# mySalesDrive

# Quick
# User Guide

**PA** e **business**

# Capture IT
# (IPad) Guide

# Contents

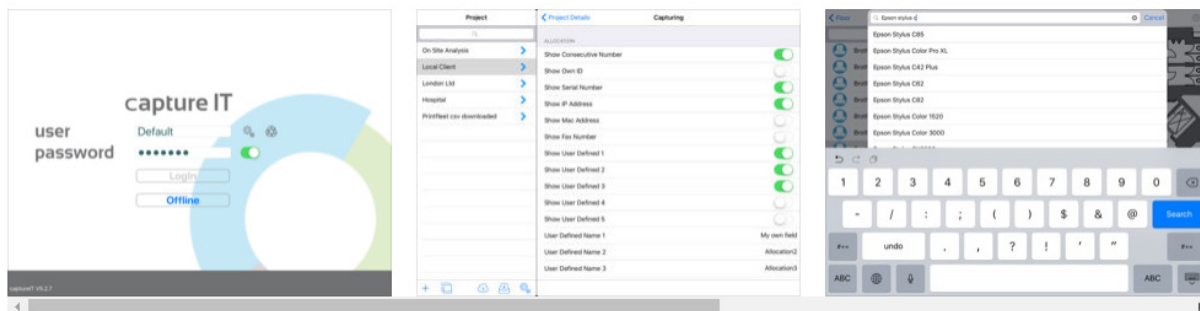# CaptureIT IPad App

## *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.
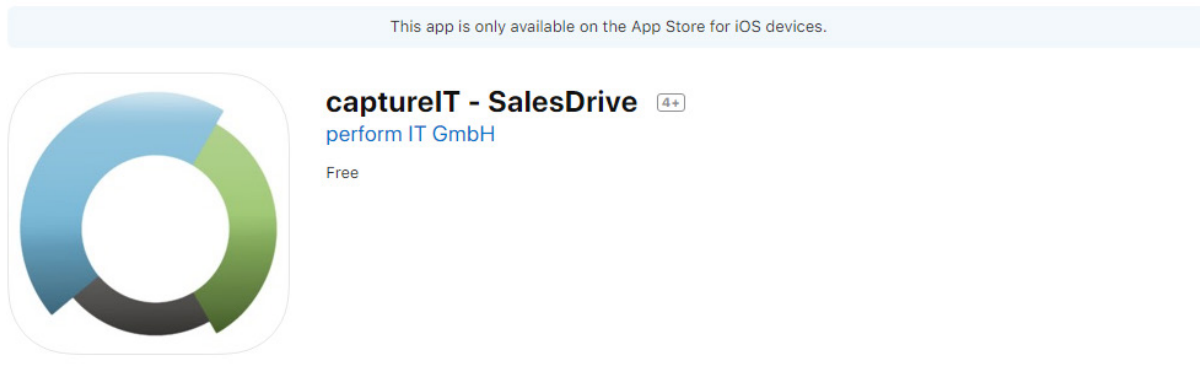


## Help and Tutorials:

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:

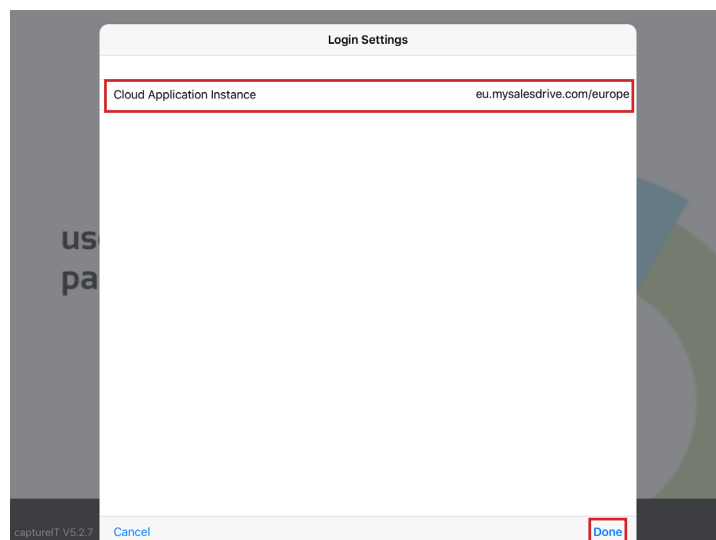eu.mysalesdrive.com/Europe/web/manual/videos/iPad/

