Mobile Quotes Documentation

Settings

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≡	Settings	Save
App ID:		
18890 40894		
Company:		
Platypus Proc	ducts	
Branch:		
BRISTOL		
User Profile:		
ADMINISTRA	TOR	
Username:		
CHLOE		
Forms Queue	:	
650		
Web Services	URL:	
http://ws.mag	ce.systems/	
Timeout (sec	onds):	
20		
	Test Web Services	
	Test Mace Connection	
	Wipe App	
0	X	X
Settings	Defaults	Parameters

On first set-up, you will be asked for the following details:

Username - User ID for the device

Forms Queue – The forms queue for managing email processes

Web Services URL – The webservices URL required to connect to MACE

Press **Save** and then complete the additional settings:

App ID – This will be generated automatically

Company – The company to connect to in MACE

Branch – The branch to raise mobile quotes for

User Profile – The MACE user ID for this device

Timeout (seconds) – The delay that will occur before an error is displayed while trying to connect to MACE

Additional options include:

Test Web Services – Test the device connection to web services

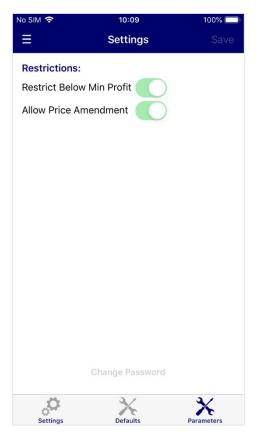
Test Mace Connection – Test the device connection to MACE

Wipe App – Clear device data and restore to default settings

Defaults

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Ξ	Settings	
Note: click the	box to display a co	lour selector.
Theme Colour	:	
#00026B		
Theme Text Co	olour:	
#FFFFFF		
Page Text Cold	our:	
#000000		
Page Detail Co	olour:	
#44444		
	Reset Defaults	
	heser benunts	
Ö,	*	X
Settings	Defaults	Parameters

Parameters



The Defaults page can be used to change application colours.

Theme Colour – Main colour for the application

Theme Text Colour – Used for text headings and titles

Page Text Colour – Application Background colour

Page Detail Colour – Used for page text

Reset Defaults – Set colours to the default application colour scheme

There are multiple colour options, with the ability to enter colour names such as 'red', or type in a colour's hexadecimal code. Colours on this screen will be saved automatically.

Alternatively, clicking the box next to the textbox will open a detailed colour selection screen. Click **Save** on this screen to save your colour selection.

The settings in this page are application global.

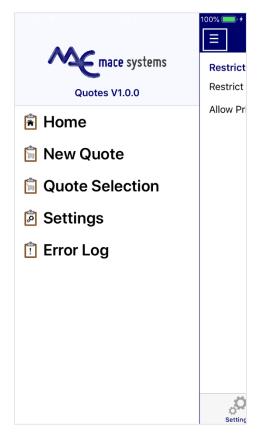
Restrict Below Min Profit – Restrict the quote to minimum profit values

Allow Price Amendment – Allow user to change prices within the application

Change Password – Set a password to access this page and change parameter settings.

Save – Save any changes made to the parameters

Navigation



To navigate, either slide the screen to the right, or press the three dashed lines.

To select a page, tap on the required menu option.

To create a new mobile quote, tap **New Quote**.

To select an existing mobile quote, tap **Quote Selection**.

To change settings, select the **Settings** option.

To view past error messages, tap Error Log.

Error Log

No SIM 🗢	12	2:08	100% 🔲 ' 🗲		
≡	Erro	r Log			
Date: 05/	11/2019	Options:	0		
Tidy	All:	\supset	Email		
05/11/19 12:05	The operation ha	is timed out.			
05/11/19 12:04	The operation ha	is timed out.			

Date - List error messages on a set date

Options – Display options bar

Tidy – Clear error messages older than 60 days old

All – View all messages regardless of set date

Email – Email error log to MACE Support

Quote Entry

No SIM 🗢	11:08	100% 💷 🕂			
≡	Quote Entry	Options			
Quote: Nev	w (05/11/19)				
Order Ref:	Counter				
Customer:	0001				
Salesman:	00 HOUSE				
Valid Until:	15/11/2019				
FRE		Add			
0007:1		£58.79 for 1			
WHITE MARBLE	SINK	(- +)			
	Total: £58.79				

Product Page

No SIM 🗢	11:19	100% 🥅 🕂
🗸 Back	0007:1	Save
Description:		
WHITE MARBLE	SINK	
Quantity:		
1		
Price Per 1:	Discour	nt:
58.79	0.00	
	Total: 58.79	
Physical 46	On-Order 20	Allocated
Free		ommitted
1	C	45

Quote – The quote ID. This will be generated when the quote is saved

Order Ref – Customer quote reference

Customer – The customer ID. Customers can be selected by ID, name and sort key

Salesman – Salesman ID. This is populated automatically by the customer default but can be changed

Valid Until – Date until quote is invalid

FRE – Add a line of text to the quote

Add – Add a product to the quote. Products can be searched for by ID, name and sort key, with the default price pulled in automatically. Product quantity can be adjusted with the -/+ buttons. Slide line to the right to delete the product or tap the product line to display the Product page

Total – Total value of quote

Options – Save the quote or delete the quote and return to the home screen

Description – Product description

Quantity – Adjust the line product quantity

Price Per 1 - Price value for a single unit

Discount - Total product line discount

Total – Total goods value for this line

Save – Save the pricing amendments

The Product page also displays the current stock balances for the product.

