



# BROOM STREET SOFTWARE

***"Sweeping Away The Competition..."***

## User Guide for Mobile Desk 3 App QAD® System Setup

### Control File

Select Option 1 to Setup "Mobile Desk Control File"

Use this function to setup global defaults for "mobile desk". These parameters may be configured by userid as well.

### Order Desk Settings

SE/EE: Enter your QAD version

Alert Days: Enter the number of days for alerts to show up on mobile device

Maximum Login Attempts: Enter # of incorrect login attempts to allowed before locking account

Direct QAD Updates Allowed: Enter yes if Mobile Desk can perform direct QAD updates

Multi-Tier: Enter yes If your Mobile Desk Server is not the QAD Primary Server

QAD Email System: Enter QAD Default Email System used for outgoing email's from Mobile Desk

Detail App History: Enter Yes to record all Activity by users in Mobile Desk

Authenticate AD Command: If a user is setup as an AD user, enter the operating system command to validate the user

AD Domain: Enter the Network Domain that the Mobile Desk Server is a member of

Order History Days: Enter the number of days of order history you want to display on mobile device

Include Quotes: Enter yes to include quotes

Include FSM: Include SMM orders/invoices

Push New Orders: Enter yes to include new orders as alerts

Push Past Due: Enter yes to include past due orders as alerts

Push Shipments: Enter yes to include shipments as alerts

Push Credit: Enter yes to include credit holds as alerts

Schedule Firm Weeks: Enter number of firm weeks for scheduled orders you wish to display

Schedule Plan Weeks: Enter number of planned weeks for scheduled orders you wish to display

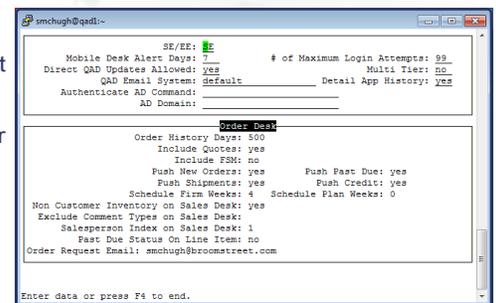
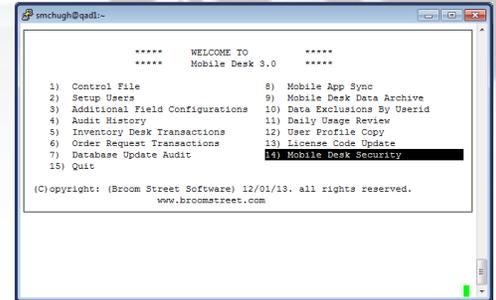
Non Customer Inv on SD: Enter yes if you wish to view non customer locations on Sales Desk

Exclude Com Types on SD: Enter a list of Comment Types you do not wish to show on the Master Comment Drill Down on Sales Desk

Salesperson Index on SD: On the Sales by Salesperson Drill Down enter the Salesperson index on the customer master you wish to total sales by

Past Due Status on Line Item: Enter yes to trigger Order Desk to report an order as past due if any line on the order is past due

Order Request Email: Enter email recipient for any new order requests entered by Order Desk



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## Enter Userid

- Active Directory: Enter yes if the user/password should be validated against the networked active directory system
- Userid: Enter Mobile Desk userid (**NOTE: THIS DOES NOT HAVE TO BE QAD USER**)
- Name: Enter Mobile Desk user name
- Password: Enter Mobile Desk password (**NOTE: IF QAD USER, THE SYSTEM TAKES PASSWORD FROM QAD SYSTEM**)
- Active: Enter yes if user is active Mobile Desk user
- Locked Account: Enter no to remove locked status
- Alert Days: Enter number of alert days for the user
- QAD Domains: Enter comma separated list of domains this user can view data for
- Email: Enter the email address for this user
- Order Desk: Enter yes if this user will be using Order Desk
- Inventory/Planning Desk: Enter yes if this user will be using Inventory and/or Planning Desk
- Purchasing Desk: Enter yes if this user will be using Purchase Desk
- Mobile Trunk: Enter yes if this is a Mobile Trunk user
- Admin Desk: Enter yes if the user will be using Admin Desk
- DocLib User: Enter yes if the user will using DocLib App