# Logging In:

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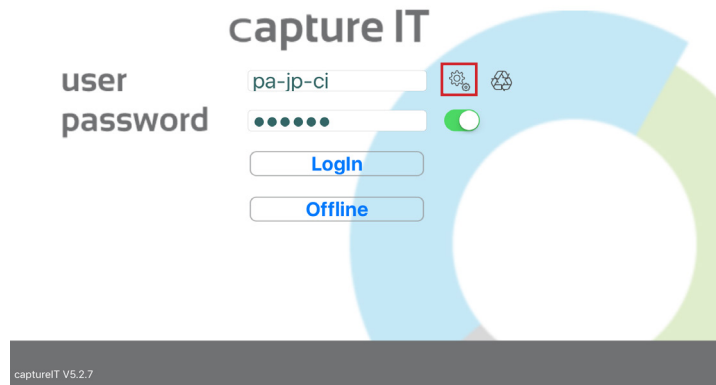


The Cloud Application Instance should display the URL: eu.mysalesdrive.com/europe
If this is not displayed, please tap the URL and enter the correct details.



*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 Login icon.

# Navigating CaptureIT:

## *Button Functionalities:*

General buttons and Shortcuts

There are different shortcuts or quick navigation buttons available:

| Icon | 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. |
| ☁ | 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). |
| ⚙ | 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. |
| 🗄 | 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
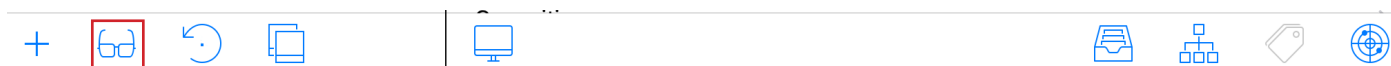
| Icon | Description |
|------|-------------|
| 👓 | Displays all assets from the current selected floor |
| 🏷 | Displays all assets from the current selected floor, which are already plotted to the floor plan |
| ∿→ | Displays all assets from the current selected floor, which are not plotted to the floor 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.
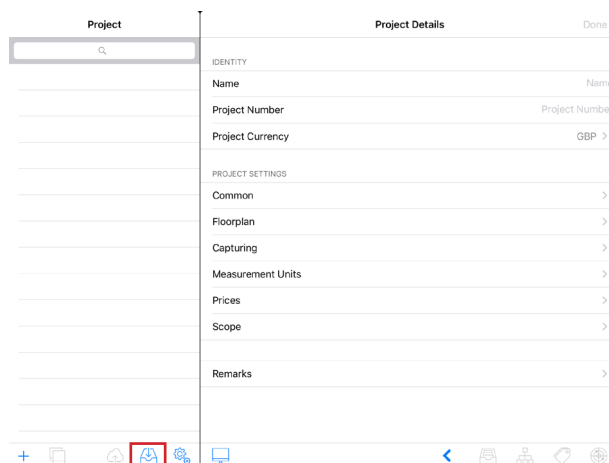
# Creating a new project in Capture IT:

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).
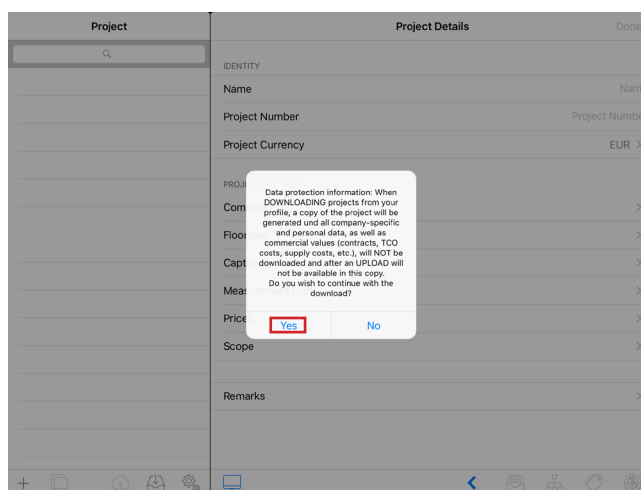
# Downloading an existing audit from MySalesDrive:

