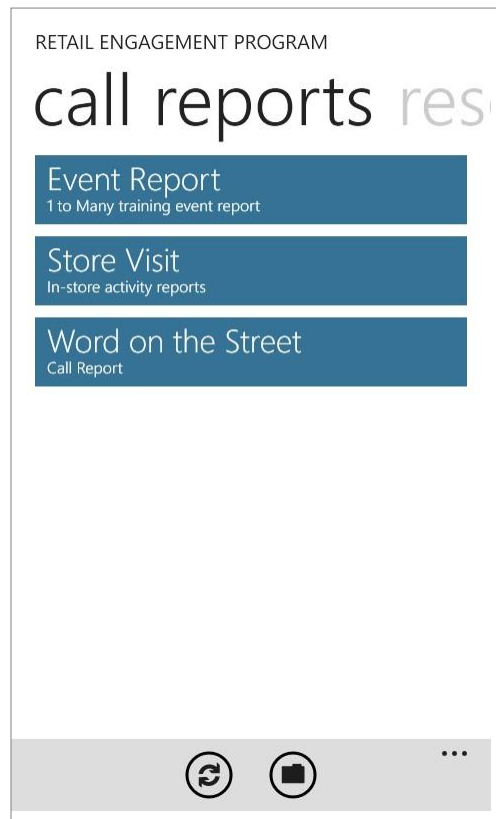


RETAIL ENGAGEMENT PROGRAM

Beta Testing Notes for Windows Phone



BETA OVERVIEW

The Retail Engagement Program Windows Phone App is currently in beta testing. Most features are working but some are slow to load, and in some cases the program may crash and will need to be restarted.

This document includes:

1. Known issues
2. How to report trouble when you have it
3. Brief user guide

Your participation in the beta program will help us make this application commercially ready.

Thank you

KNOWN ISSUES

- When you run the program for the first time and after you have entered in your ID number, the program will ask if you wish to download files associated with the app now or later. If you choose to do this now and select yes, there is a 4-8 second delay on the Resource files to initially display prior to download.
- If you say yes to download those files or any other files that may be pushed to the phone during beta testing, we also suggest that you let the program download all the files it requires prior to jumping into a call report or any other part of the program. You can see the files loading by swiping right from the Call Report page (blue tiles) to the Resources page (purple tiles). Under the name of each file it will show the status of each file downloading. Some of our test accounts have over 50 files with over 100 Mb of data. This can take a few minutes to load and is recommended to be done only with Wi-Fi.
- While files are downloading, do not click on any files that have downloaded for review until all the files have downloaded.
- There can be some delays moving in and out of options in the settings pages. This is often due to the quality of phone you are using (slower processor or faster processor).
- Not all of our recovery options have been added to the program. All records are submitted to the Outbox. The Outbox transmits messages to the server. In the event something gets corrupted, there is no Outbox recovery at this time and will require a re-install of the software.
- When in call reports, you may experience delays coming back out of a selection list. The screen may appear white for several seconds before the call report you are in appears again. This is largely due to the quality of processor in the phone you are using. However, we are working to minimize this delay.

HOW TO REPORT TROUBLE WHEN YOU HAVE IT

Examples A	Example B
I was using a call report and it stopped working.	I am Lisa Johnson, lisa.johnson@microsoft.com . I am in Mexico using ID number 1234567890. My handset is a Nokia 521 with my primary language set to Spanish.
It does not send.	When using a call report called Best Buy Report, anytime I try and take a picture, the program throws me out of the application. This is not intermittent and I can reproduce this every time I try and take a photo.
It crashes when I use it.	
I cannot log in.	

When reporting trouble, please provide:

1. Your name
2. Your Email
3. Your Country
4. Use ID number (10 digit ID)
5. If this is a server side issue:
 - What page are you on where the trouble happens
6. If this is a device issue:
 - Device Make and Model you are using
 - Device language setting
7. The problem:
 - Detail enough to help us, step-by-step, reproduce the problem
 - Has happened once and your are having trouble reproducing it
 - Happens intermittently and it is hard to tell what steps are causing this to happen
 - Can be reproduced every time
8. Can someone in your office on their device reproduce the same issue?
9. If there is an error message on the screen, you can also send us a screen capture?

Reports can be sent to both brianpan@microsoft.com and help@westlakesoftware.com simultaneously.

