

#### 22 March 2018 - What's New : (Android Play Store Version 593)

1. This addresses some issues reported by Android users that Freeway was shutting down at times when the GPS Tracking was turned on for Style Templates.

Below is a download link for users unable to access the Google Play Store

http://www.ostendo.info/downloads/ostendo/freeway\_593.apk

#### 9 March 2018 - What's New : (Android Play Store Version 589)

#### 1. Mobility Checklists:

a. List / Form – checklists can now be presented as a simple list or as a form in Freeway.

0 Check Lists		
List Detail Groups Items	Conditional Rules	
Name Standard Service	Description Standard Service CheckList	List or Form Form  List Form Form

If Form is chosen, then each item in the checklist can also be assigned a Form Caption (maximum 15 characters).

Check Lists	;							
List Detail G		Condition	al Rules					
-Checklist: Stand								
Group Name	Group Seq	Item Seq	Variable Name	Description	Туре	List Values or I	Help Text	Form Caption
Std	10	20		Record what is done and any recommendations	CheckBox			Recommendations
Std	10	30		Record materials used	CheckBox			Materials
Std	10	40		Record Start and Stop times	CheckBox			Times
Std	10	50		Get Contact signature	CheckBox			Signature
▶ Std	10	10		Inform Contact Person on arrival at site	CheckBox			Check-In

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+	Test01	
	StdService	
Check-In		
Inform Contact Pe	rson on arrival at site	
Recommendations	s 🔄	
Record what is do	ne and any recommendations	
Materials		
Record materials u	used	
Times		
Record Start and S	Stop times	
Signature		
Get Contact signat	ture	

# b. Include CheckLists in Notes:

Ticking this box will add entries associated with any CheckList Item to the Notes field in the job.

# c. Item Types :

- AssetList this displays a list of assets belonging to the customer
- Reading this allows the entry of a Reading value in the checklist
- Scan this allows the scanning of a barcode from within the checklist

# 2. Style Template Types:

# - DELIVERYDROPOFF

This provides a DropOff Checkbox and a Notes field.

The DropOff Checkbox is used to indicate whether the item is dropped off (ticked) or not (unticked).

The notes field can be used to enter any pertinent notes related to the delivery or non-delivery.

# - PURCHASERECEIPTSLIP

This template type allows the entry of the packing slip number of the receipted goods.

# - QUANTITIES

This template type is used to record quantities for statistical purposes or to keep track of work performed to date.

The recorded quantities can be set to update statistics of the associated Customer or Supplier / Customer Asset / Customer Asset Readings / Site / Item.

The Quantity records are linked to specific Descriptors which are defined to collect the required statistical data.

# 3. Inquiry Packs :

- Authorised for Customer B2B Use
- Authorised for Subcontractor Use

Inquiry Packs	
List Detail Contents	
Pack Name	Description
Pack Name General	Description General Inquiries Pack

You can now authorise specific Inquiry Packs to be accessible to Customers or Subcontractors by ticking these checkboxes. The Customer or Subcontractor employee using Freeway must also have this Inquiry Pack assigned to him/her.

# 4. Mobility Rules:

# Additional Materials B2B Conditional Style

Additional Materials B2B Conditional Style	Ignore Item and Descriptor B2B Include Flag
Include Multiple Item Units	Ignore Item and Descriptor B2B Include Flag Filter Items and Descriptors where B2B Include Flag is True

Items and Materials have a "**Include in Mobility B2B**" flag in the Detail screen. For B2B Customers, this rule allows you to expose ALL materials or ONLY materials where "Include in Mobility B2B" is ticked.

# Include Multiple Units

This checkbox allows you to display multiple Units of Measure (if exists) in Freeway.

#### 5. Items / Descriptors Detail tab:

- Include in Mobility B2B

Tick this box if you wish to specifically make this Item or Descriptor available for B2B Customer selection. This is controlled by the Mobility Rule **"Additional Materials B2B Conditional Style**".

ABC Classification Cycle Count Code Duty %
Alternate Item Available Introduction Date 17/11/2006
Prevent Negative Stock for this Item
Backflush Issues on Assembly Receipt
Exclude from Web Exclude from POS Include in Mobility B2B
Purchase Warranty Applies

Descriptor Sales Settings	
Sales Warranty Applies 🔲	₽ 2
Exclude from Web Sales 🔲	Include in Mobility B2B 🗌
Segmented POS Barcodes 🗌	
Mobility Image	-

# 6. Descriptor Mobility Quantities:

Special Descriptors can be defined to record quantities in Freeway templates for the purposes of measuring productivity rates or capturing quality control data.

Data that can be recorded through such descriptors include:

- **Qty Capture** : this defines the type of Quantity capture:

Completed Qty Only Completed Qty with Time stamp Continuous Qty Only Continuous qty with Time stamp Start Stop Time Only Start Stop Time and Completed Qty

- **Qty Aggregate** : this defines the type of aggregation:
  - SUM MIN MAX LAST ENTRYAVG (average of all quantities entered) HOURLYAVG (Hourly average of quantities entered)
- Log Qty Against : this specifies which entity to record the quantities against:
  - Company Asset Reading Name Customer or Supplier Site Item
- Linked Company Assets : if logged against an Asset, then this specifies which Asset
- **Update Reading Name** : if logged against an Asset Reading, then this specifies which Reading Name.

<b>Descriptor Mobility Quan</b>	itities
Mobility Quantity Capture	N/A 💌
Mobility Quantity Aggregate	SUM 👻
Log Quantities against	N/A 💌
Linked Company Asset	P
Update Reading Name	P
-	

7. Additional Documentation are available to provide more details on some of these new functions:

# Freeway B2B - Documentation

http://www.ostendo.info/downloads/ostendo/Freeway\_For\_B2B\_Customers\_Explained.pdf

# **Freeway Sub Contractors - Documentation**

http://ostendo.info/downloads/ostendo/Freeway For Subcontractors Explained.pdf

# Freeway Internal Employees Recording of Quantities & Statistics - Documentation

http://ostendo.info/downloads/ostendo/Freeway\_Recording\_Qtys\_And\_Stats\_Explained.pdf

# Freeway CorrectiveAction template type

http://ostendo.info/downloads/ostendo/Freeway\_Corrective\_Actions\_Explained.pdf

# **Freeway Multi Asset Servicing**

http://ostendo.info/downloads/ostendo/Freeway\_Multi\_Asset\_Servicing\_Explained.pdf

A compilation of previous version changes is kept in the Appendix at the end of this document.

# A. INTRODUCTION

The Freeway.apk is a mobile app designed to run on Android and IOS tablets and phones. A Windows offering could be considered later if there is significant demand for it.

The Freeway.apk is tightly integrated with the Ostendo ERP system and provides Ostendo users with innovative mobility solutions across a broad range of functional areas.

The Freeway.apk will also work with authorised standalone solutions which are independently developed for specific industry verticals (example: Electricians COC and ESC, and eSafety for Health and Safety).



The Ostendo-Freeway.apk Mobility solution is designed to be easy to set up and deploy. It consists of three main components:

- A. The Ostendo API Configuration and Security setup
- B. The Ostendo Mobility Setup and Definition Screens in Ostendo (Mobility Menu)
- C. The Freeway.apk Mobile App on the mobile device

The Ostendo Mobility Setup and Definition process defines what data is to be displayed and/or collected, what is mandatory and what is not, and who can use what mobility sheets. This can be done without programming skills by making use of a combination of Check Lists, Images, Signatures, Sketches, Notes, etc.

**Freeway.apk** has all the necessary features to execute business operations and collect data for a wide variety of functions including:

- Service Jobs/Quotes/Direct Invoices
- Sales Orders/Quotes/Direct Invoices
- Purchase Orders/Receipts
- Update Assembly Orders
- Update Delivery Orders
- Customised Data Collection and business process implementations for example : Purchase Requisition approvals, New Customer Credit review, Quality Assurance, etc.

**Check Lists, images, signatures, sketches, notes, materials, times, etc.,** are the basic building blocks of the Freeway Mobility app or mobility sheet. You can specify a combination of such objects to perform hazard checks, capture input data, conduct surveys, etc.

The primary objective of Ostendo Freeway is to enable Ostendo users to **quickly set up and deploy** <u>*customised*</u> **mobile solutions that will enhance business efficiency.** 

This document will outline the key concepts relating to Ostendo-Freeway.apk Mobility solutions and walk you through the various steps involved in defining and implementing such mobility solutions into the Ostendo ERP system.

# I. Ostendo API Configuration

Ostendo-Freeway.apk Mobility solutions require the following:

- Ostendo API service configured and running
- Windows Firewall set to allow Inbound and Outbound access via the API port
- Mobile devices (smartphones or tablets) loaded with the Freeway.apk.

# Ostendo API setup:

Go to FILE  $\rightarrow$  API Service and select API Configuration:

Service Port	82
Use https	
https Port	443
Static File Directory	c:\Temp
Alternate DB Username	
Alternate DB Password	
Override Local IP Address	
Override Remote IP Address	

For **HTTP**:

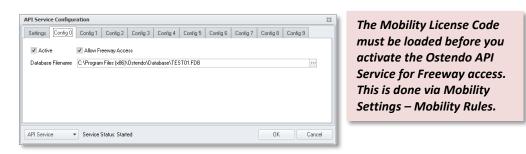
**Service Port** - enter the Port number (e.g. 82)

For **HTTPS**:

Use Https	-	tick this box
Https Port	-	enter the Port number (e.g. 443)
<b>Override Local</b>	IP Addre	ess – enter the Domain Name which is SSL Certified.
Override Remo	ote IP Ad	dress – enter the Domain Name which is SSL Certified.

Note: A fuller description of HTTP and HTTPS settings can be found at the end of this section.

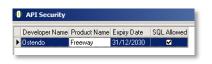
• Assign the appropriate HTTP / HTTPS entries and go to Config 0 tab.



• Fill in the database path. Tick Active and Allow Freeway Access boxes.

Note: Only Config 0 is used for Freeway Access. Do <u>not</u> use Config 1 to 9. Go to FILE  $\rightarrow$  API Service and select **API Security**:

The API Security screen allows you to authorize one or more third-party developers and products to have access to your Ostendo API Service. It also enables you to generate the API key for each developer-product. Add a record for Freeway if it is not already there. Names should not contain spaces.



# Note: Please ensure your Windows Firewall is set to allow access to the Ostendo API port.

The following example is based on Windows 7. Other versions may be slightly different. The objective is to ensure that the Firewall allows incoming and outgoing traffic via the designated Ostendo API port.

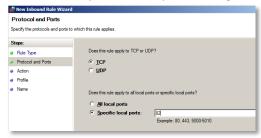
• Go to Windows Firewall – Advanced Settings:

Eile Action View Help
Windows Firewall with Advanced S Windows Firewall with Advanced Security on Local Computer
Inbound Rules
Connection Security Rules Windows Firewall with Advanced Security provides network security for Windows computers.
🗄 📓 Monitoring
Overview
Domain Profile
Windows Erewall is on

- Click on Inbound Rules, New Rule...
- Rule Type: Port. Click Next.

Rule Type Select the type of firewall rule to	create.
Rule Type Protocol and Ports	What type of rule would you like to create?
Action     Profile     Name	Program     Rule that controls connections for a program.     Paget     Rule that controls connections for a TCP or UDP port.     Prodefined:
	BranchCache - Context Retrieval (Uses HTTP) Rule that controls connections for a Windows experience. Custom Custom rule

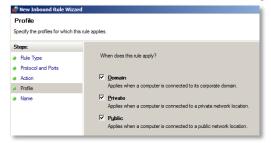
• **Protocol and Ports**: TCP, Specific local port = designated Ostendo API port number. Click Next.



• Action: Allow the connection. Click Next.

Action Specify the action to be taken	when a connection matches the conditions specified in the rule.	
Steps:		
Rule Type	What action should be taken when a connection matches the specified conditions?	
Protocol and Ports		
<ul> <li>Action</li> </ul>	Allow the connection This includes connections that are protected with IPsec as well as those are not.	
<ul><li>Profile</li><li>Name</li></ul>	Allow the connection in it is secure This include only connections that have been authenticated by using IPsec. Connection will be secured using the settings in IPsec properties and rules in the Connection Security Rule node.	
	Customze	

• **Profile**: Applies to Domain, Private, Public. Click Next again.



• **Name**: Give the Rule an appropriate name. Click Finish.

📅 New Inbound Rule Wizard		
Name		
Specify the name and descripti	on of this rule.	
Steps:		
a Rule Type		
Protocol and Ports		
Action		
Profile	Name:	
Name	Ostendo API	
	Description (optional):	

• Next, click on <u>Outbound Rules</u> and do exactly the same as above.

IP Address and Port Forwarding (Applicable for Remote connections only): You will need to assign a fixed (internal) *IPv4 address* to your Ostendo server and set up **Port** Forwarding on your router so that all calls to that API port will be forwarded to your Ostendo server correctly.

Freeway does NOT require your Ostendo API to have a Static IP Address (Fixed External IP Address). This is only required if you have other 3<sup>rd</sup> party applications interfacing with your Ostendo API.

Note: For operating environments with very strict security that blocks access to websites, please ensure their rules allow the following websites to be accessed:

www.freewayapi.com http://api.ipify.org

This is required to allow Freeway to send API keys to the cloud and determine IP addresses stored for Freeway.

# More information on Configuring the Ostendo API Service for HTTP or HTTPS:

For Std Http port connection follow the setup below

# Setting Up Ostendo API HTTP:

Access the API Service Configuration screen

• Type in the 'Service Port' to use for http (NB: Port forwarding must have already been setup on this port)

Settings Config 0 Config 1 Co	nfig 2 Config 3 Config 4 Config 5 Config 6 Config
Service Port	82
Use https	
https Port	0
Static File Directory	
Alternate DB Username	
Alternate DB Password	
Override Local IP Address	
Override Remote IP Address	

• Ensure you have setup Windows Firewall Inbound / Outbound Exceptions for this port

# Test the API Service Connection (Local and Remote):

#### Local IP Address Test:

- From the Windows Command DOS prompt type Ipconfig
- Note the IPv4 Address 192.168.1.53. This is your local IP address
- Type this address In your browser along with the port number as shown in this example. 192.168.1.53:82 (Notice the colon ':' between the IP address and Port No.)
- Your browser should return this screen proving that you have contacted the API successfully. (NB: The version number maybe different)

Ostendo API Service (2.0.0.422)	)
Table List	
Resource List	

# **External IP Address Test:**

- From your browser google 'whats my IP address'
- Google will return your current external IP address.
- Type this address into your browser along with the port number ensuring you have a colon (*externallPaddress:portnumber*) in between the IP address and Port Number
- Your browser should return this screen proving that you have contacted the API successfully. (NB: The version number maybe different)

Ostendo API Service (2.0.0.422)
Table List
Resource List

# Configuring the Ostendo API Service for HTTPS.

For enhanced security, it is strongly recommended that HTTPS be used in preference to HTTP. This is because HTTPS sessions are encrypted. Use HTTP only if the HTTP requests are not routed via the internet.

# Steps to implement HTTPS:

- The company needs to obtain an SSL certificate (Signed by a Certificate Authority) for the domain name they wish to use for this (cannot be an IP address)
- Once obtained the certificate must be installed on the server
- Then the certificate must be bound to an IP/port and a URL reservation made in http.sys (Link below on configuration)
- In Ostendo (API Configuration) the flag must be set to use https and the appropriate port set, then *BOTH* the override IP's must be set to the new https domain name

To use HTTPS, you will require an SSL Certificate and SSL Key. Obtaining and setting these up are deliberately not covered off in this document as the methods vary from site to site. Your IT Support provider <u>must</u> set this up and prove it is working in advance of any Ostendo API setup. This link may be of assistance to your support provider. NB: This process is not related to Ostendo therefore Development-x cannot assist with this.

https://docs.microsoft.com/en-us/dotnet/framework/wcf/feature-details/configuring-http-and-https#configuringssl-certificates

Once the Certificate has been applied and proven to operate correctly by the IT Support Provider, you can amend the necessary Ostendo API Configuration settings as follows.

# NB: The Ostendo API Service Session must run either entirely HTTP or HTTPS, not a mixture of both.

# Setting Up Ostendo API HTTPS:

Access the API Service Configuration screen

- Tick 'Use https' (NB: Port forwarding must have already been setup on this port)
- Specify the https Port number that has been assigned with port forwarding
- Specify the Domain name in the 'Override Local IP Address'
- Specify the Domain name in the 'Override Remote IP Address'

API Service Configuration	
Settings Config 0 Config 1 Config	g 2   Config 3   Config 4   Config 5   Config 6   Config 7   Co
Service Port	0
Use https	
https Port	8012
Static File Directory	
Alternate DB Username	
Alternate DB Password	
Override Local IP Address	bobsbikes.com
Override Remote IP Address	bobsbikes.com

• Ensure you have setup Windows Firewall Inbound / Outbound Exceptions for this port

# Test the API Service Connection (Local and Remote Combined):

# Local & Remote SSL Certificate Test:

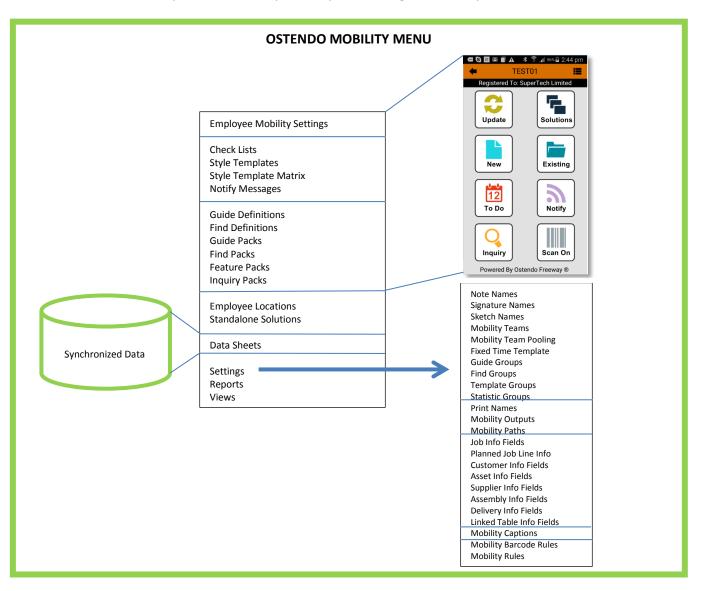
- Thru the web browser type your address.
  - https:\\bobsbike.com

Ostendo API Service (2.0.0.422) Table List Resource List

# More Information:

Certificate Authorities, or Certificate Authorities / CAs, issue Digital Certificates. Digital Certificates are verifiable small data files that contain identity credentials to help websites, people, and devices represent their authentic online identity (authentic because the CA has verified the identity). CAs play a critical role in how the Internet operates and how transparent, trusted transactions can take place online. CAs issue millions of Digital Certificates each year, and these certificates are used to protect information, encrypt billions of transactions, and enable secure communication.

An <u>SSL Certificate</u> is a popular type of Digital Certificate that binds the ownership details of a web server (and website) to cryptographic keys. These keys are used in the <u>SSL/TLS protocol</u> to activate a secure session between a browser and the web server hosting the SSL Certificate. In order for a browser to trust an SSL Certificate, and establish an SSL/TLS session without security warnings, the SSL Certificate must contain the domain name of the website using it, be issued by a trusted CA, and not have expired.



The Ostendo Mobility Menu is where you set up and manage all mobility-related functions and solutions.

# 1. Employee Mobility Settings

You need to define an Employee Mobility Settings record for each mobility user. The top section of the Detail tab is for general user settings. As a minimum, you should fill in the following for each mobile user:

Employee	-	the name of the mobility user
Password	-	the password to allow the user to synchronize with Ostendo
Site Name	-	the name of the site this user is associated with
Sheet Prefix	-	the unique prefix for this user. This will form part of the datasheet id.
	<b>C</b> . 1	

and one or more of the following needs to be ticked:

Job Selection Available -	allows this user to work with Jobs
Customer Selection Available -	allows this user to work with Customers
Supplier Selection Available -	allows this user to work with Suppliers
Assembly Selection Available -	allows this user to work with Assembly Orders
Delivery Selection Available -	allows this user to work with Delivery Orders
Purchase Selection Available -	allows this user to work with Purchase receipts
Inventory Count Selection Available	- allows this user to work with Stock Counts
Internal Selection Available -	allows this user to work with Internal datasheets

Employee Mobility Settings		- 🗆 ×
List Detail		
Employee	КК	Close
Password	XXXX	Add
Employee Style	Internal	
Department		Save Save
Site Name	Company	🔊 Cancel
Optional Warehouse		
Optional Location		X Delete
Sheet Prefix	KK	Layout
Device Print Option	Email or View	
Default Internal Email		🔲 Fast Code
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	Standard	
Device Materials Time Entry Customers Jobs Suppliers	Assemblies Deliveries Purchases Counts Assignment Move Rules Restricted Warehouses Picking Classes	1
Number of Synchronised Sheets Retained	10	
Number of Synchronised Sheets Retained Auto Synchronise Completed Data Sheets	10	
Auto Synchronise Completed Data Sheets		
Auto Synchronise Completed Data Sheets Auto set On and Off Site for Sheet Creation and Completion v		
Auto Synchronise Completed Data Sheets Auto set On and Off Site for Sheet Creation and Completion v Auto Set On and Off Site for Start/Stop Times		
Auto Synchronise Completed Data Sheets Auto set On and Off Site for Sheet Creation and Completion v Auto Set On and Off Site for Start/Stop Times Set Tracking Code for Creation and Completion of Sheets		
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Please refer to Ostendo Reference Help for further explanations of each field.

The bottom section of the Detail tab consists of several subtabs which allow you to further define how this mobility user's Freeway app will function:

Device :	this relates to auto synchronization of completed datasheets, onsite-offsite tracking, Tracking Code for creation/completion, notification method when forwarding datasheets t others, and display of wallpaper images for the Main screen in portrait and landscape modes.		
Materials:	allows you to restrict the materials that this user is allowed to select		
Time Entry:	Labour Codes allowed, how time is entered, how time data is posted in Ostendo		
Customers:-	restrict Custom	er/Asset selection, number of history notes allowed, Sales Type	
	when creating r	new Sales Order, whether pricing should be hidden.	
Jobs:	restrict Job sele	ction, number of history notes allowed, Job Types, Non-Finished	
	Assignments, H	ow Actual Lines are inserted, whether pricing should be hidden.	
Suppliers:	restrict Supplier	r selection, number of History Notes allowed, Purchase Type, whether pricing	
	should be hidde	en.	
Assemblies: restrict Assem		lies selection, number of History Notes, Non-Finished Assignments, How	
	Actual Lines are inserted.		
<b>Deliveries:</b> restrict Deliver		es selection, Non-Finished Assignments, whether pricing should be hidden,	
	should Invoiced	l Deliveries be included?	
Purchases:	Restriction condition, auto-sync Purchase List, Horizon days		
Counts:	Restriction condition, auto-sync Count List, display On Hand qty in Count Lines.		
Assignment Move Rules:		these rules apply to how assignments are affected when an assignment	
		status changes from "Active" to "InProgress" on the Freeway app.	
Restricted Warehouses:		by site and warehouse	
Picking Classes:		Include or exclude Picking Classes	

# 2. Style Templates

A Style Template defines the structure and elements that make up a specific business operation / data collection process. It is a set of records describing objects (Check Lists, signatures, sketches, notes, images, etc.) that are associated with a **Style Name**.

For example, you can have different style templates for Service Jobs, Sales Quoting, Purchase Requisition Approvals, etc.

The Style Template screen has 4 tabs (List-Detail-Template-Settings).

The Detail screen shows the StyleName, Description, Creation Styles for various types of work, notes and Forwarding Employees (if applicable).

Style Templates			
List Detail Template Settings			
Name	Description		Template Group
StdService	Standard Se	srvice Style	<i>P</i>
Creation Style when Select	ing Customer	Creation Style when selecting Supplier	Creation Style when selecting Job
New Actual Job	•	N/A 👻	Update Order 🗸 🗸
Creation Style when selecti	ng Assembly	Creation Style when selecting Delivery	Creation Style when selecting Purchase
N/A	•	N/A 👻	N/A 💌
Creation Style when selecti	ng Count	Creation Style when selecting Internal	
N/A	•	N/A 👻	
Set Copy to Invoice for Linked Job Data Sheet Creation Material Lookup Style Standard Job Type for New Job Order Job Type for New Job with Customer Asset Field Style Image			
Purchase Type for New Purchase Order Sales Type for New Sales Order			
How Material Quantities are Posted			
Quantities UnChanged	•	Time Tracking is Active if Auto On and	Off Site for Start/Times is Set 🛛 🗹
Notes Forwarding Employe	es		

The 8 Creation Style fields enable you restrict where this style template is used and to specify what happens to the data when you select and use it.

For example, if the Style Name is "SALES ORDER" and Creation Style when Selecting Customer is "New Order Sales" - then what this means is that :

if you select a Customer and then you select this "SALES ORDER" template, then this will enable you to create a New Sales Order for that customer.

If the Style Name is "SALES ORDER" and Creation Style when Selecting Supplier is "N/A" - then what this means is that if you select a Supplier, you will not see this style template. This is just another way for you restrict where this style template is available for selection.

The Creation Style selected (other than N/A) determines what will be done with the data entered - e.g. new job/order created, or update Assembly order, or just data only, etc. Following is a summary of what you can do with the templates you design based on the Creation Style chosen for each selection type:

Customer: New Direct Invoice – create a new Direct Invoice for the selected customer. New Actual Job – create a new Job Order with Actuals issued. New Order Job – create a new Job Order only (no Actuals). New Quote Job – create a new Job Quote New Quote Sales – create a new Sales Quote New Order Sales – create a new Sales Order New POS Order – create a new Point-Of-Sale Order Data Only – collect any data related to a customer. Data is kept with the DataSheet. No master tables are updated.

