

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. Your 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