QUICK USER GUIDE

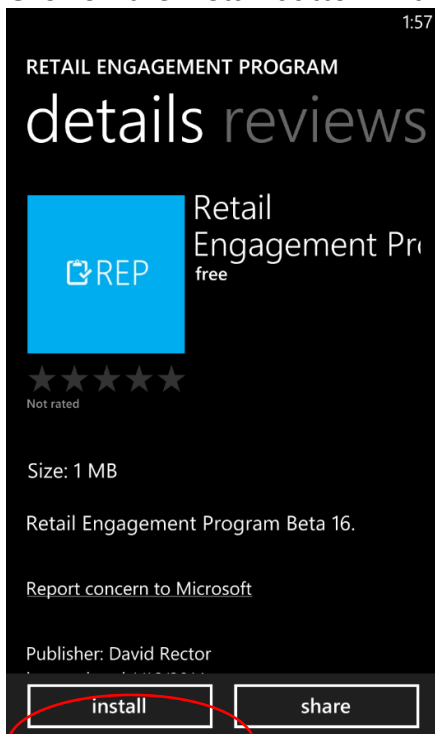
Installing the App

This application requires a Windows Phone 8.x device. It will not run on prior version of Windows Phone.

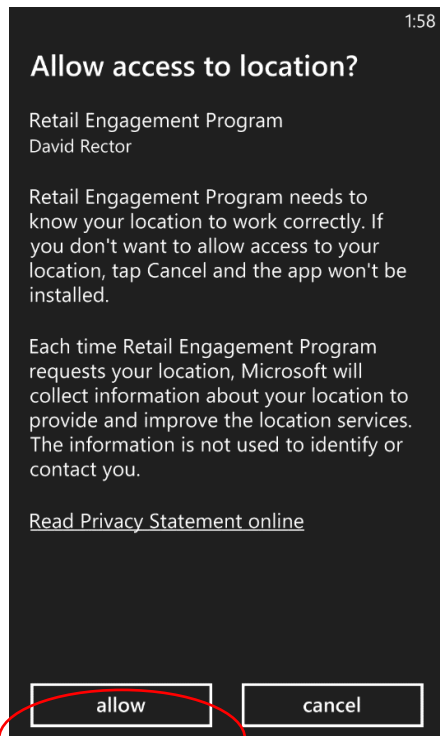
Click on this link on your phone: <http://www.windowsphone.com/s?appid=da712ef8-3924-4c7d-92c7-56b707db83ec>

It is recommended that the link be opened on a Windows Phone 8.x.

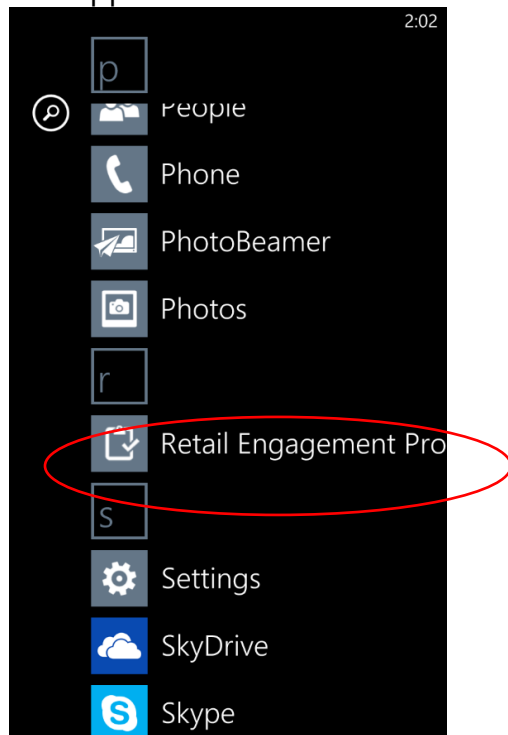
Click on the Install button in the Windows Phone Store



Click Allow on the "Allow access to location?" question.

