

# Smobi Userguides

## Smobi - Mobile Userguide

### Objects available on Smobi

\* Note some options are only available if the object is selected as an object in the Smobi schema i.e. if "Contacts" is not selected as an object in the schema you will not be able to add a new contact to an "Account" for instance. If you add "Contact" to your Smobi schema this option will become available.

Objects on Smobi generally have the following options:

- "Search" object
- "Edit" object
- "Add a note"
- "Add or New" object
- "Recently Updated"
- "Recently Created"

#### **"Search" object**

The "Search" option will allow you to search your Objects by entering for example a company name or part of the company name. You results will be in a list format showing 10 results at a time by default. You have the option at the bottom of the screen to "view next" which will give you the next 10 results, and so forth.

#### **"Edit" object**

The "Options" option will give you the option to "Edit", "View Object", and "Add a Note" to an object.

When choosing "Edit", you will be able to edit all the fields like the "Account Name", the "Account Type", etc.

#### **"Add a Note"**

To "Add a Note", you will be prompted for a "Title" of the note which is compulsory and then the "Body" of the note. This note will then be added to that specific object.

\* A note has to be associated with an Object. You cannot create a freestanding note.

### **"Add or New" object**

You are able to add objects by selecting the "add Objects" option. Complete the mandatory fields and select add

### **"Recently Updated"**

The "Recently Updated" objects will list the titles of the latest 10 objects that have been updated.

### **"Recently Created"**

The "Recently Created" objects will list the titles of the latest 10 objects that have been created.

## **Phone requirements**

Before you can start you have to ensure that you have a compatible mobile phone.

The two requirements are that your phone is JAVA and GPRS enabled. Most phones are JAVA, GPRS capable.

Smobi is compatible with Midp 1.0 devices onwards. This is most available devices from about 2002 onwards.

## **Enabling your Data connection**

To access Smobi from your mobile device you require a working data connection. Most mobile devices are data capable and if you can access the internet from your device your data access is enabled. If not you will have to enable data access.

If the phone is capable of the above the next step is to activate the GPRS and MMS functions on your phone.

Contact your network service provider and request data access to be activated for your mobile device.

## Getting Smobi on your mobile device

- Open your mobile device internet browser
- Enter <http://www.getsmobi.com> in the "go to" address bar
- Select the link displayed
- Follow the prompts to complete the download
- Click on the Smobi application to launch
- The Application is generally stored under applications, games or Java

## Login to your Salesforce account

At the login screen enter your Salesforce username and your Salesforce password.

If your Salesforce administrator has not set Smobi as a trusted IP you will be required to enter your Security token in the security token field. The token only needs to be entered the first time that you login to Smobi.

Note: If your Salesforce administrator set Smobi as a trusted IP the security token field has to be left empty.

## Menu of your Smobi mobile application

Your Menu screen will have the following default options, namely "Accounts", "Contacts" and "Notes". More objects can be added from the Administrator web interface.

"Accounts" will give you the option to view or create your accounts that you normally have on your desktop Salesforce interface.

"Contacts" will give you access to the contact details as on the desktop interface and you will also be able to edit or add a contact.

"Notes" allows you to add notes to a specific option.

## Other

On the Login Screen you have "More..." option.

This option gives you access to an "About" page which explain a bit more about the development house and their technology.

The "Privacy Policy" is explained quite briefly - the extensive version is available on <http://smobi.virtualmobiletech.com/terms-and-conditions>

At the "Password Settings" option, you can select whether Smobi should remember your password or not. You can also select whether to hide your password characters or not.

The "Style Settings" option allows you to choose whether you would like to "Set Font" or "Set Theme". The "Set Font" option allows you to choose between a Large, Small or Default font. The "Set Theme" option allows you to choose between the default styling or a more corporate style (in red and gray) or a green themed style.

## **Where can I retrieve my password?**

If you have forgotten your password please go to the Salesforce website and follow the lost password prompt.

## **Authenticate Smobi on Salesforce.com**

### **Ask your Salesforce administrator to add Smobi to the Trusted IP range:**

If Smobi is included as a trusted IP on the Salesforce account it will negate the need to enter the security token on the mobile device the first time the user login to Smobi mobile. The security token is difficult to enter correctly and each mobile user is required to enter it the first time they login to Smobi mobile. It is recommended that Smobi is added as a trusted IP since it is only required to be done once on the Administration web interface.

Note: If the IP is set Smobi users does not have to enter their security tokens on their mobile devices.

The administrator can view the process of adding Smobi as a trusted IP in the Administrator User Guide.

**OR**

### **Enter the security token**

If you do not have your existing security token, you can get it by logging on to your Salesforce account on your desktop. Click on "Setup" in the top right corner where you will find the "Setup - Help - Logout" options. A page

with "Your Personal Setup" will appear. In the "My Personal Information" field, click on the third option.

"Reset your Security Token", which will take you to a next page where you have to click on "Reset Security Token" to confirm the action. Your security token will be sent to the email address connected to your Salesforce account.

When entering your security token, you will use your password plus your token that has been emailed to you. For instance if your password is "password" and your token "xxxxxx", you will enter "password xxxxxx". Your Security token will be saved on your mobile application and you will not have to enter it every time you login.

On the bottom of your screen you will find an OK button on the right-hand side. Click on that navigation button to log into your Salesforce mobile application.