smchugh@qadl:-

Userid: smchugh

Active Directory: no

Name: Steve Mchugh

Password: \_\_\_\_\_

Active: yes

Locked Account: no

Alert Days: 7

QAD Domain's: CPC

Email: smchugh@broomstreet.com

Order/Sales Desk: \_\_\_\_\_

Inv/Plan Desk: \_\_\_\_\_

Purchasing Desk: \_\_\_\_\_

Mobile Trunk: \_\_\_\_\_

Admin Desk: \_\_\_\_\_

DocLib User: \_\_\_\_\_

## Order Desk Configuration

- Order Desk Label: Enter label you wish to have show up on your mobile device
- Order Desk Report: Enter yes if user has access to Order Desk reports
- QAD Customers: Enter list of QAD customers you have access to
- QAD Ship-Tos: Enter list of QAD ship-tos you have access to
- QAD Salespersons: Enter list of QAD salespersons you have access to
- QAD Order Sites: Enter list of QAD order sites you have access to
- QAD Analysis Codes: Enter list of QAD customer analysis codes you have access to
- QAD Regions: Enter list of QAD customer regions you have access to
- QAD Customer Type's: Enter list of QAD customer types you have access to
- Inventory Sites: Enter list of QAD inventory sites you wish to show inventory on for Order Desk

smchugh@qadl:/esi/mfgr/e021/workmobile2

Order Desk Configuration

Order Desk Label: Order Desk

Order Desk Report: yes

QAD Customer's: Roger

QAD Ship-To's: \_\_\_\_\_

QAD Sales Person's: \_\_\_\_\_

QAD Order Sites: \_\_\_\_\_

QAD Analysis Codes: \_\_\_\_\_

QAD Regions: \_\_\_\_\_

QAD Customer Types: \_\_\_\_\_

Inventory Sites: 1020,2054

Enter data or press F4 to end.

## Inventory Desk Settings

smchugh@qadl:-

Userid: inventorydesk

Name: Inventory Desk

Password: \_\_\_\_\_

Active: yes

Locked Account: no

Alert Days: 7

QAD Domain's: CPC

Email: inventorydesk@anywhere.com

Order Desk: yes

Inventory/Planning Desk: yes

Purchasing Desk: yes

Mobile Trunk: yes

Enter data or press F4 to end.



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## Inventory/Planning Desk Configuration

Inventory Desk Label: Enter text that will show on mobile device for Inventory Desk

Planning Desk Label: Enter text that will show on mobile desk for Planning Desk

QAD Items: Enter a list of items to show on mobile device

QAD Product Lines: Enter a list of product lines to show on mobile device

QAD Type List: Enter a list of item types to show on mobile device

QAD Group List: Enter a list of item groups to show on mobile device

QAD Buyer List: Enter a list of item buyers to show on mobile device

QAD Supplier List: Enter a list of item suppliers to show on mobile device

QAD Analysis Code: Enter a list of item analysis codes to show on mobile device

QAD P/M LIST: Enter list of P/M codes that show up on mobile device

QAD Sites List: Enter a list of QAD sites you wish to use on mobile device

QAD Item Status List: Enter a list of item statuses you wish to show on mobile device

## Inventory Desk Configuration

Push Negative Inventory: Enter yes to push alerts for items that fall below zero

## Purchasing Desk Settings

Purchase Desk Label: Enter text you wish to show on Purchase Desk label

Supplier List: Enter list of QAD suppliers you wish to work with

Supplier Type List: Enter list of supplier types you wish to work with

List Type List: Enter a list of valid list types you wish to work with

Requested By List: Enter a list of requested by values you wish to work with

Buyer List: Enter a list of buyers you wish to work with

Purchasing Site's: Enter a list of purchasing sites you wish to work with



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## Add Additional Fields

Choose menu option 3 to setup up additional field configurations to show up on the mobile devices.