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



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'.
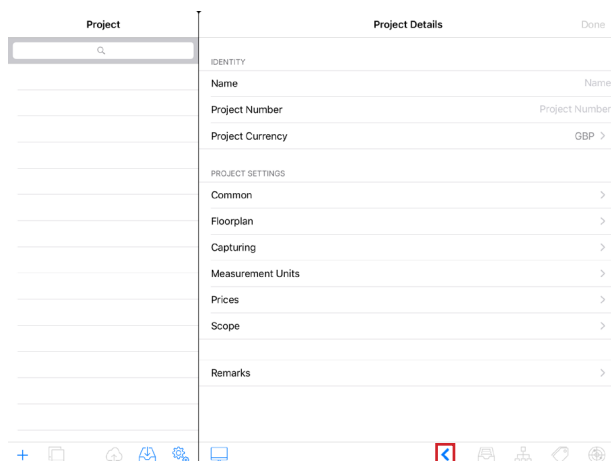


A list of current and historically shared customers and their projects will be displayed. The user must tap on the correct customer (located on the left list) and tap the correct project to download (located on the right list). Once the correct customer and project have been selected, tap the 'Download'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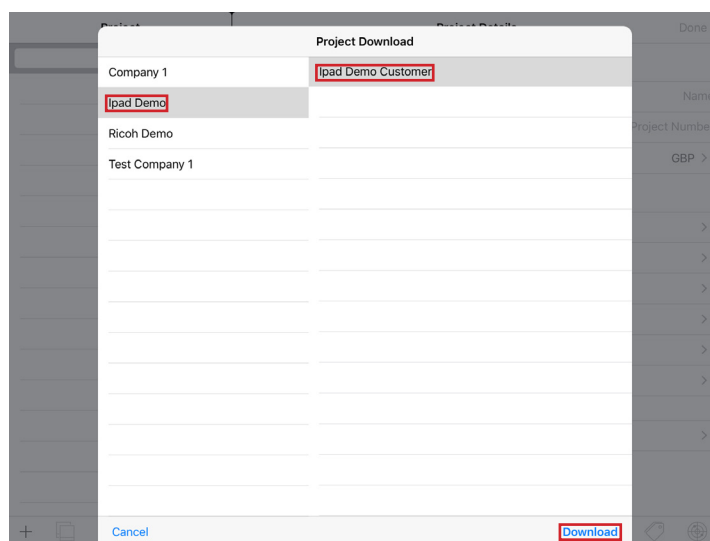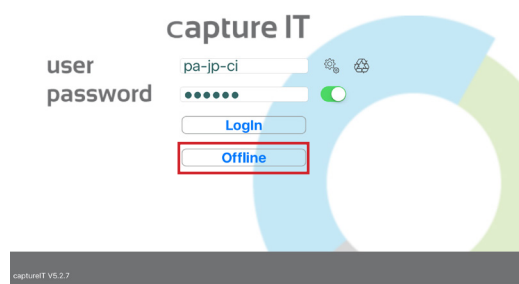


*Depending upon the configuration of the project this may take a few minutes as all the sites and devices will be downloaded to the local IPad

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.
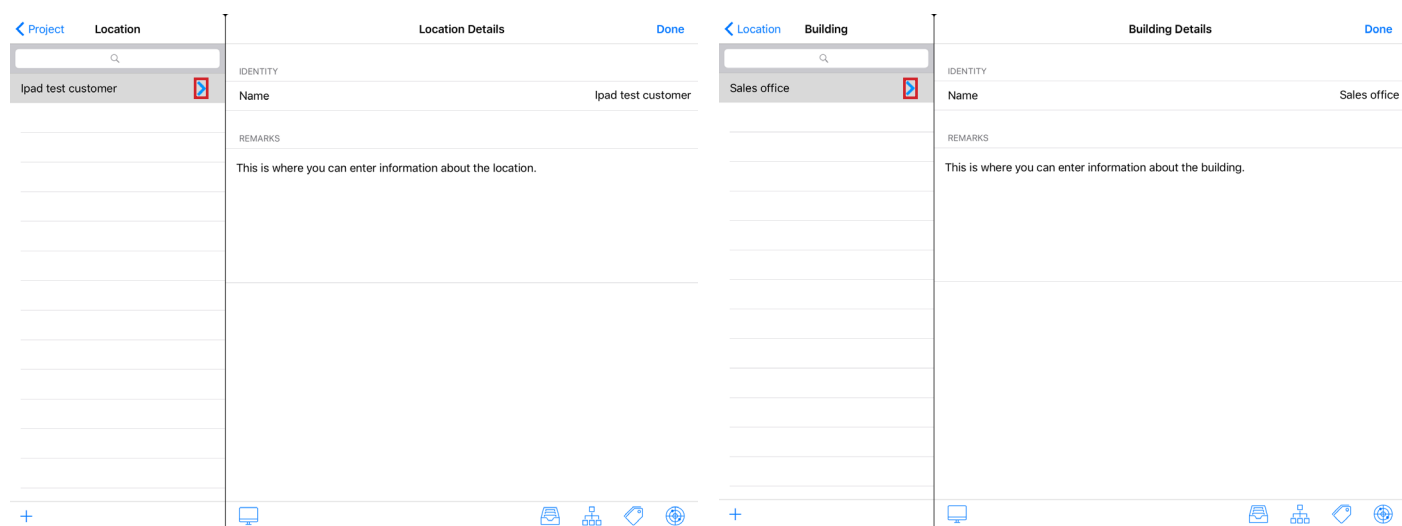