Mobile Quote Selection

No SIM 奈	11:37 Quote Selection	100% 🗩 🕫
0001		
Valid Only:	\bigcirc	
Quote: 7 (2: 0001 - JOHN S	3 September 2019) MITH	
Quote: 11 (0 0001 - JOHN S	03 October 2019) SMITH	
Quote: 12 (0 0001 - JOHN S	03 October 2019) MITH	
Quote: 20 (2 0001 - JOHN S	23 October 2019) MITH	
Quote: 21 (0 0001 - JOHN S	05 November 2019) MITH	

Customer ID - Search for quotes by customer ID

Valid Only – Only display quotes that have not expired

Refresh - Refresh the list of quotes

Tap a quote to display the quote details within the Quote Entry page

Quote Entry – Existing Quotes

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く Back	Quote Entry	Options
	ve 🔀 Email Convert [Delete
Quote: 21 Order Ref: Customer:	(05/11/19) Counter 0001	
Salesman: Valid Until:	00 HOUSE	
FRE	,.,	Add
0007:1 WHITE MARBLE	SINK	£108.00 for 2
	Total: £108.00	

Existing quotes opened through Quote Selection will have additional features under the **Options** button.

Save – Save the changes to the quote

Email – Email the quote

Delete – Delete the quote

Convert – Convert the quote into a mobile Sales Order

Back – Return to the Home page

Unlock Mobile Quotes

If a mobile quote is locked by the system but not currently in use on a device, the quote can be unlocked through the Unlock Mobile Quotes process. This can be found under the **Other | System Security** menu options.

At the Quote ID prompt, enter the mobile quote ID or press '#' to display a list of locked mobile quotes. When a quote is selected, hit 'Y' to unlock the quote.

Unlock Mobile Quotes in BRISTOL (770)	8			
				📄 Print Screen
	Unlock Mobi	le Quotes	P14763	07/11/19
Quote ID	Mobile Quote Selection :- ID Date Time USA 1-> 22 07/11/19 12:46 CH	LOE	or PETIIPN	
11C33 0 py L	owny w excy i revious pagey s		OF REFORM	
Unlock Mobile Quotes in BRISTOL (770)	8			
Unlock Mobile Quotes in BRISTOL (770)		le Ouotes	P14763	Print Screen
Unlock Mobile Quotes in BRISTOL (770)	<pre> Unlock Mobi 22 Locked by: 18937 37165 (CHLOE) Locked Date: 07 Nov 2019 Locked Time: 12:46 </pre>	le Quotes	P14763	Print Screen 07/11/19

Mobile Quote Enquiry

Network Client has a new graphical enquiry screen listing live and historical mobile quotes. The quote can then be selected to open a new form with additional quote information displayed.

🥵 Mobile Quote	Enquiry										- 🗆 ×
_			Mobile Quotations - S	Selection					Distant		
Program Mo	blie Quote En	quiry							Platyp	us Products, CM	5 Branch BRISTOL, 1
			Include Live	\checkmark	Include History						
Quote Id	Customer Id				,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,					Branch	Туре
Guote la	customeria			05/11/2019						bianch	1996
			To Date	05/11/2019					- 10		
									- 10		
			From Customer				Search		- 10		
				First					- 10		
			To Customer				Search				
				Last							
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			Select Salesma	an			Search				
				First					- 10		
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		-							- 🗆 🗙		
		Program M	lobile Quotation		User CHLOEW	Company Pl	atypus Products	, CM5 Branc	h All branches, ALL*		
🌮 Mobile Quot	e Francisco Ca										– 🗆 X
Mobile Quot	e Enquiry, Co	ID	21		Valid Until	15/11/2019				-	~
Program M	obile Quote E	Customer	0001		Order Reference	Counter				:M5 Brar	ch All branches, ALL*
Search Quote	ld		JOHN SMITH		Date	05/11/2019					13 Items
	_	Branch	1		Salesman	00				-	
Quote Id	Customer Id		BRISTOL			HOUSE				Branch	Туре
1			BRIGTOL			HOUGE				1	HISTORY
3		G Refresh							1 Items	1	HISTORY
6	_	Nerresi							T items	1	HISTORY
8		Product ID	 Description 		Sales	Unit	Quantity	Price	Line Value	1	LIVE
2	0003	0007:1	WHITE MARBLE SIN	IK	1		2	£54.00	£108.00	1	LIVE
10										1	LIVE
11	0001									1	LIVE
12	0001									1	LIVE
13	0001									1	HISTORY
20	0001									1	LIVE
21	0001									1	LIVE
22	0001									1	LIVE
									Escape - Close		