Supplier:	New Order Purchase – create a new Purchase Order for the selected Supplier. New Receipt Purchase – create a new Purchase Receipt. Data Only – collect any data related to a Supplier. Data is kept with the DataSheet. No master tables are updated.
Job:	<b>Update Order</b> – update an existing Job Order (usually with Actuals). <b>Data Only</b> – collect any data related to a Job. Data is kept with the DataSheet. No master tables are updated.
Assembly:	<ul> <li>Update Order – update an existing Assembly Order.</li> <li>Data Only – collect any data related to an Assembly Order.</li> <li>Data is kept with the DataSheet. No master tables are updated.</li> </ul>
Delivery:	<b>Update Order</b> – update an existing Delivery Order. <b>Data Only</b> – collect any data related to a Delivery Order. Data is kept with the DataSheet. No master tables are updated.
Purchase:	<b>Update Receipt</b> – update an existing Purchase Order Receipt. <b>Data Only</b> – collect any data related to a Purchase Order Receipt. Data is kept with the DataSheet. No master tables are updated.
Count:	<b>Update Count</b> – update an existing Inventory Count. <b>Data Only</b> – collect any data related to a Inventory Count. Data is kept with the DataSheet. No master tables are updated.
Internal:	<ul> <li>Update Times – record non-costed timesheet data usually for Payroll /reporting purpose.</li> <li>Data Only – collect any data. Data is kept with the DataSheet.</li> <li>New ReStock Order – This datasheet generates Purchase Order(s) when completed.</li> <li>A template can be created to enter items and restock quantities required. When the internal data sheet is completed and sync-ed with Ostendo, the Purchase Order(s) will be automatically generated with Status = "Planned".</li> </ul>

Internal datasheets can be used to drive business processes. For example you could create a template for restocking of sundry items in the office. An employee could use the Freeway app to raise a New ReStock Order, When completed this internal datasheet will create one or more Planned Purchase Orders (one per Supplier). These planned Purchase Orders can be reviewed by a Supervisor before issuing to the supplier(s). The completed datasheet serves as an audit trail for the process.

From the Creation Styles listed above, combined with the ability to record textual data and images / sketches / signatures / audio, etc. and the power of built-in CheckLists – there is an infinite number of ways the Freeway app can be deployed. We just need to stretch our imagination to review/rethink our business processes to see how we can improve business efficiencies by using the power of the Freeway app.

Material Lookup Style can be either **Standard** or **Graphical**. Graphical means mobility images associated with the items or descriptors will also be displayed when looking up materials. Recommended size is 256 x 256 pixels (png or jpeg).

You can also specify the JobType / PurchaseType / SalesType for the Order to be generated with the template style. This will override what is specified in the Employee Mobility Settings.

The **Template tab** shows a set of template lines which effectively defines how that template style will work. Each line defines the sequence number, type (CHECKLIST / NOTE / SIGNATURE / SKETCH / IMAGES / TIMES / MATERIALS / MAP, etc), description, option, Print checkbox, and Display Option.

List Detail	Template				
Sequence	Туре	Description	Option	Include In Print	Display Option
10	CHECKLIST	Checklist	Standard Service		Always
20	NOTE	Service Notes	StdServiceNote		Always
30	MATERIALS	Materials used			Always
40	TIMES	Labour used		<b>V</b>	Always
50	SIGNATURE	Contact Signature	Contact	<b>V</b>	Always
60	PRINT	Print Service Sheet	Service Sheet		Always
70	TRACKING	Job Tracking			Always
80	TICKET	Call Ticket			Always
90	PLANNEDLINEINFO	Planned Lines			Always

The **Settings tab** allows you to specify certain default settings that will apply whenever this template is used. These settings will take precedence over similar settings in Employee Mobility Settings.

🛿 Style Templates				
List Detail Template Settings				
Specific Employee Employee Name How Times	are Posted in Ostendo   Default Labour Code for Time En	y Auto Time Entry Creation Rule	Material Pre-Fill List Charge S	tyle Non-Charge Code
KK Job Direct	LAB-GENERAL	Use Employee Setting	Chargeat	le

# 3. Checklists

Checklists serve to remind the mobility user to perform specific required actions.

Each Checklist (CheckName) can have one or more GroupNames associated with it. And each Check group will have one or more Check items.

The Checklists screen has 5 tabs (List-Detail-Groups-Items-Conditional Rules).

The Detail screen shows the Checklist name and description.

The Groups screen shows the GroupNames and their "Mandatory\_Style" (Optional / All items mandatory / Any One item).

Each item in each group is then defined in the Items tab. Each item is either a Checkbox / Text / Memo / List / Info / Number / Integer/ Date / Time / Signature / PhotoNote / Group CheckBox .

Help Text can be associated with each item. This help text will be displayed on the Freeway app when the user clicks on "Info" next to the template item.

Check Lists							
List Detail Gr	oups Items C	Conditional Rule	es				
Checklist: Standa	ard Service						
Group Name	Group Seq	Item Sec 🛆	Variable Name	Description	Туре	List Values or Info Text	Help Text
Std		10		Inform Contact Person on arrival at site	CheckBox		
Std		20		Record what is done and any recommendations	CheckBox		
Std		30		Record materials used	CheckBox		
Std		40		Record Start and Stop times	CheckBox		
▶ Std		50		Get Contact signature	CheckBox	<b>_</b>	
					CheckBox Text Number Date Integer Memo List Info	×	

Conditional Rules can be added to checklists to dynamically alter the flow of the checklist based on responses to earlier checklist items. This will be explained in more detail later. (Please refer to Part 2 – Conditional CheckList Primer at the end of this document.)

# 4. Style Template Matrix

The Style Template Matrix screen defines what Data Sheet style templates are available for selection in the mobile app based on a combination of parameters. It is a grid with the fields – DATASHEETSTYLE, JOBTYPE, CUSTOMERTYPE, CUSTOMER, SUPPLIERTYPE, SUPPLIER, EMPLOYEE, STYLENAME.

Data Sheet Style	Job Type	Customer Type	Customer	Supplier Type	Supplier	Employee	Style Name
Customer							StdService
Job							StdService
▶ Internal 🛛 🔽	1					KK	TripLog
Customer							HeatPump
Supplier Job						KK	ExpenseLog
Assembly						KK	PhotoLog
Delivery Internal							GENCHECK
All							Garden Shed
Delivery							Car Overheating

# 5. Notify Messages

This screen allows you to pre-define messages that can be sent to all or specific employees. Employee Level and Employee columns specify who can select such a message when they click on the Notify button in their Freeway app. The Notify Caption is the actual message sent. The correct status should be entered in the ON/OFF Site Indicator relevant to the Message Caption.

Notify Messa	ges						
Employee Level	Employee Se	equence No	Notify Caption	Notification Method	Who to Notify	Notify Name	ON/OFF Site Indicator
All Employees		1	Arrived on Site	Text Message	Specific Employee	Bob Drum	OnSite
* All Employees		2	Finished Job. Leaving Site	Text Message	All Employees		OffSite 💌

# 6. Guide Definitions

This set of screens allows you to define and compile a set of slides with associated notes into a "Guide". Guides can be easily created wherever there is a need to provide step-by-step instructions with accompanying pictures or simply documenting a process or standard operating procedure.

e Name: I	ntroduction to Ostendo Freeway		
a No	Slide Name	Description	Slide Image
	Introduction	Ostendo Freeway is a mobility solutions platform.	
20	Solutions	Categories of Ostendo Freeway Solutions	
30	The Front Screen	What is on the Front Screen	
40	Datasheets	How data is collected in Freeway	
50	Style Templates	How data sheets are designed	
60	Using the App	How to use the Ostendo Freeway App	-
70	Update Button	How to synchronize the data with Ostendo	
80	Starting a New Datasheet	Example of initiating a new datasheet	
90	Sample Template	How the datasheet is laid out on the mobile device	
100	Sample Print Output	A view of the Print Dutput	<u> </u>
110	Reviewing the Data	How the DataSheet data is reviewed in Ostendo.	<u> </u>
120	New Actual Job	Example of a New Job with Actuals	
130	JobLines Actuals	Example of JobLines with actuals inserted	<u> </u>
endo F	reeway is a mobility solutions p	atform that can meet a variety of business needs.	

On the Freeway app, users access to Guides via the **Guides button**.

# 7. Find Definitions

This set of screens allows you to define and compile product catalogues and business information which can be organized into a hierarchical structure. Examples are sales catalogues; or a list of branch offices / stores organized into geographical regions.

0	Find D	efinitions			
ſ	_ist Det	ail Elements			
	Seq No	Find Name	Description	Style	Hierarchical Name
	10	Lighting Catalogue	Lighting Sales Catalogue	Catalogue	Lighting
Þ	20	Partners	List of Business Partners	Information	General

On the Freeway app, users access to Catalogues and business information via the Find button.

#### 8. Guide Packs

Each Freeway user can be assigned a Guide Pack which defines what Guides he or she can view. Multiple Guide Packs can be defined to meet the different needs of different users.

🛛 Guide Packs		
List Detail Contents		
-Pack Name: Freeway Technical-		
Guide Group	Seq No	Guide Name
Freeway Technical	40	Create a Freeway Guide
Freeway Technical	20	Connecting Freeway to Ostendo
Freeway Technical	10	Introduction to Ostendo Freeway

# 9. Find Packs

Each Freeway user can be assigned a Find Pack which defines what Catalogues or business information he or she can view. Multiple Find Packs can be defined to meet the different needs of different users.

0	Find Packs	;	
_	List Detail C Pack Name: Gr		
ľ	Find Group		Find Name
Þ	Catalogues	10	Lighting Catalogue
	Partners	20	Partners

#### **10. Feature packs**

In Item Mobility and Web (and Descriptor Mobility and Web) screens you can enter specific **Features** for each Item or Descriptor.

However there may be other features that you wish to include which applies across all items/descriptors (e.g. the Standard Sell Price).

So instead of adding Standard Sell Price as a feature in each and every Item or Descriptor, we can use **Feature Packs** to do that.

Feature Packs also allow you to pull in all associated **Item Properties / Descriptor Properties** to be included as Features.

If no Feature Packs are defined, then you will only see the features defined for each individual item / descriptor via the Item/Descriptor Mobility and Web screens.

You can have multiple Feature packs defined to meet the different needs of different groups of Freeway users.

A Freeway user can have only **one Feature Pack name assigned**, but that pack can have many **Feature Groups**.

Feature Pack					
List Detail Cont	ents				
Pack Name: Retail					
Feature Group	Feature Code Type	Feature Style	Seq No	Feature Description	Feature Notes
Pricing	Item Code	Standard		10 Retail Price	Price = \$[[STDSELLPRICE]]
Technology	Item Code	Standard		20 Latest Technology	This product is made with the latest

#### **11. Inquiry Packs**

These screens allow you to define standard inquiries for the Freeway user. It is in fact an Inquiry report generator that facilitates the creation of your own inquiries in a simple, structured manner. You can define multiple Inquiry Pack names and their associated inquiries. Each Freeway Mobility user can be assigned an Inquiry Pack and this will determine the inquiries he has access to.

ack Name: General							Close
Inquiry Type Inq	quiry Name	Inquiry Style		Inquiry Explanation	Display Customer Aging	Display Stock Levels 🛓	Add
CUSTOMERINQUIRY Cus	stomer Sales Position	Chart-Scorecard-Listing	10	The color coded indicator for the Sales Order Li			
PRODUCTINQUIRY Sim	nple Item Inquiry	Listing	20	Product Inquiry with stock on hand		✓	Sav
							Cano
							X Dele
						د	- 📄 Displ
							📕 📑 Displ
	Scorecard (Statistics)						Displ
isting Chart Scorecard S						<u> </u>	Displ
	Open Sales Orders		late:	"Il (select * from RFTIJEN DATFASTEXT(orderda	te))	<u>  </u>	Displ
isting Chart Scorecard S Listing Caption	Open Sales Orders		late:	'   (select * from RETURN_DATEASTEXT(orderda	te]]	e^2	Displ
isting Chart Scorecard S Listing Caption Header Line Header Note	Open Sales Orders ' <b>Order No: </b> ordernotes		∙ate:	"   (select * from RETURN_DATEASTEXT(orderda	tej)	) <u> </u>	Displ
isting Chart Scorecard S Listing Caption Header Line Header Note Header to Detail Key	Open Sales Orders     ordernotes ordernumber	'∥ordernumber∥''∥' <b>Order D</b>		··· _ ·	tej)		Displ
isting Chart Scorecard S Listing Caption Header Line Header Note	Open Sales Orders ' <b>Order No: </b> ordernotes ordernumber ause from salesheader w	'∥ordernumber∥''∥' <b>Order D</b>		'∥ (select * from RETURN_DATEASTEXT(orderda d orderstatus ⇔ "Closed" order by sysuniqueid	tej)		
isting Chart Scorecard S Listing Caption Header Line Header Note Header to Detail Key Header From and Where Ck Header From and Where Ck	Open Sales Orders 'b>Order No: ordernotes ordernumber ause from salesheader w Count	'    ordernumber    ' '    ' <b>Order D</b>	lvalue and	d orderstatus <> 'Closed' order by sysuniqueid	tej)	1	
Chart Scorecard S Listing Caption Header Line Header Note Header to Detail Key Header From and Where Ck Header Results Restriction ( Header Indicator Logic	Open Sales Orders ' <b>Order No: </b> ordernotes ordernumber ause from salesheader w Count case when (orderda	'    ordernumber    ' '    ' <b>Order D here customer = :passedselected ate &lt; (current_date - 365)) then 2!</b>	ivalue and 55 else 16	d orderstatus <> 'Closed' order by sysuniqueid	tej)	1	
Chart         Scorecard         String           Listing         Caption         String         String </td <td>Dpen Sales Orders <a href="https://www.communet.com">&gt;</a></td> <td>'    ordernumber    ' '    '<b>Order D here customer = :passedselected ate &lt; (current_date - 365)) then 2!</b></td> <td>ivalue and 55 else 16</td> <td>d orderstatus &lt;&gt; 'Closed' order by sysuniqueid</td> <td>tej)</td> <td>1</td> <td></td>	Dpen Sales Orders <a href="https://www.communet.com">&gt;</a>	'    ordernumber    ' '    ' <b>Order D here customer = :passedselected ate &lt; (current_date - 365)) then 2!</b>	ivalue and 55 else 16	d orderstatus <> 'Closed' order by sysuniqueid	tej)	1	
Listing Chart Scorecard S Listing Caption Header Line Header Note Header Fron and Where Cit Header Row and Where Cit Header Results Restriction ( Header Indicator Logic Detail Line Detail Line	Open Sales Orders <body>           Order No:       ordernotes      ordernumber     ause from salestheader w     Count     case when (orderded case when (orderdddddddddddddddddddddddddddddd</body>	'    ordernumber    ' '    '(b>Order D here customer = :passedselectec ate < (current_date - 365)) then 2' cimal(18,3)    '    lineunit    ' (b>	dvalue and 55 else 16 I codetype	d orderstatus <> 'Closed' order by sysuniqueid \$777215 end     > '   linecode    ': '  linedescription    ''	tej)	1	
Header Line Header Note Header to Detail Key Header From and Where Ck Header Results Restriction ( Header Indicator Logic Detail Line	Dpen Sales Orders '\cb>Order No: ordernotes ordernumber from salesheader w Count case when (orderd casf(ordergt) as de linenotes ture salesimes whe	'    ordernumber    ' '    ' <b>Order D here customer = :passedselected ate &lt; (current_date - 365)) then 2!</b>	dvalue and 55 else 16 I codetype	d orderstatus <> 'Closed' order by sysuniqueid \$777215 end     > '   linecode    ': '  linedescription    ''	tej)	1	

#### 12. Data Sheets

The Data Sheets screen allows the user to view and edit the Data Sheets data received from the mobile device. It has 3 tabs (List-Detail-Contents).

Each time a Data Sheet is captured using the Freeway Mobile App, a **SheetID** is assigned. The List tab display a list of all Data Sheets by SheetID.

The Detail tab shows the summary grid of all records relating to a specific Data Sheet.

The Contents tab allows you to browse through the actual data in the Data Sheet.

List         Detail         Contents           Sheet ID         Image: Sheet Display Sheet S	0 Data Sheets					
	List Detail Cont	tents				
🕨 KK1130164 StdService Black Shoes (Wholesale) Ltd [Job] JOB400073 Generated from Service Sheet: KK110060 [Task] Job [StdService] KK1130 KK 🗹	Sheet ID	🗹 Style	Name	Description	Employee	Updated
	KK1130164	StdService	Black Shoes (Wholesale) Ltd [Job] J0B400073	Generated from Service Sheet: KK110060 [Task] Job [StdService] KK1130	KK	

t Detail Contents		
Name	Description	Туре
Information	Black Shoes (Wholesale) Ltd [Job] JOB400073	INFO
Standard Service	Checklist	CHECKLIST
StdServiceNote	Service Notes	NOTE
Materials & Charges	Materials used	MATERIALS
Times	Labour used	TIMES
Contact	Contact Signature	SIGNATURE
Site Tracking	Job Tracking	TRACKING
Ticket	Call Ticket	CHECKLIST

13. Settings - These are a series of names and definitions required to create the mobility templates.

*Note Names:* Note Names allows you to name different types of notes you wish to use with your Style Templates.

Note Names							
Note Name	Description	Copy to Customer Notes	Copy to Customer History Notes	Copy to Direct Invoice Notes	Copy to Job Notes	Copy to Job History Notes	Copy to Job Invoice N
ActivityNote	Activity Note				✓		
QANote	Quality Assurance Notes						
ShedNote	Shed Notes				•	✓	⊻
StdServiceNote	Standard Service Notes				✓	✓	

# *Signature Names*: Signature Names allows you to name different types of signatures you wish to use with your Style Templates.

0 Signature Names						
Signature Nar	me Description	Mandatory	Lock Checklists when Signed	Lock Materials when Signed	Lock Times when Signed	Signature Clause
Contact	Contact Signature					
Inspector	Inspector Signature					
QA	QA Signature		<ul><li>✓</li></ul>			

# Sketch Names:

Sketch Names allows you to name different types of sketches you wish to use with your Style Templates.

Sketch Names		
	Sketch Name	Description
Þ	Cabling	Cabling Diagram
	Config	Configuration Diagram
	Design	Design
	Room	Room Layout
	Site	Site layout
	Sketch	Sketch

# *Mobility Teams:* Mobility Teams setting allow you to name the teams and link the workers to each team. The workers' time can be entered by a supervisor and assignments can be made to Mobility Teams.

0 Mobility Teams				
Team Nam	e Employee			
<u> </u>				
A-Team	Bob Drum			
A-Team	Jane Steel			
A-Team	Keith Rogers			

**Mobility Team Pooling:** This allows you to identify the teams which work on a "pooled" basis. This means anyone in the team can grab a job assigned to the pool. Once a team member grabs a job, it will **not** be available to anyone else in the team. The assignment will then belong to just that individual team member (and the assignment board will be updated accordingly).



*Fixed Time Template:* Fixed Time Template allows you to pre-define all the fixed time slots associated with a Fixed Time Template name. You can define multiple time slots for one or more names.



**Guide Groups:** Guide Groups setting allows you to define the names of Guide Groups which can be used when organizing Guide Packs for Freeway users.



*Find Groups:* Find Groups setting allows you to define the names of Find Groups which can be used when organizing Find Packs for Freeway users.

0 Find Groups			
Group Name	Group Seq	Group Description	
Catalogues	10	Sales Catalogues	
Partners	20	Business Partners	

*Template Groups:* Template Groups setting allows you to define the names of Template Groups which can be used in Style Template's Detail tab. Templates having the same group name will be displayed together in the Freeway App.



**Statistic Groups:** Statistic Groups setting allows you to define the names of Scorecard Statistic Groups which can be used in Scorecard Statistics tab. This enables you to organize scorecard statistics in an Inquiry into logical groupings.



#### **Print Names:**

Mobility Print Names allows you to list different types of print outputs you wish to use with your Style Templates. The Override HTML Code here allows you to replace the default HTML with your own HTML for the entire output of each Print Name.

The Print Name must not include any special characters (e.g. "/", etc.)

0 Print Names					
Print Name	Default Email To	Override HTML Code	Email Audio Files	Email Image Files	Display Prices
GenCheck	Internal				
HeatPump	Internal				
Report	Internal				
Service Sheet	Internal				
* Invoice	External				✓

Display Prices option allows prices to be included in the Print output.

# *Mobility Outputs:* Mobility Outputs allows you to define / override HTML contents per section (type) of the print outputs.

0 Mobility Out	Mobility Outputs				
Print Name	Туре	HTML Code			
Service Sheet	INFO	<pre><head><title>Service ID: [[TABLE=SERVICESHEETSUMMARY FIEL[  &lt;/pre&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;TIMES&lt;/td&gt;&lt;td&gt;&lt;body&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;MATERIALS&lt;/td&gt;&lt;td&gt;&lt;body&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;NOTE&lt;/td&gt;&lt;td&gt;&lt;body&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;SIGNATURE&lt;/td&gt;&lt;td&gt;&lt;body&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;•&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;/tbody&gt;&lt;/table&gt;</title></head></pre>			

#### **Mobility Paths:**

This allows you to specify the full UNC path of each of your mapped drives. This is required to ensure that the Freeway app can access any linked document which may be stored in mapped drives. The format of the path would be : \\ComputerName\SharedFolder\Resource

(computerName (SnareaFolder (Resource

0 Mobility Paths		
Mapped Drive	Server Path	
* G 💌		
A B G H J K L		

# *Job Info Fields:* Job Info Fields allows you to add any other Job Header record fields to be displayed in the mobile app - Job Inquiry function.

s
Field Caption
SalesPerson

**Planned Job Line Info:** Planned Job Line Info allows you to display fields for any unissued (planned) job lines in the Style template. The default fields that are always displayed in Planned Lines are LineNumber, LineCode, LineDescription.

Planned Job Line Info
Field Name Field Caption
LINENOTES Linenotes

**Customer Info Fields:** Customer Info Fields allows you to add any other Customer master record fields to be displayed in the mobile app - Customer Inquiry function.

Customer Info Fields				
Field Name	Field Caption			
► CUSTOMERWEB	Website			
SALESPERSON	Salesperson			

**Asset Info Fields:** Asset Info Fields allows you to add any other Customer Asset record fields to be displayed in the mobile app - Asset Inquiry function.

0 Asset Info Fields			
Field Name	Field Caption		
* SERVICEZONE	Service Zone		

**Supplier Info Fields:** Supplier Info Fields allows you to add any other Supplier master record fields to be displayed in the mobile app - Supplier Inquiry function.

Supplier Info Fields			
Field Caption			
Contact			

**Assembly Info Fields:** Assembly Info Fields allows you to add any other AssemblyHeader record fields to be displayed in the mobile app - Assembly Inquiry function.

O Assembly Info Fields		
Field Caption		
LeadTime		

**Delivery Info Fields:** Delivery Info Fields allows you to add any other SalesDeliveryHeader record fields to be displayed in the mobile app - Delivery Inquiry function.

Delivery Info Fields		
Field Name	Field Caption	
* PACKEDBY	Packed By	

This allows you to add any fields to be displayed from any table that is linked to Customer / Supplier / Job / Assembly / Delivery / Asset.

Linked Style	Linked to Field Style	Source Table Name	Source Key Field	Source Data Field	Field Caption
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLCONTACT	Contact Name
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLDATE	Call Date
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLTIME	Call Time
Customer	Primary Field	CALLNOTES	COMPANYNAME	TICKETID	TicketID
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLSTATUS	Status
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLBRIEFDESC	Description
Customer 💌	Primary Field				
Customer Supplier Job Assembly Delivery Asset					



# Mobility Captions:

The button on the Main Screen displays a menu for selection of Jobs, Customers, Suppliers, Assembly Orders, Delivery Orders, and Internal Data Sheets. The Mobility Captions allows you to modify the captions for any of the items in this menu.

Menu Item	Menu Item Instruction	Menu Item Caption
DISPLAYCUSTOMERS	<ul> <li>Select a Customer for the New Sheet</li> </ul>	Select Customer
DISPLAYCUSTOMERS DISPLAYSUPPLIERS DISPLAYJOBS DISPLAYASSEMBLIES DISPLAYDELIVERIES DISPLAYINTERNAL		

#### Mobility Barcode Rules:

These rules define what fields are used to identify the entity when barcode scanning is used. Ostendo builds a reference list of all such codes. When a barcode is scanned, the Freeway app will be able to determine the entity type (Product / Customer / Supplier / JobTask/ AssemblyStep / Delivery /Customer Asset) and what to do next.

Product Barcode Style	Barcode
Customer Barcode Style	No Barcode
Supplier Barcode Style	Barcode Product Code
Job Barcode Style	SYSID
Assembly Barcode Style	SYSID
Delivery Barcode Style	Delivery No
Customer Asset Barcode Style	Asset No
Location Barcode Style	No Barcode
Employee Barcode Style	SYSID

For Job Barcode, use the **JOBTASKS'** SYSUNIQUEID. For Assembly Barcode, use the **ASSEMBLYSTEPS'** SYSUNIQUEID.

Mobility Rules:With these rules, you can stop automatic posting to Service Jobs or Sales Orders when data is<br/>synchronized with the host.

You can also specify whether editing or deletion of the uploaded sheets is allowed. The Registered Company allows you to display the name of your company in the main menu of the Ostendo Freeway Service.

No Automatic Data Sheet Posting	
Allow Data Sheet Editing	
Allow Data Sheet Deletion	
Registered Company	SuperTech Limited
Mobility Licence Code	ZfuETwoKgqKW4Lh+EgVRsrelopW2
Refresh Interval (Minutes)	
Horizon (Hours Back)	
Company Cross Reference	Match Name or any Cross Reference
Check Mobile in Cross Reference	$\checkmark$
Check Phone in Cross Reference	$\checkmark$
Check Email in Cross Reference	$\checkmark$
Create Data Sheet Linked Docs From	1/01/2016
Default ReStock Supplier	Some Supplier Ltd
Long Description Label	Product Overview
Specification Label	Technical Specs

The Mobility License Code must be loaded here before you activate the Ostendo API Service for Freeway

Refresh Interval and Horizon defines how often Employee Locations display is refreshed and how far back in time to retrieve Employee location data.

Company Cross Reference style is used when the Freeway app creates new Customer or Supplier records. This check helps to prevent duplicate customer/supplier records.

You can specify when to start creating Data Sheet pdf documents which will be linked to the respective Job/Assembly/Sales/Purchase/Invoice. (Requires Parent Folder Path to be specified in General Rules as well as DataSheet Queue Type to be specified in Queue Schedule.)

Default ReStock Supplier – allows you to specify a Supplier as the default for generating a Purchase Order when a New ReStock Order (internal) data sheet is completed.

# III. Ostendo Freeway.apk - the Mobility App

Installing the Freeway.apk on your mobile device:

1. Once you have downloaded/copied the **freeway.apk** to your device, click **Install** button.



2. Open the app and click on "Ostendo – Connect to an Ostendo ERP Backend" and enter a Solution Name. The Solution Name allows the Mobility User to give a unique label to the Ostendo Database being connected to. Please note that the same Freeway app on the same device can be used to connect to more than one Ostendo database or Standalone Solution. The Solution Name will appear at the top of the screen so that the user will know which Ostendo database or Standalone solution he/she is working with.

