Visual Streamline FAQ

Mobile Sales Processing Overview

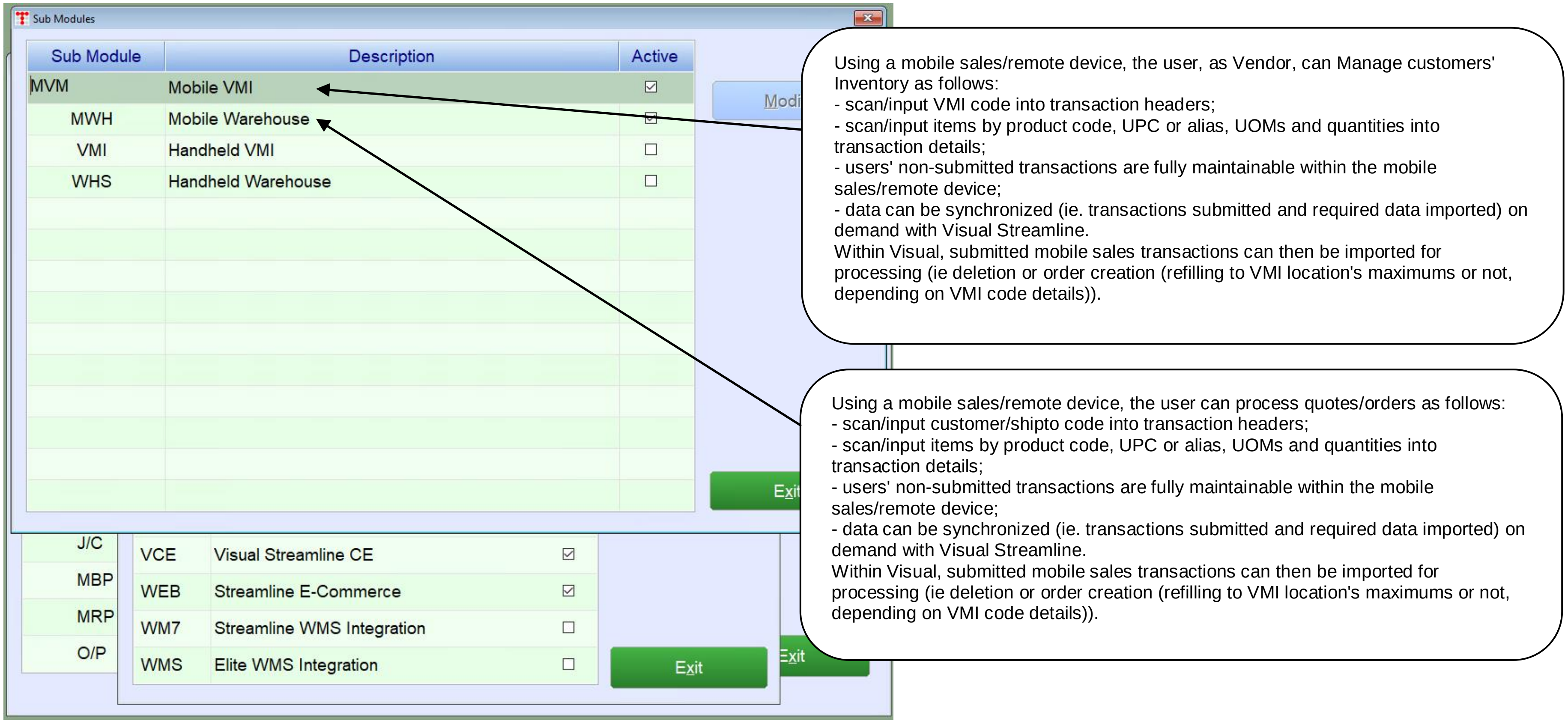
Installation > Modules

In order to activate Mobile Sales processing, the Integration sub-module VCE (Visual Streamline CE) must be turned on.

Installation > Modules > Sub Modules

Once the Visual Streamline CE module is turned on, there are sub-modules that determine whether to process Warehouse Orders or Vendor Managed Inventory.

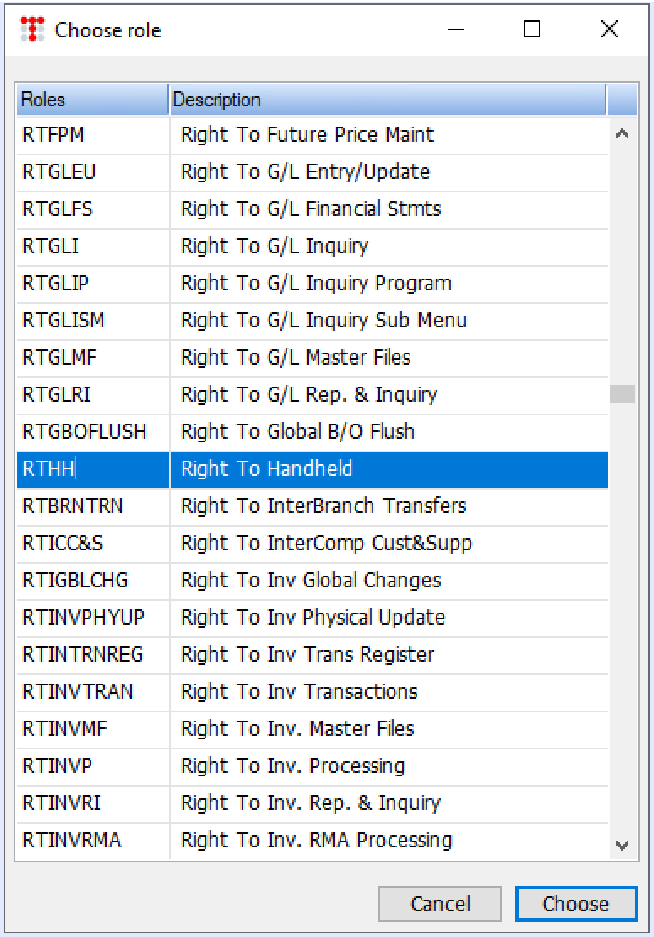
The screenshot below shows the sub-modules for processing Warehouse Orders and Vendor Managed Inventory on the Mobile Sales.