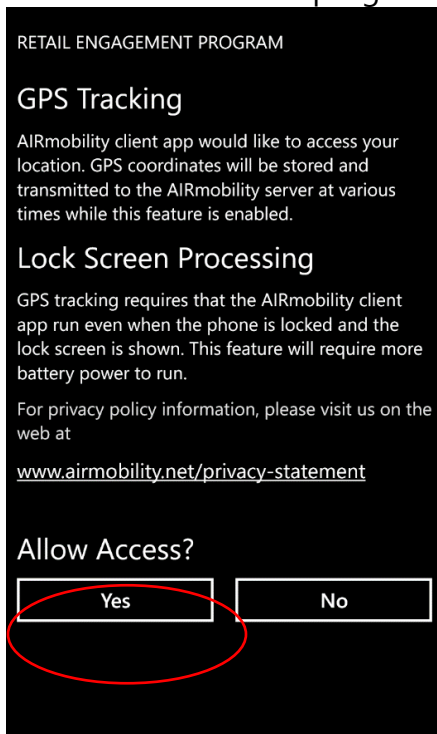


The Application:



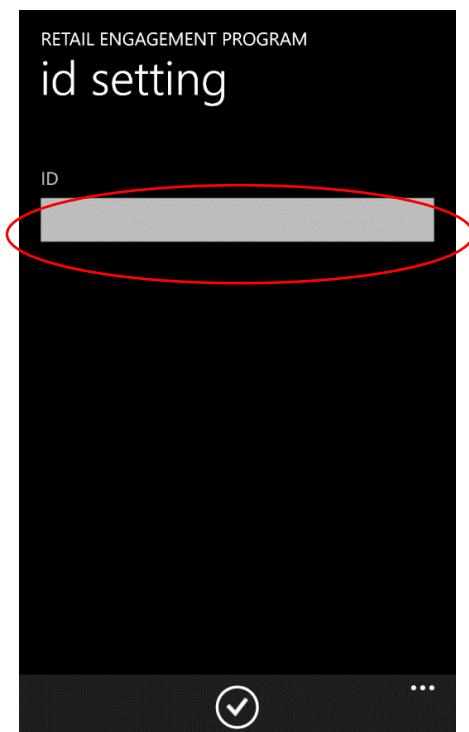
Click on the **Retail Engagement Program** program

Click Yes to allow the program to use GPS and run in the background



Once the application is installed, the program will ask you for a 10 digit ID number. Each rep has their own ID number and can be found online at www.msftreps.com. Your administrator can look this ID number up for you.

Enter the 10 digit ID to access the program



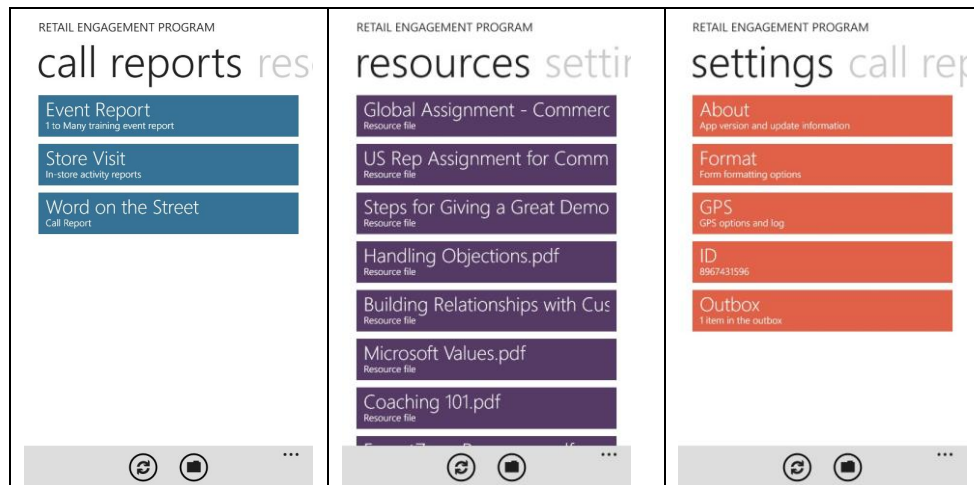
If you enter in the wrong ID number, no call reports (shown in blue below with three call reports) will not display.

To edit your ID number if entered in wrong, you do not need to re-install the program.

See option in settings (orange) called ID and edit your ID number if necessary.

The program has three main sections:

- Call Reports (Blue) – the forms you will be completing when visiting stores, etc.
- Resource Files (Purple) – a list of all files related to you day-to-day work.
- Settings (Orange) – general settings and other information about the application.



