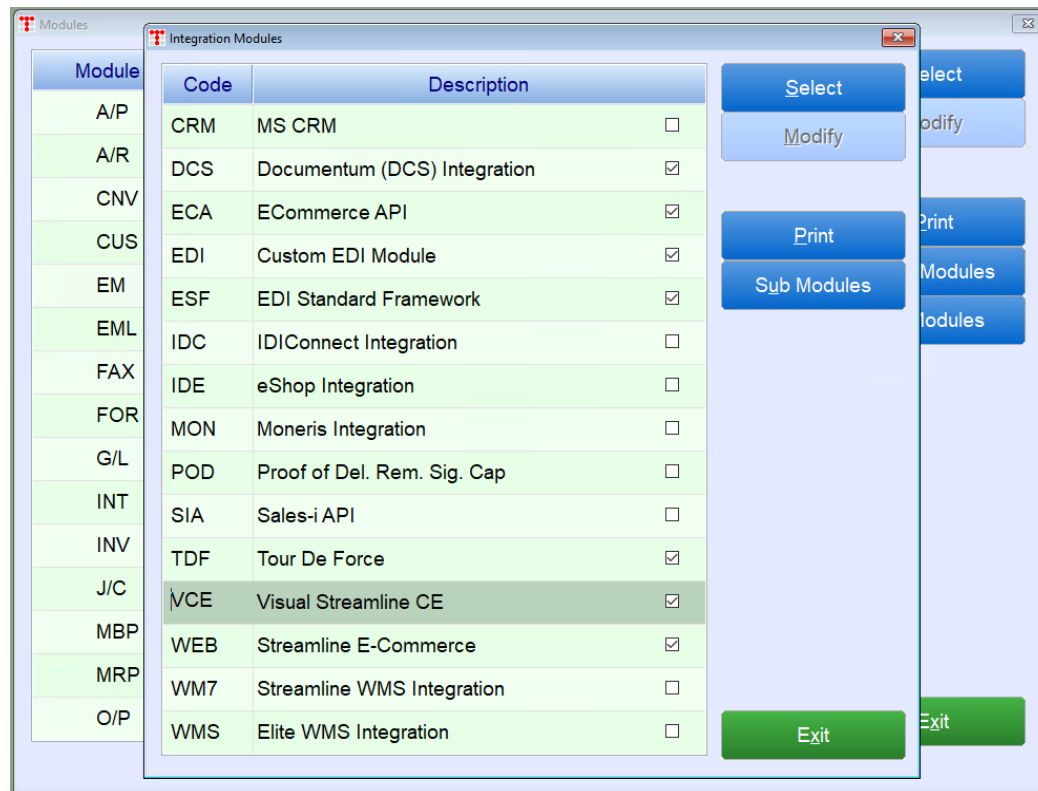


# Visual Streamline FAQ

## 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.

The screenshot displays two windows from the Visual Streamline application. The top window, titled "Sub Modules", contains a table with columns "Sub Module", "Description", and "Active". It lists four modules: MVM (Mobile VMI), MWH (Mobile Warehouse), VMI (Handheld VMI), and WHS (Handheld Warehouse). The bottom window shows a "J/C" (Job Control) section with a table listing various integration options like VCE, WEB, WM7, and WMS.

| Sub Module | Description        | Active                              |
|------------|--------------------|-------------------------------------|
| MVM        | Mobile VMI         | <input checked="" type="checkbox"/> |
| MWH        | Mobile Warehouse   | <input checked="" type="checkbox"/> |
| VMI        | Handheld VMI       | <input type="checkbox"/>            |
| WHS        | Handheld Warehouse | <input type="checkbox"/>            |

| J/C |                      |                                     |                                     |
|-----|----------------------|-------------------------------------|-------------------------------------|
| VCE | Visual Streamline CE | <input checked="" type="checkbox"/> |                                     |
| MBP | WEB                  | Streamline E-Commerce               | <input checked="" type="checkbox"/> |
| MRP | WM7                  | Streamline WMS Integration          | <input type="checkbox"/>            |
| O/P | WMS                  | Elite WMS Integration               | <input type="checkbox"/>            |

Using a mobile sales/remote device, the user, as Vendor, can Manage customers' Inventory as follows:

- scan/input VMI code into transaction headers;
- scan/input items by product code, UPC or alias, UOMs and quantities into transaction details;
- users' non-submitted transactions are fully maintainable within the mobile sales/remote device;
- data can be synchronized (ie. transactions submitted and required data imported) on demand with Visual Streamline.