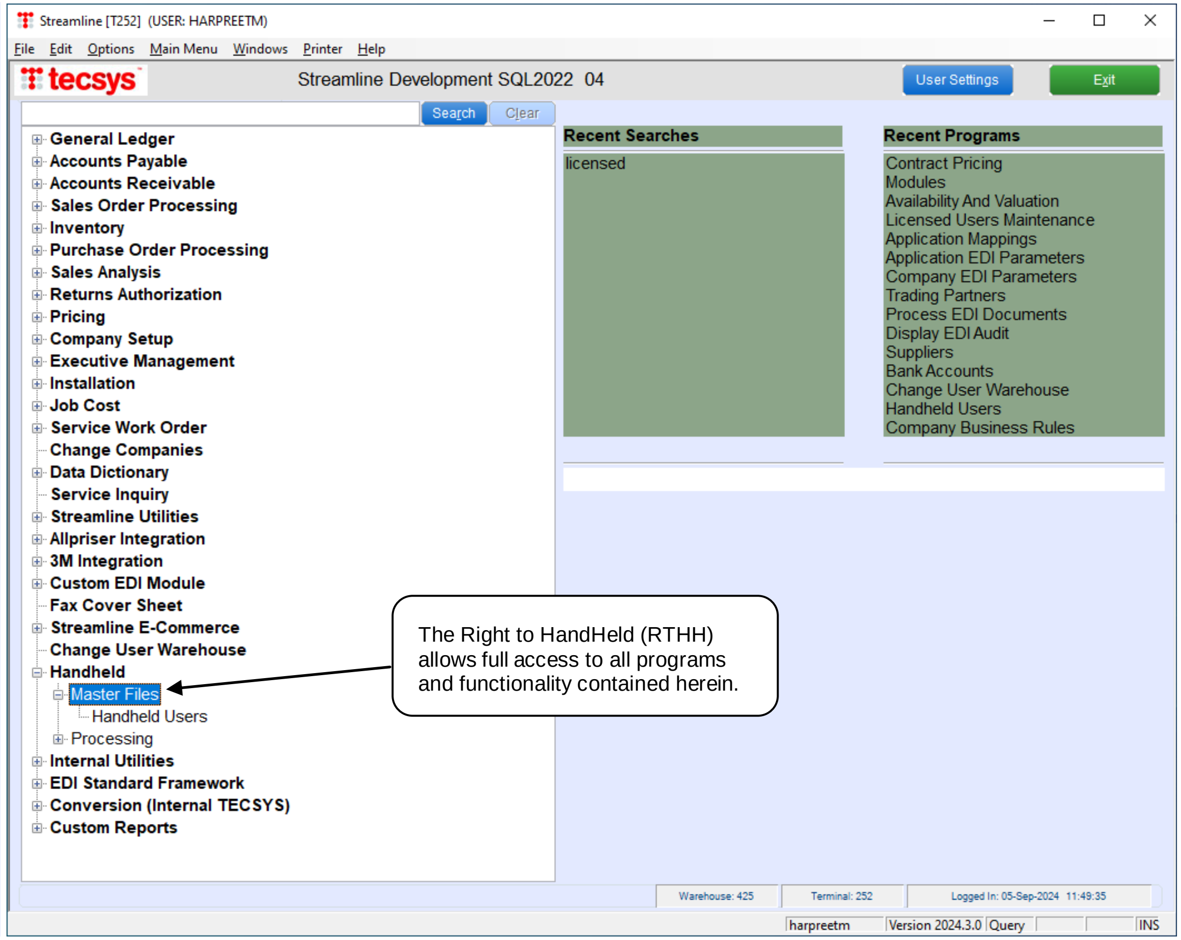


RTHH (Right to HandHeld)

Once the HandHeld module is turned on and the sub-modules that determine whether to process Warehouse Orders or Vendor Managed Inventory are set, there is further right that needs to be added to the appropriate users to grant access to the 'Handheld' option on the Main Menu.

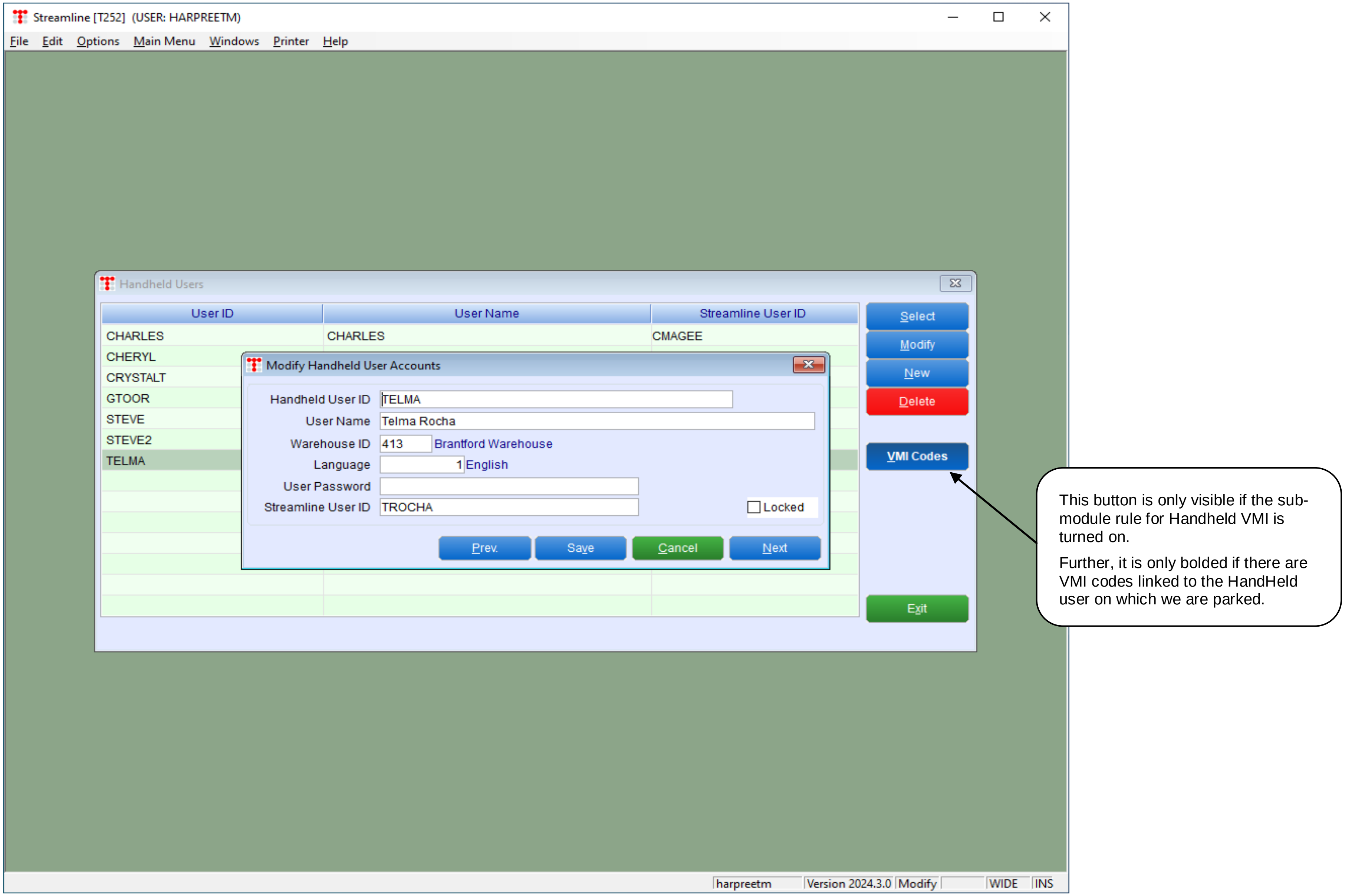
Currently, the Right to HandHeld (RTHH) allows full access to all HandHeld programs and functionality.





