

# MySalesDrive Quick User Guide

# Capture IT (IPad) Guide

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# **CaptureIT IPad App**

#### Installation Process:

If the CaptureIT Application has not been installed, please visit the Apple App Store and search for 'CaptureIT - SalesDrive' to install the product.



#### iPad Screenshots

	Project	-	Capturing	< Poor			on stylus d Stylus CB	5	_	_			_	O Cance	The state of the s
	On Site Analysis	>	Show Consecutive Number	•	Brot	Epsor	Stylus Col	or Pto XL							5 4
	Local Client	>	Show Own ID	0	Real	Epsor	Stylus C4	2 Plus							52
	London LN2	>	Show Sarial Number	0	Brot	Epsor	Stylus OE	2							20
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-	Printfleet cay downloaded	>	Show Mac Address	0	Real	Epsor	Stylus Col	er 1520							2
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-- Quick and efficient data collection -

Reduce the time spent performing analysis of customer print output environments – and maximize your profit – with the help of capture IT! capture IT is a proven software tool for mobile data collection – now available for iPad! capture IT enables you to professionally map the status of a current print output environment – and together with a comprehensive database – create an output solution matched to y more

#### Help and Tutorials:

For more help with the product, please visit the below links:

eu.mysalesdrive.com/Europe/web/manual eu.mysalesdrive.com/Europe/web/manual/ipadbuttons/

For a video tutorial, please visit the below link:

eu.mysalesdrive.com/Europe/web/manual/videos/iPad/

# Logging In:

Once the application has been opened, ensure the Login Settings are correct. Click on the 4 icon to open the application instance settings



The Cloud Application Instance should display the URL: eu.mysalesdrive.com/europe If this is not displayed, please tap the URL and enter the correct details.

		Login Settings		
				1
	Cloud Application Instance		eu.mysalesdrive.com/europe	
116				
us pa				
ра				
captureIT V5.2.7	Cancel		Done	
captureri VO.Z./	Cancer		Done	

\*If this step does not work, please check with your MySalesDrive representative, as a specialised domain may be needed

If the details are correct, tap 'Done', on the bottom right of the window. Once completed, enter the sign in credentials that have been issued to log into the application using the <u>login</u> icon.



# Navigating CaptureIT:

#### **Button Functionalities:**

General buttons and Shortcuts

There are different shortcuts or quick navigation buttons available:

+			
lcon	Description		
+	Click on a plus icon to create a new object (project, location, building, floor or asset – depending on which list you currently are).		
<	Click on the left arrow icon to go back to the start screen in order to use another login credentials or change the server instance.		
$\bigcirc$	Click on the cloud icon in order to upload the selected project to the cloud application (You need a fast and stable internet connection (ideally WiFi) and a valid login to use this feature).		
	Click on the download icon to get a project from the cloud application. In the dialog select the project you want download from your account. (You need a fast and stable internet connection (ideally WiFi) and a valid login to use this feature).		
<u>کې</u>	Click on the gear icon to change the application settings.		
	Click on the display icon to switch to the full screen view. The list on the left will disappear.		
	Click on the list icon to switch to the list screen view. The list on the left will appear.		
æ	Click on the files icon to jump directly to the project overview. This is a shortcut button.		
÷	Click on the structure icon to jump directly to the floor list view. This is a shortcut to the first location and building available within your project.		
	Click on the tag icon to jump directly to the asset list/form view. This is a shortcut to the first location, building and floor available within your project		
	Click on the radar icon to jump directly to the floor list/map view. This is a shortcut to the first location, building and floor available within your project.		

#### **Asset list Filter Buttons**

There are different filter available for the asset list. Switch between those by tapping the filter button

+			F		$\bigcirc$	
lcon	Description	]				
60	Displays all assets from the current selected floor					
Ś	Displays all assets from the current selected floor, which are already plotted to the floor plan					
᠕᠍ᢣ	Displays all assets from the current selected floor, which are not plotted to the floor plan					
	Displays all assets in the current project, if plotted or not. With this filter it is possible to change the floor of assets					



## Navigating CaptureIT:

Once signed in, decide from the following options:

- Create a new project, with no customer or device information
- Download an exsisting project, the MySalesDrive Administrator can share exsisting projects with IPad users via the 'Professional Consultant' account.