🛥 🔄 🖸 🕮 🗑 🔽 🕸 🔋 📶 78% 🗎 10.05 am	Solution Name	<ul> <li>         Image: Constraint of the second second</li></ul>
Select a Solution Style Ostendo Connect to an Ostendo ERP Backend Standalone Instali an Industry Vertical Solution	Enter a Solution Name TEST01	Settings
Ostendo Merged Connect to Ostendo merged with Vertical Solut	Cancel OK	Autralized relativity (Totals     Autralized relativity)     View Size     Medium
		Theme     On     Numeric Keyboard Style     Number Pad
		Qty Speed Entry     On     Barcode Scanner Type     Camera

Now you need to go to API Security in Ostendo to generate a FastCode. Enter the FastCode into the Freeway
app and press GO button. The FastCode will install the API Key and the Mobility Key into the app.
Press the back arrow to return to Main screen.

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	TEST01		•	TEST01
Click "OK" to copy code to clipboard  418919	API Key	1	API Key	
	>>>	$\rightarrow$	•••••	••••••••••
OK Cancel	Mobility Key		Mobility Key	
	Fast Code		•••••	•••••••
X	418919 GO	1	Fast Code	
				GO

# 4. Initial synchronization with Ostendo - Press



button on the Main Screen.

Enter the Mobility User's **name** and **password** as defined in Employee Mobility Settings (in Ostendo). Then press Login to start initial synchronization.

This step connects the mobile device to Ostendo. Ostendo then verifies the employee's credentials and, based on his settings in the EMPLOYEEMOBILITYSETTINGS table, will send the relevant jobs/customers data and/or mobile sheet templates back to the device. Upon successful synchronization, the user can start working with the Freeway app.

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Registered To:	User	Registered To: Su	perTech Limited
Update	Kk Password ••••	Update	Solutions
New Existing	Network Local Sync Mode Standard Sync	New	Existing
To Do	Network: This can be either Local or Remote.	12 To Do	Notify
Inquiry Powered By Ostendo Freeway ®	Local means you are connecting directly to your Ostendo machine via your wifi LAN. Remote means connecting via the internet (WAN).	Powered By Oster	Scan On

Under normal usage, as a security measure, the user needs to enter a Username and password before synchronisation can begin. Completed mobility sheets on the device are first sent back to the Ostendo database before any new data is brought back to the device.

Once synchronization is completed, the app disconnects from the host database and the mobile user carries on in **offline mode**.



This Main Screen button shows what solutions are available to be loaded onto this app.



This Main Screen button starts a new datasheet process. It first prompts you to select either a Job/Customer/Supplier/Assembly/Delivery/Internal before selecting the appropriate template to generate the datasheet..



This Main Screen button displays existing datasheets for selection. This allows you to continue working on previously created datasheets.



This Main Screen button displays list of To Do tasks for selection. In Ostendo, such tasks are generated by Call Ticket Actions, Job/Sales Quotes Follow-Up Actions, Activity Calendar Events (appointments), and History Notes Follow-Up Actions.



This Main Screen button displays list of Notification Messages that the user can send.

These messages are pre-defined in Ostendo Mobility menu – Notify Messages.



This Main Screen button displays list of standard Inquiries for selection. These inquiries allow the user to get additional information relating to Jobs, Customers, Suppliers, Assembly Orders, Deliveries, and Labour Times recorded.



This Main Screen button allows you to scan a barcode and immediately initiate a datasheet. This button functions like a short-cut way to launch datasheets based on the type of barcode being scanned.

	Rules
	Settings
	Defaults
	Diagnostics
	About

The **Menu** button at the top right hand corner of the Main Screen displays the following:

**Rules** – gives a summary of the Employee Mobility Settings of this user.

**Settings** – allows user to modify the View Size, Theme, Keyboard style, Speed Entry, and Barcode Scanner Type.

**Defaults** – to specify Tracking Codes for when DataSheet is created and when it is completed. Applicable to Jobs, Assemblies, Deliveries. **Diagnostics** – runs a set of checks to test the connection between the Mobile device and the API.

**About** – This shows the current Freeway apk version number.



Tip: The Back Key will bring you to the previous displayed screen. If you keep on pressing the Back Key, you will eventually exit the application.
 Using the *Home Key* allows you to temporarily step out of the application and do something else (like - take a phone call, send a message, or run another app). To return to the Ostendo

Freeway App, all you need to do is click on the Freeway icon again and you will be brought back to the exact same page you were on previously.

# B. Mobility Setup and Definitions (An Example)

We shall use a very simple example to illustrate how to create a mobility solution using Ostendo Freeway. Let us assume that we want the service technician to follow this standard procedure at every service job he attends:

- 1. Inform contact person of his arrival on site.
- 2. Perform the job and make service notes and recommendations
- 3. Record materials used.
- 4. Record Start and Stop times
- 5. Get Contact signature at end of job before leaving site.

# **Check Lists**

We want to include a Checklist to ensure all these mandatory steps are done. We can call this check list "Standard Service" and go to **Mobility menu** to set it up like this:



**Note**: Check Lists do not need to be included in the style. However it is often helpful to include checklists to remind service personnel and to maintain service standards.

st Detail Gro	oups Items (	Conditional Rule	es				
iecklist: Standa	ard Service						
Group Name	Group Seq	Item Sec 🕗	Variable Name	Description	Туре	List Values or Info Text	Help Text
Std		10		Inform Contact Person on arrival at site	CheckBox		
Std		20		Record what is done and any recommendations	CheckBox		
Std		30		Record materials used	CheckBox		
Std		40		Record Start and Stop times	CheckBox		
Std		50		Get Contact signature	CheckBox		

# Lists

Since we need to record materials and times used, we will need to set up a couple of lists. Go to **Inventory**  $\rightarrow$  **Lists** and set up something like these:

🍘 Items 🛛 +	Drag & Drop Item	is 🗊 Descriptors	s 🔐 Labour Codes 🛛 🗹 Custo	mise	
List Detail	Lines Groups				
List Code: Serv	vice Parts				
Line Number	Code Type	Code	Description	Unit	Qty
10	Item Code	100-2000	Washer-Mild Steel-8MM	Each	1
20	Item Code	110-2033	Washer-Stainless Steel-8mm	Each	1
30	Item Code	200-2066	Bolt-Mild Steel-8mmx50mm	Each	1
40	Item Code	210-2132	Bolt-Stainless Steel-8mmx50mm	Each	1
50	Item Code	300-2150	Nut-Mild Steel-8mm	Each	1
60	Item Code	300-2159	Nut-Stainless Steel-8mm	Each	4
		000 2100	Trai Stainess Steeronin	Eaun	
Lists	Drag & Drop Items		Customis Codes		
Lists					
Lists	Drag & Drop Items Lines Groups				
<b>Lists</b> ∭ Items + List Detail	Drag & Drop Items Lines Groups purList				Qty
Lists Items + List Detail List Code: Labo Line Number	Drag & Drop Items Lines Groups purList	Descriptors	Subour Codes 🛛 🗹 Customis	e	Qty
Lists Items += List Detail List Code: Labor Line Number 10	Drag & Drop Items Lines Groups purList Code Type	Descriptors	e Labour Codes V Customis	e Unit	Qy 1
2 Lists Items +2 List Detail List Code: Labo Line Number 10 20	Drag & Drop Items Lines Groups purList Code Type Labour Code	Descriptors Code LAB-SERVICE	Description On Site Service Labour	unit Hours	Qty 1 1
Lists  Items +  Items +  List Detail  List Code: Labor  Line Number  10 20 30	Drag & Drop Items Lines Groups ourList Code Type Labour Code Labour Code	Code LAB-SERVICE LAB-INSPECTION	Labour Codes 🔽 Customis Description On-Site Service Labour Standard QA Labour	e Unit Hours Hours	Qty 1
Lists Items List Detail List Code: Labo Line Number 10 20 30 40	Drag & Drop Items Lines Groups butist Code Type Labour Code Labour Code Labour Code	Code LAB-SERVICE LAB-SERVICE LAB-INSPECTION LAB-GENERAL	Labour Codes      Customis     Description     On-Site Service Labour     Standard QA Labour     General Labour	e Unit Hours Hours Hours	Qy 1 1 1

Note that Lists are associated with employees. This means that different employees can have the same or different lists (if so required).

# Note Names

We want the service technician to record notes, so we need to define a Note Name called "StdServiceNote". Go to Mobility  $\rightarrow$  Settings and select Note Names:

2	Note Names							
	Note Name	Description	Copy to Customer Notes	Copy to Customer History Notes	Copy to Job Notes	Copy to Job History Notes	Copy to Asset Notes	Copy to Asset History Notes
Þ	StdServiceNote	Standard Service Notes			V	<b>V</b>		

You will notice that you could set the notes to be automatically copied to various places. You can also specify Call Classification and Subclassification for History notes.

#### **Signature Names**

In the same way, for signatures, we need to define a Signature Name in Mobility Settings:

0	Signature Na	mes					
	Signature Name	Description	Mandatory	Lock Checklists when Signed	Lock Materials when Signed	Lock Times when Signed	Signature Clause
Þ	Contact	Contact Signature					
	Inspector	Inspector Signature		✓			
	QA	QA Signature	<b>v</b>	✓			

If required, you can prevent changes being made to the Data sheet after it has been signed by the client. Just tick the appropriate "Lock" checkbox.

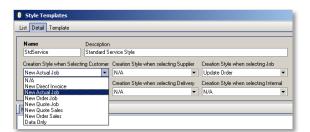
#### **Print Names**

If we want Print Output, then we need to define a Mobility Print Name in Mobility Settings. The Override HTML Code here allows you to replace the default with your own HTML layout design:

Print Name	5				
Print Name	Default Email To	Override HTML Code	Email Audio Files	Email Image Files	Display Prices
GenCheck	Internal				
HeatPump	Internal				
Invoice	External				✓
Report	Internal				
Service Sheet	Internal				

#### **Style Templates**

We now have sufficient elements ready to define a style template for our Standard Service job. Go to Mobility  $\rightarrow$  Style Templates and add a style called "StdService":



A style allows you to specify whether a Job with Actuals will be created, or an Invoice, or just a Job Order (no actuals), or a Quote. In our example, since we are doing service jobs, this style will create jobs with actuals (time and materials) included.

The contents of the template for our simple service jobs will be as follows:

st Detail	Template				Information StdService
Sequence	Туре	Description	Option	Include In Print	Bank West
10	CHECKLIST	Checklist	Standard Service		Standard Service
20	NOTE	Service Notes	StdServiceNote		Checklist
30	MATERIALS	Materials used			StdServiceNote
40	TIMES	Labour used			Service Notes
50	SIGNATURE	Contact Signature	Contact		Materials & Charges
60	PRINT	Print Service Sheet	Service Sheet		Materials used
					Labour used
					Labour used

output for this style. The Print Name used is selected in the Option field, and the contents to be printed are those that are ticked.

> > > > Print Service Sheet Complete Data Sheet

When this style is displayed on a mobile device, the user will work with exactly this set of items and nothing else. So a style template in effect guides the user as work is carried out and data recorded.

Note: If you want to modify a particular section of the Print Output, then go to Mobility Outputs in Mobility Settings and enter/modify the HTML codes used to generate that section:

Print Name	Туре	HTML Code
Service Sheet	INFO	<head><title>Service ID: [[TABLE=SERVICESHEE]&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;TIMES&lt;/td&gt;&lt;td&gt;&lt;body&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;MATERIALS&lt;/td&gt;&lt;td&gt;kbody&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;NOTE&lt;/td&gt;&lt;td&gt;&lt;span style="font-family: 'Century Gothic'; font-&lt;br&gt;weight: normal; font-style: normal; text-decoration;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;Service Sheet&lt;/td&gt;&lt;td&gt;SIGNATURE&lt;/td&gt;&lt;td&gt;Vegita Holina; tokoge Holina; textoecoladol:&lt;br&gt;none;font-size: 11pt/&gt;&lt;br&gt;&lt;/u&gt; &lt;/b&gt; &lt;/u&gt; &lt;/b&gt; &lt;/b&gt; &lt;/u&gt; &lt;/b&gt; &lt;/b&gt; &lt;/b&gt; &lt;/b&gt; &lt;/u&gt; &lt;/b&gt; &lt;/b&gt; &lt;/b&gt; &lt;/b&gt; &lt;/li&gt; &lt;li&gt;(ITABLE=SERVICESHEETLABOURI&lt;br&gt;FIELDNAMES=WORKDATE_WORKSTARTTIME,&lt;br&gt;WORKENDTIME_LINECODE_LINEDESCRIPTION&lt;br&gt;JUNEQTYITYPE=TABLEI&lt;br&gt;HEADINGS=Date,Start,End,Code,Description,Hours&lt;br&gt;s ATTRIBUTES=width="100%" border="1" ]]&lt;/br&gt;&lt;/td&gt;&lt;/tr&gt;&lt;/tbody&gt;&lt;/table&gt;</title></head>

If the Print Name does not exist yet, then Add a record, specify the Print Name, select the type and hit SAVE. The HTML Code will then be added. Make your alterations and hit SAVE again.

(If you are happy with the standard HTML code provided, then you do not need to specify anything in the Mobility Outputs.)

# **Style Template Matrix**

This matrix allows you to specify what style sheet to use under what conditions. In our example, we simply want to use our StdService style for all jobs and all customers.

Style Template I	Matrix						
Data Sheet Style	Job Type	Customer Type	Customer	Supplier Type	Supplier	Employee	Style Name
Customer							StdService
▶ Job 💌							StdService

# **Employee Mobility Settings**

0 List

This is the final setup step - before we can start using the mobility solution.

# Employee Mobility Settings defines the employee's unique password and prefix and what is displayed to him when using Ostendo Freeway Mobility solutions.

List Detail						
		KK.				
Employee		KK ****				
Password						
Site Name		Company				
Optional Warehouse						
Optional Location Sheet Prefix		VV				
		KK				
Device Print Option		Email or View				
Default Internal Email						
Exclude this Employee from Forwarding	Sheet on to others					
Job Selection Available						
Customer Selection Available			v			
Supplier Selection Available						
Assembly Selection Available						
Delivery Selection Available						
Internal Selection Available			V	1		
Inherit Mobility Settings from another En	nployee					
Device Materials Time Entry Custom		s Assemblies D	eliveries Assignment	Move Rules		
Number of Synchronised Sheets Retain				_	10	
Auto Synchronise Completed Data She				✓		
Auto set On and Off Site for Sheet Crea	tion and Completion	when Tracked		$\checkmark$		
Set Job Tracking Code for Creation and	Completion of Shee	ts		$\checkmark$		
Notification method (if any) used when f	orwarding to others		None			
The number of Days forward to display	ToDo activities					
Auto Sync the ToDo when selected						
Device Materials Time Entry Custor	mers Jobs Suppl	iers Assemblies	Deliveries			
Restricted Material List Code	Service Parts					
	Service Faits					
Items Restriction Condition						
Descriptors Restriction Condition						
Material Pre-Fill List	Pre-Filled					
Device Materials Time f Restricted Labour List Co Labour Restriction Condi	ode I	Jobs Suppliers LabourList	Assemblies Delive	ries Assignmer	it Move Rules	
Restricted Labour List Co	ide I		Assemblies Delive	ries Assignmen	nt Move Rules	
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Restricted Labour List Cc Labour Restriction Condi Time Entry Mode Fixed Time Template Mobility Team for Time E Auto Insert Time Entry or Default Labour Code for How Times are Posted in Weekly Timesheet Start Device Job F Job F Numl Job T Inclu How Hide Auto Activ Job S set J Shift, Allow	Adde I tion Sheet Creation Time Entry I Ostendo Day I Materials Time ielection Range Restriction Condition Der of Latest Job H Type for New Job C Type for New Job V de Non-Finished A: Actual Lines are In Pricing for Material Sync the Job List v ate Mobility Pooling torizon Days ob/Assignment to I Assignment to refle Payment Entry	LabourList Start Stop LAB-SERVICE Job Direct Monday Entry Customer Monday istory Notes Dirder with Customer As ssignments a nu iserted is when selected g inProgress from	ers Jobs Suppliers sset mber of Days back OnSite Tracking	Assemblies All Open Job JOBTYPE in Standard Service	Deliveries Assignme s ('Service', Standard')	
Restricted Labour List Cc Labour Restriction Condi Time Entry Mode Fixed Time Template Mobility Team for Time E Auto Insert Time Entry or Default Labour Code for How Times are Posted in Weekly Timesheet Start Device Job S Job F Numi Job T Job T Job T Set J Shift, Allow Disat	Adde	LabourList Start Stop LAB-SERVICE Job Direct Monday Entry Customer N istory Notes Drder with Customer As signments a nu iserted is when selected g inProgress from ict actual Start fr	ers Jobs Suppliers sset mber of Days back OnSite Tracking	Assemblies All Open Job JOBTYPE in Standard Service Create New	Deliveries Assignme s ('Service','Standard') _ine	
Restricted Labour List Cc Labour Restriction Condi Time Entry Mode Fixed Time Template Mobility Team for Time E Auto Insert Time Entry or Default Labour Code for How Times are Posted in Weekly Timesheet Start Device Job S Job F Numi Job T Job T Job T Set J Shift, Allow Disat	Adde I tion Sheet Creation Time Entry I Ostendo Day I Materials Time ielection Range Restriction Condition Der of Latest Job H Type for New Job C Type for New Job V de Non-Finished A: Actual Lines are In Pricing for Material Sync the Job List v ate Mobility Pooling torizon Days ob/Assignment to I Assignment to refle Payment Entry	LabourList Start Stop LAB-SERVICE Job Direct Monday Entry Customer N istory Notes Drder with Customer As signments a nu iserted is when selected g inProgress from ict actual Start fr	ers Jobs Suppliers sset mber of Days back OnSite Tracking	Assemblies All Open Job JOBTYPE in Standard Service	Deliveries Assignme s ('Service','Standard') _ine	

# Please refer to Ostendo Reference Help for details of the Employee Mobility Settings fields.

5

5

# C. Using The App

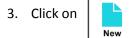
Now that we have completed the setup and definitions for a simple DataSheet style as well as set up an employee to work with this app, let's try it out.

1. Click on the Freeway.apk app icon (f)

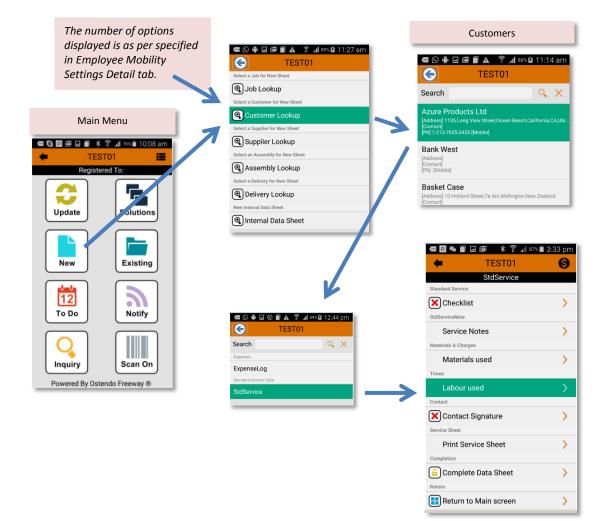


Fill in the User name and password and click on Login. After a few seconds, all the required lists, style templates, jobs/customers/suppliers, etc. will be downloaded to the mobile device.





Then press "Customer Lookup", select the Customer, then select Template (if you have more than one). Else the default template will be used to create the datasheet. (In our example it is StdService.)



4. You can see that the DataSheet layout is defined by the style template.

	87% 🗎 3:33 pm			1899 × 🗊 🔳	🛿 3:41 pm
TEST01	6		-	TEST01	6
StdService				StdService	
Standard Service		In our example, we made	Standard Servi	ce	
Checklist	$\geq$	the CheckList and	Check	list	>
StdServiceNote	``\	Signature mandatory. You	StdServiceNot	,	
Service Notes	>	will see a red cross next to	Servic	e Notes	×
Materials & Charges		/ it when first displayed.			· · · ·
Materials used	>	When it is done, the cross	Materials & Ch	arges	
Times		· /	Mater	als used	> >
Labour used	> /	will change into a green	Times		
Contact		tick.	Labou	r used	>
Contact Signature	K>		Contact		
Service Sheet			Conta	ct Signature	
Print Service Sheet	>		Service Sheet		
Completion			Drint (	ervice Sheet	×
🔓 Complete Data Sheet	>			ervice Sneet	1
Return			Completion		
Return to Main screen	>		🔓 Comp	ete Data Sheet	>
			Return		
			Return	to Main screen	>

5. Once all the mandatory items are completed, the Data Sheet for the job can be completed by selecting the "Complete Data Sheet".

Once this is done, the Data Sheet is **ready for uploading**. This will be done immediately (if Sync Data sheet on Completion is turned on in Employee Mobility Settings) or when the mobile device is next synchronized with Ostendo.

6. If the Style Template has Print output defined, then you can print and/or email the output. Here is a sample of the HTML output:

	🖻 🖬 📄 🕲 🛛		<u>+</u> @	lh. €	100% <b>1</b> 2:12 p
Service	e Sheet				
Service Tecl Customer: A	e: 7/07/16 2:09:39 pm h: KK .zure Products Ltd				
Widget was	flooded.				
Vidget was <b>Materials us</b>	flooded.	Description			Qty
Vidget was <b>Aaterials us</b> Code	flooded.	Description Washer-Mild	Steel-8MM		0ty
Vidget was <b>Aaterials us</b> Code 100-2000	flooded.				
Service Note Widget was Materials us Code 100-2000 300-2150 EXPENSES	flooded. •ed	Washer-Mild			10
Vidget was <b>Aaterials us</b> Code 100-2000 300-2150	flooded. ed	Washer-Mild Nut-Mild Stee			10
Vidget was <b>Aaterials us</b> Code 100-2000 300-2150 EXPENSES	flooded. ed	Washer-Mild Nut-Mild Stee		Description	10



7. Reviewing the Data Sheet data in Ostendo:

### Go to Mobility → Data Sheets

Click on Include Updated, and you will see all the Data sheets that have been uploaded.



The Detail and Contents tabs will show the actual contents of each of the elements that make up the Data Sheet.

Since the Style Sheet specifies that a new Actual Job is created when it is initiated via a customer selection, we should see the job automatically created in Job Orders screen:

🚺 Job Orders				
Job Invoices	📆 Job Retentions	📷 Job Calendar 🛛 🥜	Call Centre   📌 Location Ma	ap 🛛 Job Budgets 🗍 Data Sheets 🛛 🚔 Crea
List Detail Line	es			
Order No	Order Date	Status	Customer	
JOB400104	7/07/2016	▼ InProgress ▼	Azure Products Ltd	P .
Description			Addit	tional Order Address Details
Generated from	n Service Sheet: KK11	39889	Billing Customer	
Job Type	Job	Style	Azure Products Ltd	<i>P</i>
Standard	P Cus	tomer 💌	Addit	tional Billing Address Details
Job Sheet	Current Task	Tracking Code	Job Scheduling	
Not Printed 💌	·	) 🖉 🌽	Required Date	Requested Time of Day
Site Name C	Company		7/07/2016 👻	Job Tasks
			Estimated Duration	Job Booking Status
Settings Dim	s Scheduling Over	ides Financial	0 Minutes	Not Booked In     Job Booking

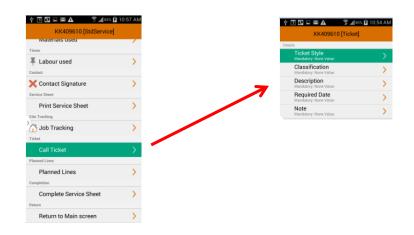
And the Lines with Actuals updated as well:

🛛 Job O	rders													
🧾 Job In	voices	📆 Job Re	etentions 🛛 📷 Ja	b Calendar 🛛 🥜	Call Centre 🛛 🐋	Location Map	Job Budgets	Data Sheet	ts 🛛 📑 Create F	Required P	Purchase Orders	Create Re	quired Assembly Orders	💲 Job Tran
List Det	ail Line:	s												
			gress] Customer:A	zure Products Lto	l									
Batch Ent	try 📋	Lists	🗊 Items 🛛 🧊	Descriptors	🖞 Kitsets 🛛 🔒 T	remplates	💋 Catalogue It	ems 📑 Is	ssues 🛛 😤 Tei	stOrderSc	ript			
Seq	Task	Line	e No Line Type	Code		Order Qty	Actual Qty	Unit Cost	Actual Cost	Unit	Unit Price	Unit Incl Price	Description	
10	Job		10 Item Code	100-2000		10	10	\$0.0400	\$0.0400	Each	\$24.0000	\$24.0000	Washer-Mild Steel-8MM	
10	Job		20 Item Code	300-2150		2	2	\$0.0000	\$0.0000	Each	\$0.1478	\$0.1500	Nut-Mild Steel-8mm	
10	Job		30 Descriptor (	ode EXPENSI	ES	20	20	\$0.0000	\$0.000	\$	\$0.0000	\$0.0000	Expense	
10	Job	40	Labour Coo	e LAB-SER	VICE	4.033	4.033	\$35.0000	\$35.0000	Hours	\$75.0000	\$75.0000	On-Site Service Labour	
4														
Order Val	Jes 🔻 N	lett \$542.	.7800 Cost	\$141.5600	Margin % 73.92	2 Mark	up % 283.43	M Alte	er Markups					
Line Info														
Job Line Line No: 4		operties A	ctual Issues W	arranty Dimensio	ons Order Histor							997 		
Date	Qt			ployee	Rate Scale	Charge Style	Non-Cha	arge Code	Issue Source	Issue M		escription	Re	corded Notes
7/07/2	016	4.033	\$35.00 KK		STD	Chargeable			Issues	KK113	9889 KK113	9889		

# D. ADDITIONAL NOTES:

1. **Call Tickets**: If TICKET is added to a Style Template, then the user can create a Call Ticket from within a DataSheet. Call Tickets created will be added to the Call Centre when the DataSheet is synchronized with Ostendo. This could be used to generate follow-up visits.

ist Detail	Template			
Sequence	Туре	Description	Option	Include In Print
10	CHECKLIST	Checklist	Standard Service	
20	NOTE	Service Notes	StdServiceNote	<b>V</b>
30	MATERIALS	Materials used		<b>V</b>
40	TIMES	Labour used		<b>V</b>
50	SIGNATURE	Contact Signature	Contact	<b>V</b>
60	PRINT	Print Service Sheet	Service Sheet	
70	TRACKING	Job Tracking		
80	TICKET	Call Ticket		
90	PLANNEDLINEINFO	Planned Lines		



# 2. Defaults – Tracking Codes

Defaults allow the user to specify the Tracking Codes for when a DataSheet is created (Start Tracking Code) or when it is completed (Stop Tracking Code). This applies mainly to Job Tasks, Assembly Steps, and Delivery Orders.

