

Ostendo

And

Freeway

Business

To

Business (B2B)

(Update 233)

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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.

The screenshot shows the 'Employees' form with the following details:

- Employee Name:** B2B Customer
- Employee Number:** [Empty]
- Start Date:** [Empty]
- Status:** Active
- Classification:** Full Time
- Qty:** [Empty]
- Employee Details:**
 - Title:** [Empty]
 - First Name:** [Empty]
 - Last Name:** [Empty]
 - Position:** [Empty]
 - Department Code:** [Empty]
 - Calendar Order:** 1
 - No Scheduling:**
- Sub-Contractor Supplier:** [Empty]

- 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.
 - Do not enter a password as this will be generated later specifically for each customer who will be linked to this mobility employee
 - Enter a Datasheet Prefix
 - Enter a Site to be used by these Customers
 - Ensure at least Customer Selection Available is ticked
 - 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..

The screenshot shows the 'Employee Mobility Settings' form with the following details:

- Employee:** B2B Customer
- Password:** ****
- Employee Style:** Mobility B2B
- Department:** [Empty]
- Site Name:** Company
- Optional Warehouse:** [Empty]
- Optional Location:** [Empty]
- Sheet Prefix:** B2B
- Device Print Option:** Email or View
- Default Internal Email:** [Empty]
- Exclude this Employee from Forwarding Sheet on to others:**
- Job Selection Available:**
- Customer Selection Available:**
- Supplier Selection Available:**
- Assembly Selection Available:**
- Delivery Selection Available:**
- Purchase Selection Available:**
- Inventory Count Selection Available:**
- Internal Selection Available:**
- Inherit Mobility Settings from another Employee:**
- Level of Information Displayed:** Minimum

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

Device	Materials	Time Entry	Customers	Jobs	Suppliers	Assemblies	Deliveries	Purchases	Counts	Assignment Move Rules	Restricted Warehouses
Set Tracking Code for Creation and Completion of Sheets											<input type="checkbox"/>
Notification method (if any) used when forwarding to others					None						
The number of Days forward to display ToDo activities											
Auto Sync the ToDo when selected											<input type="checkbox"/>
Portrait Home Image (16:9)											
Landscape Home Image (16:9)											
Portrait Home Image (4:3)											
Landscape Home Image (4:3)											
Portrait Home Image (16:10)											
Landscape Home Image (16:10)											
Standalone Auto Update Days											
Fixed Internal Style Name for Scanning											
Default Screen after Scan					Sheet Summary						
Find Pack Name											
Guide Pack Name											
Feature Pack											
Inquiry Pack					B2B Inquiry Pack						
Product Selection Style for Warehousing					Manual Selection						

- 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 Qty's: Displays all qty's including negative qty's

Only Positive Qty's: 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'

Device	Materials	Time Entry	Customers	Jobs	Suppliers	Assemblies	Deliveries	Purchases	Counts	Assignment Move Rules	Restricted Warehouses
Restricted Material List Code											
Items Restriction Condition											
Descriptors Restriction Condition											
Material Pre-Fill List											
Hierarchical Name											
Material Lookup Structure					Flat						
Product Inquiry Available											<input checked="" type="checkbox"/>
Style of Product Inquiry Lookup					Standard						
Stock Inquiry level					All Site Totals						
Default Picking and Receipting Location Logic					Use Product Defaults						
Drill Down Product Inquiry Name											
Default the Picking Qty											<input type="checkbox"/>
Default the Receipting Qty											<input type="checkbox"/>
Product Inquiry Quantity Display Style					Availability Status						
Next Button Caption											
Finish Button Caption											
Swap Scan Button for Lookup											<input type="checkbox"/>
Lookup Button Caption											

- 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'

Device	Materials	Time Entry	Customers	Jobs	Suppliers	Assemblies	Deliveries	Purchases	Counts	Assignment Move Rules	Restricted Warehouse
Customer Restriction Condition											
Customer Asset Selection											<input type="checkbox"/>
Customer Asset Restriction Condition											
Number of Latest Customer History Notes											
Number of Latest Customer Asset History Notes											
Sales Type for New Sale											B2B
Hide Pricing for Materials											<input type="checkbox"/>
Include Purchase Reference in Sales Fields											<input checked="" type="checkbox"/>
Include Purchase Reference in Invoice Fields											<input type="checkbox"/>
Include Project in Invoice Fields											<input type="checkbox"/>
Include Purchase Reference in Job Fields											<input checked="" type="checkbox"/>
Include Job Category in Job Fields											<input type="checkbox"/>
Include Mobility Team in Job Fields											<input type="checkbox"/>
Include Job Required Date Info in Job Fields											<input checked="" type="checkbox"/>
Allow Payment Entry											<input type="checkbox"/>
Place Holder Customer for Creating New Customers											
Customer Details Style											Information Only
Allow Assignment Booking for New Jobs											<input type="checkbox"/>