#### Creating a new project in Capture IT:

Tap the + icon which is located at the bottom left corner. This will generate a blank project form to complete. (This information is not required to continue the Audit, it can be completed at a later date).

Project	Proj	ject Details Done
٩	IDENTITY	
Newly created project	Name	Newly created project
	Project Number	Project Number
	Project Currency	EUR >
	PROJECT SETTINGS	
	Common	>
	Floorplan	>
	Capturing	>
	Measurement Units	>
	Prices	>
	Scope	>
	Remarks	>
+ 🗋 🏾 🏟 🖓		< 🖻 🏦 🖉 🚇

#### Downloading an existing audit from MySalesDrive:

To download an existing project, tap on the 🖄 icon.

Project	Project Detail	S Done
٩	IDENTITY	
	Name	Name
	Project Number	Project Number
	Project Currency	GBP >
	PROJECT SETTINGS	
	Common	>
	Floorplan	>
	Capturing	>
	Measurement Units	>
	Prices	>
	Scope	>
	-	
	Remarks	>
	-	

This will initiate a pop-up, the message is regarding data protection information of what is and isn't included in the project download. If you want to proceed with the download tap 'Yes'.

Project	Project Details	Done
٩	IDENTITY Name	
	Project Number	
	Project Currency	EUR >
	Prov.     Data protection information When     DOWN-CALING projects from your     prevended that, and the company specific     commercial values (contracts, TCO     contracts)     contracts     contracts	
	Remarks	
+ 🗋 🖓 🖽 🍇	🖵 < 🖉	

A list of current and historically shared customers and their projects will be displayed. The user must tap on the correct customer (located on the left list) and tap the correct project to download (located on the right list). Once the correct customer and project have been selected, tap the 'Download' button, located at the bottom right of the window.

	P14	Project Download	Done
	Company 1	Ipad Demo Customer	
	Ipad Demo		Name
	Ricoh Demo		Project Number
	Test Company 1		GBP >
			>
			>
			×
			>
			>
			>
			>
+	Cancel	Download	0

\*Depending upon the configuration of the project this may take a few minutes as all the sites and devices will be downloaded to the local IPad

As the Project has been downloaded, the user can now work on the floor walk, while offline. To access offline functionalities, tap on the < icon to log out of the solution.

Project	Project Details	Done
٩	IDENTITY	
	Name	Name
	Project Number	Project Number
	Project Currency	GBP >
	PROJECT SETTINGS	
	Common	>
	Floorplan	>
	Capturing	>
	Measurement Units	>
	Prices	>
	Scope	>
	Remarks	>
+ 🗋 🕜 🖽 🎕		

While on the login screen, tap \_\_\_\_\_\_. This will login to the solution, but allows the user to work offline.

(This is in case the auditor does not have internet connectivity while performing the audit). The Auditor can then upload the completed project once they get an internet connection.



The project's structure can now be navigated using the > icon to drill-down to the particular 'Location', 'Building' and 'Floor' the auditor is conducting their floor walk on.

<pre>     Project Location </pre>	Location Details Done	Location Building	Building Details Done
٩	IDENTITY	٩	IDENTITY
Ipad test customer	Name Ipad test custom	Sales office	Name Sales office
	REMARKS		REMARKS
	This is where you can enter information about the location.		This is where you can enter information about the building.
			-
			-
			-
			-
			-
+		+	

If the user requires to go back to the previous screen, they can use the  $\lt$  icon. (Located top left of the screen).

If the user needs to add a new 'Location', 'Buildings' or 'Floor' to the project, they can use the + icon against the correct area. (Located bottom left of the screen).