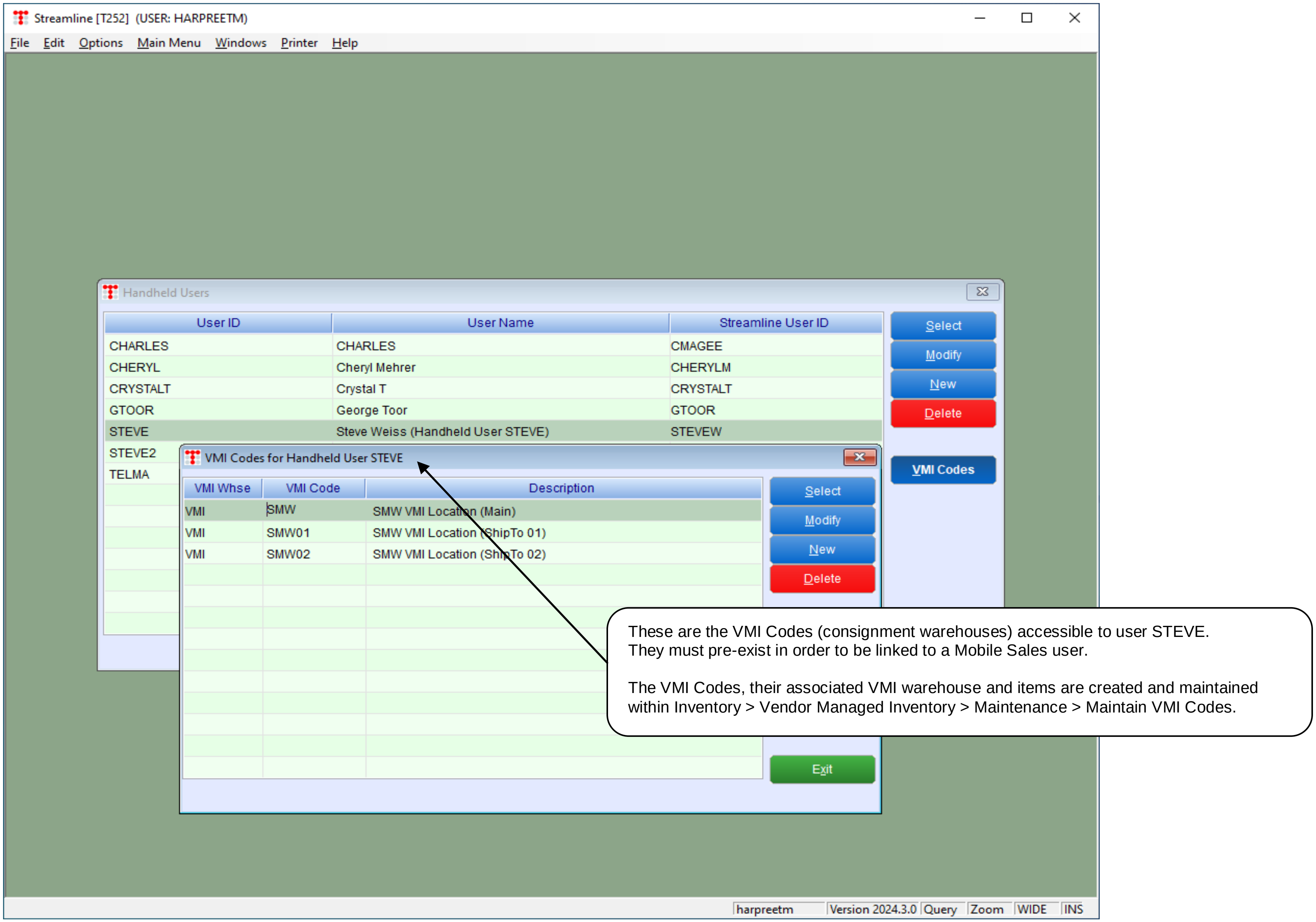
HandHeld > Master Files > HandHeld Users

This program is used to create, modify or delete users who will be granted access to Visual Streamline CE on the mobile device. It is further used to specify allowable VMI warehouses for users within VMI Order Entry on the mobile device.



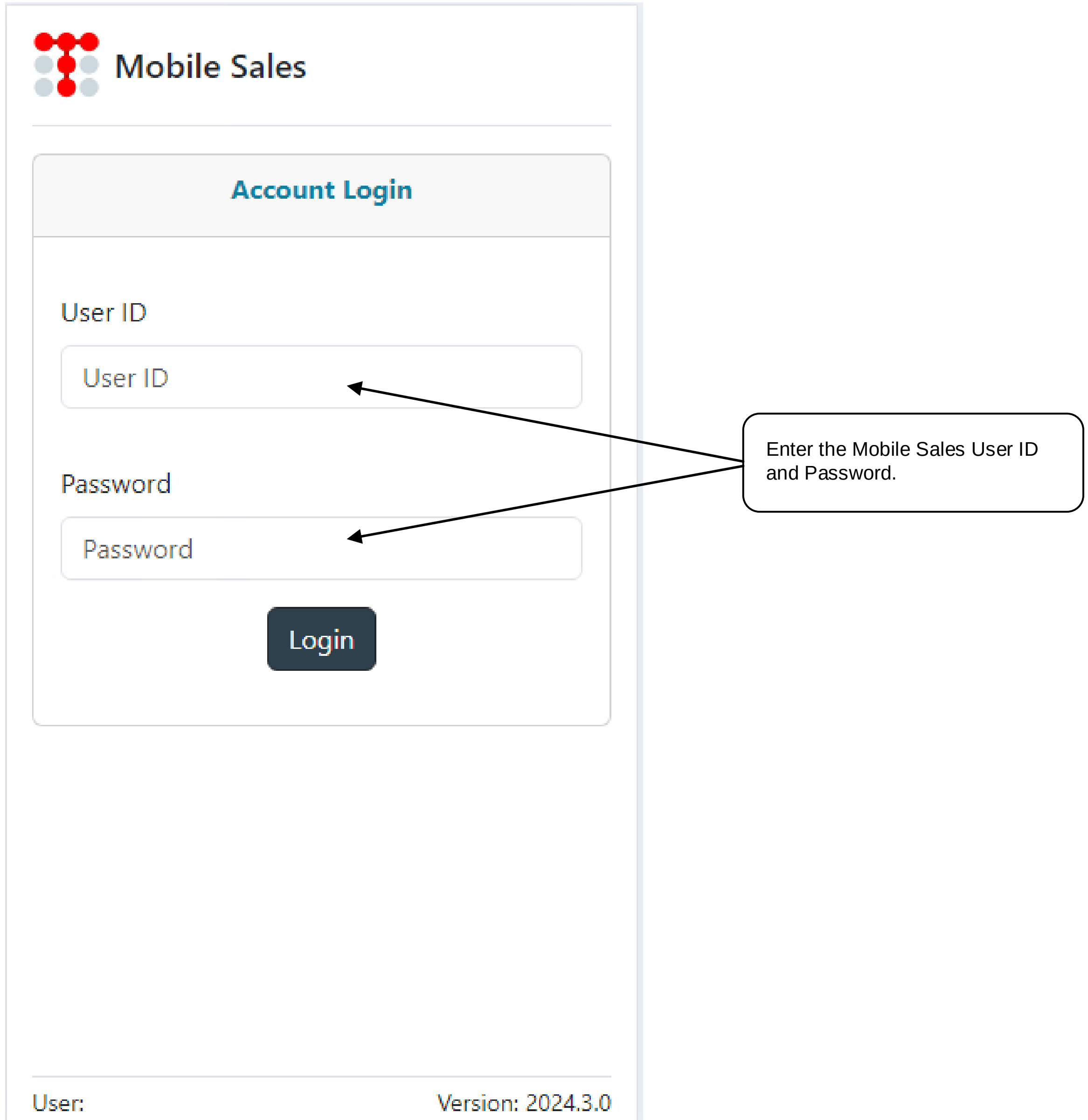
HandHeld > Master Files > HandHeld Users (VMI Codes)

The screenshot below shows the VMI Codes to which the handheld user has been granted access.
Only these VMI Codes will be presented to the user on the handheld when processing VMI orders.



Mobile Sales

Now, let's have a look at the actual Mobile Sales screens.
This is the main login screen.