While on the login screen, tap [ Offline ]. This will login to the solution, but allows the user to work offline.



(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.



If the user requires to go back to the previous screen, they can use the ‹ 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



- **Reset floorplan** - *Deletes previously uploaded floorplan*
- **Photo Library** - *Upload an image from the IPad's hard-drive*
- **Take Photo** - *Use the IPad's camera to take a photo of the customer's fire escape plan or floor layout*



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:
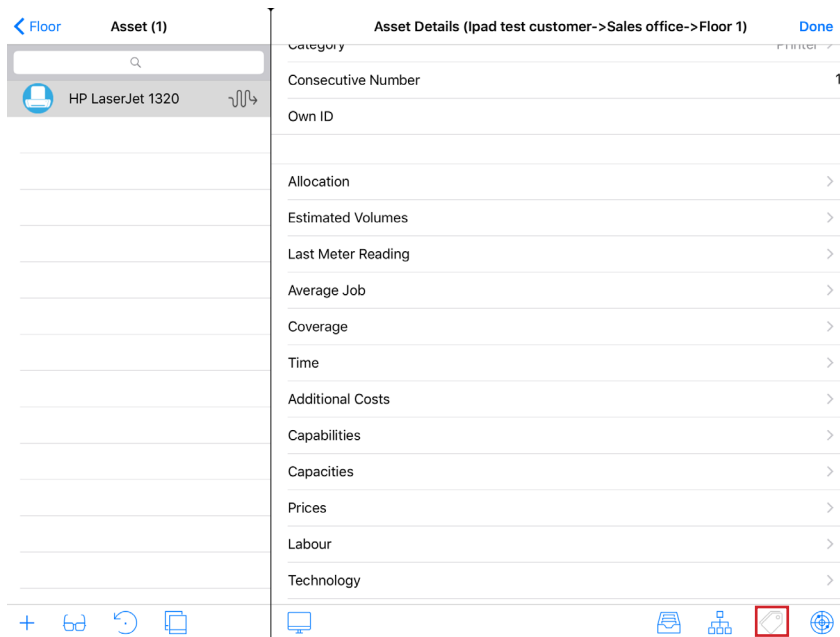
## *Adding single devices to the project:*

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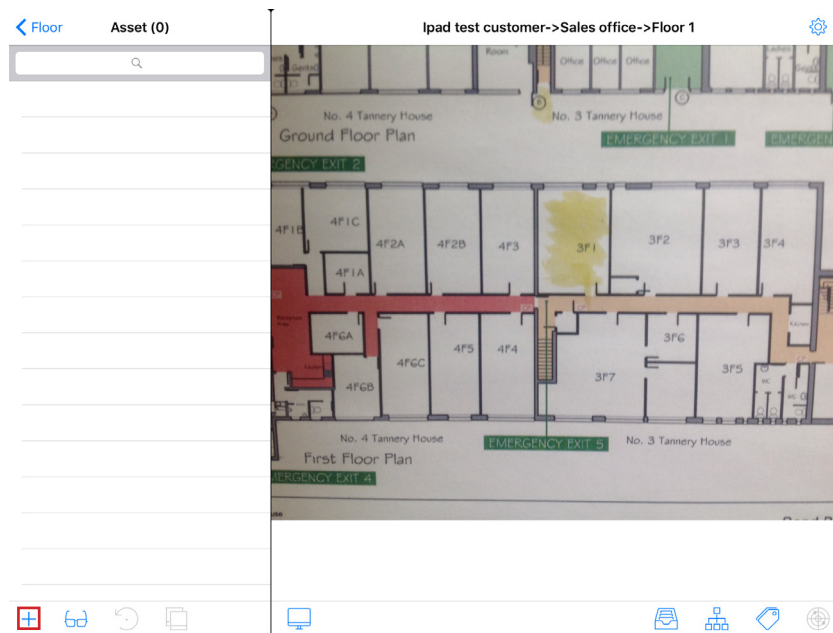