			· P A 🛛 🕄			A∎S ≭ 🛜 /
			-	TEST01	-	TEST01
			Defaults		Defaults	
	■ * 😤 📶 88% 🖸 4		Start Sheet Jo On Site	b Tracking Code	Start Shee	
gistered T	rest01		Stop Sheet Jol	b Tracking Code	Stop Shee	et Job Tracking Co
	Rules		Start Sheet As	sembly Tracking Code	Set	et Assembly Track
5	Settings		Stop Sheet As	sembly Tracking Code	Sti (none	e)
date	Defaults		Start Sheet De	livery Tracking Code	St. In Tra	ansit
	Diagnostics		40010	livery Tracking Code	Ste Off Si	ite
	About				On He	old
	Existin	ıg			On Si	
New 12 o Do	Existin					
12			🕑 Job Tr	acking		
				acking g Code Description		
	Notify Scan C			Code Description	Tracking Colour	
	Notify		Tracking	Code Description	Tracking Colour	ne
	Notify Scan C		Tracking ▶ In Transi	Code Description t In Transit to Custor	Tracking Colour	te ne ge

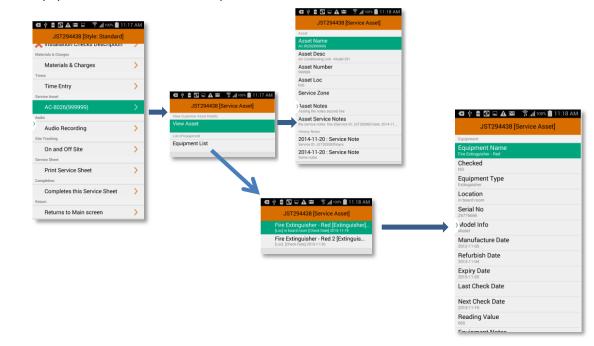
- 3. **Barcode**: For Barcode reading on Android devices, you need to download the free "Barcode Scanner" app by ZXing Team from Google Play Store. You can also pair a Bluetooth scanner to use with the app if you have one.
- 4. **Audio**: To play audio recordings on your computer, you need to install Apple QuickTime Player (free from Apple).
- Sync Mode: Standard Sync or Re-Initialize Data.
   Standard Sync only changes to jobs/customers/assemblies, etc. since the last sync is pulled back.
   Re-Initialize Data means everything (including templates, etc.) is synchronized. Use this mode if you made changes which alter the way the template/app works.

# 6. Assets and Equipment List:

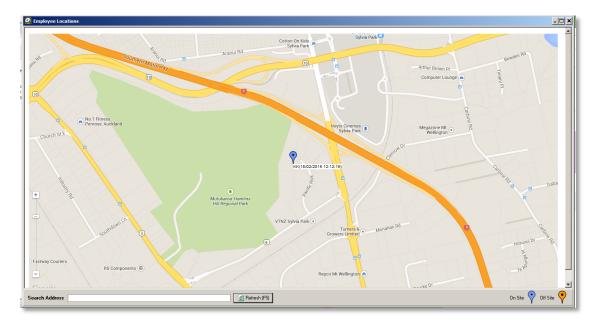
a. You can define a list of equipment (e.g. fire extinguishers) under an Asset

	o <mark>mer Assets</mark> omer Asset Images	s 🛛 🔤 Customer	Asset History N	otes   🥐 Customer As	set Tracking	🛓 Customer A	sset Hierarchy 🛛 🛄	Recurring Invoices	s   📑 Service Pla	ans 🛛 🛅 Customer	Asset Readings	Customis
	tail Planning & H		Tree									
Asset No	: AC-8026(999999	3) [Active]										
Order 1	Гуре	Order No	Order Date	Status	Actual Cost	Planned Cost	Invoiced Nett Value					
Service	э	SER401118	2/11/2011	InProgress	\$75.00	\$150.00	\$0.00					
Service	•	SER401484	17/07/2014	InProgress	\$0.00	\$613.22	\$0.00	]				
Service	8	SER401527	5/11/2014	InProgress	\$27,923.38	\$400,730.46	\$37,882.27	]				
Service	8	SER401537	19/11/2014	InProgress	\$0.90	\$0.64	\$0.00	]				
Service	9	SER401538	19/11/2014	Open	\$0.00	\$0.00	\$0.00	]				
Service	9	SER401540	19/11/2014	Open	\$0.00	\$0.00	\$0.00	1				
Service		SER401543	20/11/2014	InProgress	\$360.00	\$414.00	\$0.00					
Service	8	SER401547	20/11/2014	InProgress	\$360.00	\$414.00	\$0.00	]				
Service	9	SER401548	20/11/2014	InProgress	\$360.00	\$414.00	\$0.00	]				
Planning		0000000					*****	1				
Batch En	itry 📶 Service P	lans										
Planned	Servicing Recu	rring Invoices Li	nked Warranties	Equipment								
Seq	Name		Туре	Seri	al No	Manufac	ture Date Refu	bish Date La	st Check Date	Next Check Date	Expiry Date	Location
	10 Fire Extingu	isher - Red	Exting	iisher Z67	76666	5/11/20	12 4/11/	2013 19.	/11/2014	19/11/2015	5/11/2015	in board room
	20 Fire Extingu	isher - Red 2	Exting	isher 788	76876876	7/11/20	14 7/11/	2014 20.	/11/2014	20/11/2015		

An asset could be a building or campus, etc. A service job could be defined for this asset with a list of equipment to be serviced or inspected.

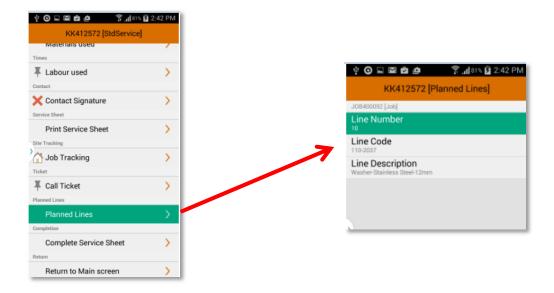


7. **Employee Locations**: Clicking on this item in the Ostendo Mobility menu will show you a map of the employee's last known location. Blue pin means on site and orange pin means off site.



In **Mobility Rules**, you can set the **Refresh Interval** (in minutes) to update this display after the specified time. You can also set a view **Horizon**. This will determine how far back in time (hours) the app will retrieve the employee's location data.

8. Planned Job Line Info: In Mobility Settings menu, this function will allow you to add any jobline field to display in addition to the default fields (LineNumber, LineCode, LineDescription). Planned Job Line Info needs to be added to a style template to display those fields.



**9.** Adding fields to Standard Inquiries: The Freeway app have a set of standard inquiries for Jobs, Customers, Suppliers, Assemblies, and Deliveries. You can add more fields by going to Mobility Settings menu and selecting any of the following:

Job Info Fields

Field Caption

SalesPerson

Field Name

SALESPERSON

- Job Info Fields
- Customer Info Fields
- Supplier Info Fields
- Asset Info Fields
- o Assembly Info Fields
- Delivery Info Fields

These functions allow you to add additional fields to standard inquiries.

750704		
TEST01	÷ O 🗆 🖬 🖻 🖻	🛜 📶 83% 🚺 2:48 PM
Registered To:	Ostendo Freev	way Service
	Select a Job for Information	
🧹     🍆	Job Inquiry	
pdate Solutions	Select a Customer for Information	
	Customer Inquiry	
New Existing		
To Do	밖 ⓒ 및 ≌ @ @ இ 개월?% 월 3:03 PM Ostendo Freeway Service	(1) (143% (2) 2:45 (1) 133% (2) 2:45 (1) 133% (2) 2:45 (1) 133% (2) 2:45
	Customer Name	Customer
	Cash Sale Customer	Name Cash Sale Customer
	Website	Customer Type
iquiry Scan On	Salesperson	Retail
wered By Ostendo Freeway ®	Customer Notes	Address C/- Development X Ltd,PO Box 76131,Manukau City,NI,Nev
wered by Ostendo Freeway @		Contact
wered by Ustendo Freeway @	Job	
wered by Ostendo Freeway (6)	Job Job No 108400001	Phone 09 525 3612
wered by Ostendo Freeway @	Job No Job No JoBA0001 Description	Phone
wered by Ostendo Freeway @	Job Job No 108400001	Phone 09 525 3612
wered by Ostendo Freeway @	Job No 10840001 Description Repair of a PC (replace Harddisk)	Phone 09 525 3612 Mobile
wered by Ostendo Preeway (6)	Job No IOB400001 Description Repair of a PC (replace Harddisk) Job Type Standard Task Job Required Date 2013-03-07	Phone 09 525 3612 Mobile Email
wered by Ostendo Freeway 🥹	Job No Job No 108400001 Description Repair of a PC (replace Harddisk) Job Type Standard Task Job Required Date	Phone 99 525 3612 Mobile Email Web Customer Name
wered by Ostendo Freeway 🥹	Job No IOB400001 Description Repair of a PC (replace Harddisk) Job Type Standard Task Job Required Date 2013-03-07	Phone 99 525 3612 Mobile Email Web Customer Name Cash Sale Customer

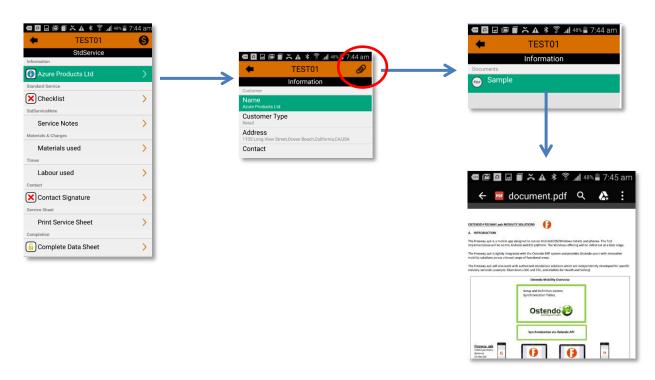
**10.** Linked Table Info Fields: In addition to the above, this function allows you to add fields to the standard inquiries from other tables which are related to these main tables.

<u>0</u> L	Linked Ta	ble Info Fields				
Lir	nked Style	Linked to Field Style	Source Table Name	Source Key Field	Source Data Field	Field Caption
Cu	ustomer	Primary Field	CALLNOTES	COMPANYNAME	CALLCONTACT	Contact Name
Cu	ustomer	Primary Field	CALLNOTES	COMPANYNAME	TICKETID	TicketID
Cu	ustomer	Primary Field	CALLNOTES	COMPANYNAME	CALLSTATUS	Status
Cu	ustomer	Primary Field	CALLNOTES	COMPANYNAME	CALLBRIEFDESCRIPTION	Description
* Cu	ustomer	SYSUNIQUEID	OSTDEF_TESTASSET	HEADERSYSUNIQUEID	ASSETNAME	Asset

If there is a one-to-many relationship, then only fields from the latest record will be shown. The tables can be linked either via the Primary (Key) Field or via the SYSUNIQUEID value. 11. Viewing Related Documents: If there are documents linked to jobs or customers, these can be accessed by the Freeway.apk . If the documents are stored in a <u>mapped drive</u>, ensure that the mapped drive is defined in the Mobility Paths in Mobility Settings.

Document Manageme	nt		<u>- 🗆 ×</u>
List Detail Document Settings —			Close
Document Name	Document Type	Linked To	Add
Sample	Customer 🔻	Azure Products Ltd 🖉	Save
Copy to Jobs Copy	to Sales 🛛 Print / Email with sta	tement	🤟 Cancel
	Correspondence		🗙 Delete
Document Details	futorials\OstendoFreewayTutorial_	20160808.pdf ····	View
Notes			]

To access the document from the Customer datasheet in the Freeway app, click on Information; then click on the "paperclip" at the top right corner. This will display all linked documents for the customer. Clicking on the document will allow you to download and view the document on your mobile device.



The same process applies to Jobs, Suppliers, Assemblies and Deliveries.

12. Note Names – Include Materials / Times: If you tick "Include Materials in Note" or "Include Times in Note" then this data will also be appended to the notes when the data sheet is completed and sent back to Ostendo.

Note Name	Description	Include Materials in Note	Include Times in Note	Copy to Customer Notes	Copy to Customer History Notes	Copy to Direct Invoice Notes	Copy to Job Notes
ActivityNote	Activity Note						<ul><li>✓</li></ul>
QANote	Quality Assurance Notes						
ShedNote	Shed Notes						<ul><li>✓</li></ul>
StdServiceNote	Standard Service Notes	✓	✓				✓

13. Hazards and Instructions : In Ostendo – GENERAL menu, you can define a list of Hazards and Instructions.

l Hazards			
List Detail			
Hazard Code	Description	location	Risk level
▶ Dog	Dog on the loose in property	Garden & driveway	Moderate
House Inspection	Standard house inspection procedure	Residential Property	Instruction

Hazards and Instructions can be linked to Customers and Jobs/JobTasks via the Related button. For Bill of Materials, they can be linked via the Hazards sub-tab in the Detail tab.

In Mobility Menu – Style Template, hazards and instructions can be included using the Hazards template type.



For example, if the template is used for a Service Job, and the Job or Customer has hazards and/or instructions linked to it, then including Hazards in the template will automatically display all the linked hazards and instructions. If both the Customer and the Job have hazards and instructions, then both will be shown on the Freeway app.

Typical hazards for Customer will be site related (e.g. dangerous chemicals stored on site); while for jobs it could be the kind of tools used (e.g. scaffolding or ladders).

Hazards are listed first in order of Risk Level (Extreme, High, Moderate, Low), followed by Instructions.

14. Allow Payment Entry : In Employee Mobility Settings – Customers & Jobs subtabs, you can tick this option to allow the mobility user to accept payments from customers.

For example, if the mobility user is creating a Sales Order and he is allowed to accept payment for the order, he will see a \$ icon at the top right corner of his Sales Order template. Clicking on the \$ icon will bring up a screen to accept a payment.

■ <b>♀</b> ⊒⊠© ≭ ♡͡͡/84%	2:00 pm	• •	.≦©\$ @⊠⊒
Ostendo Remote	6	-	Ostendo Remo
Sales Order		_	Sales Order
ormation	_	Nett F	Price NZ\$53
A-Z Stationery Supplies	>	Gross	Price NZ\$53
terials & Charges		<b>A</b>	Update Prices
Materials and Charges	>	Metho	od Cash
es Fields		Refere	ence Paid in
Sales Additional Fields	>	Amou	int 533.40
ard On Details			
Forward On Details	<u>&gt;</u>	Secon	nd Method
npletion	· ·	Secon	nd Reference
Complete Data Sheet	>	Secon	nd Amount
lum		Balan	ce NZ\$0.
Return to Main screen	>		

**15. Main Screen Layout:** In Employee Mobility Settings you can add a background image to the Main Screen (like a wallpaper) as well as re-arrange the buttons. You can also hide or display any of the buttons. In the following example, the buttons are re-arranged and the top four buttons are hidden. Hidden buttons can still be accessed via the Menu button at the top right hand corner of the Main Screen.



Please refer to Ostendo Reference Help – Employee Mobility Settings – Device Tab for details on how to load the background images (for portrait and landscape) and how to re-arrange the buttons.

16. Automatic Creation of Linked Data Sheet pdf: In Mobility Rules if a date is selected for "Create Data Sheet Linked Docs From", then each time a data sheet is completed on the mobile device and is synchronized back to Ostendo, the system will automatically create a Data Sheet pdf and link it to the Job / Assembly / Sale / Purchase / Invoice.

Note that a **Parent Folder Path** must also be specified in **General Rules** and a **DataSheet** Queue Type is defined in **Queue Service** before this can happen.

Additionally, if the "*Set 'Copy to Invoice' for Linked Job Data Sheet Creation*" is also ticked, then that flag will also be ticked when the linked document is created.

lame	Description			
O Times	Assembly T	imes		
reation Style when Select	ting Customer	Creation Style when selecting Supplier	Creation Style when selecting Job	
N/A		N/A	N/A	-
reation Style when select	ing Assembly	Creation Style when selecting Delivery	Creation Style when selecting Inter	nal
pdate Order	-	N/A	N/A	-

# **17.** Settings relating to Scan On Button:

Scan On button can be used for the following types of barcodes:

- Customers
- Suppliers
- Jobs
- Assemblies
- Customer Assets
- Deliveries
- Employees

If used, **Mobility Barcode Rules** (in Mobility – Settings) must be defined for each of these types.

Mobility Barcode Rules				
Product Barcode Style	Barcode			
Customer Barcode Style	SYSID			
Supplier Barcode Style	SYSID			
Job Barcode Style	SYSID			
Assembly Barcode Style	SYSID			
Delivery Barcode Style	Delivery No			
Customer Asset Barcode Style	Asset No			
Location Barcode Style	No Barcode			
Employee Barcode Style	SYSID			

For Job Barcode, use the **JOBTASKS'** SYSUNIQUEID. For Assembly Barcode, use the **ASSEMBLYSTEPS'** SYSUNIQUEID.

Next, in **Employee Mobility Settings**, the following rules must be set in order for the Scan On button to know which Style Template to use when a barcode is scanned:

Device tab:	(Employee barcode)	Fixed Internal Style Name for Scanning
Customers tab	: (Customer barcode)	Fixed Customer Style Name for Scanning
Jobs tab:	(Job barcode)	Fixed Job Style Name for Scanning
Fixed Job 9	tyle Name for Scanning	StdService

Suppliers tab: (Supplier barcode)	Fixed Supplier Style Name for Scanning
Assemblies tab: (Assembly barcode)	Fixed Assembly Style Name for Scanning
Deliveries tab: (Delivery barcode)	Fixed Delivery Style Name for Scanning

# E. SAMPLE TEMPLATES:

# 1. Service jobs

Style Templates			
List Detail Template Se	ittings		
Name StdService	Description Standard Service Style		
Creation Style when Selec	ting Customer Creation Style wher	n selecting Supplier Creation Style when selecting Job	
New Actual Job	▼ N/A	Update Order	-
Creation Style when select	ting Assembly Creation Style wher	n selecting Delivery Creation Style when selecting Inte	ernal
N/A	▼ N/A	▼ N/A	•
Set Copy to Invoice for Lir	nked Job Data Sheet Creation 🔲	Material Lookup Style Standard	•
Job Type for New Job Ord		with Customer Asset Purchase Type for New Purchase	Order
Field	Service	<i>P</i>	$\mathbf{P}$
Sales Type for New Sales	Order		
Notes Forwarding Employ	ees		

0 Style Templates									
List Detail Template Settings									
Sequence	Туре	Description	Option	Include In Print	Display Option				
10	CHECKLIST	Checklist	Standard Service		Always				
20	NOTE	Service Notes	StdServiceNote		Always				
30	MATERIALS	Materials used			Always				
40	TIMES	Labour used			Always				
50	SIGNATURE	Contact Signature	Contact		Always				
60	PRINT	Print Service Sheet	Service Sheet		Always				
	ist Detail Sequence 10 20 30 40 50	ist Detail Template Settings	ist Detail Template Settings Sequence Type Description 10 CHECKLIST Checklist 20 NOTE Service Notes 30 MATERIALS Materials used 40 TIMES Labour used 50 SIGNATURE Contact Signature	Itemplate         Settings           Sequence         Type         Description         Option           10         CHECKLIST         Checklist         Standard Service           20         NOTE         Service Notes         StdServiceNote           30         MATERIALS         Materials used         40           40         TIMES         Labour used         50           50         SIGNATURE         Contact Signature         Contact	ist Detail Template Settings       Sequence     Type     Description     Option     Include In Print       10     CHECKLIST     Checklist     Standard Service     Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Image: Colspan="2">Colspan="2">Image: Colspan="2">Colspan="2">Contact       20     NDTE     Service Notes     StdServiceNote     Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Contact       20     NDTE     Service Notes     StdServiceNote     Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Colspan="2">Contact       20     NDTE     Service Notes     StdServiceNote     Image: Colspan="2">Image: Colspan="2"       30     MATERIALS     Materials used     Image: Colspan="2"     Image: Colspan="2"       40     TIMES     Labour used     Image: Colspan="2"     Image: Colspan="2"       50     SIGNATURE     Contact Signature     Contact     Image: Colspan="2"				

NoteName: StdServiceNote
<ul> <li>-copy to CustomerNotes</li> </ul>
-copy to JobNotes
-copy to AssetNotes

SignatureName: Contact -Mandatory

0 Check Lists			
List Detail Groups Items	Conditional Rules		
Name	Description		
Standard Service	Standard Service Checkl	List	
			_
0 Check Lists			
List Detail Gr	oups Items Conditional	Rules	1
Checklist: Standa	ard Service		
Groups Seq	Group Name	Mandatory Style	
▶ 10	Std	All	

PrintName: Service Sheet
-Default Email to INTERNAL

List Detail Groups Items Conditional Rules										
-(	Checklist: Stand	ard Service								
	Group Name	Group Seq	Item Sec 🔺	Variable Name	Description	Туре	List Values or Info Text	Help Text		
•	▶ Std		10		Inform Contact Person on arrival at site	CheckBox				
	Std		20		Record what is done and any recommendations	CheckBox				
	Std		30		Record materials used	CheckBox				
	Std		40		Record Start and Stop times	CheckBox				
	Std		50		Get Contact signature	CheckBox				

# 2. Direct Invoice

Direct invoice					
Style Templates					
List Detail Template Settings					
Name Description					
Name         Description           Direct Invoice         Direct Invoice					
Creation Style when Selecting Customer Cr. New Direct Invoice	reation Style when selecting Supplier	Creation Style when selecting Job N/A	•		
	eation Style when selecting Delivery	Creation Style when selecting Interr N/A	nal ▼		
Set Copy to Invoice for Linked Job Data Sh	neet Creation 🔲 🛛 Material Lookup	Style Standard	• No.		
Job Type for New Job Order Job T	ype for New Job with Customer Asset	Purchase Type for New Purchase (	Jrder	teName: ActivityNote py to CustomerNotes	
Sales Type for New Sales Order	Style Templates				
	List Detail Template Settings				
Notes Forwarding Employees	Sequence Type	Description	Option	Include In Print Display Option	1
	20 MATERIALS	Materials Used		Always	
	30 NOTE 40 SIGNATURE	Notes Customer Signature	ActivityNote Contact	Always	
	50 PRINT	Print the Invoice	Invoice	Always Always	L
				SignatureNar	ne: Contact
	PrintName: Inv			-Mandatory	
	-Default Email t				
	-Email Image Fi -Display Prices	les			
	-Override HTMI	L Code			
Override HTML Code for	PrintName: Invoic	0			
<pre><head><title>[[TABLE=MOBILI&lt;br&gt;height="130" KEYFIELD=IMAG&lt;/pre&gt;&lt;/td&gt;&lt;td&gt;ESERVICEIMAGES   FIEL&lt;/td&gt;&lt;td&gt;D=IMAGEBLOB TYPE=&lt;/td&gt;&lt;td&gt;IMAGE ATTRIBU&lt;/td&gt;&lt;td&gt;TES=width="280"&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;td&gt;&lt;/td&gt;&lt;/tr&gt;&lt;tr&gt;&lt;td&gt;</title><span <="" style="font-family" td=""><td>ily: 'Century Gothic'; fo</td><td>ont-weight: normal; for</td><td>nt-style: normal; 1</td><td>ext-decoration: none;</td><td>font-size: 20pt;"&gt;</td></span></head></pre>	ily: 'Century Gothic'; fo	ont-weight: normal; for	nt-style: normal; 1	ext-decoration: none;	font-size: 20pt;">
<b>INVOICE<b><hr/></b></b>	,				
<body></body>					
<span style="font-family: 'Cen&lt;br&gt;&lt;b&gt;Invoice ID:&lt;/td&gt;&lt;td&gt;tury Gothic'; font-wei&lt;/td&gt;&lt;td&gt;ght: normal; font-style&lt;/td&gt;&lt;td&gt;: normal; text-deo&lt;/td&gt;&lt;td&gt;coration: none;font-siz&lt;/td&gt;&lt;td&gt;e: 11pt;"></span>					
	JMMARY FIELD=SERV	ICEID TYPE=VALUE KE	YFIELD=SUBJECT	TYPE KEYVALUE=INFO	]]
<b>Invoice Date:</b>				•	
[[TABLE=SERVICESHEETSU	JMMARY FIELD=RECO	RDTIMESTAMP TYPE=	VALUE   KEYFIELD	=SUBJECTTYPE KEYVA	LUE=INFO]]
<b>Prepared by: </b> [[TABLE=SERVICESHEETSU	IMMARY FIFI D=FMPI	OYFENAME TYPE=VA	I UE KEYEIEI D=SU	ΙΒΙΕCTTYPEΙΚΕΥΛΑΙ Π	=INFO]]
<pre><b>For Customer:</b></pre>					
[[TABLE=SERVICESHEETIN	IFO   FIELD=ACTUALFIE	LDTEXT TYPE=VALUE	KEYFIELD=ACTUA	LFIELDCAPTION   KEYV	ALUE=Customer]]<
br>					
<span style="font-family: 'Cen&lt;/td&gt;&lt;td&gt;tury Gothic'; font-wei&lt;/td&gt;&lt;td&gt;ght: normal; font-style&lt;/td&gt;&lt;td&gt;: normal; text-dec&lt;/td&gt;&lt;td&gt;coration: none;font-siz&lt;/td&gt;&lt;td&gt;e: 11pt;"></span>					
[[TABLE=SERVICESHEETMATER				NEQTY,EXTENDEDGRO	SSPRICE   TYPE=TAB
LE HEADINGS=Code,Description <caption><b>MATERIALS/EXP</b></caption>			100%,		
<span style="font-family: 'Cen&lt;/td&gt;&lt;td&gt;tury Gothic'; font-weig&lt;/td&gt;&lt;td&gt;ght: normal; font-style&lt;/td&gt;&lt;td&gt;: normal; text-dec&lt;/td&gt;&lt;td&gt;coration: none;font-siz&lt;/td&gt;&lt;td&gt;e: 11pt;"></span>					

</b>[[TABLE=MOBILESERVICERULES|FIELD=SUBJECTSUBCAPTION|TYPE=VALUE|KEYFIELD=RECORDTYPE|KEYVALUE=CURRENCYSYM BOL]]

[[TABLE=SERVICESHEETHEADER|FIELD=EXTENDEDNETTPRICE|TYPE=VALUE|DISPLAYFORMAT=#,##0.00]]<br><b>Total Price:

</b>[[TABLE=MOBILESERVICERULES|FIELD=SUBJECTSUBCAPTION|TYPE=VALUE|KEYFIELD=RECORDTYPE|KEYVALUE=CURRENCYSYM BOL]]

[[TABLE=SERVICESHEETHEADER|FIELD=EXTENDEDGROSSPRICE|TYPE=VALUE|DISPLAYFORMAT=#,##0.00]]<br></span>

<span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 11pt;">
<b><br>NOTES</b><br>

[[TABLE=SERVICESHEETNOTES|FIELD=NOTEBLOB|TYPE=VALUE|KEYFIELD=NOTENAME|KEYVALUE=ACTIVITYNOTE]]<br></span>

<span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 11pt;"> <b><br>CUSTOMER SIGNATURE</b><br> [[TABLE=SERVICESHEETSIGNATURES|FIELD=SIGNATURE|TYPE=IMAGE|ATTRIBUTES=width="130" height="130"|KEYFIELD=SIGNATURENAME|KEYVALUE=Contact]]<br> </span></body>

# 🛥 🖸 🕓 💐 🖾 🖬 🙆 💽 🖬 🗛 🛨 🛨 🛨 🛨 🛨 🔸 🗱 🛜 📶 78% 🖬 2:42 pm

# Invoice\_KK1289651.html



# INVOICE

Invoice ID: KK1289651 Invoice Date: 19/10/16 2:10:53 pm Prepared by: KK For Customer: Azure Products Ltd

#### MATERIALS/EXPENSES

Code	Description	Unit	Qty	GrossPrice
100-2001	Washer-Mild Steel-9MM	Each	100	7.999975
LABOUR	Labour Used in Progress Claim	\$	1	115
Nett Price: \$ 106.96 Total Price: \$ 123.00				

#### NOTES

#### CUSTOMER SIGNATURE



# PART 2 : Ostendo Freeway – Conditional Checklist Primer

# Introduction

Ostendo Freeway is an easy-to-use framework to build mobility solutions for a variety of businesses and organisations. One of the key components of this framework is Conditional Checklists. Conditional Checklists can be used to create mobile apps to help users follow a pre-defined process to carry out such tasks as problem diagnosis, compliance certifications, custom product configuration, quality assurance, and so on.