Within Visual, submitted mobile sales transactions can then be imported for processing (ie deletion or order creation (refilling to VMI location's maximums or not, depending on VMI code details)).

Using a mobile sales/remote device, the user can process quotes/orders as follows:

- scan/input customer/shipto code into transaction headers;
- scan/input items by product code, UPC or alias, UOMs and quantities into transaction details;
- users' non-submitted transactions are fully maintainable within the mobile sales/remote device;
- data can be synchronized (ie. transactions submitted and required data imported) on demand with Visual Streamline.

Within Visual, submitted mobile sales transactions can then be imported for processing (ie deletion or order creation (refilling to VMI location's maximums or not, depending on VMI code details)).

## 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.

**Choose role**

| Roles       | Description                    |
|-------------|--------------------------------|
| RTFPM       | Right To Future Price Maint    |
| RTGLEU      | Right To G/L Entry/Update      |
| RTGLFS      | Right To G/L Financial Stmt    |
| RTGLI       | Right To G/L Inquiry           |
| RTGLIP      | Right To G/L Inquiry Program   |
| RTGLISM     | Right To G/L Inquiry Sub Menu  |
| RTGLMF      | Right To G/L Master Files      |
| RTGLRI      | Right To G/L Rep. & Inquiry    |
| RTGBOFLUSH  | Right To Global B/O Flush      |
| <b>RTHH</b> | <b>Right To Handheld</b>       |
| RTBRNTRN    | Right To InterBranch Transfers |
| RTICC&S     | Right To InterComp Cust&Supp   |
| RTIGBLCHG   | Right To Inv Global Changes    |
| RTINVPHYUP  | Right To Inv Physical Update   |
| RTINTRNREG  | Right To Inv Trans Register    |
| RTINVTRAN   | Right To Inv Transactions      |
| RTINVMF     | Right To Inv. Master Files     |
| RTINVP      | Right To Inv. Processing       |
| RTINVRI     | Right To Inv. Rep. & Inquiry   |
| RTINVRMA    | Right To Inv. RMA Processing   |

**Streamline [T252] (USER: HARPREETM)**

File Edit Options Main Menu Windows Printer Help

**Streamline Development SQL2022 04**

Search Clear

**General Ledger**

- Accounts Payable
- Accounts Receivable
- Sales Order Processing
- Inventory
- Purchase Order Processing
- Sales Analysis
- Returns Authorization
- Pricing
- Company Setup
- Executive Management
- Installation
- Job Cost
- Service Work Order
- Change Companies
- Data Dictionary
- Service Inquiry
- Streamline Utilities
- Allpriser Integration
- 3M Integration
- Custom EDI Module
- Fax Cover Sheet
- Streamline E-Commerce
- Change User Warehouse
- Handheld**
  - Master Files**
  - Handheld Users
- Processing
- Internal Utilities
- EDI Standard Framework
- Conversion (Internal TECSYS)
- Custom Reports

**Recent Searches**

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- Contract Pricing
- Modules
- Availability And Valuation
- Licensed Users Maintenance
- Application Mappings
- Application EDI Parameters
- Company EDI Parameters
- Trading Partners
- Process EDI Documents
- Display EDI Audit
- Suppliers
- Bank Accounts
- Change User Warehouse
- Handheld Users
- Company Business Rules

The Right to Handheld (RTHH) allows full access to all programs and functionality contained herein.

Warehouse: 425 Terminal: 252 Logged In: 05-Sep-2024 11:49:35

harpreetm Version 2024.3.0 Query IINS

## 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.

The screenshot shows the Streamline [T252] (USER: HARPREETM) application. The main window is titled 'Handheld Users' and contains a table with the following columns: User ID, User Name, and Streamline User ID. The table lists several users, including CHARLES, CHERYL, CRYSTALT, GTOOR, STEVE, STEVE2, and TELMA. A 'Modify Handheld User Accounts' dialog box is open, showing the details for user TELMA. The dialog box includes fields for Handheld User ID (TELMA), User Name (Telma Rocha), Warehouse ID (413 Brantford Warehouse), Language (1 English), User Password, Streamline User ID (TROCHA), and a 'Locked' checkbox. The dialog box also has 'Prev.', 'Save', 'Cancel', and 'Next' buttons. On the right side of the 'Handheld Users' window, there are buttons for 'Select', 'Modify', 'New', 'Delete', 'VMI Codes', and 'Exit'. The 'VMI Codes' button is highlighted with a callout box.