By tapping the + icon and entering the model, the user can search the MySalesDrive database to search for the particular machine/s the customer has on site.
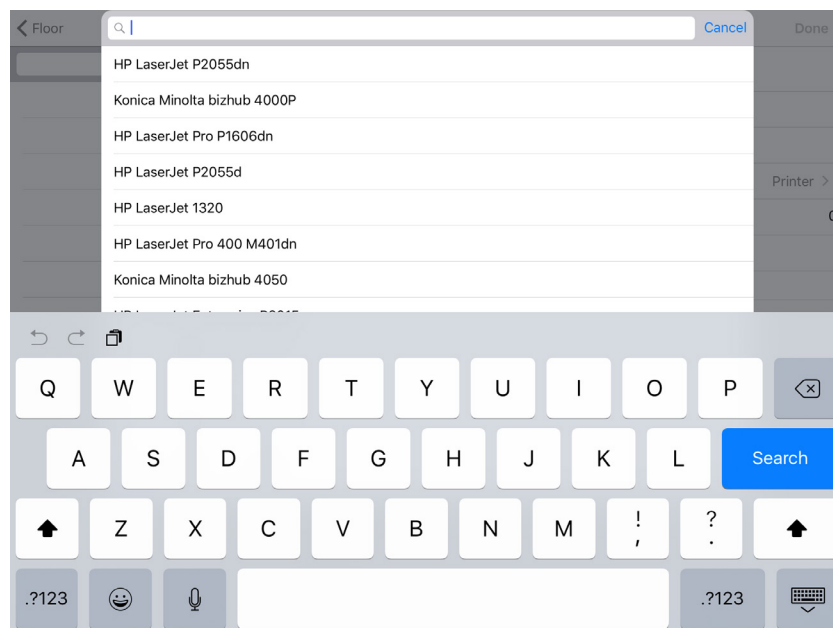
Once the machine has been located and added, tap the ✎ icon to start manually entering data for the device e.g, Serial Number, Device Volumes or Meter Readings, Costs, etc.
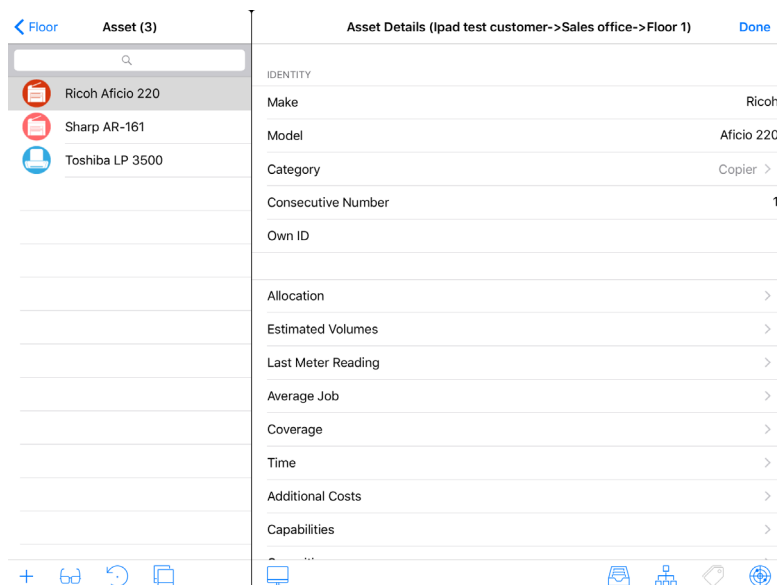


## Previous device collection

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.



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 ⊕ icon (located bottom right of the screen).



