

SouthWare ^{mobile} ExecuView

The SouthWare ExecuView Portal provides a mobile-oriented overview of the key measurements of your business success. It provides simple, intuitive, touch-based screens for your executives and decision makers so they can easily access data and functions they need to monitor your business. It can be used on phone and tablet devices (as well as desktop computers), and uses a browser-based platform for portability across all devices that have a browser.

Information you can access includes:

- Current sales activity
- Tasks
- Financial summaries
- An assortment of financial graphs

The portal is designed as a fully-functioning starting point for your mobile executive experience. Since it uses NetLink templates you may also customize this to change the style/look or features. To use the ExecuView portal you must be a licensed user of SouthWare ExecuMate II.

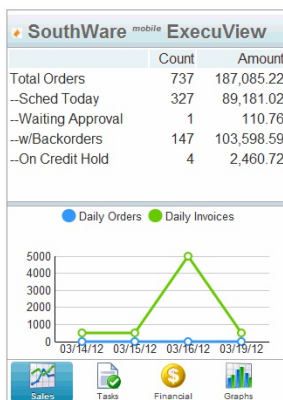
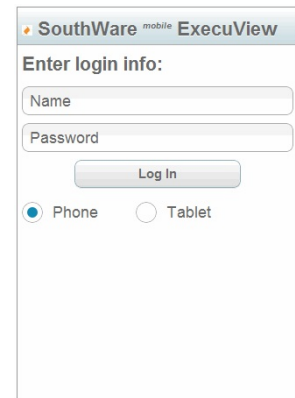
Access to Portal

To access this portal you must call the request MPEXECULOGIN:

- “https://yourNetLinkURL?request_id=mpexeculogin” if you have an SSL server
- “http://yourNetLinkURL?request_id=mpexeculogin” if you don’t have an SSL server

This requires you to enter your name and password to gain secured access to the data. This name/password must be a valid NetLink internal requestor who has security clearance for ExecuMate II data.

During login you may also choose to display the phone or the table version of the ExecuView portal. The tablet version simply makes the portal a little wider to show more graph detail and task detail.



Phone View

Sales Activity View

This view shows the current status of open sales orders and a graph of recent sales activity. The graph shows daily orders and daily invoices for the last few days with activity.

Tasks View

This view shows a list of open tasks assigned to you (your operator code).

Task List

The buttons at the top give you three options for filtering the list:

- **Today** - shows only open tasks scheduled for today
- **+/-7** - shows only open tasks scheduled within a range of 7 days prior to and 7 days after today
- **All** - shows all open tasks for your operator

Date	Type	Referen
03/22/12	Appointment	Status re
03/23/12	Appointment	Planning
03/27/12	Call - Outbound	Question

Task List

Edit/Complete a Task

Select a task to access the task details view. In this view you may edit the:

- Date
- Time
- Reference
- Task Type
- Task Result
- Text Details

To change the task and leave it open, press the “Save” button. This saves the task to your server and returns to the list.

To complete the task press the “Done” button. You must enter a Result before you complete the task. The task will be completed and removed from the task list, and the list will redisplay.

Date 03/22/12
Time 11:00 AM
Ref Status review
Type Meeting - Office
Result Resolved Problem

Discussed current issues with training project and resolved outstanding problem

Task Edit

Add a Task

Press the “Add” button from the list to add a new task. The new task view will include defaults as defined in your TaskWise operator record.

Enter the appropriate data and press the “Save” button to save the new task to your server.

Note: If you need to edit a task you added during this session you should first refresh the page so that current data from the server will be available for editing.

Date 03/27/12
Time 8:00 AM
Ref
Type Call - Outbound
Result

Text

Task Add

Financial View

This view provides various snapshots of the company financial status. A button bar lets you switch between three views:

- Income Statement - this shows a summary of the major income statement categories for a mini-profit/loss statement
- Balance Sheet - this shows a summary of the major balance sheet categories for a mini-balance sheet
- Other - this shows some other key numbers such as summaries of pending transactions and A/R aging totals

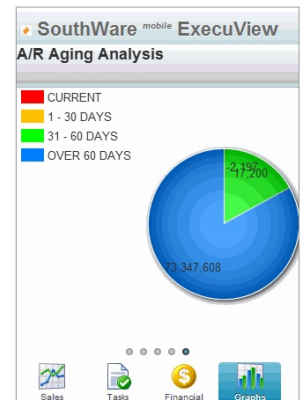
	PTD-Curr	YTD-Curr
Sales	0	50
Cost of Sales	0	10
Oper Exp	0	85,071
Other	0	17,019
Net Income	0	-68,012

Financial - Income Stmt

Graphs View

This view provides several graphs of company-wide trends and status. These graphs are presented in a carousel so that you may “spin” through them with a horizontal swipe. As of this writing the graphs include:

- Monthly Sales Trend
- Weekly Sales Trend
- Monthly Profit Trend
- Monthly Cash Balance Trend
- A/R Aging Analysis



A/R Aging Analysis

Set Up Notes

There are no special installation steps for this portal, and it should be ready for use when you install the update release. Make sure that any persons who will use this portal have been given operator security of at least 5 for ExecuMate II.

Device Shortcut Set Up

Executives and managers who use this portal will appreciate easy access to the login screen. You can provide this by adding a shortcut launch from the menu similar to an “app”.

- On an iPhone, iPod Touch, or iPad:
 - Open Safari
 - Navigate to the login URL
 - Press the icon that is left of the address bar (a “+” or box with arrow)
 - Select “Add to home screen”
 - Edit the icon name (such as “ExecuView”) and press the “Add” button

Self-contained portal data

The “touch” technology used by this portal combines all views into a single web page, so once the portal is loaded no other interaction is needed with the server unless you update tasks or refresh the page.