Once the user has reached the 'Floor' level of the structure, they are given the option to upload a floorplan of the customers office.

\*If the floorplan was previously uploaded, please ignore this step.



Tap 'Press here to select an image and apply as a floorplan', which will bring up a drop-down list of the following options

Name		
Dama	Reset floorplan	Reset floorplan - Deletes previously uploaded floorplan
Rema	Photo Library	<ul> <li>Photo Library - Upload an image from the IPad's hard-drive</li> <li>Take Photo - Use the IPad's camera to take a photo of the customer's</li> </ul>
	Take Photo	fire escape plan or floor layout
Γ	Cancel	

Building Floor		Floor Details	Done
۹		IDENTITY	
Floor 1	>	Name	Floor 1
		Remarks	>
		Press here to select an image and apply as a floorplan	
		Auf risk floor Pan Konstruction	
+	(		H 🖉 💮

Now the floorplan has been uploaded, tap the Done icon on the top right corner to start plotting devices.



### Entering and plotting devices onto the Floorplan:

#### Adding single devices to the project:

If this is a newly created project or devices have not been added to the project, the floor walker can input the device manually.



By tapping the + icon and entering the model, the user can search the MySalesDrive database to search for the particular machine/s the customer has on site.

<b>&lt;</b> Floor	٩	Cancel	Done						
	HP LaserJet P2055dn								
	Konica Minolta bizhub 4000P								
	HP LaserJet Pro P1606dn								
	HP LaserJet P2055d		Printer >						
	HP LaserJet 1320		0						
	HP LaserJet Pro 400 M401dn								
	Konica Minolta bizhub 4050								
5 Č	ð								
Q	W E R T Y U I O	Ρ	$\propto$						
А	S D F G H J K L		Search						
	Z X C V B N M !	?	•						
.?123		.?123							



Once the machine has been located and added, tap the  $\bigcirc$  icon to start manually entering data for the device e.g, Serial Number, Device Volumes or Meter Readings, Costs, etc.

Floor Asset (1)	Asset Details (Ipad test customer->Sales office->Floor 1)	Done
٩	Consecutive Number	1
🕒 HP LaserJet 1320 기/아	Own ID	
	Allocation	>
	Estimated Volumes	>
	Last Meter Reading	>
	Average Job	>
	Coverage	>
	Time	>
	Additional Costs	>
	Capabilities	>
	Capacities	>
	Prices	>
	Labour	>
	Technology	$\rightarrow$
+ 68 🕤 🗋	· · · · · · · · · · · · · · · · · · ·	9 💮

#### Previous device collection

A software data capture agent may have been used to collect details about devices. These can be uploaded to the project via a .csv file by the 'Professional Consultant'. In this case a list of devices will be available for the user to select and place onto the floorplan.

Floor Asset (3)	Asset Details (Ipad test customer->Sales office->Floor 1)	Done
٩	IDENTITY	
Ricoh Aficio 220	Make	Ricoh
Sharp AR-161	Model	Aficio 220
Toshiba LP 3500	Category	Copier >
	Consecutive Number	1
	Own ID	
	Allocation	>
	Estimated Volumes	>
	Last Meter Reading	>
	Average Job	>
	Coverage	>
	Time	>
	Additional Costs	>
	Capabilities	>
+ 68 5 🗋		<ul> <li>Image: Image: Ima</li></ul>

Some devices may not have been collected via the data capture agent e.g if the device was not on the network when the agent collected its data. Where this happens, the user must use the manual entry method to add missed devices and input vital device data.



#### Placing devices onto the floorplan:

Once devices have been added to the project either being manually entered or via the .csv upload from the 'Professional Consultant', the floor walker can start plotting the devices in the correct position on the floor plan.

Navigate to the floorplan view using the  $\oplus$  icon (located bottom right of the screen).



To plot a device, tap on the right side of the device's cell with the  $\mathfrak{M}$  icon, which will then drop it into the middle of the floorplan, allowing the floorwalker to adapt the device into the correct location on the floor.