### **The application does not work on my phone**

E-mail us your phone model, mobile number and a description of the problem. E-mail:

[support@virtualmobiletech.com](mailto:support@virtualmobiletech.com)

## **Smobi - Administrator userguide**

The Administrator Guides will provide guidelines for the administrator to manage and customise Smobi mobile accounts.

### **Register and login for Smobi**

Click on "Free Trail"

You will be prompted for your "First Name", "Last Name" and "Country". Next you are asked to enter your "Salesforce Username", this will be the username that you use to login to Salesforce. The last step requires you to enter the text displayed in the text box. When completed click on register.

You will receive an confirmation email from [support@virtualmobiletech.com](mailto:support@virtualmobiletech.com) This e-mail address is being protected from spambots. You need JavaScript enabled to view it , click on the link to complete registration. Login to the Smobi Administrator web interface with your user name and temporary password as indicated in the Smobi registration email.

Once you have logged in you can reset the password.

To access the Administrator web interface after registration go to the Smobi website and click on Administrator login.

## **Other options for your Smobi application**

The administrator interface provides you with the options to "Manage your custom schemas" and to "Manage your accounts". These options enables the administrator to add new Smobi users and to customise the user interface for each user.

### **Manage your custom schemas**

This option enables the administrator to create new schemas, edit schemas or delete schemas. The default schema is the one displaying the Salesforce objects Accounts, Contacts and Notes.

To create a new schema, click on "New Custom Schema", enter a name for the schema and a description. Click "Okay".

To customise your new schema further, click on the name of your schema. This will display the page where you can add your Salesforce objects. All the possible options that you have in your Salesforce Web based CRM, is displayed in the drop down box. (Note: Only add objects that the user will use, otherwise you will end up with a rather lengthy menu on your mobile application.)

Click on "Add", to add Objects to the list of displayed objects. All objects will appear in the "Included Salesforce Objects" menu. Objects can be deleted or edited from here. .

To "Edit" the object, click on the Name of the object, for example "Accounts". From here you can add more Salesforce object fields to the Mandatory fields.

When you are done click on the "Manage Custom Schemas" option on the menu left to return you to the schema menu.

### **Manage your Accounts on the Smobi web interface**

This option enables the administrator to manage his users' accounts. You can assign specific schemas for specific users from here.

To edit an account, click on the edit option next to the account name. This will allow you to change the schema that the user will see when using the mobile application.

To add an account, click on the "Add Account" option. Enter the account's username (which will be the account holder's username) and choose the schema that should be associated with the new user.

## Customising Smobi

Smobi is designed to be customised by the administrator to only display the Salesforce objects that your user's requires.

The administrator can customise Smobi on the Smobi Administrator web interface.

### **Manage your custom schemas:**

This option enables you to create new schemas, edit schemas or delete schemas.

Select "Manage Custom Schemas" from the Menu

Click on "Add New Custom Schema", this will prompt you for a name for the schema and a description. Click "Okay".

### **Add objects to a schema:**

Click on the "new schema name" displayed to add Salesforce objects to your new schema. All the possible options that you have in your Salesforce Web based CRM, is displayed in the drop down box from where you can add additional objects..

After selecting the objects and clicking on "Add", your list of objects will appear in the "Included Salesforce Objects" menu. You can "Delete" or "Edit" the available objects.

### **Edit available object fields:**

To "Edit" the object click on the object, for example "Accounts". You will now be able to add more Salesforce object fields to the Mandatory fields that are set for the specific object.

## Default Smobi Schema on your mobile device

Your Menu screen will have the following default options, namely "Accounts", "Contacts" and "Notes". More objects can be added on the Smobi Administrator web interface.

"Accounts" will give you the option to view or create your accounts that you normally have on your desktop Salesforce interface.

"Contacts" will give you access to the contact details as on the desktop interface and you will also be able to edit or add a contact.

"Notes" allows you to view or add notes associated with objects.

## **Authenticate Smobi on Salesforce**

Salesforce requires that third party applications are authenticated as a security measure. There are two authentication methods.

- The company Salesforce administrator can add the Smobi address to the trusted IP range on the company Salesforce account. This is the recommended method since it negates the need for each Smobi mobile user to enter the security token on their mobile devices.
- Each Smobi mobile user must enter their security token that is linked to their Salesforce account the first time they login to Smobi mobile. The security token is long and difficult to enter, it is therefore recommended that the Administrator sets the Smobi address as a trusted IP.

### **Adding Smobi to the Trusted IP range:**

To manage the list, go to Setup -> Administration Setup -> Security Controls -> Network Access -> New -> IP:79.125.11.60 (begin and end range)

**OR**

### **Get your security token.**

If you do not have your existing security token, you can get it by logging on to your Salesforce account on your desktop. Click on "Setup" in the top right corner where you will find the "Setup - Help - Logout" options. A page with "Your Personal Setup" will appear. In the "My Personal Information" field, click on the third option.

"Reset your Security Token", which will take you to a next page where you have to click on "Reset Security Token" to confirm the action. Your security token will be sent to the email address connected to your Salesforce account.

When entering your security token, you will use your password plus your token that has been emailed to you. For instance if your password is "password" and your token "xxxxxx", you will enter "password xxxxxx". Your Security token will be saved on your mobile application and you will not have to enter it every time you login.

On the bottom of your screen you will find an OK button on the right-hand side. Click on that navigation button to log into your Salesforce mobile application.