| User ID  | User Name | Streamline User ID |
|----------|-----------|--------------------|
| CHARLES  | CHARLES   | CMAGEE             |
| CHERYL   |           |                    |
| CRYSTALT |           |                    |
| GTOOR    |           |                    |
| STEVE    |           |                    |
| STEVE2   |           |                    |
| TELMA    |           |                    |

**Modify Handheld User Accounts**

Handheld User ID: TELMA  
User Name: Telma Rocha  
Warehouse ID: 413 Brantford Warehouse  
Language: 1 English  
User Password:   
Streamline User ID: TROCHA ☐ Locked

Prev. Save Cancel Next

**VMI Codes**

Exit

This button is only visible if the sub-module rule for Handheld VMI is turned on.  
Further, it is only bolded if there are VMI codes linked to the HandHeld user on which we are parked.

## 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.

The screenshot displays the Streamline [T252] (USER: HARPREETM) application interface. The main window is titled "Handheld Users" and contains a table with the following data:

| User ID | User Name                         | Streamline User ID |
|---------|-----------------------------------|--------------------|
| CHARLES | CHARLES                           | CMAGEE             |
| CHERYL  | Cheryl Mehrer                     | CHERYLM            |
| CRYSTAL | Crystal T                         | CRYSTALT           |
| GTOOR   | George Toor                       | GTOOR              |
| STEVE   | Steve Weiss (Handheld User STEVE) | STEVEW             |
| STEVE2  |                                   |                    |
| TELMA   |                                   |                    |

On the right side of the "Handheld Users" window, there are buttons for "Select", "Modify", "New", "Delete", and "VMI Codes". The "VMI Codes" button is highlighted, and a pop-up window titled "VMI Codes for Handheld User STEVE" is open. This pop-up window contains a table with the following data:

| VMI Whse | VMI Code | Description                  |
|----------|----------|------------------------------|
| VMI      | SMW      | SMW VMI Location (Main)      |
| VMI      | SMW01    | SMW VMI Location (ShipTo 01) |
| VMI      | SMW02    | SMW VMI Location (ShipTo 02) |

On the right side of the "VMI Codes for Handheld User STEVE" window, there are buttons for "Select", "Modify", "New", and "Delete". An arrow points from the text box below to the "VMI Codes" button in the "Handheld Users" window.