A checklist is a pre-defined list of questions or pointers to guide a user and ensure that he/she follows a disciplined and consistent approach to the task at hand. Conditional Checklists makes the process dynamic. Depending on the answers to the preceding questions, the Conditional Checklist can take a variety of paths so that the relevant set of questions are asked and responded to, depending on the actual situation being addressed.

Conditional Checklists help ensure that:

- 1. Service/Sales personnel offer consistent quality service regardless of their experience.
- 2. Problems are diagnosed, quality assured, or products configured efficiently without having to go through each and every question in the Check List.
- 3. Companies can continuously improve their processes by fine-tuning their checklists based on past experience.

Ostendo Freeway offers companies the opportunity to tailor-make mobility solutions based on their unique business requirements. Over time, as requirements changes or as experience is gained, the Ostendo Freeway mobility solution can be fine-tuned accordingly. Such changes can be made in-house or with the help of their Ostendo consultant. Ostendo Freeway gives businesses and organisations the capability to continually hone their own competitiveness/effectiveness in their respective marketplace.

We have put together the following examples to illustrate how Conditional CheckLists can be put to practical use:

- 1. Generator Test a simple quality assurance checklist.
- 2. Shed Estimator illustrates how a Conditional Checklist can be used to configure and compute the price of a custom built product.
- 3. Car Overheating Diagnostic shows how a set of checklists can be put together to do problem diagnostics and resolution.
- 4. Heat Pump Selector shows how checklists can be organized to calculate requirements based on room dimensions and select the appropriate Heat Pump model.

Note: It is recommended you go through the examples in the above sequence as the detailed explanations are in the first example. Subsequent examples assume you are familiar with what is already explained in earlier examples.

# Example 1: Generator Test

0

XYZ Generators Ltd wishes to ensure that all their domestic generators meet the following technical specifications before they are sold:

- a. Output Voltage must be >= than 235 volts and <= 242 volts.
- b. Output Current must exceed 10 amps.
- c. Noise level of Generator when run at load must be less than 60 decibels.

A Quality Assurance template and checklist can easily be created in Ostendo Freeway to handle such requirements.

1. Go to Mobility → Check Lists to create a new checklist called Generator Test. As it is a straight forward set of tests, we can put all the check items into one group.

ists						
il Groups Items Co	onditional Rules					
	escription esting Domestic	Generators				
				MAS @ @	😤 🚛 🛯 🕯 💼 5:55	РM
				KK322194 [Gen	erator Test]	
				Quality		
Check List	s			Generator Serial Number Mandatory: All Value:	er.	>
		ns Conditional Rules	/	Date tested Mandatory: All Value:		>
Checklist: Gen	herator Lest			Output Voltage (235 - 24	42 volts)	
Groups Sea	Group Na	me Mand	tatoru Stule	Mandatory: All Value:	,	2
Groups Seq	Group Na 10 Quality	ame Mano All	datory Style	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value:		> >
			Jatory Style	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value: Noise Level in decibels	nps)	> > >
			Jatory Style	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value:	nps)	> > >
Check Lists	10 Quality oups Items (		Jatory Style	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value: Noise Level in decibels	nps)	> > >
Check Lists List Detail Gro -Checklist: Genera	10 Quality oups Items ( ator Test	All		Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value: Noise Level in decibels ( Mandatory: All Value:	nps) ( < 60 dBA	
Check Lists	10 Quality oups Items (	All Conditional Rules Variable Name	Jatory Style Description Generator Serial Number	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value: Noise Level in decibels	nps)	> > >
Check Lists List Detail Gro -Checklist: Genera Group Name	10 Quality oups Items ( ator Test Item Seq	All Conditional Rules Variable Name	Description	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value: Noise Level in decibels ( Mandatory: All Value: Type	nps) ( < 60 dBA	> > es
Check Lists List Detail Gro -Checklist: Genera Group Name Quality	10 Quality oups Items ( ator Test Item Seq 10 20	All Conditional Rules Variable Name	Description Generator Serial Number	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value: Noise Level in decibels i Mandatory: All Value: Type Text	nps) ( < 60 dBA	> > es
Check Lists List Detail Gro Checklist: Genera Group Name Quality Quality	10 Quality oups Items ( ator Test Item Seq 10 20 30	All Conditional Rules Variable Name	Description Generator Serial Number Date tested	Mandatory: All Value: Output Current ( > 10 an Mandatory: All Value: Noise Level in decibels Mandatory: All Value: Type Text Date	nps) ( < 60 dBA	>>>

Checklist Items can have *variable names* if they are being used as variables in Conditional Rules.

Items tab:

**Group Name** must be defined in Groups tab. Every item must have a valid Group Name. **Item Seq** determines the sequence in which the Checklist items are displayed in the mobile app. **Variable Name** is optional.

A variable name is <u>required only if</u> the variable will be utilised in a conditional rule.

Variable names must <u>not</u> be the <u>same as</u> the Item Seq.

Variable Names must be <u>unique</u> across <u>all</u> checklists.

**Description** – This is what will be displayed in the mobile app's checklist.

**Type** – Checklist item types could be :

Checkbox / Group CheckBox Text / Memo / List / Info Number / Integer Date / Time Signature / PhotoNote

List Values - If the Type is List, then all the list values are entered here.

Conditional Rules tab:

	Check Lists								
	List Detail Groups Items Conditional Rules								
ſ	-Checklist: Generator Test								
	Rule Sequ Conditional Name	Conditional Rule	Result Type	Result Expression or Text	Check List to Add				
	10 PASS	(\$\$OUTPUTVOLTAGE >= 235) and (\$\$OUTPUTVOLTAGE <= 242) and (\$\$OUTPUTCURREN	Text	PASS					
	20 FAIL	((\$\$OUTPUTVOLTAGE < 235) or (\$\$OUTPUTVOLTAGE > 242) or (\$\$OUTPUTCURRENT ▼	Text	FAIL					
		((\$\$0UTPUTV0LTAGE < 235) or (\$ \$0UTPUTV0LTAGE > 242) or (\$ \$0UTPUTCURRENT <= 10) or (\$\$NDISELEVEL >= 60)]							

When used as a variable in a conditional rule, the Variable Name must be preceded by two dollar signs (\$\$).

As checklist items are being responded to in the Freeway mobile app, the app will continuously check if any of the conditional rules are satisfied. If satisfied, the app will either display a result or branch off to another checklist.

Note: We should not leave any Conditional Rule blank as this will always be true before any data is entered.

**Rule Sequence**: determines the sequence the rules are applied. Once a rule is satisfied, the remaining rules will be ignored.

Conditional Name: a user-defined name for the rule.

**Conditional Rule**: In this example, all three requirements (OutputVoltage, OutputCurrent, NoiseLevel) must be met before the generator is deemed to have passed the quality check.

This is expressed in the **Conditional Rule** called PASS:

(\$\$OUTPUTVOLTAGE >= 235) and (\$\$OUTPUTVOLTAGE <= 242) and (\$\$OUTPUTCURRENT > 10) and (\$\$NOISELEVEL < 60)

The second condition in this example is FAIL when any of the requirements are not met:

((\$\$OUTPUTVOLTAGE < 235) or (\$\$OUTPUTVOLTAGE > 242) or (\$\$OUTPUTCURRENT <= 10) or (\$\$NOISELEVEL >= 60)

**Result Type:** If this rule is not branching off to another CheckList, then the type could be either an **Expression** or **Text**. Text is simply some words that will be displayed, while Expression is a formula to be computed.

**Result Expression:** If this rule is not branching off to another CheckList, then either the text or expression is entered here. In this example, the word 'PASS" or "FAIL" is the text entered here. If Result Type is an Expression, then an expression (formula) would be entered in this column. This column is left blank if the rule is branching off to another CheckList.

**CheckList to Add**: If the Result Type is neither an Expression nor a Text, then this column is used to enter the name of the CheckList to branch to.

점 🖬 🛕 💽 @ @ 🥏 🍞 📶 (۱۹ الله 8: KK322194 [Generator Test]	39 PM		
Quality			
Generator Serial Number Mandatory: All Value: ABC123DEF456	>		
Date tested Mandatory: All Value: 17/12/14	>		
Output Voltage (235 - 242 volts) Mandatory: All Value: 240	>		
Output Current ( > 10 amps) Mandatory: All Value: 12	>	ý 🖬 🖬 🛦 🕄 🕲 🖨	🔶 📲 🤶
Noise Level in decibels ( < 60 dBA Mandatory: All Value: 45	>	KK322194 [Ger	nerator Te
Result		Evaluated Result	
Evaluated Result Mandatory: Optional Value: PASS	>	PASS	

2. Go to Mobility  $\rightarrow$  Style Templates to create a new template called GENCHECK:

0 Style Templates
List Detail Template
Name Description
GENCHECK Generator Check
Creation Style when Selecting Customer Creation Style when selecting Supplier Creation Style when selecting Job
Data Only 🔹 N/A 💌 Data Only 💌
Creation Style when selecting Assembly Creation Style when selecting Delivery Creation Style when selecting Internal
Data Only 🔹 N/A 💌 Data Only
Notes Forwarding Employees

We will not create any job or invoice with this template. So select 'Data Only' for Creation Style when Selecting Customer / Job / Assembly / Internal

<u>)</u> s	tyle Tem	plates			
List	Detail 1	l'emplate			
S	equence	Туре	Description	Option	Include In Print
•	10	CHECKLIST	Generator Test	Generator Test	✓
	20	NOTE	QA Notes	QANote	
	30	SIGNATURE	QA Signature	QA	
	40	PRINT	Report	GenCheck	

For this template, we will start with the Generator Test CheckList, followed by QA Notes and Signature. We also want to print a report for documentation purposes.

(Note: You need to have the Note name, Signature name, and Print name defined in Mobility Settings first.)

3. We now go to StyleTemplateMatrix to add a record so that we can select this GENCHECK template as well.

Data Sheet Style	Job Type	Customer Type	Customer	Supplier Type	Supplier	Employee	Style Name
Customer							StdService
Job							StdService
Internal						KK	TripLog
All							HeatPump
Internal						KK	ExpenseLog
All						KK	PhotoLog
All							Garden Shed
Delivery							Car Overheating
All			Ì	İ	Ì		GENCHECK

Note that even though DataSheet Style is "All", we have actually limited it to Customer, Job, Assembly, and Internal in step 2 above.

4. Now we should be able to synchronize our Freeway app on our mobile device to get this template from Ostendo.

·		CheckList			
		∲ ⊑ 🖬 🛦 🛢 🕃 @ @ 🦻 🖗 KK322414 [Genera			9:36 P
		Quality Generator Serial Number Mandatory: All Value:	>	Quality	
		Date tested Mandatory: All Value:	>	Generator Serial Number Mandatory: All Value: 123ABC456	>
		Output Voltage (235 - 242 Mandatory: All Value:	volts)	Date tested	>
		Output Current ( > 10 amps Mandatory: All Value:	s) >	Mandatory: All Value: Output Voltage (235 - 242 volts)	5
TEMPLATE		Noise Level in decibels ( < Mandatory: All Value:	60 dBA >	Mandatory: All Value: 239	
ਫ਼⊠∆≜⊆∉∉ ?⊿™™∎	9:35 PM			Output Current ( > 10 amps) Mandatory: All Value: 15	)
KK322414 [Style: GENCHECK]				Noise Level in decibels ( < 60 dBA Mandatory: All Value: 50	)
formation KK322414[Style: GENCHECK]	>	÷ 🗆 🖬 🕰 🖀 🖸 👾 👜		Result	
enerator Test	Not		ANote]	Evaluated Result Mandatory: Optional Value: PASS	)
🔇 Generator Test	2	OK. Passed.			-
ANote	>			Completed CheckList an	nd
QA Notes	1			Evaluated Result	
🔇 QA Signature	Signa	ture 🜵 🗆 🗠 🛔 🖸 💩 🙋 🖇	🕻 📶 100% 💼 9:47 PM		
nCheck		KK322414 [QA]	5		
Report	2	No. 04	17/10/14		
Completes this Service Sheet	>	Name QA	17/12/14		
		Gé	<u>त</u> .		
	Para				
	Rep	Service Tech: KK Service Tech: KK Customer: Brown & Sons (19)			
		Generator Test			
		Check Item	Check Value		
		Generator Serial Number Date tested	123ABC456		
		Output Voltage (235 - 242			
		Output Current ( > 10 amp Noise Level in decibels ( <			
		under load Result	PASS		
		OA Net			
		<u>QA Notes</u> OK. Passed.			
		QA Signature			
		a			
		Da.			

# Example 2: Shed Estimator

Check

In this example, the Price of a shed is based on its dimensions and type of finish.

It can be any length and any width, with two standard choices for Height (2100 mm or 2300 mm) and type of Finish (Zinc or ColourSteel).

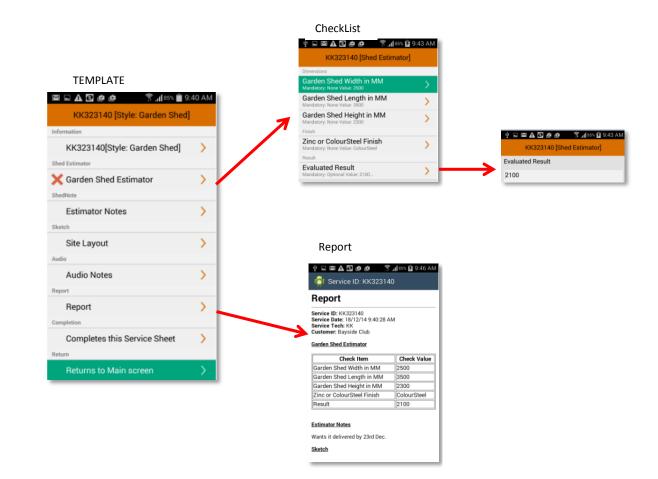
	Description Garden Shed Estimator CheckLift  sts Groups Items Conditional Rules hed Estimator				
_Lis _Ch	t Detail Groups Items Conditional Rules coldist: Shed Estimator	Description	Type List V.	alues	For Height and Finish, we use a List to ensure only the available options are selected.
	imensions         10         SHED WID TH           imensions         20         SHED LENG TH           imensions         30         SHED HEIGHT           inish         40         SHED FINISH	Garden Shed Garden Shed Garden Shed Zinc or Colour	Length in MM Number Height in MM List 2100 Steel Finish List Zinc İzinc	2300 2300 v	
F	our Variable names are de	fined in this	s CheckList to compu	te the price.	
ck Lists					
Detail Groups Items Con dist: Shed Estimator	ditional Rules				
e Seguence   Conditional Nam	e Conditional Rule	Result Type	Result Expression	Checl	k List to Add
10 SHEDPRICE	\$\$SHEDFINISH = 'ColourSteel'	Expression	(\$\$SHEDWIDTH / 1000) * (\$5		
20 SHEDPRICEZIN	C \$\$SHEDFINISH = 'Zinc'	Expression	(\$\$SHEDWIDTH / 1000) * (\$5		(\$\$SHEDWIDTH / 1000) * (\$\$SHEDLENGTH /
			\$\$\$\$HEDWIDTH / 1000) * (\$ 1000) * 165 * (case when \$\$ then 1.2 else 1 end)	\$SHEDLENGTH /	1000) * 200 * (case when \$\$SHEDHEIGHT = 2300 then 1.2 else 1 end)

The price is computed based on the following formula:

If Finish = ColourSteel and Height = 2300, then Price = Width in Metres X Length in Metres X 200 X 1.2 If Finish = ColourSteel and Height = 2100, then Price = Width in Metres X Length in Metres X 200 X 1.0 If Finish = Zinc and Height = 2300, then Price = Width in Metres X Length in Metres X 165 X 1.2 If Finish = Zinc and Height = 2100, then Price = Width in Metres X Length in Metres X 165 X 1.0

This is translated into two Conditional Rules (Finish = ColourSteel or Finish = Zinc). The Result Expression uses a case statement to determine the factor to use based on Height selected.

## Shed Estimator Template in Action:



The expression (\$\$SHEDWIDTH / 1000) \* (\$\$SHEDLENGTH / 1000) \* 200 \* (case when \$\$SHEDHEIGHT = 2300 then 1.2 else 1 end)

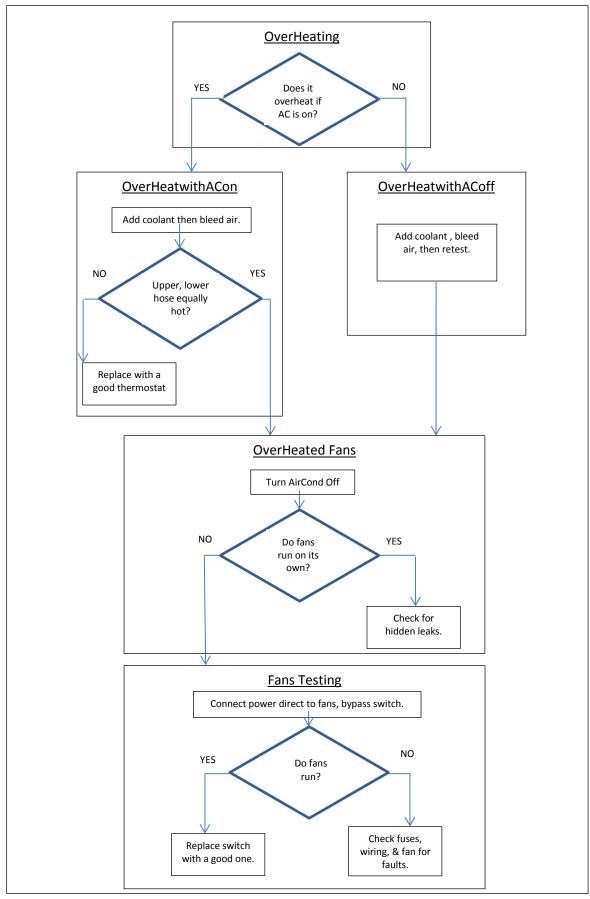


However if you cast the expression as TEXT and concatenate it to the string 'Price = \$' like this: 'Price = \$' || cast((\$\$SHEDWIDTH / 1000) \* (\$\$SHEDLENGTH / 1000) \* 200 \* (case when \$\$SHEDHEIGHT = 2300 then 1.2 else 1 end) as TEXT)

Will present the result like this

÷ 🗆 🖬 🗛 🕄 🖻 🖻	穿 📶 93% 🗳 10:12 AM
KK323171 [Sh	ed Estimator]
Evaluated Result	
Price = \$2100.0	

# This example shows how a CheckList can branch off to another checklist. Suppose you have the following documented flowchart for diagnosing Car Overheating problems.



We can create 5 CheckLists to implement this flowchart:

The initial CheckList - Overheating

Check Lists           List Detail Group: Items Conditional Flakes           Name         Decoption           Dever Heating         Ear Overheading Diagnostics		
Check Lists List   Detal   Groups   Items   Conditional Rules Checklist Diver Heating	Construct     Construct	
Groups Seq Group Name Mandatory Style    Mandatory Style	Mandatory: None Value:	
Greek Lists         List         Detail         Groups         Items         Conditional Rules           CheckList:         Over Heating         Group Name         Item Seq         Variable Name         Description           Group Name         Item Seq         Variable Name         Description         Does car overheat with AirCond ON?           OverHeat         10 OVERHEATWITHAC         Does car overheat with AirCond ON?         Does car overheat with AirCond ON?	Type List Values Type List Values Type List Values Type Contemposities off to one of two possible CheckLists.	
Check Lists     List Detail Groups Items Conditional Rules     Checklist: Over Hearing     Rule Sequence   Conditional Name   Conditional Rule   Result Type	e Result Expression Check List to Add	
10 OverHeatwithAC \$\$0VERHEATWITHAC = 'YES' Expression     20 OverHeatwithACNo \$\$0VERHEATWITHAC = 'NO' Expression	Overheat with AC           Overheat with No AC	

Next CheckList: Overheating with Aircon ON – Overheat with AC

Check Lists List Detail Groups Items Conditional Rules						
Name         Description           Øverheat with AC         Øverheating with Akt Cond On EleckList						
Check Lists						
List Detail Groups Items Conditional Rules			_	<ul> <li>C ⊠ ♀ □ ⊠ ♀ ▲</li> </ul>	i 🖹 😤 📶 100% 💼 3:3	86 P.M
Checklist: Overheat with AC	Note: A ticked Che	ckBox equals a		KK323494	[Over Heating]	
Groups Seq Group Name Mandatory Style	YES and an unticke	d CheckBox		OverHeat		
10 Coolant     Optional	equals a NO.			The Does car overhad	eat with AirCon	>
				Coolant Add Coolant to	radiator	_
Check Lists		This CheckList co	ould branch	Mandatory: None Value	radiator g YES	>
List Detail Groups Items Conditional Rules		to another Chec	kList	Are the upper a	nd lower hoses	>
Group Name Item Seg Variable Name Perception	Type Li Values	(Overheat Fans)	or solve	Result		
Coolant 10 ADDC00LANT Add Coolant to radiator	CheckBox	the problem by		Evaluated Resu		>
Coolant 20 UNEQUALTEMP Are the upper and lower hoses equ	xally hot? List YES	the thermostat.	replacing	Mandatory: Optional Va	lue: Replace the the	_
Check Lists						
List Detail Groups Items Conditional Rules						
Checklist: Overheat with AC						
Rule Sequ Conditional Name Conditional Rule	<b>V</b>	Result Type	Result Expression	Check List to Add		
10 UnEqualTemp (\$\$UNEQUALTEMP = 'YES') and (\$\$ADD(	,	Expression		Overheat Fans		
20 UnEqualTempNo (\$\$UNEQUALTEMP = 'NO') and (\$\$ADDC	,	Text	Replace the thermostat.			
I 30 AddCoolantNo (\$\$ADDC00LANT = 'N0') and (\$\$UNEQU	ALIEMP = YES' or \$\$UNEQUALTEN	/IP = 'NO') Text	Please add the coolant.			
This last Rule is added just to prompt the u	ser to perform the Ad	d Coolant task ar	nd tick the Chec	kBox.		

Next CheckList: Overheating even when Aircon is OFF - Overheat with No AC

Check Lists					
List Detail Groups Items Conditional Rules					
Name         Description           Overheat with No AC         Overheating without Attioned ON					
Oheck Lists					
List Detail Groups Items Conditional Rules Checklist: Overheat with No AC	_				
Groups Seg Group Name Mandatory	Style		<b>(1</b> 🖂 🕂	🖬 🖾 🕥 🗛 🛱 🌹 📶 100% 🗎 3:4	46 PM
▶ 10 Retest Optional				KK323501 [Over Heating]	
			OverHeat		
Check Lists			T Doe Mand	es car overheat with AirCon latory: None Value: NO	
List Detail Groups Items Conditional Rules			Retest		
Checklist: Overheat with No AC			Add Mand	I coolant, bleed air, and rete atory: None Value: NO	>
Group Name Item Seg Variable Name Des	cription Typ	e List Values		,	_
Retest 10 ADDCOOLANTRETE Add		eckBox			
Check Lists					
					1.
List Detail Groups Items Conditional Rules					-
Checklist: Overheat with No AC					
Rule Sequence Conditional Name Conditi	onal Rule	Result Type	Result Expression	Check List to Add	
10 TurnOffAC \$\$ADD	COOLANTRETEST = 'YES'	Expression		Overheat Fans	
					л.
This CheckList branches off to and	ther checklist after th	ne task is do	ne.		

# Next CheckList: Checking Overheated Fans – Overheat Fans

Check Lists List Detail Groups Items   Conditional Rules Name Description Uverheat Fans Uverheated Fan:				
Check Lists List Detail Groups Items Conditional Rules Checklist: Overheat Fans Groups Seq Group Name Mandatory Style 10 Fans Optional Check Lists	OverH T Retest Fans	Image: Control of the second		
List     Detail     Groups     Items     Conditional Rules       Checklist:     Overheat Fans     Variable Name     Description     Type     List Values       Fans     10     ACOFF     Turm AirCond OFF     CheckBox       Fans     20     FANSRUN     Does fan operate on its own     List     YES			to another Ch	lve the problem
Check Lists List Detail Groups Items Conditional Rules Checklist Overheat Fans				
Rule Sequi Conditional Name Conditional Rule	Result Type	Result Expression	Check List to Add	
10 WaterLeaks     (\$\$FANSRUN =YES') and (\$\$ACOFF = YES')     20 TestFan     (\$\$FANSRUN =N0') and (\$\$ACOFF = YES')	Text Expression	Check for hidden water leaks.	Fan Testing	
30 ACOFFNo (\$\$ACOFF = 'NO') and (\$\$FANSRUN = 'YES' or \$\$FANSRUN = 'NO')	Text	Please turn off Air Cond first.		
This last Rule is added just to prompt the user to turn off the AirCo	on and tic	k the CheckBox.		

