

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 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.