To plot a device, tap on the right side of the device's cell with the 〰 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.
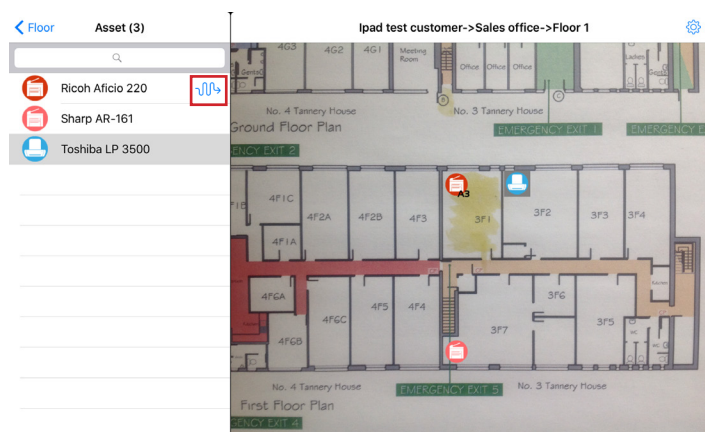


Depending on 'Project Settings', the device icons may be too small or too large for the floor plan. To change the sizing tap on the ⚙ icon (located top right of the screen) and move the scroll to the optimal position
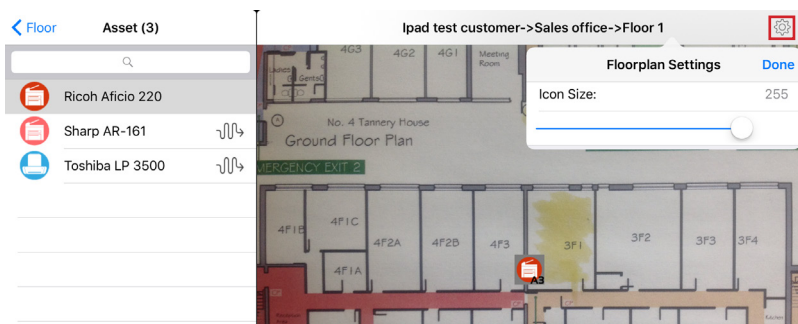
If required, extra information can be added to a device, by tapping on the device the 'Asset Details' dialogue will appear. Allowing the user to add volume information, remarks on the device, take a photo of the device, etc.
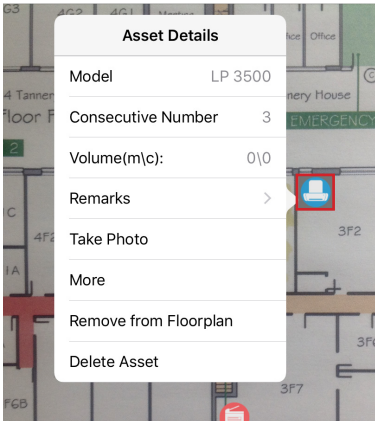


After all the devices have been plotted and the floorwalker has completed their audit, they can then upload the plotted data to allow the 'Professional Consultant' to create the Future State Proposal and Reports.

## Uploading a completed floorwalk project:

Navigate back to the 'Project Home Screen'. Tap on the ☁ icon to upload the newly plotted project.





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.
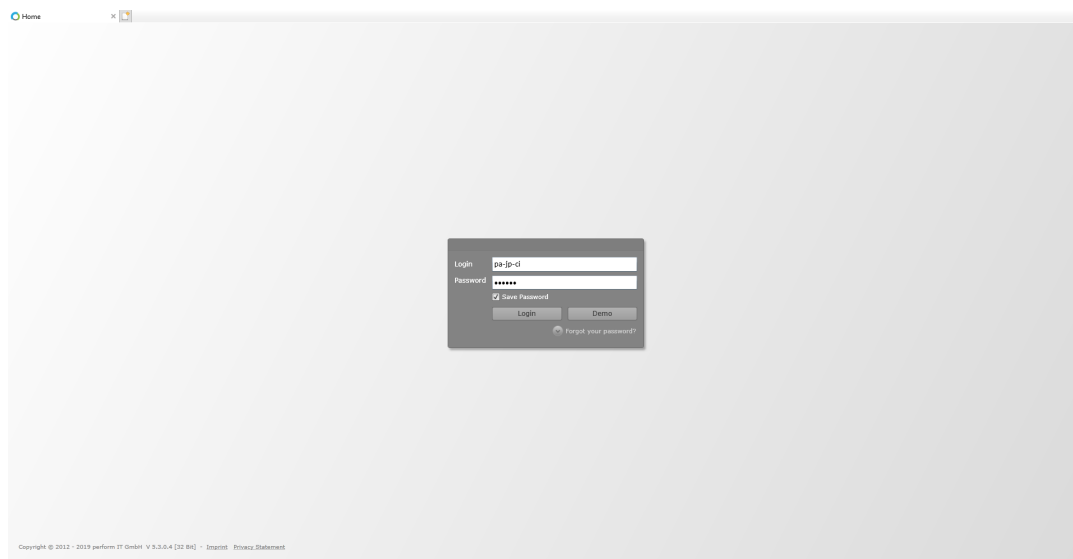