# Final CheckList: Testing the AirCon fans - Fan Testing

Check Lists		
List Detail Groups Items Conditional Rules		3 🗠 ∲ 🖫 🖾 🛇 🛦 當 😤 "∦100° 📲 3:54 PM
Name Description		KK323501 [Over Heating]
Fan Testing Testing the aircond fans.	01	verHeat
	4	Does car overheat with AirCon >
	Re	ietest
		Add coolant, bleed air, and rete >
Check Lists	Fa	ans
		Turn AirCond OFF
List Detail Groups Items Conditional Rules	1	Does fan operate on its own
Checklist: Fan Testing	1	Mandatory: None Value: NO
Groups Seq Group Name Mandatory Style	Fa	Power fan directly bypassing s
10 Fan Testing Optional		Mandatory: None Value: NO
		Does the fan operate? >
Check Lists		
ist Detail Groups Items Conditional Rules		
hecklist: Fan Testing		This final CheckList resolv
Group Name Item Seq Variable Name Description Type List Value	s	the problem by either
Fan Testing 10 POWERDIRECTLY Power fan directly bypassing switch CheckBox		
Fan Testing 20 FANELECTRICAL Does the fan operate? List YES		replacing the Fan Switch
		fixing fuses, wiring, etc .
Check Lists		
st Detail Groups Items Conditional Rules		
iecklist: Fan Testing		
le Sequ Conditional Name Conditional Rule	Result Type	
	Text	Check the fuses wiring and the fan itself for faults.
10 WiringIssue (\$\$FANELECTRICAL = 'NO') and (\$\$POWERDIRECTLY = 'YES')		
10         WringIssue         (\$\$FANELECTRICAL = NO1) and (\$\$POWERDIRECTLY = YES')           20         FanSwitch         (\$\$FANELECTRICAL = YES') and (\$\$POWERDIRECTLY = YES')           30         PowerDirectNo         (\$\$POWERDIRECTLY = NO1 and (\$\$FANELECTRICAL = YES')	Text	Replace the Fan Switch. Please connect power to Fan directly to continue with diagnosis.



X Ý 🖬 X 🗘 🏛 🖸 🖆 🖆	🗊 📶 100% 🛑 3:57 PM
KK323501 [Over Heating]	
Evaluated Result	
Check the fuses wiring and the fan itself for faults.	

# Example 4: Heat Pump Selector

The Heat Pump Selector starts with calculating the requirements for one room. It then checks if there is another room to be added. If there are no more rooms, then it will calculate the total requirements of all the rooms and recommend the appropriate model.

In this example, we assume the following:

- You need 45 watts per cubic metre
- Windows NONE/STANDARD/LARGE will use the following factors respectively : -5% / 0% / +5%
- Insulation LOW/MEDIUM/HIGH will use the following factors respectively : +10% / 0 / -5%

Ostendo Freeway HeatPump Selection Guide:

- Less than or equal to 2.5 Kilowatts → Model OF2500
- 2.5 5 Kilowatts  $\rightarrow$  Model OF5000
- 5 7 Kilowatts → Model OF7000
- 7 9 Kilowatts → Model OF9000
- 9 12 Kilowatts → Model OF12000

# First CheckList: HPSelect

Check Lists	
List Detail Groups Items	Conditional Rules
Name HPselect	Description Heat Pump Selector
[	
Check Lists	
List Detail Groups I	Items Conditional Rules
Checklist: HPselect	
Groups Seq Group	Name Mandatory Style
▶ 10 DIMR	oom1 All

ist Detail Gro	oups Items Con	ditional Rules				DIMRoom1	
hecklist: HPsele						Instructions Mandatory: All Value:	
Group Name	Group Seq 1	tem Sec 🛆 Variable Name 👘	Description	Туре	List Values or Info Text	Room 1 Width in Metres	
DIMRoom1	10	10	Instructions	Info	Round up width and length of room to the nearest metre.	Mandatory: All Value:	
DIMRoom1	10	20 WIDTH	Room 1 Width in Metres	Integer		Room 1 Length in Metres Mandatory: All Value:	
DIMRoom1	10	30 LENGTH	Room 1 Length in Metres	Integer		Room 1 Height in Metres	
DIMRoom1	10	40 HEIGHT	Room 1 Height in Metres	List	2.1	Mandatory: All Value:	
DIMRoom1	10	50 WINDOWS	Room 1 Windows	List	NONE	Room 1 Windows	
DIMRoom1	10	60 INSULATION	Room 1 Insulation	List	LOW	Mandatory: All Value:	
DIMRoom1	10	70 ROOM2	Is there another room?	List	NO	Room 1 Insulation Mandatory: All Value:	
					NO YES	Is there another room? Mandatory: All Value:	

1.1.1						
		Groups Items C	onditional Hules			
Liheo	sklist: HF	'select				
Ru	ile Sequ	Conditional Name	Conditional Rule	Result Expression or Text	Check List to Add	Result Type
	10	R1M2500	(((\$\$WIDTH * \$\$LENGTH * \$\$HEIGHT * 45) *	Model OF2500		Text
	20	R1M5000	(((\$\$WIDTH * \$\$LENGTH * \$\$HEIGHT * 45) *	Model OF5000		Text
	30	R1M7000	(((\$\$WIDTH * \$\$LENGTH * \$\$HEIGHT * 45) *	Model OF7000		Text
	40	R1M9000	(((\$\$WIDTH * \$\$LENGTH * \$\$HEIGHT * 45) *	Model OF9000		Text
	50	R1M12000	(((\$\$WIDTH * \$\$LENGTH * \$\$HEIGHT * 45) *	Model OF12000		Text
	60	R1COMM	(((\$\$WIDTH * \$\$LENGTH * \$\$HEIGHT * 45) *	Please see our Commercial		Text
	70	Room2	\$\$R00M2 = 'YES'		HProom2	Expression

The Conditional Rule for selecting model OF2500 is as follows:

(((\$\$WIDTH \* \$\$LENGTH \* \$\$HEIGHT \* 45) \* (case \$\$WINDOWS when 'NONE' then 0.95 when 'LARGE' then 1.05 else 1 end) \* (case \$\$INSULATION when 'LOW' then 1.1 when 'HIGH' then 0.95 else 1 end) ) <= 2500 ) and \$\$ROOM2 = 'NO'

The rest of the model selection rules are similar.

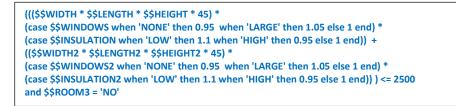
The last rule checks if there is a second room. If so, it will pull in the checklist for Room 2.

#### Next CheckList: HPRoom2

							9 <b>0 🖷 🖬 🗐 🔋 </b> 100'	📲 3:23 PM	
Check Lists						G	KK807302 [HPselect]		
st Detail Groups	Items Conditional Rules					DIME	loom1		
st Detail aroups	items - conditional males					0	Instructions Mandatory: All Value:	>	
Name HProom2	Description Heat Pump selector - F	oom 2				Ŧ	Room 1 Width in Metres Mandatory: All Value: 3	>	
TH TOOM2	Teatr any solector	2000 Miles				Ŧ	Room 1 Length in Metres Mandatory: All Value: 4	>	
						Ŧ	Room 1 Height in Metres Mandatory: All Value: 2.4	>	
Check Lists						Ŧ	Room 1 Windows Mandatory: All Value: LARGE	>	
.ist Detail Gr	oups Items Condition	al Bules				Ŧ	Room 1 Insulation Mandatory: All Value: HIGH	>	
hecklist: HProo	· ·					Ŧ	Is there another room? Mandatory: All Value: YES	>	
Groups Seq	Group Name	Mandator	ry Style			DimF	Room 2 Width in Metres		
. 10	DimRoom2	All				Ŧ	Mandatory: All Value: 3	>	
						Ŧ	Room 2 Length in Metres Mandatory: All Value: 5	>	
Check Lists						Ŧ	Room 2 Height Mandatory: All Value: 2.4	>	
st Detail Grou	ups Items Conditional	Rules				<b></b>	Room 2 Windows Mandatory: All Value: LARGE	>	
necklist: HProom						- <u>+</u>	Room 2 Insulation Mandatory: All Value: HIGH	>	
Group Name	Item Sec 🔺 Variable N	ame Desc	cription	Туре	List Values				
DimRoom2	10 WIDTH2	Roor	m 2 Width in Metres	Integer					
DimRoom2	20 LENGTH2	Roon	m 2 Length in Metres	Integer					
DimRoom2	30 HEIGHT2	Roop	m 2 Height	List	2.1			If the	re is potentially up to 3
DimRoom2	40 WINDOW	S2 Roor	m 2 Windows	List	NONE			room	s, then you need a third
	50 INSULATI	ON2 Roor	m 2 Insulation	List	LOW				list (HProom3) else you
DimHoom2									list (hprooms) eise vou
	60 R00M3	Is the	ere another room?	List	NO	$\leftarrow$			
	60 R00M3	Is the	ere another room?	List	NO	<i>←</i>	/		I not need this last item
DimRoom2	60 ROOM3	Is the	ere another room?	List	NO	<			
DimRoom2 Check Lists	60 R00M3		ere another room?	List	NO	<			
DimRoom2 Check Lists st Detail Group	s Items Conditional Rule		ere another room?	List	NO				
DimRoom2 Check Lists st Detail Group recklist: HProom2	is Items Conditional Rule	25	ere another room?		NO t Expression or Text	Check List	to Add Result Type		
DimRoom2 Check Lists st Detail Group recklist: HProom2	is Items Conditional Rule	es	* \$\$HEIGHT * 45) *	Resul		Check List	to Add Result Type		
DimRoom2 Check Lists st Detail Group recklist: HProom2 Rule Sequ Condi	is Items Conditional Rule tional Name Conditional F 500 (((\$\$\v/IDTH	*\$ ule *\$LENGTH *		Resul	t Expression or Text	Check List			
DimRoom2 Check Lists st Detail Group recklist: HProom2 Rule Sequ Condi 10 R2M2	Items Conditional Rule ional Name Conditional F 500 (((\$\$\U00ed VIDTH 000 (((\$\$\U00ed VIDTH	rs iule * \$\$LENGTH *	* \$\$HEIGHT * 45) *	Resul Model Model	t Expression or Text 0F2500	Check List	Text		
DimRoom2 Check Lists st Detail Group recklist: HProom2 Rule Sequ Condi 10 R2M2 20 R2M5	Items Conditional Ruk tional Name Conditional Ruk 500 (((\$\$\v1DTH 000 (((\$\$\v1DTH 000 (((\$\$\v1DTH	*\$ * \$\$LENGTH * * \$\$LENGTH * * \$\$LENGTH *	* \$\$HEIGHT * 45) * * \$\$HEIGHT * 45) *	Resul Model Model Model	t Expression or Text 0F2500 10F5000	Check List	Text Text		
DimRoom2 Check Lists st Detail Group necklist: HProom2 Rule Sequi Condi 10 R2M2 20 R2M5 30 R2M7	Items         Conditional Rule           ional Name         Conditional F           500         (((\$\$W10TH           000         (((\$\$W10TH           000         (((\$\$W10TH           000         (((\$\$W10TH	s s s s s s s s s s s s s s	* \$\$HEIGHT * 45) * * \$\$HEIGHT * 45) * * \$\$HEIGHT * 45) *	Resul Model Model Model Model	t Expression or Text 0F2500 0F5000 0F7000	Check List	Text Text Text		
hecklist: HProom2 Rule Sequ Condi 10 R2M2 20 R2M5 30 R2M7 40 R2M9	Items         Conditional Rule           tional Name         Conditional F           500         (((\$\$WIDTH           000         (((\$\$WIDTH           000         (((\$\$WIDTH           000         (((\$\$WIDTH           000         (((\$\$WIDTH           000         (((\$\$WIDTH           000         (((\$\$WIDTH	** * \$\$LENGTH * * \$\$LENGTH * * \$\$LENGTH * * \$\$LENGTH *	* \$\$HEIGHT * 45) * * \$\$HEIGHT * 45) * * \$\$HEIGHT * 45) * * \$\$HEIGHT * 45) *	Resul Model Model Model Model Model	t Expression or Text 0F2500 0F5000 0F7000 0F7000		Text Text Text Text		

You will need a separate checklist with unique variable names for each additional room.

If there are two rooms, then the model selection is done after the second checklist is processed. The Conditional rule for model selection in this checklist is like this:

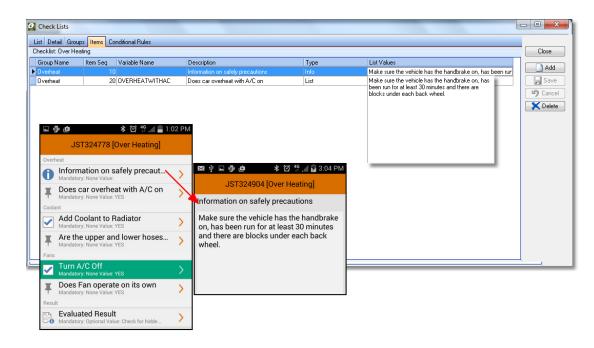


Notice that we are adding the requirements of both rooms. That is why we need unique variable names in all the checklists.

🛛 🗬 😥 💼 Service ID: KK324	후 "(71% 💼 2:08 776
Report	
ervice ID: KK324776 ervice Date: 19/12/14 12:56: ervice Tech: KK ustomer: Black Shoes (Whol leat Pump Selector	
Check Item	Check Value
Room 1 Width in Metres	5
Room 1 Length in Metres	3
Room 1 Height in Metres	2.8
Room 1 Windows	LARGE
Room 1 Insulation	LOW
s there another room?	YES
Room 2 Width in Metres	4
Room 2 Length in Metres	4
Room 2 Height	2.8
Room 2 Windows	STANDARD
	MEDIUM
Room 2 Insulation	
Room 2 Insulation s there another room?	NO

# Additional Note on CheckLists:

1. Checklist Item Type "**Info**" allows you to provide hints or instructions in the checklist where required. See example below:



2. You can also enter "Help Text" for specific items in the CheckList. This will be displayed when the Info option is clicked.

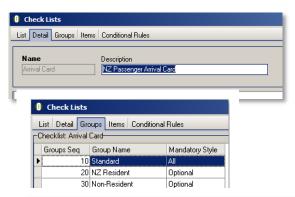
ist: Sales Order				1-		lass more		
pName Grou		Variable N	ame Description Purchase Reference	Type Text	List Values or Info Text	Help Text This is the Sali ▼		
			Pacific Holding	Trow		This is the Sales O	irder Purchase Re	eference
	⊠© ≹0?	i 16% 🗎 2	::34 pm		<b>E</b>		≭ তি িি . <b>ন</b> do Remot	
<b>œ ◊</b> <b>←</b>	≖@ ≉ऌ≸ Ostendo Re		±34 pm		<b>•</b>	Osten	do Remot	
-		mote			•	Osten		
Sales Fields	Ostendo Re Sa Selec	mote			•	Osten	do Remot les Fields	
Sales Fields	Ostendo Re Sa Selec nase Ref ory: None Va	mote			• <u>P</u>	Osten Sa	do Remot les Fields rence	te

- 3. Checklist Item Type "PhotoNote" allows you to take a photograph and then add annotations to it.
- 4. Checklist Item Type "Group CheckBox" provides the capability to add sub-checklists. When a Group CheckBox is ticked, it opens up a sub-checklist.

Sub-checklists can have any item type except another Group CheckBox. Each Group CheckBox requires a unique Group Name. All items within a Group CheckBox will have the same Group Name.

You can have multiple Group CheckBoxes within the same checklist.

Following is an example of the use of Group CheckBox:



# Check Lists

U Check Lists						
List Detail Grou	ips Items Co	onditional Rule	88			
Checklist: Arrival C	ard					
Group Name	Group Seq	Item Sec 🕗	Variable Name	Description	Туре	List Values or Info Text
Standard	10	10		Flight Number	Text	
Standard	10	20		Seat Number	Text	
Standard	10	30		Where you boarded this flight	Text	
Standard	10	40		Passport Number	Text	
Standard	10	50		Nationality	Text	
Standard	10	60		Family Name	Text	
Standard	10	70		Given Names	Text	
Standard	10	80		Date of Birth	Date	
Standard	10	90		Email	Text	
Standard	10	100		Phone Contact	Integer	
NZ Resident	20			Are you a NZ Resident?	Group CheckBox	
NZ Resident	20	120		How long away from NZ (YEARS)	Integer	
NZ Resident	20	130		How long away from NZ (MONTHS)	Integer	
NZ Resident	20	140		How long away from NZ (DAYS)	Integer	
NZ Resident	20	150		Which country did you spend most time in while overseas?	Text	
NZ Resident	20	160		Main reason for your trip?		Business
NZ Resident	20	170		Which country will you mostly live in the next 12 months?	Text	
Non-Resident	30	180		Are you a non-NZ resident?	Group CheckBox	
Non-Resident	30	190		Do you intend to stay in NZ permanently?	CheckBox	
Non-Resident	30	200		Period of intended stay in NZ (YEARS)	Integer	
Non-Resident	30	210		Period of intended stay in NZ (MONTHS)	Integer	
Non-Resident	30	220		Period of intended stay in NZ (DAYS)	Integer	
Non-Resident	30	230		Main reason for visiting NZ	List	Visiting freinds/relatives
Non-Resident	30	240		In which country did you last live for 12 months or more?	Text	

When ticked

🛥 🗞 🛱 🖾 🛐 🖬 🗛 🍥 🍞 📶 93% 🗎 2	2:43 pm
C Arrival Card	
Flight Number Mandatory: All Value:	>
Seat Number Mandatory: All Value:	>
Where you boarded this flight Mandatory: All Value:	>
Passport Number Mandatory: All Value:	>
Nationality Mandatory: All Value:	>
Family Name Mandatory: All Value:	>
Given Names Mandatory: All Value:	>
Date of Birth Mandatory: All Value:	>
Email Mandatory: All Value:	>
Phone Contact Mandatory: All Value:	>
NZ Resident	
Are you a NZ Resident? Mandatory: Optional Value: NO	>
Non-Resident	
Are you a non-NZ resident? Mandatory: Optional Value: NO	>

/	Are you a NZ Resident? Mandatory: Optional Value: YES	>
	How long away from NZ (YEARS) Mandatory: Optional Value:	>
	How long away from NZ (MON Mandatory: Optional Value:	>
	How long away from NZ (DAYS) Mandatory: Optional Value:	>
	Which country did you spend Mandatory: Optional Value:	>
	Main reason for your trip? Mandatory: Optional Value:	>
	Which country will you mostly I Mandatory: Optional Value:	>

- 5. Checklist Item Type "**Stopwatch**" adds a stopwatch function to the checklist to capture time/duration values.
- 6. Checklist Item Type "**GPS**" allows the user to record his/her GPS coordinates as part of the checklist process.

Please refer to the **OSTENDO REFERENCE HELP** for a complete list of CheckList items.

### APPENDIX 1 : Ostendo Freeway Updates History

# 7 August 2017 - What's New : ( Android Play Store Version 522 )

1. Employee Mobility Settings – Employee Style.

This is a display-only field with three possible values ("Internal", "Mobility B2B", Mobility Subcontractor).

Employee Mobility Settings	
List Detail	
Employee	Jane Steel
Password	****
Employee Style	Internal
Department	Sales
Site Name	Company

**Mobility Subcontractor** employees are employees who are linked to Suppliers. **Mobility B2B** employees are employees linked to Customers.

- 2. Employee Mobility Settings Detail tab Level of Information Displayed
  - Standard
  - Minimum

Inventory Count Selection Available	
Internal Selection Available	
Inherit Mobility Settings from another Employee	
Level of Information Displayed	Standard
	Standard
Device Materials Time Entry Customers Jobs Suppliers	Minimum Assemblies Delive

This setting applies to Job / Assemblies / Customer / Supplier / Delivery information displayed in the Info section of a datasheet. The default is "Standard".

With the introduction of Customer and Sub-Contractor usage of Freeway, it may be necessary to limit the amount of information that will be exposed to these third parties.

Use "Minimum" if you wish to limit such information to a bare minimum (basic contact information) to the "employee" concerned. Additional fields can be added to this "bare minimum" option through the use of Mobility Settings like "Job Info fields, Customer Info Fields, etc.

# 3. Employee Mobility Settings – Materials tab - Product Inquiry Quantity Display Style

For material quantities you can now choose to display one of the following:

Actual Quantities :	Both positive and negative quantities displayed.
Only Positive Quantities :	Negative quantities will be displayed as zero (0).
Availability Status :	Quantities not displayed. Just "In Stock" or "Out of Stock".

Device Materials Time Entry Customers Jobs	Suppliers Assemblies Deliverie	
Items Restriction Condition		
Descriptors Restriction Condition		
Material Pre-Fill List		
Hierarchical Name	Lighting	
Material Lookup Structure	Category	
Product Inquiry Available		
Style of Product Inquiry Lookup	Graphical	
Stock Inquiry level	All Site Totals	
Default Picking and Receipting Location Logic	Use Product Defaults	
Drill Down Product Inquiry Name	InguiryPack1;PRODUCTINQUIR	
Default the Picking Qty	Actual Quantities Only Positive Quantities	
Default the Receipting Qty	Availability Status	
Product Inquiry Quantity Display Style	Actual Quantities	

This is to cater for situations where you do not wish to show the actual stock quantities to the Freeway Mobility user.

# 4. Task Names – Default Mobility Template

You can now assign a Style Template to a Task Name so that whenever this job task is selected in Freeway, it will automatically use this Style Template. In other words the user cannot use any other template when working on such tasks.

🛚 Task Names				
Default: Job				
Task Name	Description	Department	Task Status	Default Mobility Template
AntivirusInstall	Install Antivirus on PC	Service	Active	
BackupRestore	Test the Backup & Restore	Service	Active	
Job	Standard Job Task	Service	Active	
NetworkConnect	Connecting to the Network	Service	Active	
I Service	Service Task	Service	Active	StdService
WindowsTraining	Train User On Windows	Service	Active	

#### 5. Style Templates : How Material Quantities are Posted

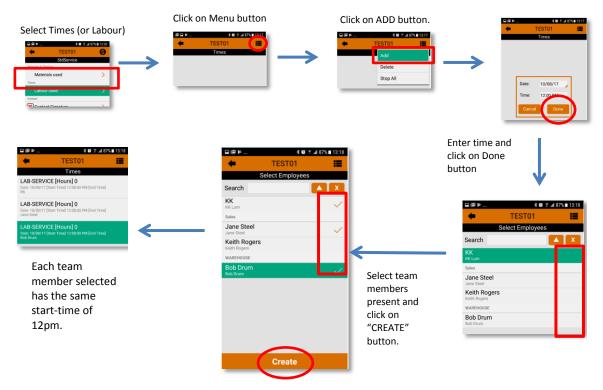
- Options are : "Quantities UnChanged" or "Quantities Reversed".

Style Templates				
List Detail Template Set	tings			
Name SalesOrder	Description Sales Order			Template Group
		Creation Style when selecting Supplier	Creation Styl	e when selecting Job
New Order Sales	•	N/A 💌	N/A	•
Creation Style when selecti	ng Assembly	Creation Style when selecting Delivery	Creation Styl	e when selecting Purchase
N/A	-	N/A 💌	N/A	•
Creation Style when selecti	ng Count	Creation Style when selecting Internal		
N/A	•	N/A 💌		
Set Copy to Invoice for Lin Job Type for New Job Orde		Sheet Creation 🔲 Material Lookup : o Type for New Job with Customer Asset	Style Standa Style Image	ard 🔹
Purchase Type for New Pu	ırchase Order 🔎	Sales Type for New Sales Order	ļ	•
How Material Quantities are	e Posted			
Quantities UnChanged	-	Time Tracking is Active if Auto On and	Off Site for St	art/Times is Set 🛛 🗹
Quantities UnChanged				
Quantities Reversed	es			

The "Quantities Reversed" setting provides an option to create a template that can handle product returns where the quantities entered will be reversed when posting back into Ostendo.

### 6. Time Entry for Mobility Teams

You can enter times for one or more Mobility Team members at the same time. You do this by selecting the members from a dropdown list of all the members in the Mobility Team.



# 7. Time Tracking :

You can now specify that GPS tracking coordinates is only sent back to Ostendo when Start/Stop times is entered (not when datasheet is created). This gives the user the flexibility to select the jobs and create the datasheets first before arriving on site and actually starting the job. This also ensures the GPS tracking data actually reflects the start/stop times of the employee (or employees in a Mobility team).

Two settings are required to set this up:

a. Employee Mobility Settings – Device Tab : Auto Set On and Off Site for Start/Stop Times

This flag must be ticked to automatically send OnSite and OffSite tracking data when Start Time or Stop Time is entered in the datasheet. (This flag is mutually exclusive to the previous setting "Auto Set On and Off Site for Sheet Creation and Completion when Tracking".)

b. Style Template Detail tab: Time Tracking is Active if Auto On and Off Site for Start/Times is Set

г актазе турстог нем г актазе отаст	
How Material Quantities are Posted Quantities UnChanged	Time Tracking is Active if Auto On and Off Site for Start/Times is Set 🗹
Notes Forwarding Employees	

This flag needs to be turned on if you wish the mobile device to send back GPS tracking coordinates only when Times data is captured on the datasheet template.

# 8. Customer Mobility

You can now extend the use of the Freeway app to customers. You can create style templates which can be used by customers to lodge a support ticket, inquire into their jobs, etc...

Before you set up the Customer Mobility screen, you need two things:

a. You need to set up an **API Security record** for Mobility B2B.

API Security				
Developer Name	Product Name	Expiry Date	SQL Allowed	API Key for
Ostendo	Freeway	31/12/2030		Internal
Ostendo	Freeway B2B	31/08/2018		Mobility B2B 🛛 👻
Ostendo	Freeway Contractor	31/08/2018		Mobility SubContracto

Multiple customers can use the same API Security record or they can each have their own unique API record.

(Note, the combination of Developer Name and Product name should be unique for all API Security records).

b. Set up an **Employee Name** in the Employee screen which you will use as a Mobility Settings employee for B2B customers.

