Ostendo

And

Freeway

Business

To

Business (B2B)

(Update 233)

Contents

B2B Ostendo / Freeway

Overview:

Ostendo & Freeway allows you to provide a B2B portal to your Customers enabling them to conduct business directly with you via the Freeway app. Examples of this include:

- Creating Sales Orders and specifying notes and materials to be ordered

- Creating Job Orders and specifying notes relating to required work

- Running Real Time Custom Inquiries eg:

  - Account information eg: Current, 1 Mth etc.. and Total Balance
  - Outstanding Invoices and details
  - Product purchases
  - Stock inquiries etc..

B2B maybe specified for any customer. Each Customer has a unique membership number (This becomes their user name in Freeway) and a unique password for them.

Like any Freeway user, they have the ability to Reset or Change their password themselves directly from within Freeway, or alternatively request Ostendo back office staff to issue them with a new password.

At any point you can stop specific B2B Customer access by updating the relevant customer mobility information status.

Example

This example allows B2B customers to create Sales Orders.

- Firstly, you must setup one Employee that will ultimately link to an Employee Mobility record.

- Setup an Employee, ensuring the No Scheduling flag is ticked so it is not displayed on the Assignment Board.

- Setup an Employee Mobility record and link to this Employee. This record will control the type of information and Style Templates the linked customer can access.

    o Do not enter a password as this will be generated later specifically for each customer who will be linked to this mobility employee
    o Enter a Datasheet Prefix
    o Enter a Site to be used by these Customers
    o Ensure at least Customer Selection Available is ticked
    o Optionally select 'Level of Information Displayed' This controls the inquiry information shown against the standard Customer Info Inquiry. Minimum excludes internal fields eg: Customer Type, Region etc..

- Complete the Device Tab information as required. In the example below we have created and linked a specific B2B Inquiry pack.

- Complete the Materials Tab information if you wish to provide product access to your Style Template.

Product Inquiry Qty Display styles influence how stock qty's are represented when they run a product inquiry

Actual Qtys: Displays all qty's including negative qty's
Only Positive Qtys: Any stock with a negative Qty will be shown with a Qty of Zero
Availability Status: No Qty's are shown, only either 'In Stock or 'Out of Stock'

- Complete the Customers Tab information with other relevant options. In this case any Sales Orders created by B2B customers will be created with a Sales Type of 'B2B'

- Now create your required Mobility Style Templates to suit your requirements

- Create a Style Template Matrix rule to make the template available to the relevant Mobility Employee record

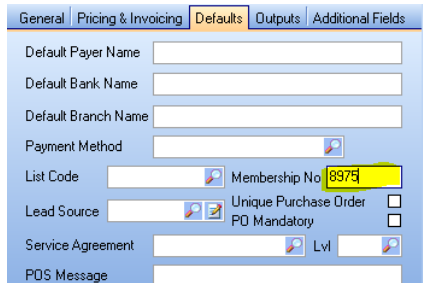- Create an API Security record for B2B ensuring the 'API Key for' is set to 'Mobility B2B'

Setting Up A Customer Enabling Access A Freeway B2B Solution:
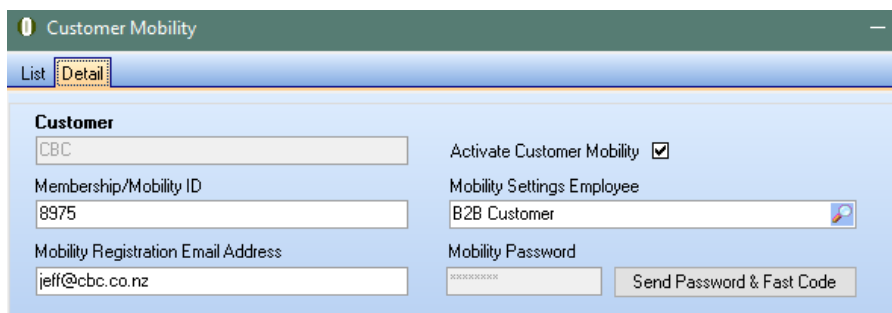
- From the Customer Detail screen in Ostendo enter a unique Customer Membership number.
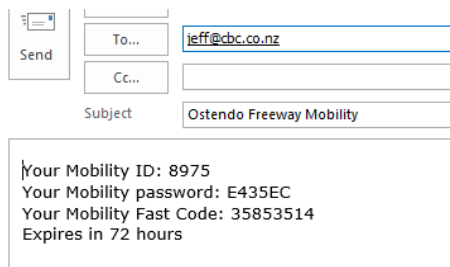
- From the Customers Related button select the 'Customer Mobility' option and enter an email address for the customer. Then press the 'Send Password & Fast Code' button and select Password & Fast Code, then select the relevant API Security record to match this to. An email will be generated to be sent advising the customer of these codes