The user can access this login screen by visiting eu.mysalesdrive.com/Europe/#/HomePage.

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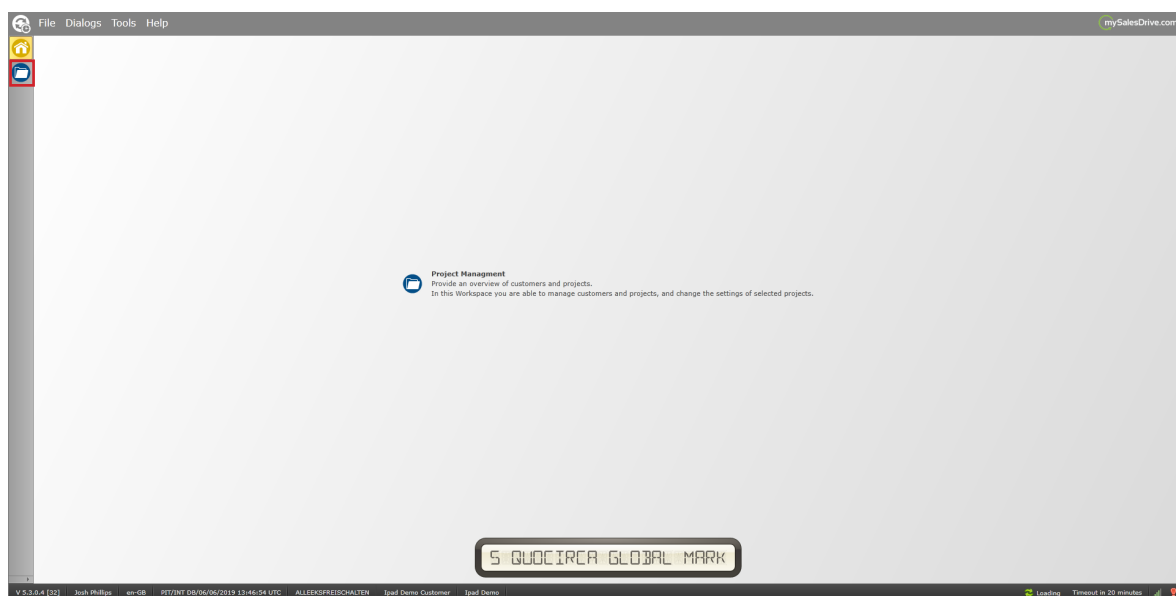