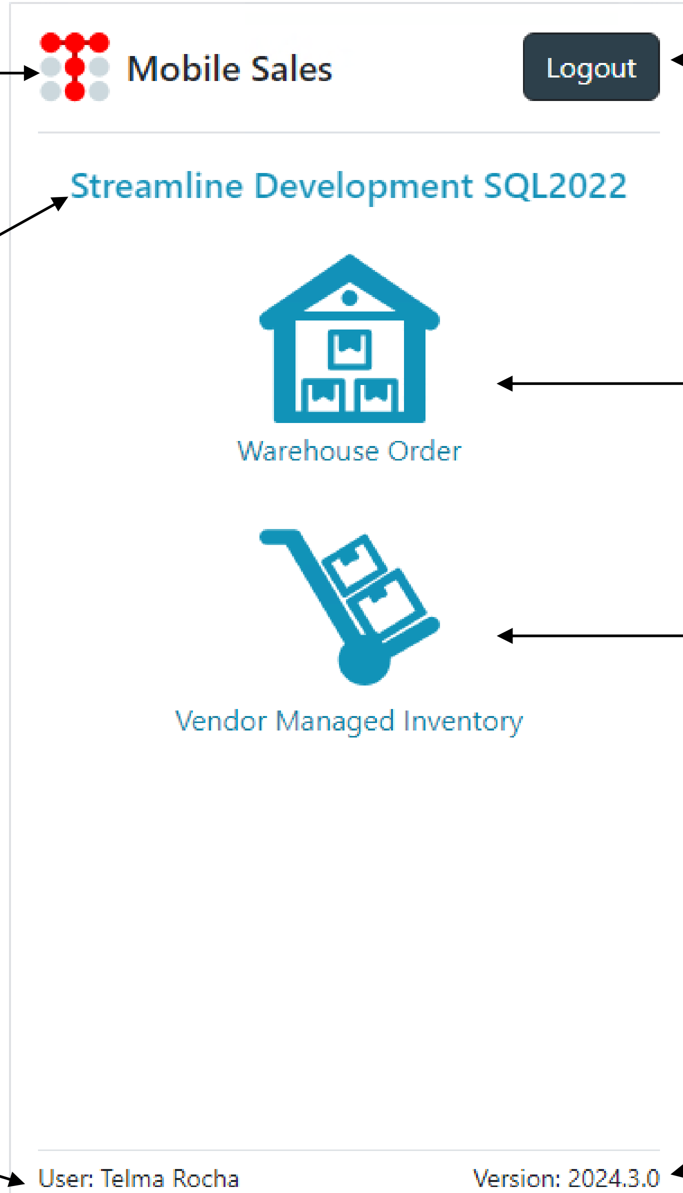


Mobile Sales

Now, let's have a look at the actual Mobile Sales screens.
This is the main selection screen (after an initial Login screen).

Clicking on the logo navigates the user back to the home page if the user is logged in, else it navigates them back to the login page.

This is the Company Name to which the person identified by the User ID below left (Telma Rocha) is linked.



The Logout button is used to logout from the application, takes the user back to the login screen.

This button is used to launch the Warehouse Order entry process.

This button is only visible if the sub-module for Mobile Sales Warehouse is turned on.

This button is used to launch the VMI Order entry process.

This button is only visible if the sub-module for Mobile Sales VMI is turned on.

This identifies the user currently logged on.

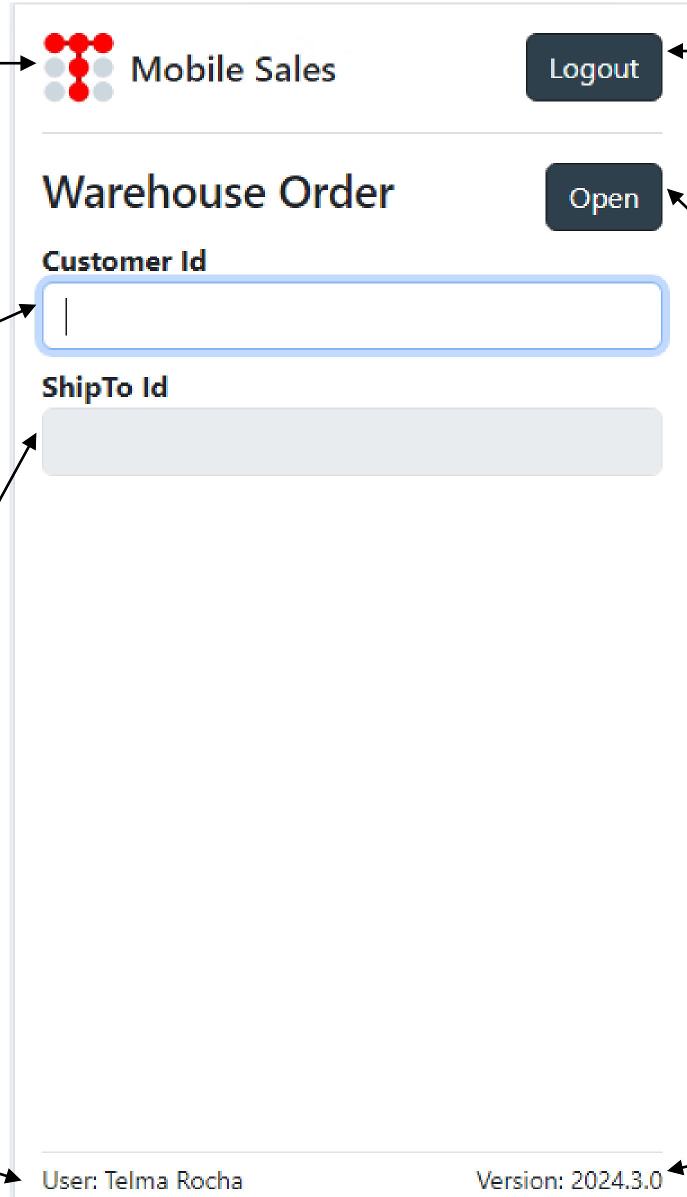
This displays the release version number of the Mobile Sales.

Mobile Sales

Now, let's have a look at the Mobile Sales Warehouse Order Screen.
This is the Warehouse and ShipTo selection screen.

Clicking on the logo navigates the user back to the home page if the user is logged in, else it navigates them back to the login page.

The Logout button is used to logout from the application, takes the user back to the login screen.



This is an auto-populate list of all customers in Visual Streamline.

Customers can be entered/selected several ways as follows:

- scan a customer or key it directly then ENT to select that customer;
- type the name, then select the customer with the stylus or hit ENT to select the auto-populated customer.

This button launches a window of all open transactions (Warehouse Orders, in this instance) for the current user.

An Open transaction is any transaction entered in either the current session or any previous sessions, but entered since the last synchronization process.

This button will be disabled (as shown) if there are no current transactions to view or if the user is mid-order (as in the screen shot).

This is an auto-populate list of all shipto addresses for the customer ID selected.

They are selectable in the same way as the customers.

This identifies the user currently logged on.

This displays the release version number of the Mobile Sales.

Mobile Sales

Now, let's have a look at the Mobile Sales Warehouse Order Screen.

Selecting the Customer & ShipTo ID will enable the user to add items to the transaction.

Clicking on the logo navigates the user back to the home page if the user is logged in, else it navigates them back to the login page.

During regular warehouse order entry, the warehouse is automatically populated with the default warehouse for the current user setup in the handheld users screen in Streamline ERP.

- You can modify the warehouse on the mobile sales application.
- Click on the warehouse to enter a warehouse from the Warehouse master list in Streamline ERP.
- **Note:** When you enter a warehouse, the next line on the order defaults to the user's default warehouse setup in the handheld users screen.