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

Sequence	Type	Description	Option	Dis
10	MATERIALS	Materials and Charges		Alw
20	NOTE	Sales Notes	B2B Notes	Alw

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

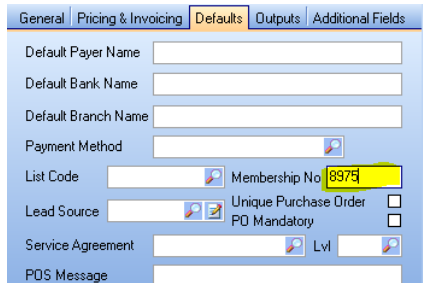
Data Sheet Style	Job Type	Customer Type	Customer	Supplier Type	Supplier	Employee	Style Name
Customer				B2B Customer			B2B Sales Order

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

Developer Name	Product Name	Expiry Date	SQL Allowed	API Key for
B2B	B2B Freeway	31/12/2031	<input checked="" type="checkbox"/>	Mobility B2B

Setting Up A Customer Enabling Access A Freeway B2B Solution:

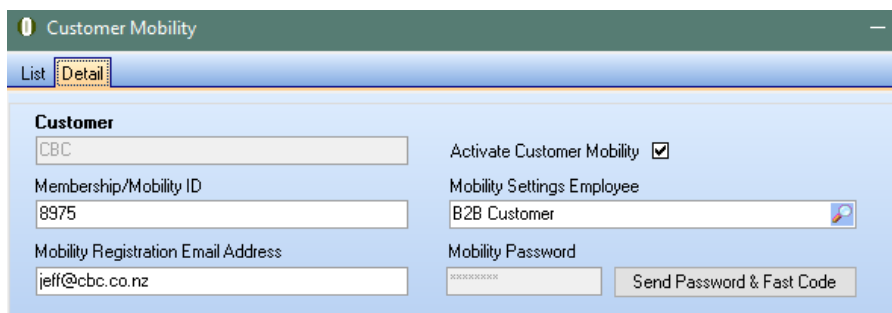
- From the Customer Detail screen in Ostendo enter a unique Customer Membership number.



The screenshot shows the 'Defaults' tab of the Customer Detail screen. The fields are as follows:

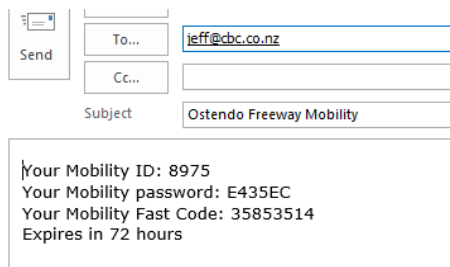
Default Payer Name	<input type="text"/>
Default Bank Name	<input type="text"/>
Default Branch Name	<input type="text"/>
Payment Method	<input type="text"/>
List Code	<input type="text"/> Membership No 8975
Lead Source	<input type="text"/> Unique Purchase Order <input type="checkbox"/>
	PO Mandatory <input type="checkbox"/>
Service Agreement	<input type="text"/> Lvl <input type="text"/>
POS Message	<input type="text"/>

- 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



The screenshot shows the 'Customer Mobility' screen with the following fields and options:

Customer	<input type="text" value="CBC"/>	Activate Customer Mobility <input checked="" type="checkbox"/>
Membership/Mobility ID	<input type="text" value="8975"/>	Mobility Settings Employee
Mobility Registration Email Address	<input type="text" value="jeff@cbc.co.nz"/>	<input type="text" value="B2B Customer"/>
		Mobility Password
		<input type="text" value="XXXXXXXXXX"/>
		<input type="button" value="Send Password & Fast Code"/>



The screenshot shows an email client interface with the following details:

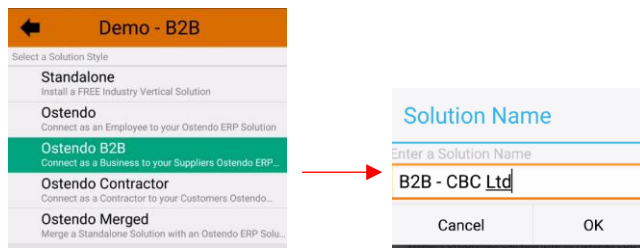
To: jeff@cbc.co.nz
Cc:
Subject: Ostendo Freeway Mobility