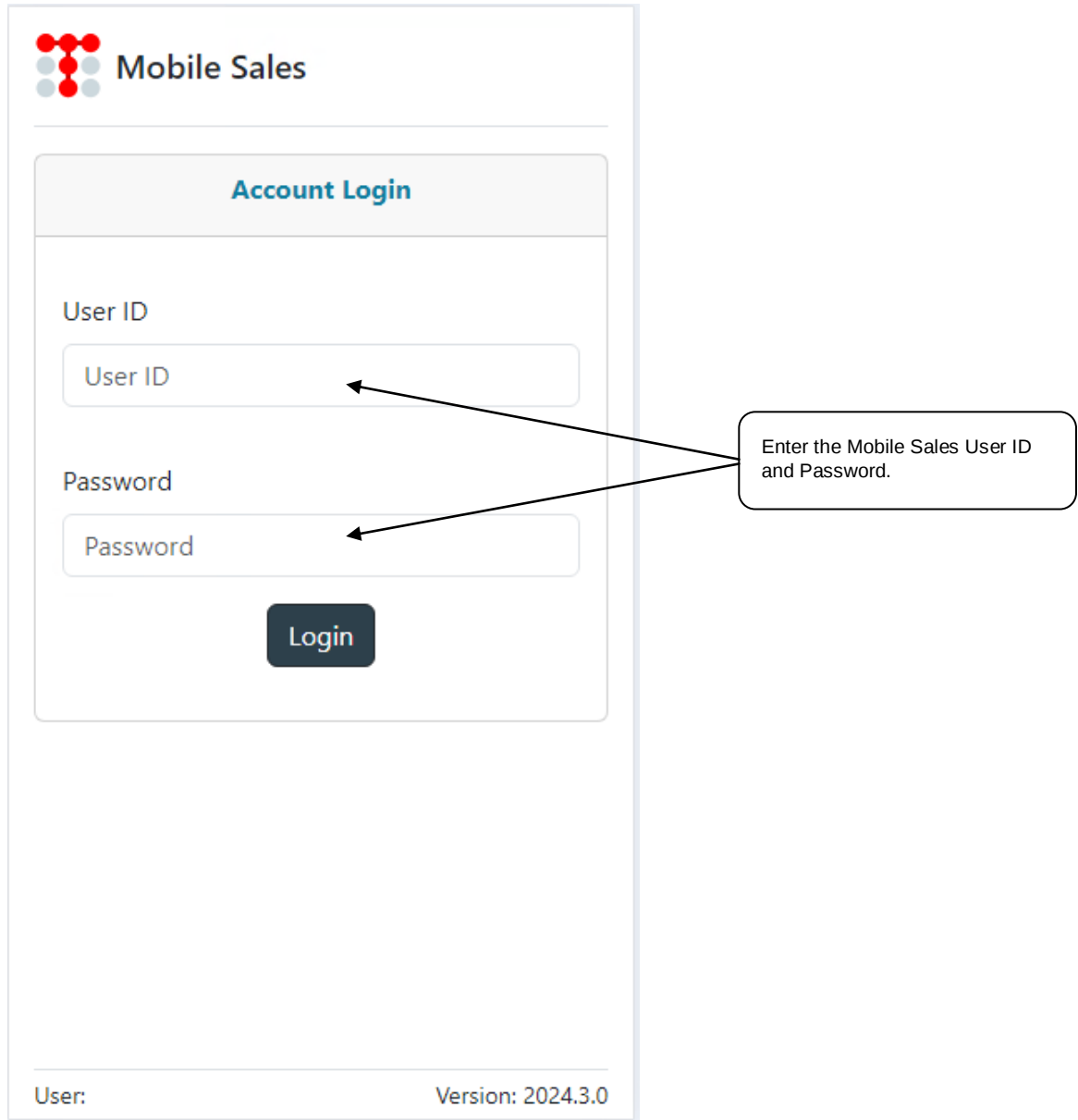
These are the VMI Codes (consignment warehouses) accessible to user STEVE. They must pre-exist in order to be linked to a Mobile Sales user.

The VMI Codes, their associated VMI warehouse and items are created and maintained within Inventory > Vendor Managed Inventory > Maintenance > Maintain VMI Codes.

At the bottom of the application window, the status bar shows: harpreetm | Version 2024.3.0 | Query | Zoom | WIDE | INS

## Mobile Sales

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



The image shows a mobile application login screen for 'Mobile Sales'. At the top left is a logo consisting of a 3x3 grid of dots, with the top-left dot being red and the others grey. To the right of the logo is the text 'Mobile Sales'. Below this is a light grey header bar with the text 'Account Login' in blue. The main content area contains two input fields: 'User ID' and 'Password', each with a light grey border and a light grey background. Below these fields is a dark blue button with the text 'Login' in white. A callout box on the right side of the screen contains the text 'Enter the Mobile Sales User ID and Password.' with two arrows pointing to the 'User ID' and 'Password' input fields. At the bottom of the screen, there is a footer bar with the text 'User:' on the left and 'Version: 2024.3.0' on the right.