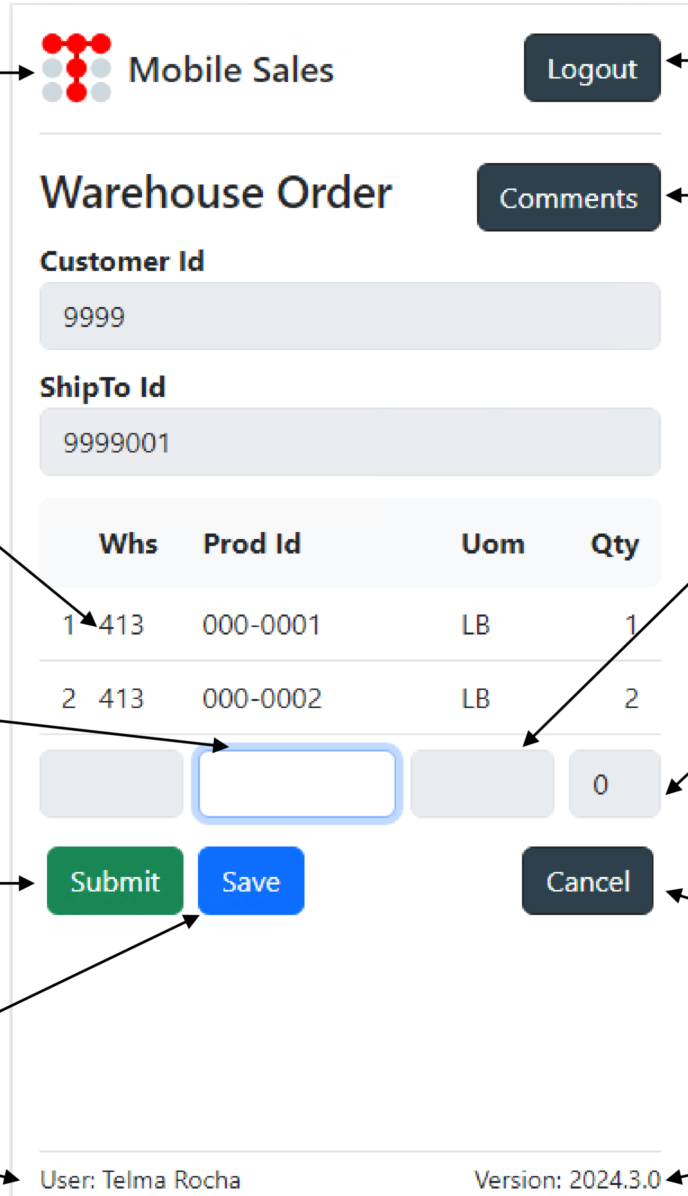
Products are scanned, entered manually or supplied upon returning from the Product Details window

This button submits the current order.

It will be assigned a new Transaction ID, if this is the first time submitted, or it will be saved to the old Transaction ID, if it was a previous submission

The 'Save' button will save changes to the existing transaction and navigate user back to the main page.

This identifies the user currently logged on.



The Logout button is used to logout from the application, takes the user back to the login screen.

This button launches a window to allow the user to enter/edit comments/notes pertaining to the currently highlighted transaction ID.

It is important to note the following:

- these notes do NOT carry through to created orders or quotes;
- these notes are NOT associated with individual detail lines but rather to the order as a whole.

If the product entered has multiple selling UOMs, there is a pulldown list of applicable UOMs, else the selling UOM is automatically filled.

Quantities can be entered manually or scanned.

It is important to note the difference, though.

Scanned quantities will continually increase the Qty field. Manually entered quantities will complete the line.

The line can be completed by hitting the ENT key or by moving off the line with the stylus.

This button opens a confirmation window with an 'OK' or 'Cancel' button.

The 'Ok' button cancels the current order entry/edit session. User is advised that data not submitted will be lost and can optionally confirm or abort the cancel procedure.

This displays the release version number of the Mobile Sales.

Mobile Sales

Now, let's have a look at the Mobile Sales Warehouse Open Transactions Screen.

Here you will see the Saved Transactions along with buttons to Delete & Open the Details of each transaction and view them below.

Clicking on the logo navigates the user back to the home page if the user is logged in, else it navigates them back to the login page.

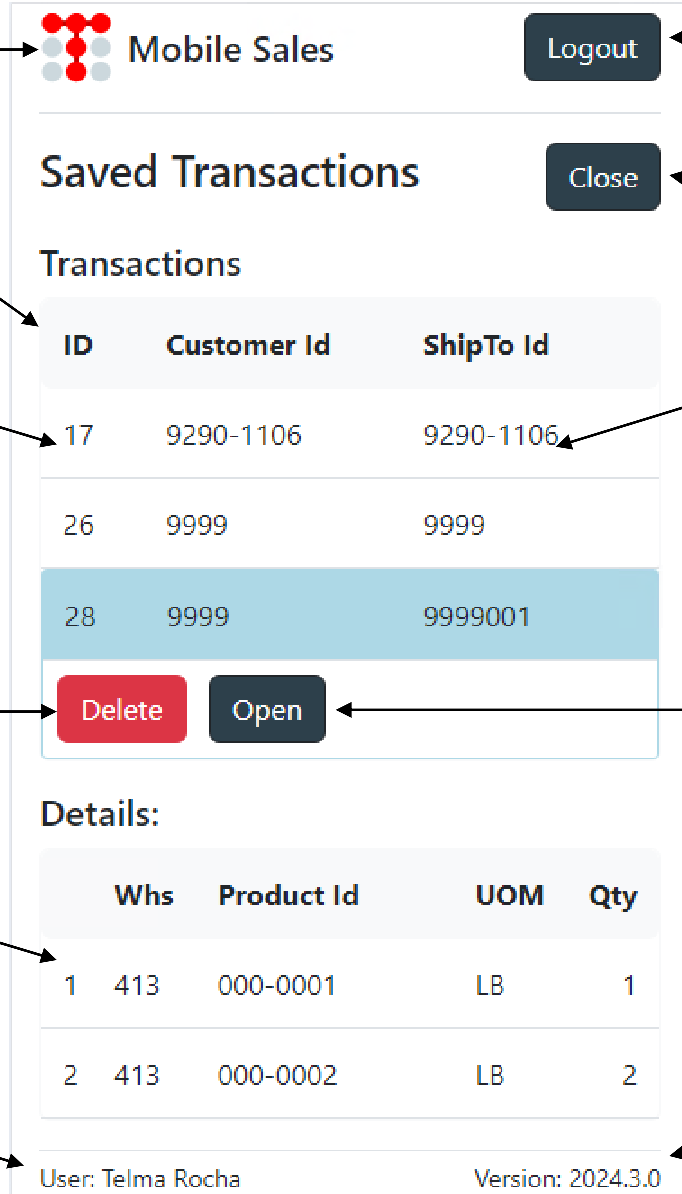
The Logout button is used to logout from the application, takes the user back to the login screen.

This is the header section for all open transactions of the current type for the current user.
Scroll bars will appear if required.

This button closes this window and redirects the user back to the Warehouse/Ship-To selection screen,

This is a transaction code ID automatically assigned to each transaction at the time of first submission.

Clicking anywhere in the transaction row shows/hides the 'Delete' & 'Open' buttons to either delete or modify the transaction.



This button allows the user to delete an entire transaction.

The Open button allows the user to Modify/Delete the lines on the transaction.

This is the details section for the transaction on which the user is currently parked on, in the header section.
Scroll bars will appear if required.

This identifies the user currently logged on.

This displays the release version number of the Mobile Sales.

Mobile Sales Transaction Details

Now, let's have a look at the Mobile Sales Warehouse Open Transactions Details Screen.
Here you will see the details along with buttons to Delete & Edit the transaction.