Depending on 'Project Settings', the device icons may be too small or too large for the floor plan. To change the sizing tap on the 🐵 icon (located top right of the screen) and move the scroll to the optimal position

< Floor	Asset (3)		Ipad test customer->Sales office->Floor 1	ŝ
	Q		4G3 4G2 4G1 Meeting Floorplan Settings	Done
0	Ricoh Aficio 220		lcon Size:	255
0	Sharp AR-161	᠕ᡗᢣ	O No. 4 Tannery House	)
•	Toshiba LP 3500	᠕ᡗᢣ	IERGENCY EXIT 2	
			4F1E         4F1C         4F2A         4F2B         4F3         3F1         3F2         3F3         3F           4F1A         4F2B         4F3         3F1         3F2         3F3         3F	E4



If required, extra information can be added to a device, by tapping on the device the 'Asset Details' dialogue will appear. Allowing the user to add volume information, remarks on the device, take a photo of the device, etc.

G3	ASSet Deta	ils	fice Office
4 Tanner	Model	LP 3500	nery House
Floor F	Consecutive Numb	er 3	EMERGENCY
2	Volume(m\c):	0\0	
C	Remarks	>	
4F2	Take Photo		3F2
IA	More		<u></u>
1.5	Remove from Floor	plan	35
	Delete Asset		
FGB		R	3F7

After all the devices have been plotted and the floorwalker has completed their audit, they can then upload the plotted data to allow the 'Professional Consultant' to create the Future State Proposal and Reports.

#### Uploading a completed floorwalk project:



Project		Project De	etails			Done
٩		IDENTITY				
Ipad Demo Customer	>	Name		lpad [	Demo Cu	istomer
		Project Number				Number
		Project Currency			(	GBP >
		PROJECT SETTINGS				
		Common				>
		Floorplan				>
		Capturing				>
		Measurement Units				>
		Prices				>
		Scope				>
		Remarks				>
+ 🗋 🙃 6	<u>Ф</u>		<	쁆	$\bigcirc$	۲

	Project Upload	Desis et Details	Done
Ipad Demo Cu:	OPTIONS		Jemo Custom
	Only assets plotted in the roomplan	$\bigcirc$	Project Numb
_	Company	Company 1 >	GBP 2
	Create new company		
			3
			3
			2
			-
+ 🗀	Cancel	Upload	0

This will bring up the Project Upload fields, allowing the user to decide how they want to upload the project. Once the settings have been applied, tap the upload button to upload the completed project.



#### Sharing a Project:

Once the iPad user has uploaded their project, they will need to sign into the PC website version of MySalesDrive to share the uploaded version of the project.



The user can access this login screen by visiting <u>eu.mysalesdrive.com/Europe/#/HomePage</u>.

Once the user has navigated to this window, they can sign in using their CaptureIT credentials to login.

Re Dialogs Tools Help	Project Management Project Management Provide an overview of outsamers and projects.	ySalesDrive.com
T Y 33.04 (22) Jun Helley en de 1977/NT 00/10/04/28/9 13:46:54 UTC ALLES/GREED/ON/TEN Jund Demo G		n minutes al 9

The CaptureIT login workspace is a simplified version of MySalesDrive. Giving the user the Project Management tab to alter customer or project information and to share the completed projects with other users within the team.

To access the Customer and Project information, click [





Identify and click the Customer and Project to share with other users.





Locate the users to share the project with, and drag their names to the right window. Ensure the 'Write' and 'Owner' buttons are ticked.

The user can alert the other members in the team using the 🧐 icon to notify the project has been uploaded.

If a member of the team needs to be removed from the list, highlight their name and use the 💽 icon.





PAE Business (EMEA Headquarters) 3 Tannery House, Tannery Lane Send, Guildford Surrey, GU23 7EF United Kingdom

Telephone: +44 (0) 1483 726 206

Sales@paebusiness.com Support@paebusiness.com