These sections, and most of the sections in call reports are supported using the panorama feature (swiping left and right). When in doubt what to do, swipe.

The resource section is simply a list if files to support your day-to-day work. Once downloaded, click on them to view. These can be PDF files, video files or any other variety of file types the handset can support. *Settings* supports a few configuration options and is not a major focus on the beta testing.

The remainder of this section will be a discussion on call reports.

CALL REPORTS

Currently there are three types of call reports.

Event Report

Event Report is to be completed when doing events for one to many people at a time.

Click on Even Report

The screenshot shows a mobile app interface for an 'EVENT REPORT'. The title 'event detail stc' is at the top. Below it are four questions, each with a dropdown menu: 'Were you the Primary or Support Rep for this event?', 'Who was the primary audience for this event?', 'Where was this event held?', and 'What city was this event held?'. At the bottom, there is a question 'Did you have any special signage or setup for this event?' with 'Yes' and 'No' options. The 'No' option is highlighted in blue. To the right of the 'No' option are three icons: a checkmark in a circle, an 'x' in a circle, and a three-dot menu icon. Annotations with lines pointing to these elements are as follows:

- Form items can be drop down menus, multiple select, yes or no, have logic than can open more questions, signature capture and more.** (Points to the first dropdown menu)
- Click on this symbol to review a record so that it can be submitted.** (Points to the checkmark icon)
- This symbol indicates that the form has a panorama view** (Points to the three-dot menu icon)
- Click this symbol to exit the form.** (Points to the 'x' icon)

There are often additional questions in the panorama to complete. Make sure when that symbol is present in the upper right, you remember to swipe through the entire report. Submit when completed.

Word on the Street

This call report enables you to capture feedback from customers and RSPs, and track what competitors are doing. Similar to how Event Report works, go step-by-step through the selections, add notes, take a photo and submit.

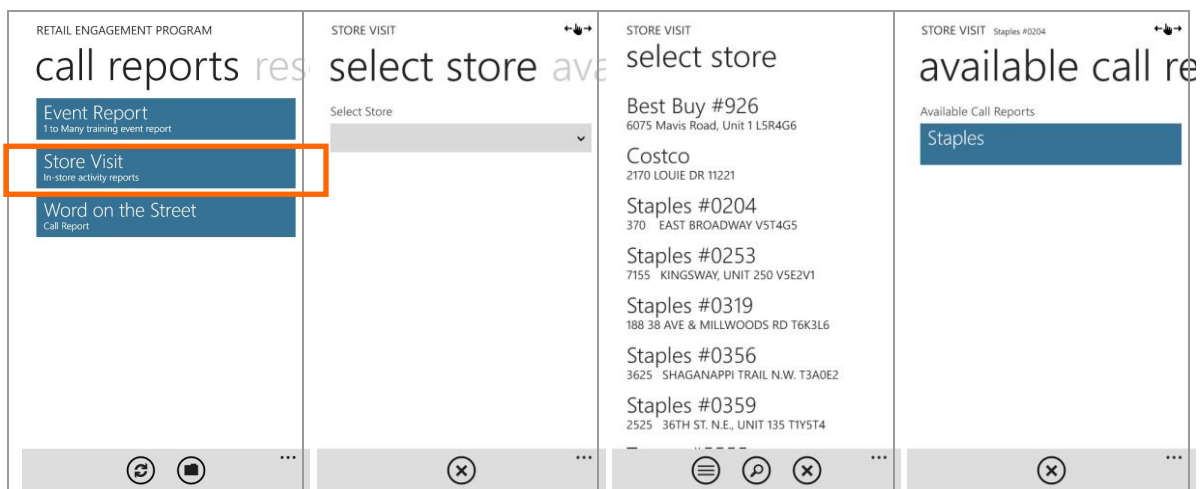
This is currently in a panorama type view. A future version may simply do all of this in one column. This may change at some point from the beta version to the released version.

Store Visit Call Reports

An administrator can create an unlimited number of call reports associate with any number of stores. In most cases, when clicking on Store Visit, the first option is to select a store from your assigned store list. Select a store and swipe right.