Send

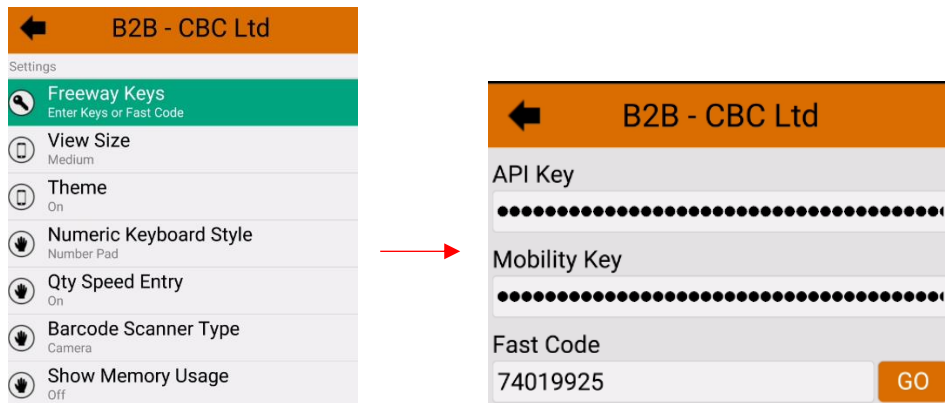
Your Mobility ID: 8975
Your Mobility password: E435EC
Your Mobility Fast Code: 35853514
Expires in 72 hours

- 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

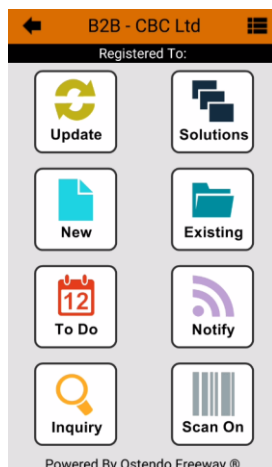


- Select 'Freeway Keys' and enter the Fast Code that was stated on the email and press the 'Go' button

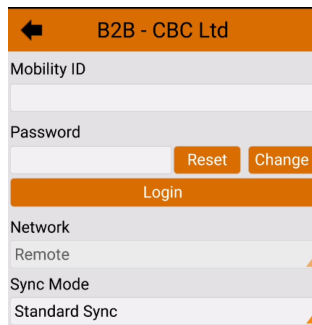


Once the Fast Code has been accepted, the API Key and Mobility keys should look as above

- 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

Sales Orders

Go To Customer | Go to Customer Contacts | Sales_Order_Import_From_CSV

List | Detail | Lines

Order No: B2B2018395 | Order Date: 9/03/2018 | Status: Open

Customer: CBC

Description: **Generated from Data Sheet: B2B2018395**

Sales Type: B2B | Sales Style: Delivery

Ack Status: Not Printed | Lead Source: | Tracking Code: |

Site Name: Company

Settings | Priority | Overrides | Financial

Credit Terms: 20th of Month | Purchase Order

Tax Group: TAXABLE | Sales Person: |

Shipping Method: | Charge Freight: | Freight Details: |

Required Date: 9/03/2018 | Order Properties: |

Order Discount | Order Deposit

Total Disc: 0 | \$0.00 | Batch Update Discount %

Delivery Address: |

Billing Customer: CBC

Order Values

Currency Code: |

Nett Amount: |

Freight Amount: |

Tax Amount: |

Total Amount: |

Instructions

Sales | Invoice | Sheet ID: B2B2018395 Date: 2018-03-09 B2B Notes: These notes were entered on the datasheet

Sales Orders

Go To Customer | Go to Customer Contacts | Sales_Order_Import_From_CSV | Create Required Ass

List | Detail | Lines

Order No: B2B2018395 [Open] Customer: CBC

Batch Entry | Lists | Items | Descriptors | Kitsets | Catalogue Items | Matrices

Line No	Line Type	Code	Order Qty	Unit	Unit Price	Unit Price Incl	Description	Discou	Line Nett Arr
10	Item Code	100-2004	6	E...	\$0.12	\$0.14	Washer...	0	\$
20	Item Code	10040	1	EA	\$10.50	\$12.08	Electropl...	0	\$1
30	Item Code	750-2174	3	E...	\$11.31	\$13.01	Tube-Mil...	0	\$3

This completes Freeway B2B Documentation