Mobile Sales

Account Login

User ID

Password

Login

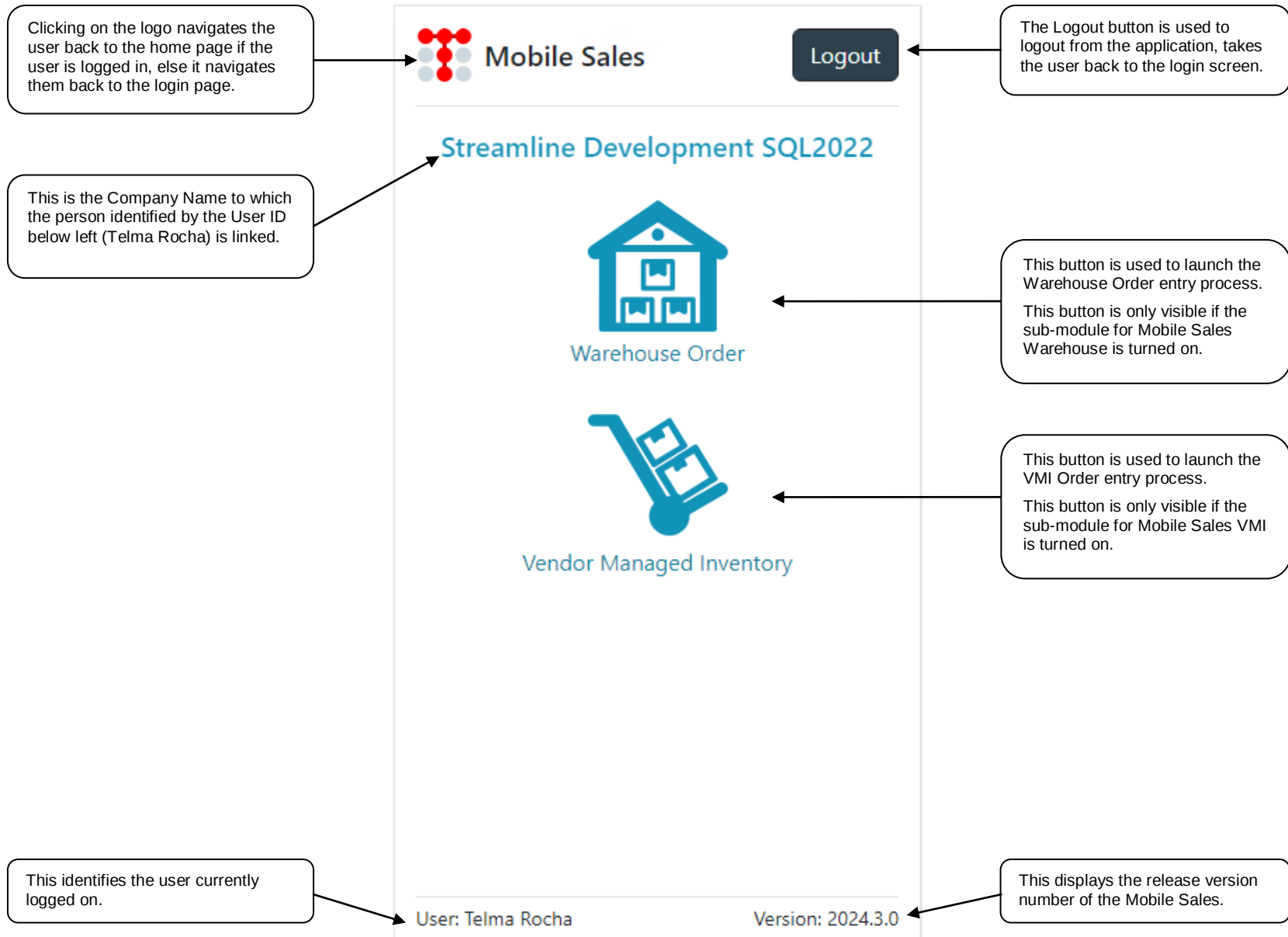
Enter the Mobile Sales User ID and Password.

User: Version: 2024.3.0

## 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).



## Mobile Sales

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

The screenshot shows the 'Warehouse Order' screen in the Mobile Sales application. It features a header with the 'Mobile Sales' logo and a 'Logout' button. The main section is titled 'Warehouse Order' and contains an 'Open' button, a 'Customer Id' input field, and a 'ShipTo Id' input field. The footer displays the user 'User: Telma Rocha' and the version 'Version: 2024.3.0'. Callouts provide detailed explanations for each element:

- Mobile Sales Logo:** 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.
- Logout Button:** The Logout button is used to logout from the application, takes the user back to the login screen.
- Open Button:** 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).
- Customer Id Field:** 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.
- ShipTo Id Field:** 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.
- User:** This identifies the user currently logged on.
- Version:** 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.