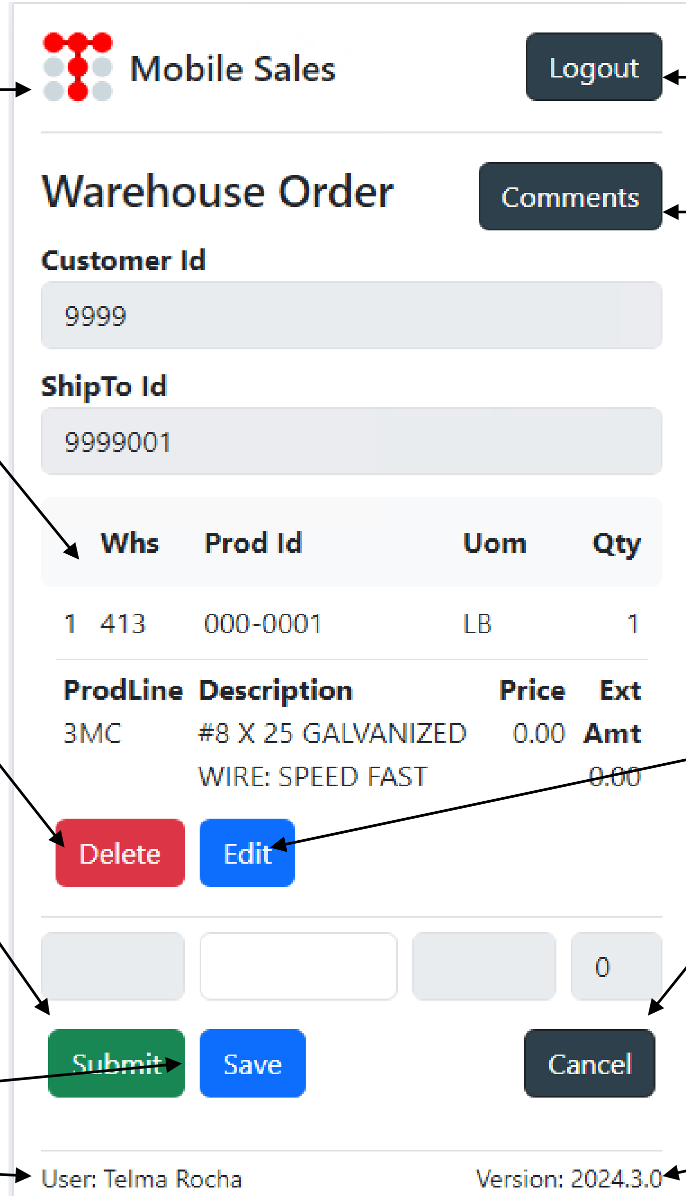
Clicking on the logo navigates the user back to the home page if the user is logged in, else it navigates them back to the login page.

The Logout button is used to logout from the application, takes the user back to the login screen.

This button launches a window to allow the user to enter/edit comments/notes pertaining to the currently highlighted transaction ID.

It is important to note the following:
- these notes do NOT carry through to created orders or quotes;
- these notes are NOT associated with individual detail lines but rather to the order as a whole.

Clicking anywhere in the row will show/hide the Delete/Edit buttons to allow further modifications to the detail line.



The 'Delete' allows the user to Delete the line from this transaction.

This 'Edit' button allows the user to Edit the transaction detail line.

This button submits the current order.

It will be assigned a new Transaction ID, if this is the first time submitted, or it will be saved to the old Transaction ID, if it was a previous submission

This button opens a confirmation window with an 'OK' or 'Cancel' button.

The 'Ok' button cancels the current order entry/edit session. User is advised that data not submitted will be lost and can optionally confirm or abort the cancel procedure.

The 'Save' button will save changes to the existing transaction and navigate user back to the main page.

This identifies the user currently logged on.

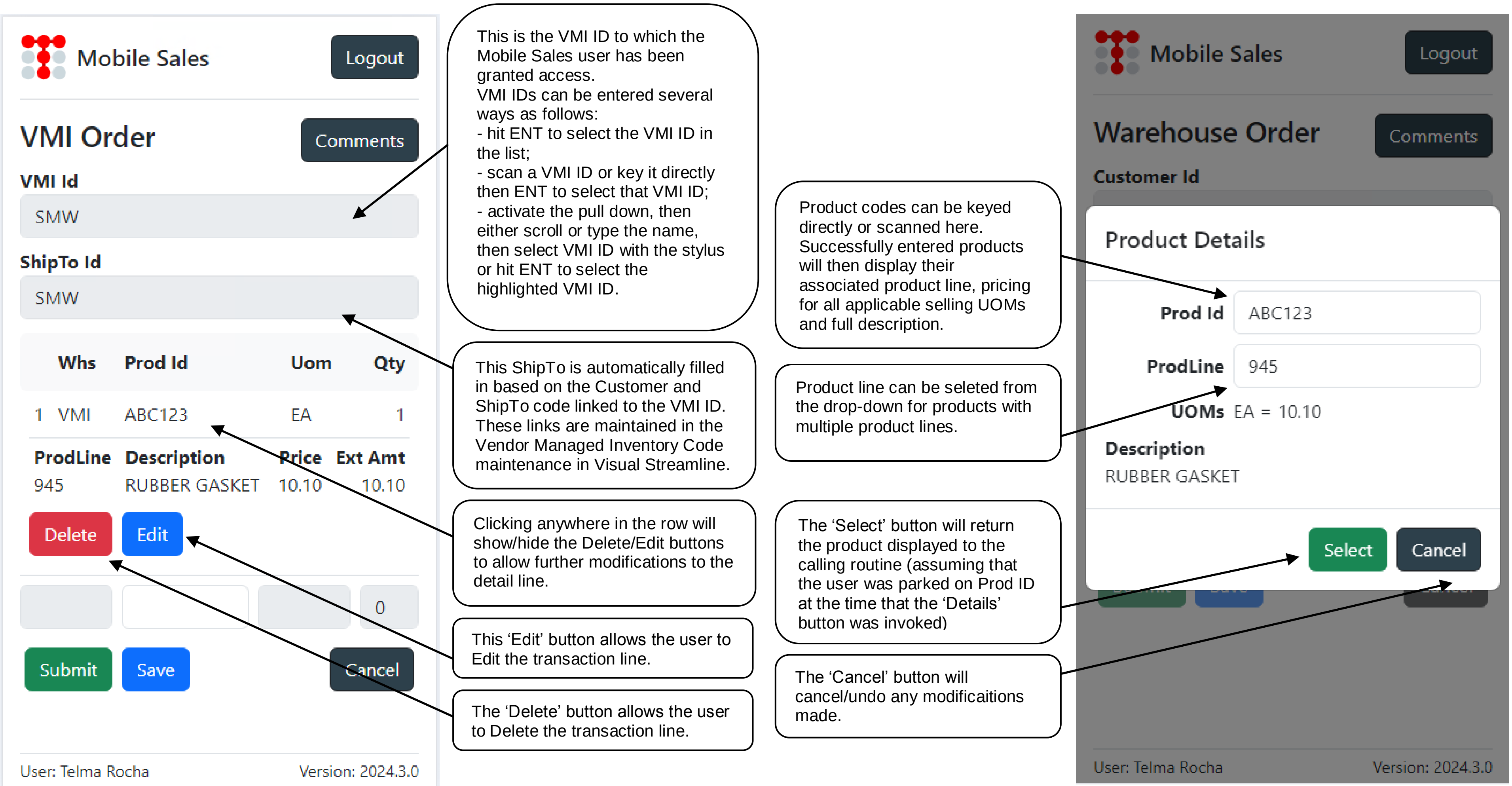
This displays the release version number of the Mobile Sales.

Mobile Sales VMI & Product Details Screen

Now, let's have a look at the actual HandHeld screens. Shown below left is the Vendor Managed Inventory screen.
It is identical in appearance and functionality to the Warehouse Orders screen, with the following exceptions:

- the handheld user is limited to those VMI IDs to which access has been granted in HandHeld Maintenance (see page 5);
- the ShipTo is automatically filled in based on the Customer and ShipTo code linked to the VMI Code in Vendor Managed Inventory Code Maintenance (that functionality is not contained in this document).