The CaptureIT login workspace is a simplified version of MySalesDrive. Giving the user the Project Management tab to alter customer or project information and to share the completed projects with other users within the team.
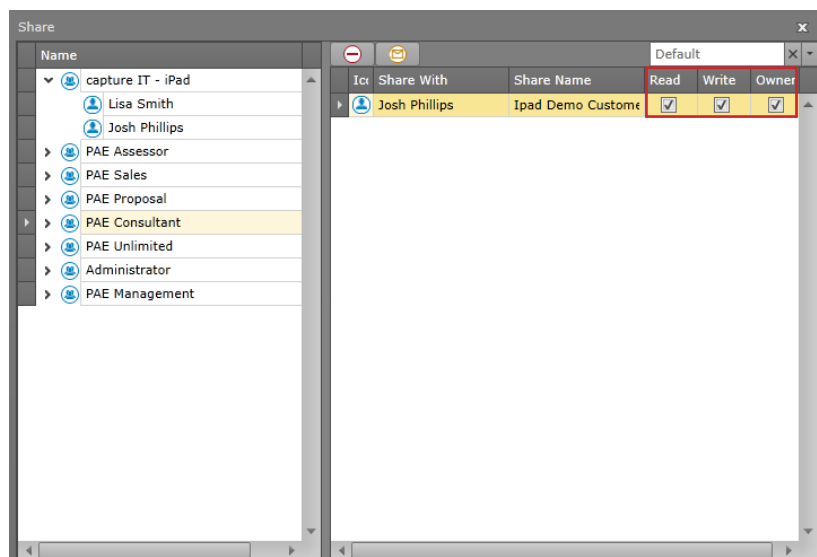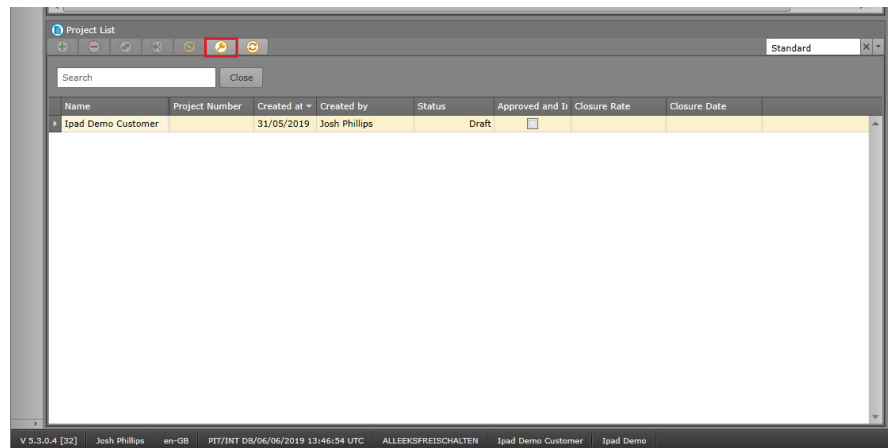
To access the Customer and Project information, click

**Customers**

**Projects**

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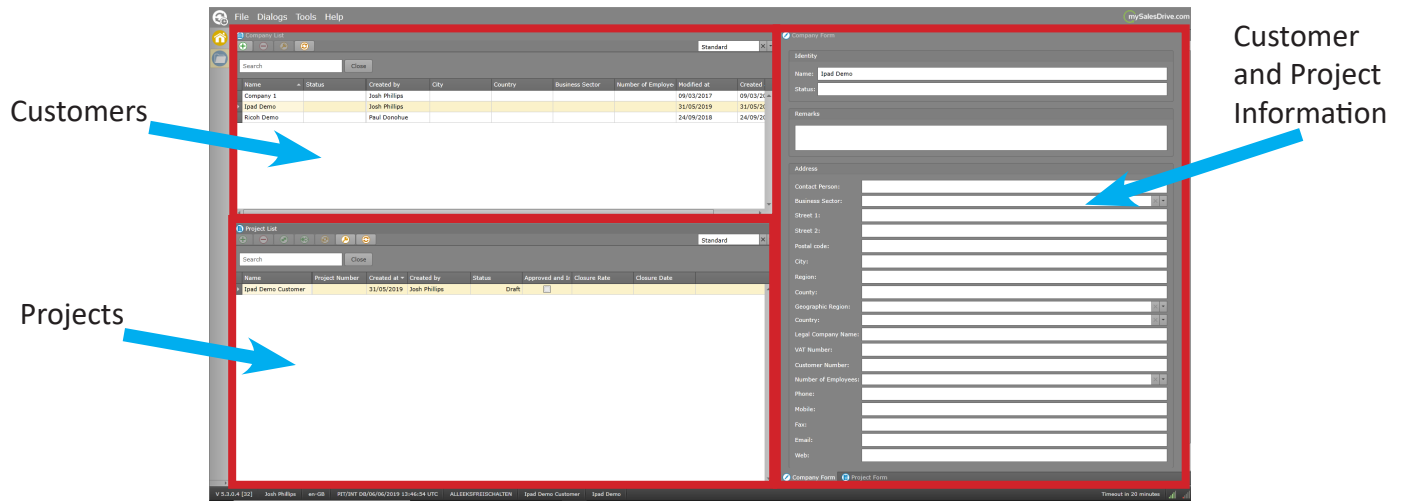
Identify and click the Customer and Project to share with other users.



Highlight the project to share and click the 🔑 icon. Located on the Project List tool bar.



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.

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