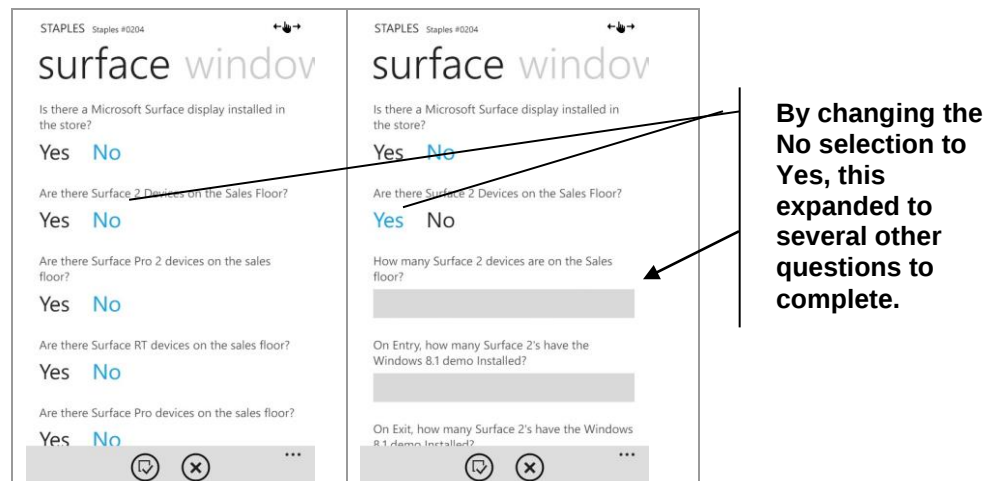
Each store can be assigned one or more call reports. This is determined by your local administrator. Select the call report that corresponds to your visit requirements.

- Select from the main menu Call Reports: Store Visit (screen 1 below).
- Use the drop down to select the store in which you are visiting (screens 2 and 3 below).
- Select the call report that corresponds to your visit (screen 3).



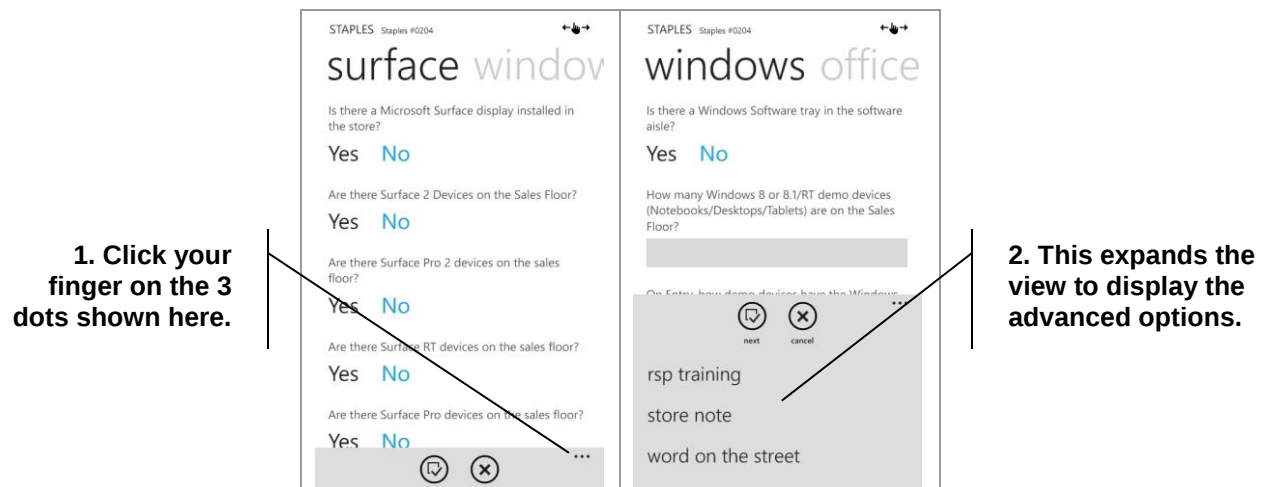
Call reports behaves similar to how Event Reports and Word on the Street behaves. You will have a series of questions broken up, section by section, in a panorama view. However, you will experience some differences.

For example, there is conditional logic. When you respond to a question a particular way, this may expand a section to offer more follow up data on that item.



By selecting the menu (noted as 3 dots in the lower right of every page of a Store Visit Call Report), you can display advanced options.