Employees		
🗄 📳 Employee Properties 🛛 📄 Employee Documents 🛛 属 Employee Ir		
List Detail Absentee Days La	bour Codes	
Employee Name	Employee Number Start	
RETAIL		
Employee Details		
Title First Name	Last Name Position	

# And the Employee Mobility Settings record:

Employee Mobility Settings		
List Detail		
Employee	RETAIL	
Password	****	
Employee Style	Internal	
Department		
Site Name	Company	
Optional Warehouse		
Optional Location		
Sheet Prefix	RET	
Device Print Ontion	Email or View	

When you first set up the Employee Mobility Settings, the Employee Style will default to "Internal" until this "employee" is associated to a B2B Customer (Mobility B2B).

# c. Customer Mobility Screen

To set up Customer Mobility, a new **Customer Mobility Screen** is provided in Ostendo which is accessible via the Related Menu in the Customer screen.

Customer Mobility	
List Detail	
Customer	
Best Prices Trading Inc	Activate Customer Mobility
Membership/Mobility ID	Mobility Settings Employee
12345678	RETAIL
Mobility Registration Email Address	Mobility Password
eric@best.co.nz	Send Password & Fast Code

This screen allows you to enter the following:

- **Membership / Mobility ID**: The customer's unique Membership number serves as his Mobility ID in Freeway.
- Activate Customer Mobility : This tick-box allows you to activate or de-activate the access given to the customer.
- **Mobility Settings Employee** : The Employee Mobility Settings to be used by this customer.

Once you associate the Mobility Settings Employee to the Customer, the Employee Style of the associated Employee will change to "Mobility B2B" in the Employee Mobility Settings screen.

Employee Mobility Settings		
List Detail		
Employee	RETAIL	
Password	****	
Employee Style	Mobility B2B	
Department		
Site Name	Company	
Optional Warehouse		
Optional Location		
Sheet Prefix	RET	
Device Print Option	Email or View	

- **Mobility Registration Email Address** : The email address of the customer person designated to handle this B-to-B relationship.
- Mobility Password : Display-only field. Password is generated by pressing the Send Password & Fast Code button.

Send Password & Fast Code Button : When pressed, three options are presented -

- a. Password & Fast Code:
- b. Password:
- c. Fast Code:

When generating the Fast Code, a list of Mobility B2B API Security records (if more than one) available will be presented. Select one to generate the Fast Code.

U Sciett all AFI S	ecurity Reco	ord	
Developer Name P	Product Name	Expiry Date	SQL Allowed
▶ Ostendo Fr	reeway B2B	31/08/2018	

An email will be generated to send the password and/or Fast Code to the customer.

	То	eric@best.co.nz
Send	Сс	
	Subject:	Ostendo Freeway Mobility
A to the	1 • 1 • 2 • 1	. 3 . 1 . 4 . 1 . 5 . 1 . 6 . 1 . 7 . 1 . 8 .
Your Your	Mobility p	D: 12345678 password: 0CA22A Fast Code: 77441921 purs

The Mobility ID, password, and Fast Code is given to the Customer when he first set up his Freeway App to link to your Ostendo database. Once he has established the link, he can then change the password (using Freeway) if he wishes to do so.

The Fast Code is used when first establishing the connection to the Ostendo database. It loads the actual API Key and Mobility License key onto the mobility device to establish the link.

Customers enter Mobility ID (instead of Employee name) and password when synchronizing their mobile device with Ostendo.

# 9. Suppliers – Detail – General Settings tab – Supplier is a Sub-Contractor

This setting, when ticked, indicates the supplier is also a sub-contractor.

0 Suppliers	
🗄 📔 Supplier Documents   🏊 Supplier Images   🧮 Supplier H	istory Notes 🛛 🏭 Contacts 🛛 📌 Location Map 🛛 🔂 Item Pricing 🛛 🔂 D
List Detail	
Supplier Name Electrical Supplies Inc	Contact Details
Supplier Printout Name	Phone Website 1800 657 788
Electrical Supplies Inc Postal Address	Fax         Email           1800 657 786         sam@sparkie.com
PO Box 5667	Mobile Primary Contact
Hamilton	Supplier Settings
City Ontario State ONT Code 54005 Country Canada Physical Address Same as Postal	General Settings       Payment Settings       Outputs         Billing Supplier       Electrical Supplies Inc       P         Status       Supplier Type         Active       General       P
18 Sparkle Road Hamilton	Supplier Region Supplier Code OffShore
City Ontario State ONT Code 54005 Country Canada	Shipping Method Buyer       Image: Constraint of Month     Buyer       Terms     Tax Group       20th of Month     Image: Constraint of Month
Code 54005 Country Canada	Foreign Currency Code

Ostendo users can set up Freeway for their Sub-Contractors to use in the performance of jobs assigned to them. Ostendo users benefit by having all job data recorded and sent back immediately upon job completion so that customer billing can be initiated faster. Sub-Contractor benefits in terms of reduced paperwork and being paid in a timely manner.

## **10. Setting up Subcontractors to use Freeway Mobility**

The following steps are required:

a. Set up **Subcontractor employees** in the Employee Screen:

Employee Properties	Employee Documents	Employee Images 🛛 🧮	Employee History Notes	Customise		
ist Detail Absentee Da	ys Labour Codes					
Employee Name	Employee Number	Start Date	Status	Classification	Qty	Assignment Imag
Sam Employee Details —			Active	<ul> <li>Sub Contractor</li> </ul>	▼	
Title First Name	Last Name	Position	Department Code	Calendar Order	lo Scheduling 🗌	
Phone F	Fax Mobile	Email <u>sam@</u>	isparkie.com	Sub-Contractor Su Electrical Supplie	••	P

An employee is a subcontractor employee when the Sub-Contractor Supplier field is filled in.

b. Set up an API Security record for Mobility SubContractors:

API Security	,			
Developer Nam	e Product Name	Expiry Date	SQL Allowed	API Key for
Ostendo	Freeway	31/12/2030		Internal
Ostendo	Freeway B2B	31/08/2018		Mobility B2B
Ostendo	Freeway Contractor	31/08/2018		Mobility SubContractor

# API Style is Mobility SubContractor.

(Note: the combination of Developer name and Product name must be unique for each API Security record.)

c. Set up the **Employee Mobility Settings record** for the Subcontractor employees:

Employee Mobility Settings			
List Detail			
Employee	Sam		
Password	****		
Employee Style	Mobility SubContractor		
Department			
Site Name	Company		
Optional Warehouse			
Optional Location			
Sheet Prefix	SAM		

#### d. Generate the FastCode for the Subcontractor employee

Click on the FastCode button to generate the Fast Code for the Subcontractor employee. If you have multiple API Security records for Mobility SubContractor, then select one to generate the Fast Code.

	То	sam@sparkie.com					
Send	Сс						
	Subject:	Ostendo Freeway Mobility					
× · · · 1 · · · 2 · · · 3 · · · 4 · · · 5 · · · 6 · · · 7 · · · 8 · · · 9							
Your Mobility Fast Code: 77652862 Expires in 24 hours							

An email will be created to send the Fast Code to the subcontractor employee.

The Subcontractor employee then uses the Fast Code to load the API key and Mobility License key onto his Freeway App.

### e. Supplier Sub-Contractors screen

This is a new screen in Ostendo Purchasing menu. The Times tab allows you to translate times entered by sub-contractor employees into Purchase Receipt or Purchase Invoice lines.

Supplier Sub Contractor	ors			
List Detail				
Supplier Electrical Supplies Inc				
Times				
Sub Contractor Employee	Labour Code	Descriptor Code for Generated Transaction	Effective Date From	Generated Transaction Style
*				None
				None Purchase Receipt for Order Purchase Receipt Only Purchase Invoice Only

The set of rules (a matrix of factors) determine what transactions could be generated based on a combination of sub-contractor employee, Labour Code, Descriptor Code, and Effective Date.

When the sub-contractor employee enter times into the Freeway datasheet, they select the appropriate Labour Codes (just like an employee). However in order to create Purchase Receipts/Purchase Invoices to pay the Supplier, these Labour Codes in the times data need to be translated into equivalent Descriptor Codes. This is achieved using entries in this Supplier Sub-Contractors Times tab.

## 11. Mobility Rules – Fast Code Expiry Hours

Specify the number of hours (from 1 to 72) desired. Fast Codes generated will need to be used within this timeframe, else it expires.

Fast Code Expiry Hours	24
Store Hazards added Remotely	

## 12. Mobility Rules – Store Hazards added Remotely

Ticking this box will allow Customer Hazards to be updated automatically when new hazards are identified and recorded when the Freeway app syncs with Ostendo.

#### **13. Inquiry Packs – Statistic Groups**

Grouping of statistics allow you to present the data in logical groupings as desired.

🕕 Statistic Gr	oups	
Group Name	Group Seq	Group Description
*		

Statistic Group names can be defined in Mobility Settings. These group names are used in the Inquiry Packs Contents – Scorecard (Statistic) tab to organize the data into the preferred sets. The statistics will be ordered by Group Name, Sequence Number, and Statistics Name.

#### 14. Freeway Security – FastCodes

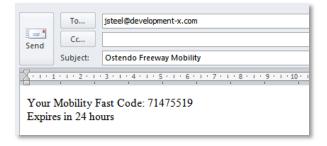
You can now generate FastCodes from either the Employee Mobility Settings screen or the Customer Mobility screen.

C Employee Mobility Settings		<u>- 🗆 ×</u>
List Detail		
Employee	Jane Steel	Close
Password	XXXX	📄 Add 🚺
Employee Style	Internal	
Department	Sales	Save
Site Name	Company	🔊 Cancel
Optional Warehouse	Main	X Delete
Optional Location	Primary	Delete
Sheet Prefix	JS	Layout
Device Print Option	Email or View	
Default Internal Email		[ Fast Code
Exclude this Employee from Forwarding Sheet on to others		

In the Employee Mobility Settings screen, you select the employee, and click on the FastCode button. If you have multiple "Internal" API Security records, then select one from the dropdown list.

Developer Name Product Name Expiry Date SQL Allowed	Select an API Security Record							
	Developer Name	Product Name	Expiry Date	SQL Allowed				
🕨 Ostendo 🛛 🛛 Freeway 🛛 31/12/2030 🛛 🗹	▶ Ostendo	Freeway	31/12/2030					

It will then generate the Fast Code and create an email to send the Fast Code to the employee. (The employee must have an email address defined in the Employees screen.)



In the Customer Mobility screen, click on the "Send Password and Fast Code" button and select either the "Password & Fast Code" or the "Fast Code" option.

If you have multiple "Mobility B2B" API Security records, then select one from the dropdown list. It will then generate the Fast Code and create an email to send the Fast Code (together with the Mobility ID and password) to the customer.

A new Mobility Rule allows you to set an expiry time limit (from 1 to 72 hours) for FastCodes generated. The default is 48 hours. FastCodes not utilized will expire automatically within the set time limit.

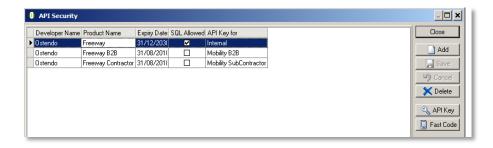
## 15. API Security records for Customers and Subcontractors

As an added security feature, it is mandatory to have separate API Security records for employees, for customers, and for subcontractors. This is to prevent customers and subcontractors from "accidentally" accessing Freeway/Ostendo as an employee.

API Security records will have a Style field which will indicate if the record is for employees (**Internal**), or for customers (**Mobility-B2B**), or for subcontractors (**Mobility-Subcontractor**).

Just like multiple employees can share the same Internal API Security record, multiple customers can share the same Mobility-B2B API Security record, and multiple subcontractors can share the same Mobility-Subcontractor API security record.

However if you wish to, you can also have an API Security record for each customer. This applies to subcontractors as well.



## 1. Apple IOS and Google Android versions of Freeway are online

We are very happy to announce that both the Apple and Android versions of Ostendo Freeway are now online under each of their respective stores:

Apple IOS Link (App Store): <u>https://itunes.apple.com/us/app/ostendo-freeway/id1114700678?mt=8</u>

Android Link (Play Store): <u>https://play.google.com/store/apps/details?id=com.development\_x.freeway</u>

From now on, the latest version of the respective apps must be downloaded from these Stores.

## 2. Mobility Rules:

Expiry Days Remaining for Picking		
Job Note Source	Job Instructions	
No of Remaining Count Lines to Display		10
No of Counted Count Lines to Display		10
Display Counted Lines Style	All Counted Lines	
Customer Note Source	General Notes	
Supplier Note Source	General Notes	

- We have added the ability to restrict the number of remaining count lines and counted count lines to display for Freeway Warehousing Inventory Counts.
- We have added the ability to define whether the Mobility employee can see all counted lines for that specific Inventory Count, or only the lines counted by that employee.
   (All Counted Lines or Only Employee Counted)
- Job Note Source: We have added this new rule to allow Notes available in the Mobile Data sheet info tab to be sourced from either the standard 'Job Instructions' (as entered in the Job Header) or 'Work Instructions' (this a new field in the Job Header called 'Work Instructions').
- **Customer Note Source**: We have added this new rule to allow Notes available in the Mobile Data sheet info tab to be sourced from either the standard **'General Notes'** (as entered in against the Customer) or **'Mobility Notes'** (this is a new notes field in the Customer screen).
- Supplier Note Source: We have added this new rule to allow Notes available in the Mobile Data sheet info tab to be sourced from either the standard 'General Notes' (as entered in against the Supplier) or 'Mobility Notes' (this is a new notes field in the Supplier screen).

These additional Notes sources give you the option to separate out internal notes (for office use only) from field notes (sent to mobile devices).

## Version 499 – What's new:

# 1. Backward and Forward compatibility:

From this update on, the Freeway App is both backward (and forward) compatible with future versions of Ostendo, and any standalone solutions created. The advantages of this are:

- Freeway will be able to connect to multiple versions of Ostendo at the same time. In other words, each solution can independently connect to different databases even when the databases have different structures (i.e. Update 227 and then say Update 230) ideal for consultants that might need to connect to multiple client sites from the one app.
- Standalone solutions that have been developed don't need to be in-sync with the Freeway app, or with any Ostendo Database that Freeway is connected too.

## 2. Inventory Counts – Prevent Mobility Editing:

We have added a checkbox to Prevent Mobility Editing. This is used where the count has been physically completed and the office is now vetting/checking the results before updating the count. If ticked, no changes can be made to the count via Freeway.

i go Items   go Inventory Availability   iii Warehouses   iii Locations List Detai Lines	Customise
List Detail Lines	
i de la construcción de la construcción de la construcción de la construcción de la construcción de la constru	
Count No Status InProgress	Count Selection · Site
Reference	From Warehouse
Count Dates Count Date Updated Date 21/06/2017	From Location
Mobility Restriction	Location Group
Mobility Team	From Category
Prevent Mobility Editing	From Sub Category
Inventory Quantity Restriction	From Item

# 3. Customer Hazards – Linking to Specific Address:

The ability to link a Customer Hazard directly to an '**Address Name**' has been added. This applies when a Job is selected in Freeway (the Style Template requires that the Type called 'HAZARDS' has been included in the Template); the hazards linked to the Customer as a whole (with no Address Name), and any hazards linked to the specific address for the Job are then included in the Data Sheet.

0 Customer Ha	azards					
List Detail						
Customer						
Basket Case						
Hazard Style	Group or Code	Override	Description	location	Notes	Address Name
I Code	Guard Dog		Fierce Guard Dogs	within the compound	Guard dogs may be on the loose on sit	e. 🛛 Queen Street 🛛 🔎

## 4. Item Hazards – MSDS (Material Safety Data Sheets):

We have added the ability to link **Hazard Codes or Groups** directly to an Item Code. This can be used in Freeway to include any safety instructions/hazards that relate to that product when used in either Jobs or Assemblies. Again like the Customer Hazards, you will need to include the 'HAZARDS' type in the Style Template.

Item Hazards ist Detail					
Item Code 100-2000	Desc Was	iption ner-Mild Steel-8MM		Unit Each	
Hazard Style	Group or Code		Description	Notes	
Code					

## 5. Job Types – Hazard Groups:

We have added the ability to link a **Hazard Group to the Job Type definition**. This enables a list of hazards to automatically inserted into the Job Hazards screen on generation of a new Job. Useful if the hazards/instructions that are introduced/needed can be attributed the type of work that is being carried out. Again like the Customer Hazards & Item Hazards, you will need to include the 'HAZARDS' type in the Style Template definition.

## 6. Customer Assets – Warranty Information:

We have added '**Warranty Information**' fields to the Customer Asset screen. These are display only fields indicating whether the asset is currently covered by a valid warranty, the warranty has expired, or warranties don't apply. The information is a summary view of any linked warranties to the asset, dynamically determining the status based on the current date and the warranty with the greatest expiry date (where there is more than one warranty for the asset).

These fields can be selected to be displayed in Freeway using "Asset Info Fields" in Mobility Settings and Asset type in the Style Template.

Customer Assets		
Customer Asset Hierarchy 🛛 🛅 Custo	mer Asset Readings	Customer Asset Reading Names
List Detail Planning & History Hierarch	ny Tree	
Asset Name         Access(2)(A-134456)           Description         Bit Conditioning Unit - Model 26           Asset Number         Asset           CA-134456         Equipmodel 26           Customer         Jim Gold 8 Co Ltd           Jim Gold 8 Co Ltd         Asset Currention		Customer Specific Informati Location at Customer Site Customer requires confir Days notice required Reminder Style Phone
Asset Origination From Source Reference Sales (S0300014 Asset Readings Primary Reading Name Warranty Info	Creation Date 10/12/2007 -	Linked Company Asset Asset Style Con Customer 💌
Warranty Expiry Warranty Status 10/12/2010 Out of Warranty Notes		

## Version 497 – What's new:

# 1. New Functions:

This version adds the following functions to Freeway:

- Assembly Picking (from inventory)
- Assembly Receipting (to inventory)
- Job Picking (from inventory)
- Purchase Order Receipting (to inventory)
- Inventory Counts

All these functions would require Freeway to have online access to the Ostendo database.

To create Data Sheet templates for these functions, these are the **new** associated settings and template types you need to use:

## a. Assembly Picking :

- Employee Mobility Settings
  - Assemblies Tab Assembly Picking Tolerance %
    - If users are allowed to *pick more than the required amount*, this sets the % tolerance allowed.
- Style Template Creation Style when selecting Assembly Update Order
- Template Type ASSYPICKING
  - This Template Type will dynamically list the Assembly Step items that can be picked from inventory.

## b. Assembly Receipting :

- Style Template Creation Style when selecting Assembly Update Order
- Template Type ASSYRECEIPTING
  - This Template Type will dynamically list the Assembly Step items that can be receipted into inventory.

## c. Job Picking :

\_

- Style Template Creation Style when selecting Job Update Order
- Template Type **JOBPICKING** 
  - This Template Type will dynamically list the Job Task items that can be picked from inventory.

# d. Purchase Order Receipting :

0

- Employee Mobility Settings
  - Detail Tab Purchase Selection Available
    - Ticking this box allows the employee to work with Purchase Receipting.
  - Materials Tab Default the Receipting Qty
    - Ticking this could make it more efficient for the employee to do receipting as the Receipt Qty is automatically filled in. The user can overwrite if required.
  - Purchases Tab

## Purchase Restriction Condition

- This allows you to specify conditions that will restrict the employee to work with certain Purchase Orders only.
- Auto Sync the Purchase List when Selected
  - This will automatically refresh the list of Purchase Orders each time the Purchase lookup is selected.
- Purchase Horizon Days
  - This will display Purchase Orders whose required date falls within the horizon. For example, if Purchase Horizon is set at 2 days, then the Mobility user will only see Purchase Orders which are required in the next two days. This is to avoid displaying unnecessarily large number of Purchase Orders for selection.
- Style Template Creation Style when selecting Purchase Update Receipt

## - Template Type – PURCHASERECEIPTING

This template type will automatically list the Purchase Order items that are yet to be receipted.

## e. Inventory Counts :

0

- Employee Mobility Settings
  - Detail Tab Inventory Count Selection Available
    - Ticking this box allows the employee to work with Inventory Counts.
  - Counts Tab

## Inventory Count Restriction Condition

- This allows you to specify conditions that will restrict the employee to work with certain Inventory Counts only.
- Auto Sync the Inventory Count List when Selected
  - This will automatically refresh the list of Inventory Count items each time the Inventory Count Lookup is selected.
- Display Stock On Hand for Count Lines
  - This will display the expected on hand quantity in the Count lines.
- Style Templates Creation Style when selecting Counts Update Count
- Template Type **COUNTLINES** 
  - This template type will list the Inventory Count items that are yet to be counted.

# 2. Employee Mobility Settings:

C Employee Mobility Settings								
List Detail								
Employee KK								
Password		****						
Site Name		Company						
Optional Warehouse								
Optional Location								
Sheet Prefix		KK						
Device Print Option		Email or View	N					
Default Internal Email								
Exclude this Employee from Forwarding Sheet on to	o others							
Job Selection Available						$\checkmark$		
Customer Selection Available						$\checkmark$		
Supplier Selection Available						$\checkmark$		
Assembly Selection Available								
Delivery Selection Available								
Purchase Selection Available								
Inventory Count Selection Available								
Internal Selection Available								
Inherit Mobility Settings from another Employee								
Device Materials Time Entry Customers Jobs	Suppliers	Assemblies	Deliveries	Purchases	Counts	Assignment Move Rules	Restricted Warehouses	Picking Classes
Restricted Material List Code								
Items Restriction Condition								
Descriptors Restriction Condition								
Material Pre-Fill List								
Hierarchical Name								
Material Lookup Structure	Flat							
Product Inquiry Available								
Style of Product Inquiry Lookup	Standard							
Stock Inquiry level	All Site To	itals						
Default Picking and Receipting Location Logic	Use Produ	uct Defaults						
Drill Down Product Inquiry Name								
Default the Picking Qty								
Default the Receipting Qty								

The following have been added to Employee Mobility Settings:

- i. **Purchase Selection Available** ticking this will allow the employee to do Purchase Receipting.
- ii. **Inventory Count Selection Available** ticking this will allow the employee to do Stock Counts.

#### iii. Materials tab:

- **a.** Default the Picking Qty ticking this will save the user from having to enter pick quantity for every item picked.
- **b.** Default the Receipting Qty ticking this will save the user from having to enter receipt quantity for every item receipted.

#### iv. Assemblies tab:

**a.** Assembly Picking Tolerance % - You can specify the percentage the user is allowed to pick above the required amount.

## v. Purchase tab (new):

**a. Purchase Restriction Condition** – this restricts the employee to working only with Purchase Orders that meet the condition specified.

- **b.** Auto Sync the Purchase List when selected This will refresh the Purchase Orders List each time Purchase lookup is selected.
- **c. Purchase Horizon Days** This will display Purchase Orders whose date falls within this horizon. This is to avoid displaying unnecessarily large number of Purchase orders for selection.

# vi. Counts tab (new):

- **a. Inventory Count Restriction Condition** this restricts the employee to working only with Inventory Counts that meet the condition specified.
- **b.** Auto Sync the Inventory Count List when selected this will refresh the Inventory Counts List each time the Inventory Count lookup is selected.
- c. Display Stock On hand for Count Lines this will display the expected On Hand quantity in the Count Lines.
- vii. **Picking Classes tab:** this allows you to restrict the employee to picking only items belonging to certain Picking Classes. Picking Classes are defined in Inventory Settings and each item in the inventory can be assigned to a Picking Class if required.

### 3. Style Templates:

Style Templates	<u>- 🗆 ×</u>
List Detail Template Settings	_ Close Close
Name Description Template Group	
StdService Style	Add
Creation Style when Selecting Customer Creation Style when selecting Supplier Creation Style when selecting Job	Save -
New Actual Job 🔹 N/A 💌 Update Order 💌	🔊 Cancel 🖌
Creation Style when selecting Assembly Creation Style when selecting Delivery Creation Style when selecting Purchase	🗶 Delete
N/A • N/A • N/A •	
Creation Style when selecting Count Creation Style when selecting Internal	
N/A VIA V	
Set Copy to Invoice for Linked Job Data Sheet Creation 🔲 Material Lookup Style Standard 💌	
Field Service	
Purchase Type for New Purchase Order Sales Type for New Sales Order	
	E
Notes Forwarding Employees	
ent Order Inventca Point	
Availability 🚟 of Sale	· · · · · ·
On Hold:	1
Laybys:	0
	v

The following have been added to Style Templates:

i. **Template Group** – You can now group your templates so that all templates of the same group will appear together in the template selection list. This should make it easier to look for templates.

Template Groups are defined in Mobility Settings.

- ii. **Creation Style when selecting Purchase** and **Creation Style when selecting Count** these two creation styles are added to cater for Purchase Receipting and Inventory Count functions.
- iii. **Style Image** You can now select an icon to represent your template. This icon will be displayed next to the template name in the Template Selection list in Freeway. There are about 20 images to choose from.
- iv. Template Types The following types have been added :
  - a. ASSYPICKING
  - b. ASSYRECEIPTING
  - c. COUNTLINES
  - d. JOBPICKING
  - e. PURCHASERECEIPTING

## 4. Other miscellaneous stuff:

- Datasheet ID is now displayed as the first item in the Info section of the datasheet template in Freeway.
- Inventory Count screen in Ostendo:

	Close Add Save Cancel Cancel
Count No     Status       InProgress     Site       Reference     From Warehouse       Count Dates     Improve To Warehouse       Count Dates     Improve To Warehouse       Count Date     Improve To Updated Date	Add
Mobility Restriction       Inventory Quantity Restriction         Count Style       From Item         Count Update       Primary Supplier	Pelated
Update Counted Inventory Lines Cycle Count Code ABC Classification	
Generate Inventory Count Lines	
Not s Recorded Notes	

- a. **Mobility Restriction** you can restrict this Count to be carried out only by a certain team.
- b. **Inventory Count Restriction** the selected **Count Style** determines the types of items that will be included in the count:
  - i. **Current Inventory Only** only items that have a positive or negative On Hand quantity.
  - ii. **Current Inventory Plus Items with Past History** the above plus any zero quantity items that have previously had transactions.
  - iii. Current Inventory Plus items with Zero Qty All items are included.
- c. Count Selection
  - i. Site allows you to restrict the Count to items for a certain Site only.
  - ii. Location Group restrict the Count to items that belong to a certain Location Group.
  - iii. Primary Supplier restrict the Count to items from a certain Supplier.
- **d. Recorded Notes** this blob field is used to store notes recorded when the Count is performed using the Freeway app.