Show below right is the Product Details screen, which can be launched from the Details button on the Vendor Managed Inventory screen (as show below) or the Warehouse Orders screen (as shown on the previous page).



Mobile Sales Transaction Details

Now, let's have a look at the Mobile Sales Warehouse Open Transactions Details Edit Screen.
Here you will see the details along with buttons to Edit/Modify the transaction.

Clicking on the logo navigates the user back to the home page if the user is logged in, else it navigates them back to the login page.

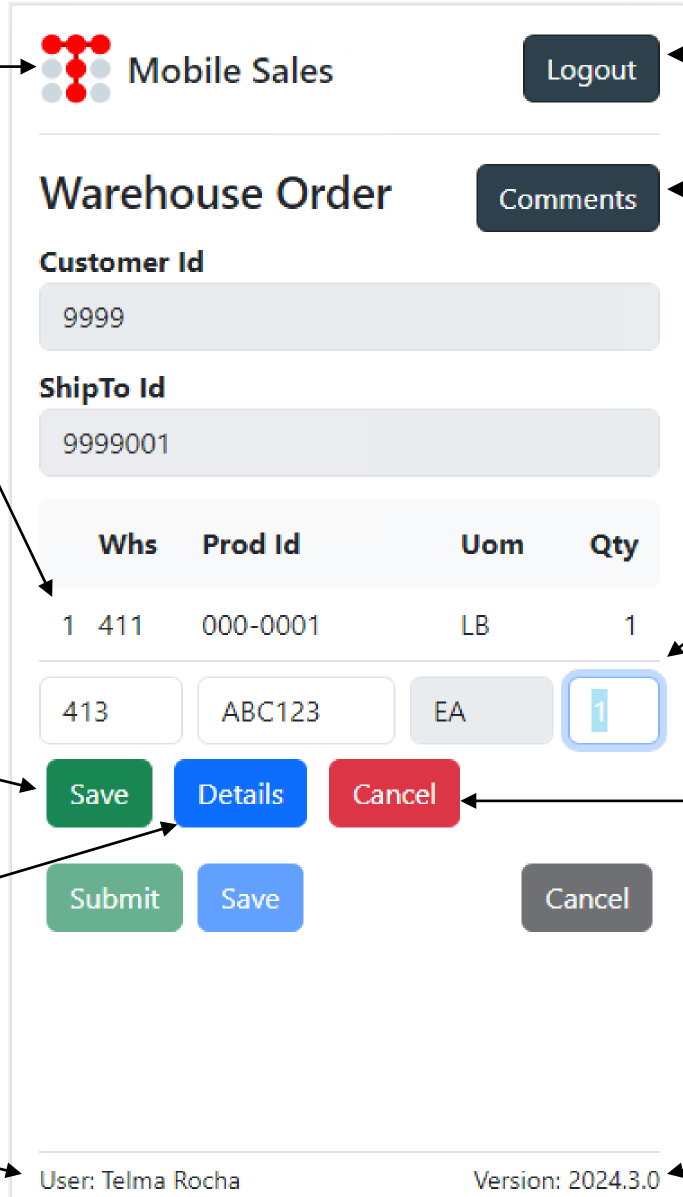
The Logout button is used to logout from the application, takes the user back to the login screen.

This button launches a window to allow the user to enter/edit comments/notes pertaining to the currently highlighted transaction ID.

It is important to note the following:

- these notes do NOT carry through to created orders or quotes;
- these notes are NOT associated with individual detail lines but rather to the order as a whole.

Clicking anywhere in the row will show/hide the Delete/Edit buttons to allow further modifications to the detail line.



User is able to modify/edit the line details and save.

The 'Save' button allows the user to save any changes made to the detail line.

The 'Cancel' button allows the user to cancel any changes made to the detail line.

The 'Details' button allows the user to see the details about the line in a new pop-up window.

This identifies the user currently logged on.

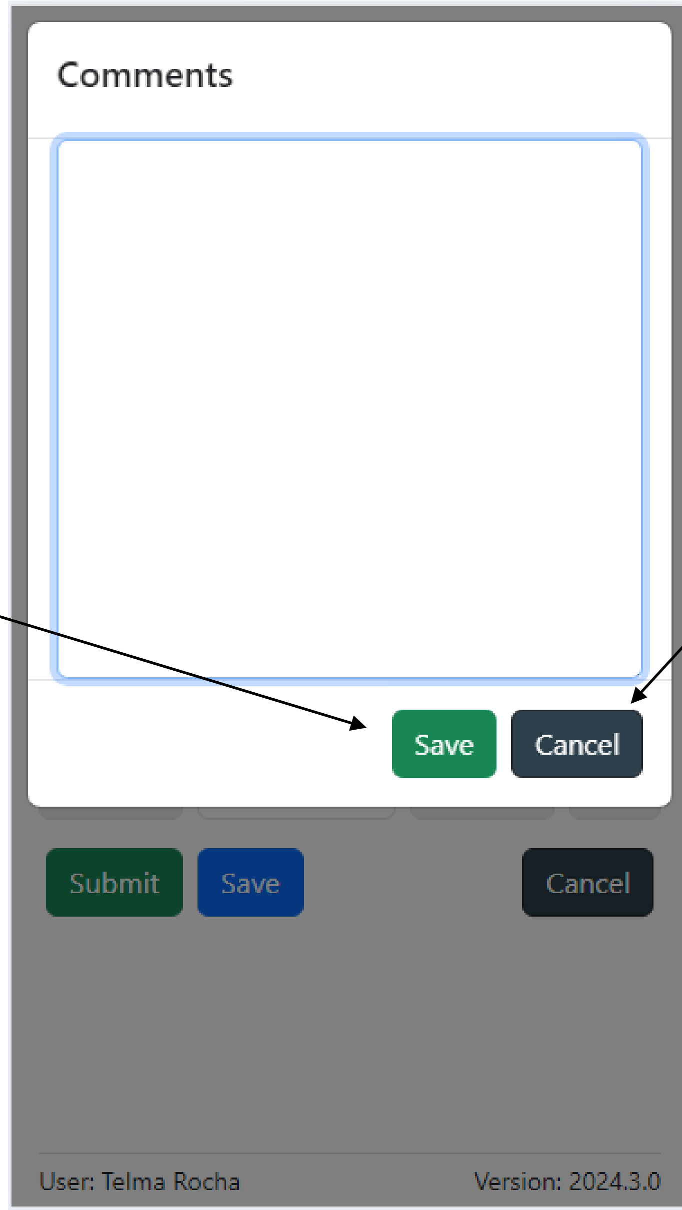
This displays the release version number of the Mobile Sales.

Mobile Sales Transaction Comments

Now, let's have a look at the actual HandHeld screens. Shown below is the Notes/Comments.

This window can be accessed by clicking on the Notes Icon/Button in any of the Transaction Lookup, Warehouse Orders or Vendor Managed Inventory screens.

Notes can be entered from the keypad or scanned.



