COMPASS
softwares

PLANNER FOR IPHONE

Contents

Planner App for iPhone by
## Compass Softwares (Thailand) Ltd

PLANNER OVERVIEW

Planner Application by Compass Softwares is a complete software solution for any Sales Team. The system works widely with different type of industries and was design to run on multiple platform which support Microsoft Windows XP/Vista/7/8 or MAC OS by using modern Web Browsers. The Application running exclusively on iPhone devices form third generation.

In this document we will describe the application which is running on iPhone devices. Even we will not cover the Web edition of the Application in this document you will be able to see and understand how these two platforms serve and complete each other.

ACCESS THE APPLICATION

After successful installation of the Planner application on your iPhone, you will see additional icon with the label "Planner", touch the icon and the main screen of the application will shows
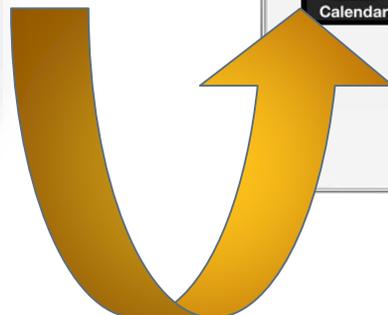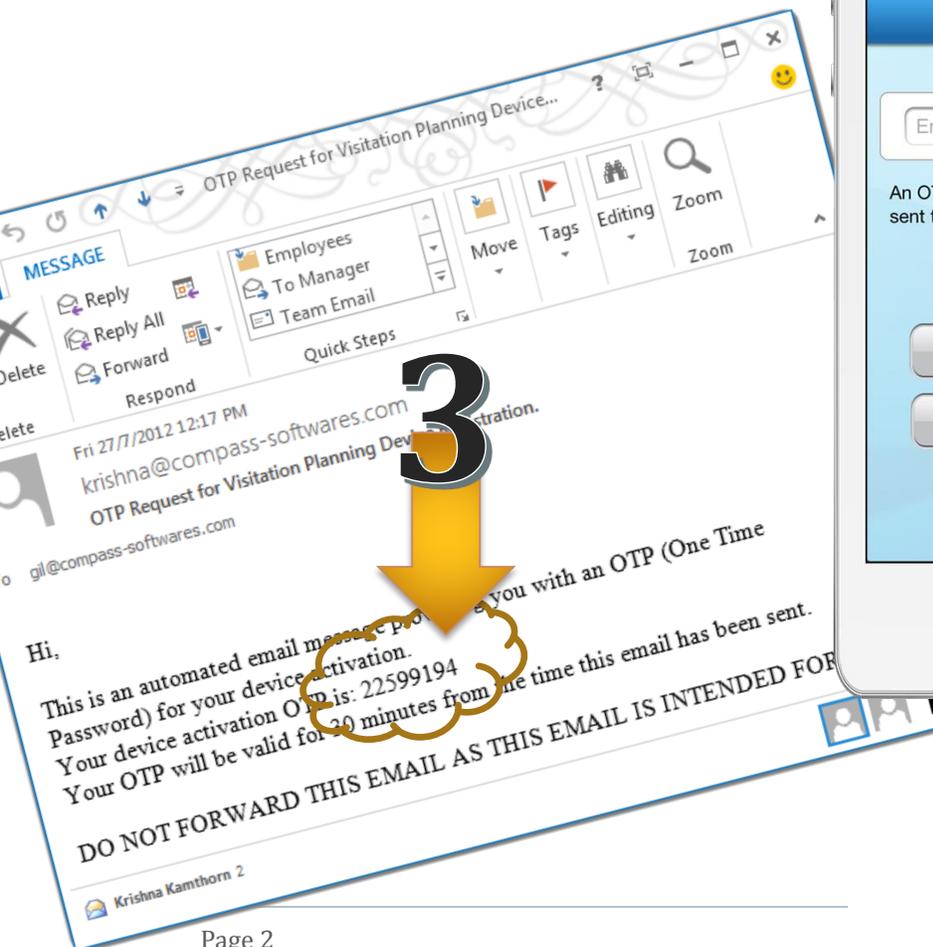
Functional Highlights

On your first time of running the application and after login with user name and password, you will request to input an OTP number (One Time password), in order to get your OTP from our system, click on the button "request New OTP", a message on the screen will pop up telling you that OTP password was send to your email.