## 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.

The screenshot displays the 'Mobile Sales' application interface. At the top, there is a header bar with the 'Mobile Sales' logo on the left and a 'Logout' button on the right. Below the header, the main content area is titled 'Saved Transactions' and includes a 'Close' button. The 'Transactions' section contains a table with three columns: 'ID', 'Customer Id', and 'ShipTo Id'. The first row is highlighted in blue. Below the table, there are two buttons: 'Delete' (red) and 'Open' (dark blue). The 'Details' section below the buttons shows a table with four columns: 'Whs', 'Product Id', 'UOM', and 'Qty'. The first row is highlighted in blue. At the bottom of the screen, there is a footer bar showing the user's name 'User: Telma Rocha' and the version 'Version: 2024.3.0'.

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.

| ID | Customer Id | ShipTo Id |
|----|-------------|-----------|
| 17 | 9290-1106   | 9290-1106 |
| 26 | 9999        | 9999      |
| 28 | 9999        | 9999001   |

| Whs   | Product Id | UOM | Qty |
|-------|------------|-----|-----|
| 1 413 | 000-0001   | LB  | 1   |
| 2 413 | 000-0002   | LB  | 2   |

User: Telma Rocha Version: 2024.3.0

## 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.

The screenshot displays the 'Warehouse Order' screen in the Mobile Sales application. The interface includes a header with the 'Mobile Sales' logo and a 'Logout' button. Below the header, there's a 'Comments' button. The main section shows 'Customer Id' (9999) and 'ShipTo Id' (9999001). A table lists transaction details with columns: Whs, Prod Id, Uom, Qty, ProdLine, Description, Price, and Ext. The first row shows '1 413 000-0001 LB 1'. Below the table, there's a 'Delete' button (red) and an 'Edit' button (blue). At the bottom, there are 'Submit' (green), 'Save' (blue), and 'Cancel' (dark blue) buttons. The footer shows 'User: Telma Rocha' and 'Version: 2024.3.0'.

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.

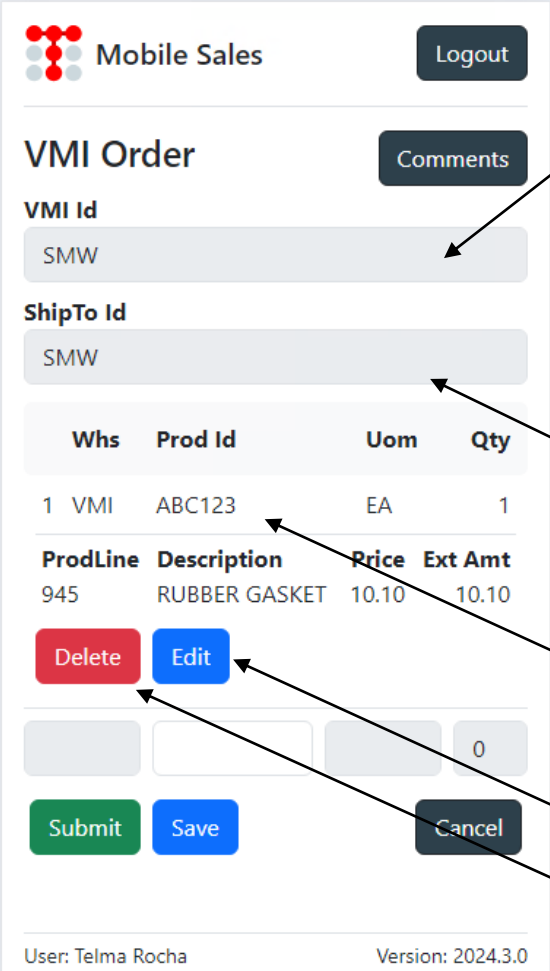
## Mobile Sales VMI & Product Details Screen

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).



This is the VMI ID to which the Mobile Sales user has been granted access. VMI IDs can be entered several ways as follows:

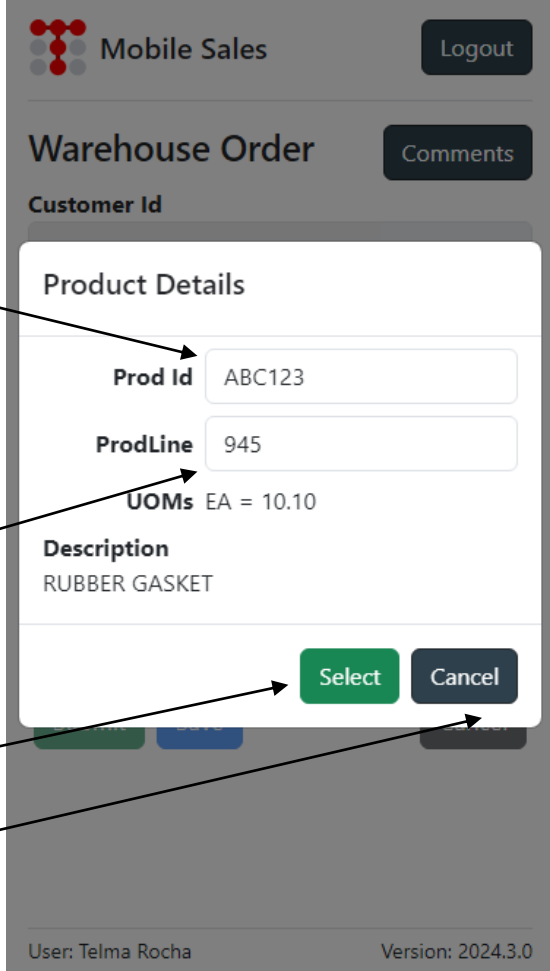
- hit ENT to select the VMI ID in the list;
- scan a VMI ID or key it directly then ENT to select that VMI ID;
- activate the pull down, then either scroll or type the name, then select VMI ID with the stylus or hit ENT to select the highlighted VMI ID.

This ShipTo is automatically filled in based on the Customer and ShipTo code linked to the VMI ID. These links are maintained in the Vendor Managed Inventory Code maintenance in Visual Streamline.

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

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

The 'Delete' button allows the user to Delete the transaction line.



Product codes can be keyed directly or scanned here. Successfully entered products will then display their associated product line, pricing for all applicable selling UOMs and full description.

Product line can be selected from the drop-down for products with multiple product lines.

The 'Select' button will return the product displayed to the calling routine (assuming that the user was parked on Prod ID at the time that the 'Details' button was invoked)

The 'Cancel' button will cancel/undo any modifications made.

## 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.

The screenshot displays the 'Warehouse Order' screen in the Mobile Sales application. The interface includes a header with the 'Mobile Sales' logo and a 'Logout' button. Below the header, there's a 'Comments' button. The main section contains input fields for 'Customer Id' (9999) and 'ShipTo Id' (9999001). A table lists transaction details with columns: Whs, Prod Id, Uom, and Qty. The first row shows '1 411 000-0001 LB 1'. Below the table, there are input fields for '413', 'ABC123', and 'EA', followed by a quantity field with '1'. At the bottom, there are buttons for 'Save', 'Details', 'Cancel', 'Submit', and another 'Save' button. The footer shows the user 'User: Telma Rocha' and the version 'Version: 2024.3.0'.

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.