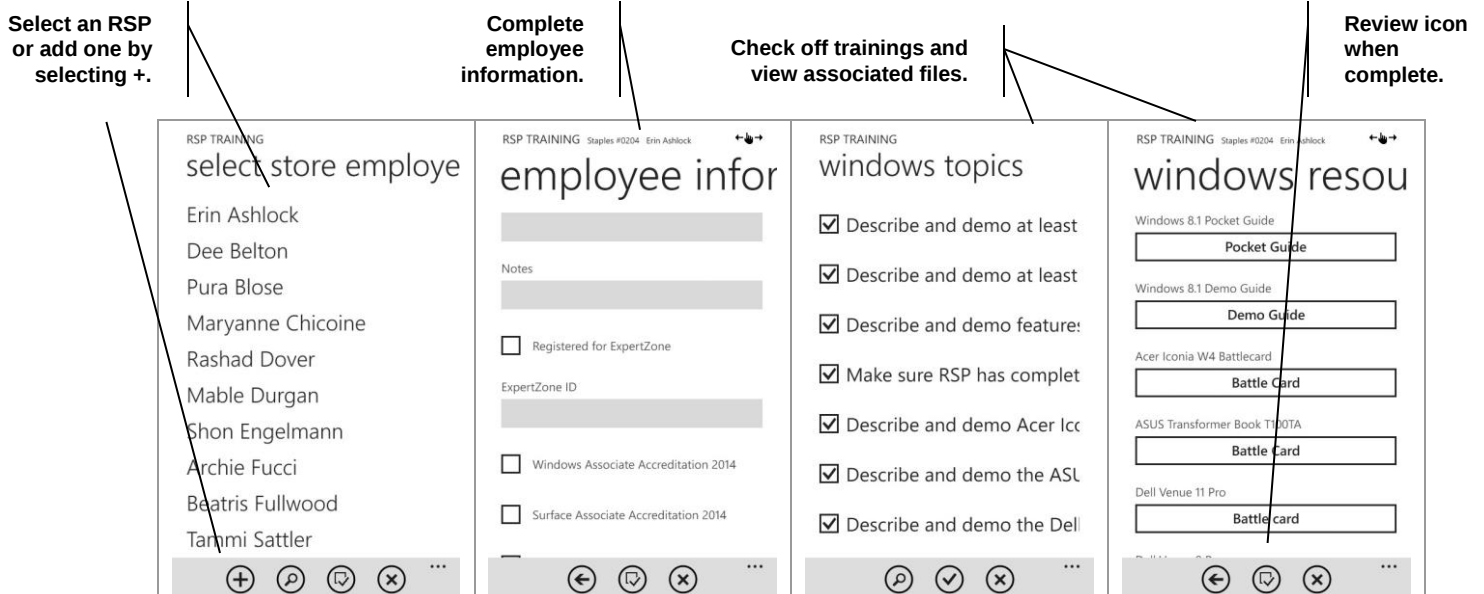
1. Store Note
2. Word on the Street
3. RSP Training



Store Note enables you to add a note related to that store. This feature will soon support a running history of the notes related to that store as well as an entry field to add a note.

Word on the Street is the same form discussed earlier. However, when accessing Word on the Street when in a store call report, the name of the store will pre-populate in this location field.

RSP Training enables you to add names of RSPs and track new and existing RPS with your training efforts.



RSP fields are synchronized with the server and have field memory. As you work through your monthly objectives with training with each RSP, the information will retain their selections. This information is tracked server side for many types of analysis; both locally in your country and comparatively between country to country at Microsoft Corporate.

If you enter a name incorrectly, inform your local admin after submission. They have editing capabilities on the server to correct contact info in this area. The correction will re-populate to the device the next time you sync with the server.

Once you submit a note, Word on the Street or RSP Training record, you will be taken back to the call report in which you were working from. That record will stay in the Outbox until you are with service to transmit.

Before a call report is submitted, you will be given a chance to review the information.

RETAIL ENGAGEMENT PROGRAM

verify data

Visit status
Visit Complete

Who did you speak with during your visit?
Assistant Store Manager

Store contact first name?
..

Store contact last name?
..

Is there a Microsoft Surface display installed in the store?
No

Are there Surface 2 Devices on the Sales Floor?
No

Navigation bar: back, up, down, close, and menu icons.