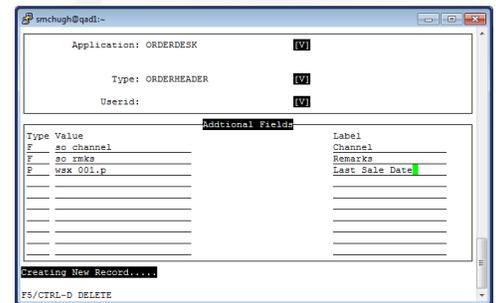
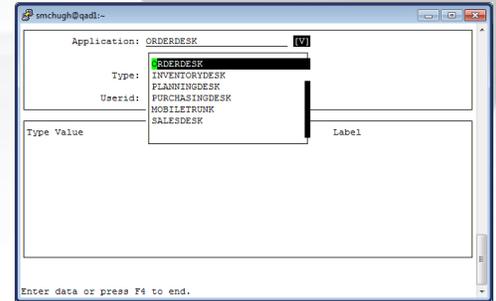
Application: Enter the application you want to add additional fields for

Type: Enter the screen where you wish to add additional fields

Userid: Enter the userid these fields apply to or blank for global

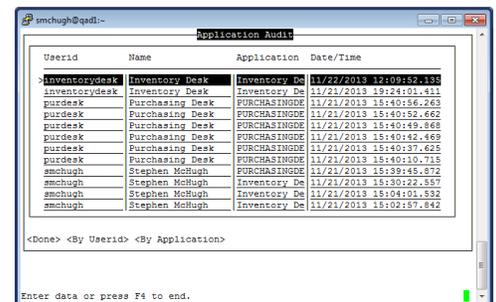
Now you can add fields to the mobile application. You can either add discrete field names or a program that can be called from the mobile app to return a calculated field.

If you create a program, you must install the program in your base Mobile Desk code directory.



## Application Audit

Select 4 on the main menu to view audit access on which Mobile Desk users are using which applications. It has the date/time of last access and the Mobile Desk application that was used.





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## Inventory Transactions

Enter 5 on the main menu to view the Inventory Desk transactions submitted by users.

You can view the following:

- 1) Date transactions entered
- 2) Whether or not transaction has been processed by QAD
- 3) If transactions failed to load into QAD
- 4) Transaction type
- 5) Userid
- 6) Item
- 7) Remarks
- 8) Effdate
- 9) Site
- 10) Lot number
- 11) Qty
- 12) Time
- 13) Location

Date	Processed	Error	Type	Userid	Item	Qty
11/21/13	no	no	RCT-REP	smchugh	A	222
11/21/13	no	no	TRANSFER	smchugh	A-001479	2
11/21/13	no	no	RCT-REP	smchugh	A-001479	22
11/20/13	no	no	TRANSFER	smchugh	A-001479	22
11/20/13	no	no	CIC-RCTF	smchugh	A-001479	1234
11/20/13	no	no	ISS-UNP	smchugh	A-001480	22
11/20/13	no	no	RCT-UNP	smchugh	A	222

<Done> <By Type> <By Userid>

From Site: From Loc: 1.1000 To Serial: asdf  
Time: 10:50 To Loc:  
Effective Date: Remarks:

Enter data or press F4 to end.

## Order Request Transactions

Enter menu option 6 to view sales/purchase order requests. These requests will be stored in the system until processed manually/automatically by the system.

You can view the following:

- 1) Date
- 2) Type of transaction requested
- 3) Userid
- 4) Item
- 5) Qty
- 6) Customer
- 7) Purchase order

Date	Type	Userid	Item	Qty	Customer	Purchase Or
11/13/13	Order	OrderDesk	A-001479	85	KROGER	

<Done> <By Type> <By Userid>

Enter data or press F4 to end.

## Database Updates

Enter menu option 7 to view database updates that occurred from Mobile Desk.

Date	Time	Type	Userid
01/05/14	10:02	DueDateUpdate	smchugh
12/30/13	10:30	DueDateUpdate	prostar
12/20/13	11:27	CRUIT-PLANNING	orderdesk
12/18/13	20:24	1.4.17-Update-Planning	planningdesk
12/18/13	18:30	1.4.17-Update-Planning	planningdesk
12/18/13	14:48	DueDateUpdate	orderdesk
12/18/13	16:18	DueDateUpdate	orderdesk
12/18/13	16:17	DueDateUpdate	orderdesk

<Done> <By Type> <By Userid>

Index: 316752  
Old Value: 01/15/14  
New Value: 02/15/14

Enter data or press F4 to end.



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## Mobile App Sync

Enter 8 on the main menu to configure the Mobile App Sync function.

Use this function to ensure that your Mobile Desk applications run in an efficient and timely manner. Sync each application on a regular time Interval. This function can be setup by your system administrator to run in Unix Cron-Tab or Windows batch scheduler.