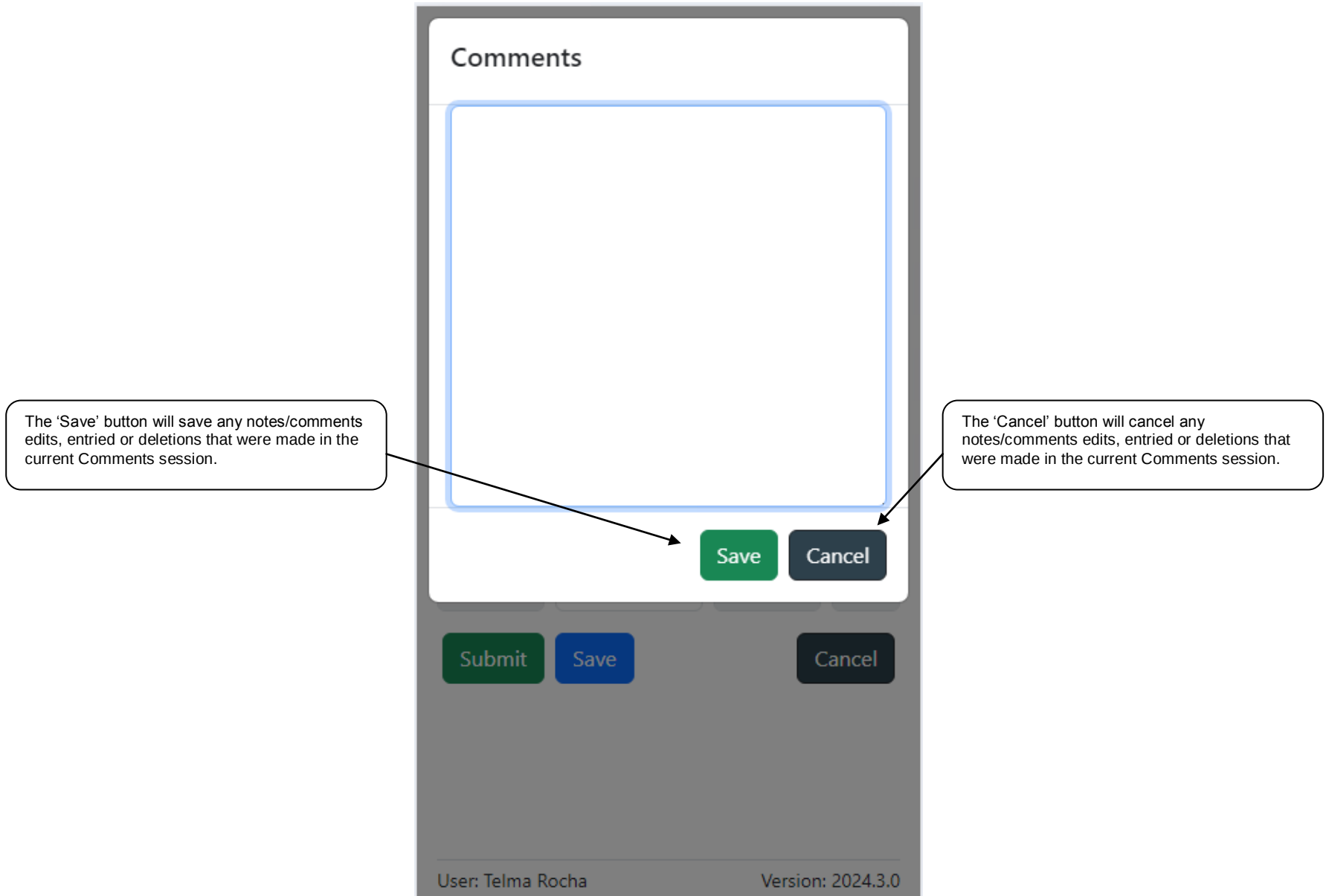
This identifies the user currently logged on.

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.



## Mobile Sales Transaction

Handheld > Processing > HandHeld Transactions

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

**Streamline [T252] (USER: HARPREETM)**

File Edit Options Main Menu Windows Printer Help

**Viewing All Handheld Transactions**

| HH ID | Trans No | Lines | HH User | Visual User | Type | Create Date | Quote | Order                 |
|-------|----------|-------|---------|-------------|------|-------------|-------|-----------------------|
| 9     | 23       | 2     | STEVE   | STEVEW      | WHS  | 28-Aug-2024 |       | RW                    |
| 9     | 25       | 2     | STEVE   | STEVEW      | WHS  | 28-Aug-2024 |       | RW                    |
| 24    | 2        | 0     | TELMA   | TROCHA      | WHS  | 28-Aug-2024 |       | 929                   |
| 24    | 3        | 0     | TELMA   | TROCHA      | WHS  | 28-Aug-2024 |       | 9999                  |
| 24    | 4        | 1     | TELMA   | TROCHA      | WHS  | 29-Aug-2024 |       | 00101033 9999         |
| 24    | 8        | 2     | TELMA   | TROCHA      | WHS  | 10-Sep-2024 |       | 00101036 SUE01 SUE01Z |

**Transaction Details:**

| Line | Product  | Description                         | Prod. Line | Whs |
|------|----------|-------------------------------------|------------|-----|
| 1    | 000-0001 | #8 X 25 GALVANIZED WIRE: SPEED FAST | 3MC        | 413 |
| 2    | 000-0002 | #9 X 100 GALVANIZED WIRE            | 3MC        | 413 |

**Buttons:** Import Handheld Transactions View UnProcessed Process All VMI Process Transaction Delete

**Callout 1 (Columns):** 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).

**Callout 2 (Delete Button):** 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.

**Callout 3 (Process All VMI Button):** 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.

**Callout 4 (Process Transaction Button):** 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.

Enter Date

Version 2024.3.0 | Query | Zoom | INS

## 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](mailto:Idmsupport@tecsys.com).

We appreciate your input.