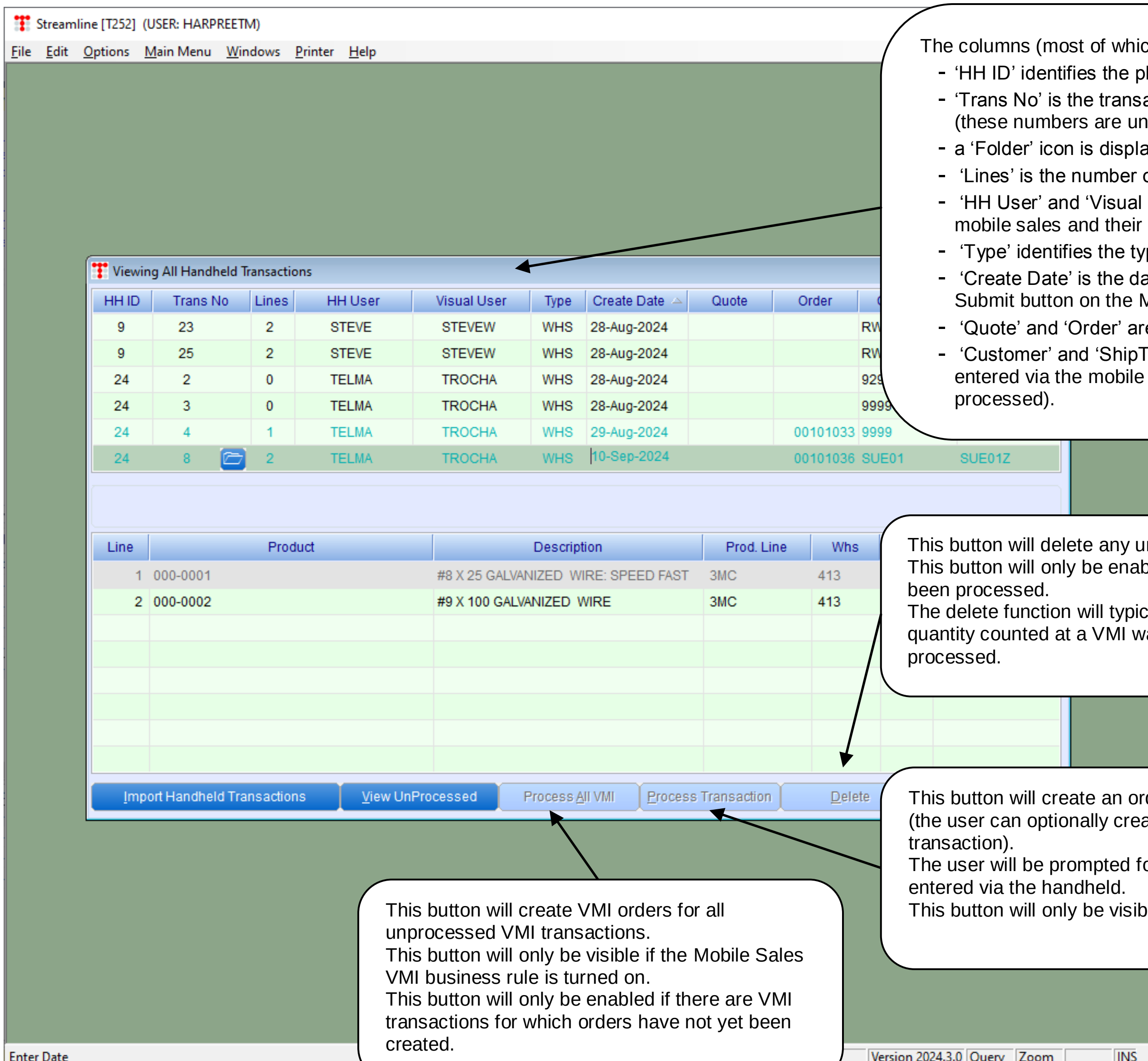
The 'Save' button will save any notes/comments edits, entried or deletions that were made in the current Comments session.

The 'Cancel' button will cancel any notes/comments edits, entried or deletions that were made in the current Comments session.

Mobile Sales Transaction

Handheld > Processing > HandHeld Transactions

The screen shot below shows all handheld transactions that have been uploaded and imported.



The columns (most of which are sortable) in the table represent the following:

- 'HH ID' identifies the physical device from which the transaction originated;
- 'Trans No' is the transaction number generated from the originating mobile sales (these numbers are unique within the HH ID);
- a 'Folder' icon is displayed if there are comments attached to the transaction;
- 'Lines' is the number of detail lines contained in the transaction;
- 'HH User' and 'Visual User' identify the user entering the transaction on the mobile sales and their associated Visual User ID;
- 'Type' identifies the type of mobile sales order (Warehouse or VMI);
- 'Create Date' is the date that the transaction was uploaded to Visual via the Submit button on the Mobile Sales screen;
- 'Quote' and 'Order' are updated when a mobile sales transaction is processed;
- 'Customer' and 'ShipTo' identify the customer and shipto codes that were entered via the mobile sales (these fields are not updated when the transaction is processed).

This button will delete any unprocessed transaction.
This button will only be enabled if the user is parked on a transaction that has not yet been processed.
The delete function will typically be used to delete transactions that cannot (eg. if the quantity counted at a VMI warehouse exceeds the maximum allowed) or need not be processed.

This button will create an order for the transaction on which the user is currently parked (the user can optionally create a quote if the current transaction is a Warehouse type transaction).
The user will be prompted for Customer or Shipto information that was not already entered via the handheld.
This button will only be visible if the transaction on which the user is parked is still open.

This button will create VMI orders for all unprocessed VMI transactions.
This button will only be visible if the Mobile Sales VMI business rule is turned on.
This button will only be enabled if there are VMI transactions for which orders have not yet been created.

Technical Notes Overview

The purpose of this section is to provide a suggested minimum server configuration and setup overview to assist with the successful implementation/installation of Streamline ERP Mobile Sales module. The Mobile Sales module has a very small footprint, approximately 1MB, with some caching requirements, and is very light duty, as far as resources are concerned.

The application can run on the same Streamline ERP server. Access to Mobile Sales will be over the VPN tunnel established from the end point device IE: Smart Phone. Mobile Sales can run from any Windows machine with IIS, as long as it has access to the internet and the Streamline SQL Server.

Standalone Server Specifications

If you require a separate server for Mobile Sales due to security concerns, then the following are the server's minimum requirements.

- MS Server Standard 2016, 2019 & 2022
- 60GB C:\ drive to be used for OS and IIS
- 4GB RAM
- 2GHz or faster CPU

Server Setup and Configuration

- The installation of the Windows operating system on the server will need to include Internet Information Server (IIS), .Net 4.5, and the .NET ASP IIS components.
- You need to setup a VPN solution that the end points (Smart Phones) can connect to so it can access the Mobile Sales application via a web browser on the local network.
- The required SQL ports will need to be opened on the corporate firewall, by you, to allow the IIS application to communicate with Streamline SQL server for data.
- Requirements of the End Point Device.
- A mobile device IE : Smart Phone with Bluetooth running Safari, Firefox, Chrome or Edge web browser.
- A mobile device IE: Smart Phone that can connect to the internal network via VPN.
- A Bluetooth Barcode Scanner. https://buy.serialio.com/collections/frontpage/products/scanfob%C2%AE-2006-bluetooth-barcode-scanner.

Your Responsibility

- You are responsibility to instal and configure the IIS environment on your Streamline ERP server or the new server as required, based on your IT security policies.
- You need to ensure the respective SQL ports are open and can communicate between the servers (if multiple servers are involved).
- You need to setup a DNS record (e.g. "ms.[ourdomain].local") that will point to the IIS server.
- You need to provide TECSYS Professional Services with proper credentials to log into the server with installation and configuration access.
- You are responsible to maintain all non-Mobile Sales-Application related server requirements including, but not limiting to: communication between servers, Windows updates, and so on..
- You are responsible to setup a VPN connection so the mobile devices can connect to it.

Tecsys Configuration and Training

Once the IIS environment configuration is completed by the client, TECSYS Project Services will install and configure the Mobile Sales application and test the environment.

Once configured and tested, TECSYS Professional Services will arrange for training with the you on user configuration and operation.

If you have feedback regarding this help page, please send us a quick e-mail to Idmsupport@tecsys.com.
We appreciate your input.