- Inquiry Pack Scorecard Statistics – Highlight Colour – you now have four colours to choose from to highlight your scorecard statistic.

ist Detail Contents							
ack Name: General							
Inquiry Type I	Inquiry Name	Inquiry Style	Seq No	Inquiry Explanation	Display Custome	er Aging Display Stock I	Levels
CUSTOMERINQUIRY (	Customer Sales Position	Chart-Scorecard-Listing	10	The color coded indicator for the Sales Ord	der Li 🗹		
PRODUCTINQUIRY S	Simple Item Inquiry	Listing	20	Product Inquiry with stock on hand			
isting Chart Scorecard	Scorecard (Statistics)						
isting Chart Scorecard Seq No Statistic Name	Scorecard (Statistics)	d Statistic From an	d Where Cl	lause Statistic Format Hig	hlight Conditional Type	Highlight Conditional Value	e Highlight Colour
	Statistic Value Field			lause Statistic Format Hig ere c Local Currency No Decimals No		Highlight Conditional Value	e Highlight Colour Blue
Seq No Statistic Name	Statistic Value Field sum(InvoiceNettAn	nount) from salesinvoice	eheader wh		Highlight	2000	Blue DRed 💌
Seq No Statistic Name 10 Total Nett Sales	Statistic Value Field sum(InvoiceNettAn sum(InvoiceNettAn	nount) from salesinvoice nount) from SalesInvoic	eheader wh eHeader	ere c Local Currency No Decimals No Local Currency No Decimals Les	Highlight	2000	Blue

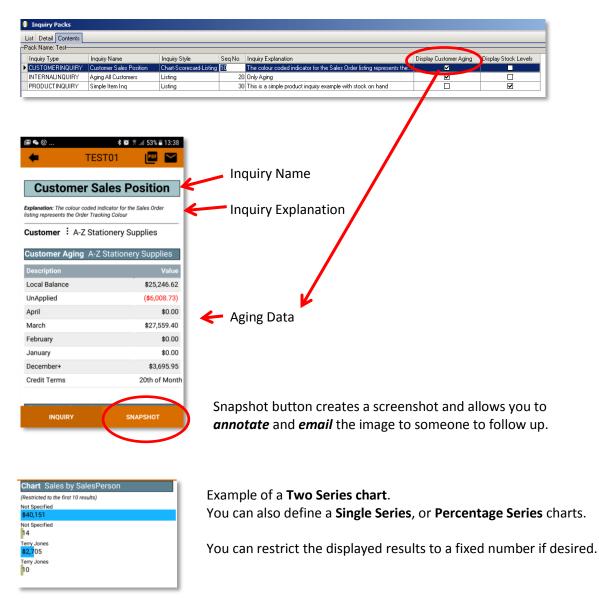
# 1. Inquiry Packs :

This new function is designed to facilitate the generation of standard inquiries for use with the Freeway app. You can define multiple Inquiry Pack names and their associated contents in the Ostendo Mobility menu. Each mobility employee can have an Inquiry Pack name assigned.

The contents of an Inquiry Pack can consist of one or more pre-defined inquiries. Each Inquiry in a pack can include one or more of the following components:

- a. Horizontal bar chart
- b. Scorecard statistics (or KPI statistics)
- c. Data listing (Header Lines and associated Detail lines)

Optionally, the inquiry can also display Customer Aging data or Product Stock Levels.





In this example, the scorecard displays four sales statistics: Total Nett Sales, YTD Nett Sales, Number of Open Orders, and Last Sales Order Date.

Some of the statistics can be conditionally highlighted in bold and red (e.g. if YTD Nett Sales is less than \$50,000)

Listing Open Sales Orders
Order No: S0300475 Order Date: 10 Jun 2008
1.000 Each <b>Item Code</b> 100-2004 : Washer- Mild Steel-12mm
1.000 Each <b>Item Code</b> 100-2005 : Washer- Mild Steel-13mm
9.000 Each <b>Item Code</b> 100-2005 : Washer- Mild Steel-13mm
Order No: SO300495 Order Date: 7 Jul 2008
Order No: SO300496 Order Date: 7 Jul 2008
1.000 Each <b>Item Code</b> 100-2003 : Washer- Mild Steel-11mm
1.000 Each Descriptor Code DESCRIPTOR1 :

This Listing example displays Header and Detail data. The Label captions for each field are all user-defined. In this example, only the Header has label specified for the two fields (Order No. and Order Date). Labels are optional.

In this example, no labels are used in the Detail Lines. Only the CODETYPE field is highlighted in bold.

If desired, Indicator Logic can be specified for both Header and Detail data to highlight certain records in the inquiry. A color-indicator box will appear at the start of each line with the appropriate colour if **Indicator Logic** is specified.

## Snapshot, Annotate, Audio Note, and Email:

Jeff	• 🖬
Calaa	
Calaa	
Sales	Position
	or the Sales Order ur
-	
Stationery	Supplies
A-Z Statio	onery Supplies
	<b>Nue</b>
	\$25,246.62
	(\$6,008.73)
	\$0.00
	\$27,559.00
	\$0.00
	\$0.00
	\$3,695.95
	20th of Month
	SNAPSHOT
	r Tracking Colo Stationery

When you hit the **Snapshot button**, you create a screen image and you can immediately **annotate it**.

You can also press the **Record button** to record an audio note. (The **round black button** next to the Email button at top right of screen.) This button will turn into a **square black button** when you press it to record your audio note.



Press the square button to stop recording your audio note.

Press the **Email button** (envelope symbol) to email the screenshot and audio note to someone.

In summary, the Inquiry Pack function of the Ostendo Mobility Menu contains an easy-to-use *Inquiry Generator* to create a wide variety of inquiries which can be simple data Listings, or charts, or scorecards or various combinations of these components.

Please refer to the **Ostendo Reference Help** for further details on how to create Inquiry Packs in Ostendo. There will also be a separate paper at:

http://ostendo.info/downloads/ostendo/HowToCreateAFreewayInguiryPack\_474.pdf

to describe the process of creating Inquiry Packs.

2. Employee Mobility Settings – Device tab and Materials tab The following are added:

## Device tab:

- Product Selection Style for Warehousing:
   Options are Manual Selection or Scan Barcode.
   Manual Selection means items are selected manually from delivery list when picking the items.
   Scan Barcode means items are picked by scanning barcodes
- StationID for POS Orders:

This allows you to select the POS Station ID to be associated with the user (mobile device). With the appropriate Style Template, an On-Hold POS Order will be created using this Station ID. At the checkout cashier's station, the POS Order can be reviewed and converted into an invoice to receive payment. You could create an Employee Mobility Settings record for each tablet you intend to use for POS.

#### Materials tab:

"Picking Product Inquiry Name" is now changed to "Drill Down Product Inquiry Name".
 When picking items in a Delivery Order with Freeway, you can drill-down on the item to see product details like Product Image and quantities available. You can also specify your own inquiry to display other information pertaining to the item. This Inquiry name must be defined in an Inquiry Pack Content record.

#### - Default the Picking Qty:

Ticking this box allows you to default the Pick Qty to the remaining quantity to be picked. This will save the user from having to enter picked quantity for every item picked. The user can overwrite if required.

#### 3. New CheckList Type – PrintNames:

There may be datasheet templates which could have multiple printout options. This checklist item allows the selection of a preferred PrintName from a pre-defined list.

List Detail Groups Items	Conditional F	Rules				
Checklist: Arrival Card						
Group Name	Group Seq	Item Seq	Variable Name	Description	Туре	List Values or Info Text
Non-Resident Questions	30	50		Are you a Non-Resident	Group CheckBox	
Non-Resident Questions	30	60		How long are you staying in Days	Integer	
Non-Resident Questions	30	80		Test Images	ImageList	
Non-Resident Questions	30	90		Photo	PhotoNote	
Non-Resident Questions	30	100		Print Names	PrintNames	PrintName1
Resident Questions	20	30		Are you a New Zealand Resident	Group CheckBox	PrintName1
Resident Questions	20	40		How long have you been away Days	Integer	PrintName2
Standard Questions	10	10		Enter your Name	SQLList	1
Standard Questions	10	20		Passport No	JobOrder	1

## 4. Style Templates:

## a. Override Group Caption

If you wish to group several template items under a common group name, you can enter the same Override Group Caption for each of those items. All the items in a group should be listed one after another in the template.

yle Tem	plates						
Detail 1	Femplate Settings						
uence	Туре	Description	Option	Display Option	Include In Print	Override Group Caption	Mandatory Entry
10	TICKET	Call Ticket		Always		Ticket Group	
20	TICKETACTIONS	Ticket Actions		Always		Ticket Group	
30	CUSTOMERDETAILS	Customer Details		Always			
	Detail 1 uence 10 20	/le Templates Detail Template Settings uence Type 10 TICKET 20 TICKETACTIONS 30 CUSTOMERDETAILS	Template         Settings           uence         Type         Description           10         TICKET         Call Ticket           20         TICKETACTIONS         Ticket Actions	Detail         Template         Settings           uence         Type         Description         Option           10         TICKET         Call Ticket         20           20         TICKETACTIONS         Ticket Actions         10	Detail         Template         Settings           uence         Type         Description         Option         Display Option           10         TICKET         Call Ticket         Always           20         TICKETACTIONS         Ticket Actions         Always	Detail         Template         Settings           uence         Type         Description         Option         Display Option         Include In Print           10         TICKET         Call Ticket         Always         Image: Call Content of Call Cont	Detail         Template         Settings           uence         Type         Description         Option         Display Option         Include In Print         Override Group Caption           10         TICKET         Call Ticket         Always         Image: Call Ticket Group           20         TICKETACTIONS         Ticket Actions         Always         Image: Call Ticket Group

## b. Mandatory Entry

You can now indicate whether a template item MUST be actioned by ticking the Mandatory Entry box.

## c. New POS Order

In "Creation Style when Selecting Customer", you now have a new option- **New POS Order**. This template will create a new On-Hold POS order in Ostendo.

This will provide the ability for a sales rep with mobile device to go round the warehouse or store with a customer to enter items into this POS order. When the customer has finished picking what he wants, he can just go to the checkout cashier and the cashier can then convert the on-hold POS order into a POS invoice and receive customer payment.

## d. New Template Types for Sales Delivery Picking

## **DELIVERYDETAILS and DELIVERYLINES**

This new template types are applicable to Delivery Orders only.



When **DELIVERYLINES** type is specified, it will *dynamically* pull in the Delivery Lines from the associated order each time the datasheet is opened. This means the latest delivery lines will be displayed each time the Delivery datasheet is opened.

If the Delivery Mode of the Mobility User is "**Proof of Delivery**", then the user can only view and/or print the lines only.

If the Delivery Mode is "**Delivery Pick**", then the user can proceed with picking of each of the Delivery Line.

**DELIVERYDETAILS** will automatically generate a checklist to collect the following information:

Picking and Packing Status:

**Picking Complete** - this is a checkbox to indicate if picking is completed for the delivery order. **Packing Complete** - this is a checkbox to indicate if the items are all packed.

Delivery Shipment Details: Actual Weight (Kg) - enter the weight of the shipment here Actual Volume (M3) - enter the volume here Number of Pieces - enter the quantity here Freight Information: **Shipping Reference** - enter shipping reference here **Specified Shipping Method** - enter shipping method here **Override Standard Freight Charge** - tick this checkbox if required **Specified Nett Freight Charge** - enter value here

All the above checklist items are optional. Use as required. When the datasheet is completed and synchronized with Ostendo, these details will be used to update the Delivery Order.

Sales Delivery Picking requires a *live connection with the Ostendo database* as the delivery lines are dynamically updated during picking.

## 5. Note Names – Copy to POS Instructions

If your New POS Order template have a Note type, then ticking this checkbox will copy the notes entered to the Instructions in the POS order created in Ostendo.

## 6. Linked Table Info Fields – Multi Field Names:

Instead of displaying one field at a time, you can now define a string of concatenated fields to be displayed together. Use the **Multi Field Names** to do this.

(	Linked Ta	ble Info Fields					
	Linked Style	Linked to Field Style	Source Table Name	Source Key Field	Source Data Field	Field Caption	Multi Field Names
•	Customer	Primary Field	CONTACTMASTER	COMPANYLINKEDTO			CONTACTNAME    ' ph: '    coalesce(CONTACTPHONE,")

#### Version 421 – What's new:

 Ostendo Freeway logo and icon : This version comes with a new logo, icon and tagline.



There are no other functional changes or additions in this version.

## Version 411 – What's new:

## 1. Feature Packs :

In Item Mobility and Web (and Descriptor Mobility and Web) screens you can enter specific **Features** for each Item or Descriptor.

However there may be other features that you wish to include which applies across all items/descriptors (e.g. the Standard Sell Price).

So instead of adding Standard Sell Price as a feature in each and every Item or Descriptor, we can use **Feature Packs** to do that.

Feature Packs also allow you to pull in all associated **Item Properties / Descriptor Properties** to be included as Features.

If no Feature Packs are defined, then you will only see the features defined for each individual item / descriptor via the Item/Descriptor Mobility and Web screens.

You can have multiple Feature packs defined to meet the different needs of different groups of Freeway users.

Mobility Labour Pric Inventory Employee Mobility Settings Check Lists Style Templates Style Template Matrix Notify Messages Guide Definitions Find Definitions Guide Packs Find Packs Feature Packs Employee Locations Standalone Solutions Data Sheets Settinas ۲

A Freeway user can have only **one Feature Pack name assigned**, but that pack can have many **Feature Groups**.

Feature Group Names are defined in Inventory -- Settings.

#### a. Feature Styles :

Feature Groups can either be "Standard" style or "Properties" style.

The "Standard" Feature Style applies to all items (or descriptors, or catalogue codes).

The "**Properties**" Feature Style will take all properties associated with the items/descriptors and generate them as features to be included in the Features Pack.

## b. Feature Description:

If "**Standard**" Feature Style, then the description can include **merged fields** from the ItemMaster or DescriptorMaster. Merged fields are Fieldnames enclosed by double square brackets (e.g. [[STDSELLPRICE]]).

# 2. Style Template –

## **NEWGUIDE type**

There is now a new template item type called NEWGUIDE.

Adding this NEWGUIDE type to your template will allow you to create a draft User Guide.

This will create two sections in the datasheet:

- One section to enter Guide Name, Guide description, and Guide Notes
- The next section to create Guide Slides (with Slide Name, Slide Description, Slide Image, Slide Notes, and Slide Sequence).

The general idea is to provide you the capability to use the Freeway App to create guides or documentation as you go about doing the actual work in the field by taking pictures and adding notes.

The final Guide or documentation can be published after reviewing and editing the initial draft created.

#### Version 404 – What's new:

## 1. Guides button :

Guides are pictorial documentation that can be added to Freeway solutions to provide help to users. The **Guide button** displays the pack of guides which are made available to the Freeway user.

Guides consist of a series of pictures or images with accompanying notes (a storyboard). Examples of Guides would be Assembly Guides for a kitset, How-To guides, Diagnostic guides, etc.

In the Ostendo Mobility menu, two new functions are added to help set up the Freeway guides: - **Guide Definitions** and **Guide Packs**.

**Guide Definitions** enables you to create guides by compiling a set of slides (images) with accompanying HTML formatted notes.

**Guide Packs** allow you to assemble sets of guides which can be assigned to Freeway users. This provides the flexibility to allow different users to have access to different guides.



Guide Packs can have one or more groups of guides, and each group can have multiple guides. Guide **Group Names** are defined in Mobility Settings.

## 2. Find button :

The Find button enables the Freeway user to look for information related to the solution. It displays the pack of **Find Catalogues** and **Find Information** available to the user.

In the Ostendo Mobility menu, two new functions are added to help set up the Freeway guides: - Find **Definitions** and **Find Packs**.

Find Definitions have two styles - Catalogue and Information.

**Catalogues** are collections of materials (items / descriptors) which could include images and notes, while **Information** styles are made up of textual elements.

**Find Catalogues** are defined by the Hierarchical Names and the associated Item / Descriptor Mobility and Web definitions.

**Find Information** is further defined by information **elements** which contain the textual contents (in HTML format).

**Find Packs** allow you to assemble sets of Find Catalogues and Information which can be assigned to Freeway users. This provides the flexibility to allow different users to have access to different Find contents.

Find Packs can have one or more groups of Find Catalogues and Information, and each group can have multiple sets of Find Catalogues and Information. Find **Group Names** are defined in Mobility Settings.

# 3. Device Layout

There are two additional button icons in the Front Screen layout editor.

Employee Mobility Settings				- 🗆
st Detail	Device Layout	×	C	
Employee				Close
Password				bbA 😭
Site Name				
Optional Warehouse	🚩 1			Save 🔚
Optional Location	Update	Solutions		🔊 Cance
Sheet Prefix		<u> </u>		X Delete
Device Print Option				
Default Internal Email				Layout
Exclude this Employee from Forwarding Sheet on to others				Layour
Job Selection Available	New	Existing		
Customer Selection Available			)	
Supplier Selection Available			1	
Assembly Selection Available	12			
Delivery Selection Available	To Do	• • •		
Internal Selection Available	10 00	Notify	1	
Inherit Mobility Settings from another Employee				
evice Materials Time Entry Customers Jobs Supplier			Rules Restricted Warehouses	
	Guides	Find		1
Number of Synchronised Sheets Retained	Guides	Find	10 📥	
Auto Synchronise Completed Data Sheets				
Auto set On and Off Site for Sheet Creation and Completion				
Set Tracking Code for Creation and Completion of Sheets				
Notification method (if any) used when forwarding to others	Inquiry	Scan On		
The number of Days forward to display ToDo activities	,			
Auto Sync the ToDo when selected				
Portrait Home Image (16:9)	Save	Cancel		
Landscape Home Image (16:9) Portrait Home Image (4:2)	Jave	Cancer		

The Guides and Find buttons can be activated by moving them into one of the top 8 positions. (The bottom 2 positions cannot be activated as only a maximum 8 buttons can be Active at any one time).

### Version 389 – What's new:

1. Hierarchical Structures for Materials Lists (Items and Descriptors): You can now organise and present your Material Lists in a hierarchical structure. In the General Menu in Ostendo, there is a new item called Hierarchical Structures. Starting with Level 1, each line in each level can have sub-levels (up to 4 levels).

.ist De	etail Hi	erarchy Tree			
Name	e	Description			
Lightir	ing	Lighting Cat	talog		
Notes	s				
Awes	some liah	ting products and accessor	ies		
	oonio iign	ang producto and decessor			
ghting-	_				
	_	2 Level 3 Level 4			
.evel 1	1 Level	2 Level 3 Level 4 Level Name	Level Description	Image	
.evel 1	1 Level No I		Level Description	Image	
.evel 1	1 Level No L 10 (	Level Name	·	Image	
.evel 1	1 Level No I 10 ( 20 (	Level Name Circular Ceiling Lights	Circular Ceiling Lights	Image	
ighting _evel 1 Seq N	1 Level No I 10 ( 20 ( 30 F	Level Name Circular Ceiling Lights Circular Flourescent	Circular Ceiling Lights Circular Flourescent	Image	



Leve	el 1 Level 2 Level 3 Level 4		
Sec	No Level Name	Level Description	Image
•	70 FLS Series	FLS Series Floodlights	
	80 FLR Series	FLR Series Floodlights	
	90 FLH Series	FLH Series Floodlights	<u> </u>

Each line in the structure represents a level or sub-level and can have an image associated with it.

## 2. Item Mobility and Web (and Descriptor Mobility and Web):

This is a new function in the Item Related Menu (same for Descriptor).

tem Code	Description	Unit
503A	503A LAMPHOLDER 1/2 BRASS THREAD	EA
Short Description		
503A LAMPHOLDER 1/2 BRAS	SS THREAD	Showcased 🗌
ong Description Label	Specification Label Features Labe	el
Product Overview		

This allows you to provide the following:

- Short Description : A short description of the item or descriptor
- Long Description : A longer description
  - **Specifications** : Technical specifications if relevant
  - **Keywords** : Keywords are used for searching (like webpages)
- **Hierarchical Names**: This is where you link the product to the hierarchical level. A product can be linked to multiple levels.

	Long Description Specifications Keyw	ords Hierarchical Names	Features
	Hierarchical Name	Hierarchical Level	
Þ	Lighting	Lighting-Lighting Accessorie	ies

-

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- **Features** : Features are additional features associated with the product. Features can be grouped under a group name and each feature can have additional notes to describe it.

Long Description	Specifications Keyw	ords Hierarchical Names	Features	
Group	Seq No	Feature	Feature Notes	

This is to support the requirements of **e-commerce** websites and **Freeway mobility** app.

### 3. Feature Groups:

In Inventory Settings, this new function allows you to define Feature Group Names to be used in the Item Mobility and Web screen.

Feature G	roups	
Group Seq	Group Name	Group Description

## 4. Employee Mobility Settings -

1

#### Materials tab:

You can now link a Hierarchical Name to an employee and specify the Lookup Structure as well.

evice Materials Time Entry Custome	rs Jobs Suppliers Assemblies Deliveries Assignment Move Rules Restricted Warehouses
Restricted Material List Code	
Items Restriction Condition	
Descriptors Restriction Condition	
Material Pre-Fill List	
Hierarchical Name	Lighting
Material Lookup Structure	Hierarchical
	Flat
	Hierarchical
	Category

- Flat : Just a simple list (no hierarchy).
  - : Use the hierarchical structure named above.
- **Category** : Use the standard Ostendo Categories and Sub-Categories structure.
  - (You can now link an image to each Category and Sub-Category).

## 5. New Mobility Rules:

Hierarchical

These new rules allow you to specify default labels for Long Description, Specifications, and Features labels.

Long Description Label	Product Overview
Specification Label	Technical Specs
Features Label	

## Having a pictorial, hierarchical structure makes looking for items much easier. Check it out for yourself.

1. Scan On Button

The Scan On button replaces the About button on the Main screen. The function of the Scan On button is to provide Freeway users an easier way to start or continue a datasheet.

The Scan On button enables you to scan a barcode which represents one of the following:

- a. A Customer
- b. A Supplier
- c. A Job
- d. A Customer Asset
- e. An Assembly
- f. A Delivery
- g. An Employee

For example, previously, to initiate a new Service datasheet for a Customer, you may go through the following process:

- Click on NEW button and select a Customer
- Then select 'Create New'
- Then select the StandardService Style template

Now, if you have defined in Employee Mobility Settings – Customers tab – the "**Fixed Customer Style Name for Scanning**" as StandardService, then you could accomplish all the above steps by merely using the Scan On button to scan the Customer barcode number.

Depending on which of the above barcode is scanned, Freeway will either initiate a new datasheet or display an existing datasheet for that barcode number.

# 2. Style Templates –

## Settings tab - Labour Charge style

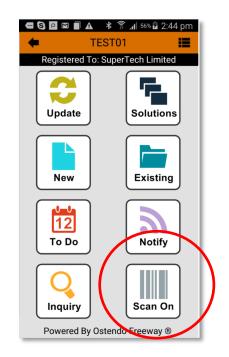
In the Style Template – Settings tab, you can now specify the Charge Style (either for a specific employee or for all employees) as either **Chargeable** or **Non-Charge**, as well as the Non-Charge cost centre code.

## 3. CheckList types

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- The drop-down list for CheckList Types is now sorted in alphabetical sequence.
  - There are three new CheckList Types
    - ImageList
    - o JobOrder
    - o SQLList

**ImageList** type allows you to display a list of images for selection. Upon selection of the desired image, the **Option Name** associated with the selected image will be the value of the Checklist item. This is useful when using pictures is more user friendly then using part numbers for selection (e.g. sales catalogue).



**JobOrder** type allows you to display a list of Job OrderNumbers which are on the Freeway device for selection. The selected ordernumber will be the value of the Checklist item. This is useful when you want to associate a datasheet with a particular Job OrderNumber.

**SQLList** type allows you to display a list of values from an SQL query for selection. The SQL query must select only one field, e.g. select itemcode from itemmaster where itemcategory = 'BOLTS'. The selected value will be the value of the Checklist item.

You can also include the **#employeename#** parameter in the SQL statement if necessary. The #employeename# parameter will pass the Freeway employee name to the SQL statement. e.g. select ORDERNUMBER from PURCHASEHEADER where BUYER = #employeename#

## Version 329 – What's new:

1. Style Templates

A new **Settings tab** has been added to Style Templates. Here you can specify the following for each employee or all employees using this template:

## a. How Times are Posted in Ostendo - Options are:

- i. Use Employee Setting
- ii. Job Direct
- iii. Create New Timesheet
- iv. Add to Existing Timesheet
- v. Add to Daily Timesheet
- vi. Add to Weekly Timesheet

## **b.** Default Labour Code for Time Entry : Select from pre-defined list of Labour Codes.

#### c. Auto Time Entry Creation Rule - Options are:

- i. Use Employee Setting
- ii. Auto Insert Time Entry on Sheet Creation
- iii. No Auto Insert of time Entry

## **d.** Material Pre-fill List - Options are: Pick from pre-defined lists of materials.

The Style Template Settings tab takes precedence over the Employee Mobility Settings.

0 Style Templates						
List Detail Template Settings						
Specific Employee Employee Name	How Times are Posted in Ostendo	Default Labour Code for Time Entry	Auto Time Entry Creation Rule	Material Pre-Fill List		
	Use Employee Setting 👻		Use Employee Setting			
	Use Employee Setting Job Direct					
	Create New Timesheet					
	Add to Existing Timesheet					
	Add to Daily Timesheet Add to Weekly Timesheet					
	in the tree try in monitor	1				

## Version 319 – What's new:

- 1. Style Templates
  - a. Internal Data Sheet a new Creation Style "New ReStock Order".
     When completed and sent back to Ostendo, this data sheet will generate "Planned" Purchase Orders for the items and quantities. This provides a simple way to raise Purchase Orders to restock supplies in the office or shop.
  - b. JobType, PurchaseType, and SalesType can now be specified for a template which is used to create orders. This overrides the defaults specified in the Employee Mobility Settings.
- 2. Mobility Settings -

Note Names

- Include Materials in Note
- Include Times in Note

When these are ticked, the Materials and Times data entered in the data sheet will be appended to the Note when the completed sheet is sent back to Ostendo.

3. Mobility Images (in ITEMMASTER and DESCRIPTORMASTER) – you can now use both **png** and **jpeg** files to load your images.

For **Graphical** Material Lookup Style, the **mobility images** loaded to the item or descriptor records should be square and recommended size is **256 by 256 pixels**.

4. Description Fields for Materials (ITEMDESCRIPTION and DESCRIPTORDESCRIPTION) – you can now enter and save up to **200 characters** for descriptions.



This concludes our quick introduction to Ostendo Freeway Mobility solutions. We trust that you will find these functions and features to be extremely helpful in building and implementing mobility solutions to meet your specific needs.