Sync Order Desk: Once a day at minimum

Sync Inventory Desk: Once a day at minimum

Sync Purchasing Desk: Once a day at minimum

Sync Sales Desk: Once a day at minimum

Sync Sales Desk Customer: Once a day at minimum. You can run by userid if a new userid and/or configuration changes have been made for that user

Record User Count: Records app usage counts

```
smchugh@qadi:~$
Invoice Days: 1
Sync Order Desk: no      02/26/16 21:02
Sync Inventory Desk: no  02/24/14 21:02
Sync Purchasing Desk: no 02/24/14 21:02
Sync Sales Desk: no     02/24/14 21:02
Sync Sales Desk Customer: no Userid:      02/27/14 11:13
Record User Count: yes

Record Update threshold: 20000
Number of Seconds to Pause when reached threshold: 30
Records Processed:
```

## Data Archive

Enter 9 on the main menu to archive your Mobile Desk data.

You can archive your Mobile Desk data to maximize your database performance as much as your company requires. You can run this whenever the size of the Mobile Desk data becomes too large.

Days of Audit History: Enter the number of days of audit history to keep in the system

Days of Invoice History: Enter the number of days of invoice history to keep in the system

Archive Data: Enter yes to delete the data off your system

```
smchugh@qadi:~$
Number of Days of Audit History to keep : 90
Number of Days of Invoice History to keep: 30
Archive Data: no
```

## Data Exclusions by Userid

Enter 10 on the main menu to exclude customer/items by specific userid.

If you want users to not view some customers/items you can run this screen and put in those exclusions.

```
smchugh@qadi:~$
Userid: salesdesk      SalesDesk
Order Desk Exclusion*
Customer:
Name:
Customer Type:
Customer Region: 30
Customer Class:
SalesPerson:
Country:
Territory:
```

```
smchugh@qadi:~$
Userid: salesdesk      SalesDesk
Inventory Desk/Planning Desk Exclusion*
Description 1: DNU
Description 2:
Item Status:
Product Line:
Item Group:
Item Type:
E/M:
Size: 2900
```

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## Daily Usage Review

Enter 11 on the main menu to view the number of active Mobile Desk users and the actual usage summarized by day.

Date	Active Users	Mobile Trunk	Usage	Mobile TrunkUsage
02/03/14	15	0	2	0
02/03/14	15	0	2	0
02/27/14	15	0	3	0
02/26/14	15	0	4	0
02/24/14	15	0	4	0
02/23/14	10	0	1	0

## User Profile Copy

Enter 12 on the main menu to copy a user profile to another user to simplify the creation of new Mobile Desk users. You enter the source userid and the new userid and the system will copy all settings for that user. You can then modify the parameters for the new user created.

Source Userid: SalesDesk SalesDesk  
Copy To Userid: newuser2

Userid: newuser3  
Name: SalesDesk  
Password: \_\_\_\_\_  
Active: YES  
Locked Account: no  
Alert Days: 7  
QAD Domain: CPC  
Email: \_\_\_\_\_  
Order Desk:  
Inventory/Planning Desk:  
Purchasing Desk:

## License Code Update

Enter 13 on the main menu to enter or add new Mobile Desk license codes. The system will validate the code and display the number of valid Mobile Desk users.

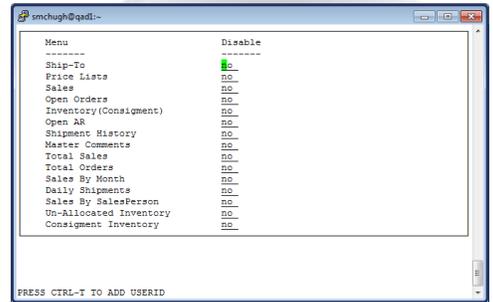
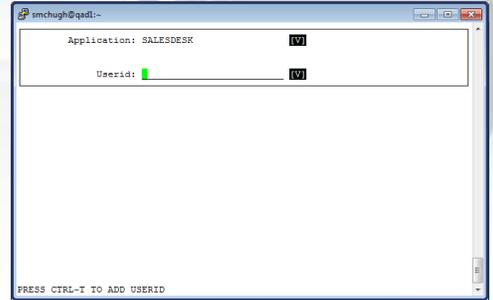
License Code: \_\_\_\_\_  
Current Mobile Desk Licensed Users: 250      Activation Date: 03/01/14  
Mobile Trunk Users: 50



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## Mobile Desk Security

This function allows you disable certain drill downs on the OrderDesk/Sales Desk



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