- Ensure the Customer has gone to the relevant Play Store or iTunes and downloaded and installed the Freeway app on their device

- When the Customer receives the email they must create a B2B type solution by selecting 'Ostendo B2B' and giving the solution an appropriate name
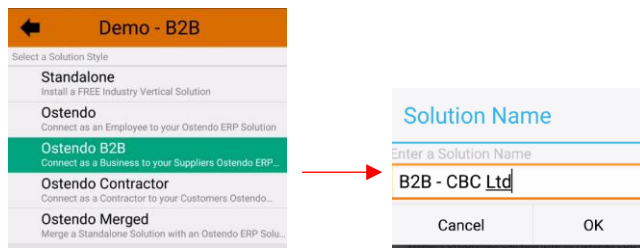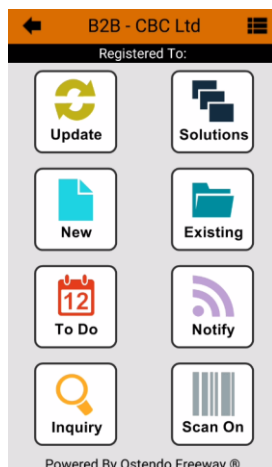

- Select 'Freeway Keys' and enter the Fast Code that was stated on the email and press the 'Go' button
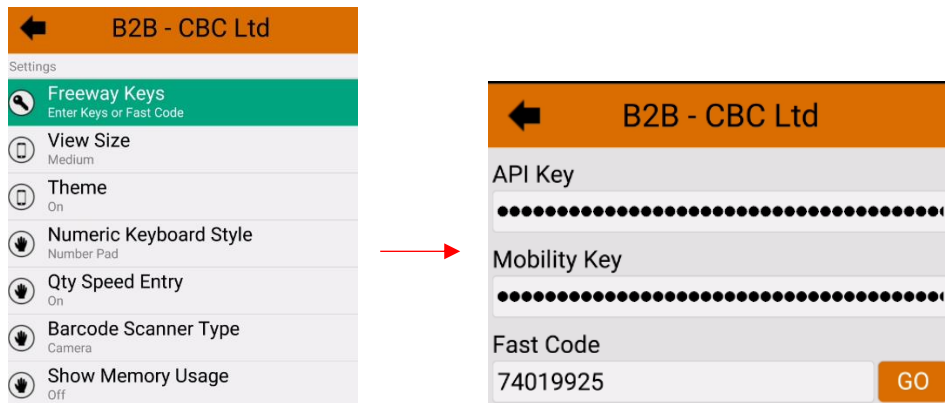
  Once the Fast Code has been accepted, the API Key and Mobility keys should look as above

- The Freeway front screen should now look like this

- The user must now synchronise by pressing the 'Update' button. From this screen they must enter the Mobility ID and Password that were advised in the email, then select 'Re-Initialize Data' from the Sync option. Press 'Login' to initiate the sync
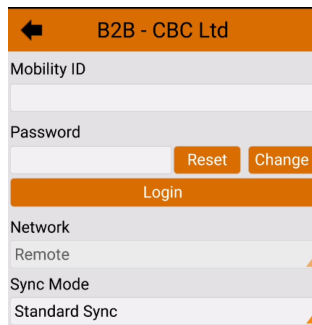
- The users screen should now look in the fashion that you configured the front screen based on your Device settings from the Employee Mobility Settings screen

- The user is now ready to use Freeway to enter a Sales Order based upon your defined Style Template. (It is assumed you already understand how to complete a datasheet.)

- Once the Sales Order is Completed, the Datasheet is returned back to Ostendo and a Sales Order created with the materials on it. NB: Because we have indicated a Sales Type of Manual Numbering, the Datasheet number is used as the Sales Order Number

This completes Freeway B2B Documentation