Login to your email account and check for an email specify your OTP number, this email deliver by our system with subject of "OTP Request for Visitation Planning Device Registration.", type the OTP number into the field "Enter OTP" and click on the Send button.

If you type the correct OTP number you will be able to continue to the next step.

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1

User OTP

Enter OTP   Send

An OTP (One Time Password) has been sent to your email / mobile.

Request New OTP

Restart Registration

2

MESSAGE

OTP Request for Visitation Planning Device...

Fri 27/7/2012 12:17 PM
krishna@compass-softwares.com
OTP Request for Visitation Planning Device Registration.

gil@compass-softwares.com

Hi,

This is an automated email message provide you with an OTP (One Time Password) for your device activation.
Your device activation OTP is: 22599194
Your OTP will be valid for 30 minutes from the time this email has been sent.

DO NOT FORWARD THIS EMAIL AS THIS EMAIL IS INTENDED FOR

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Krishna Kamthorn 2

1. Login to Planner
2. Request OTP
3. Check your email for OTP
4. Enter OTP in Planner
5. Click Send button

FIRST LOGIN TO PLANNER

After first verification you will be able to login to the system when need. To login to the system you will have to provide your username and password.

Your Admin should

Register you in

The system with

Associated Companies

1
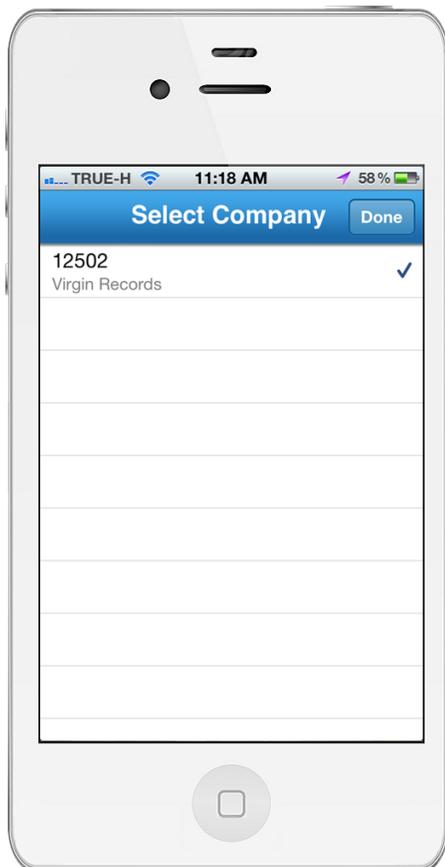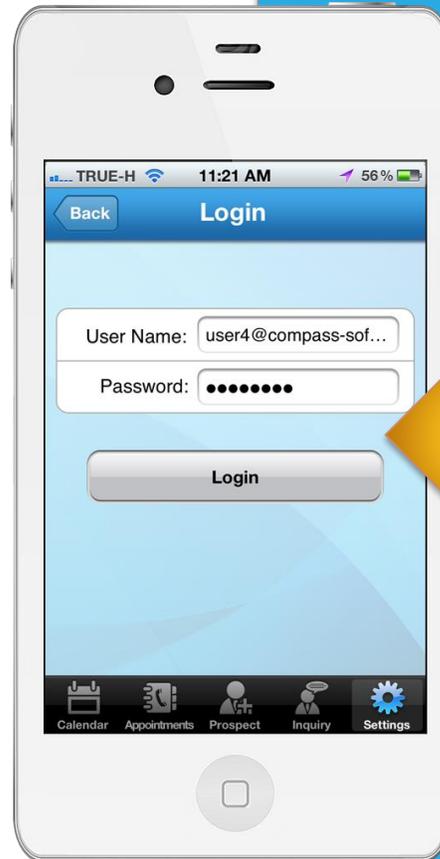
If your login was successful, you will redirect to another page to select a company in your corporate.

Please notice that even if your corporate have a number of companies, you may not allowed to access the data of all, but only for few companies (this configuration is setup by your Admin).

Select a company and click on "Done" button.

Add your first Meeting

Adding meeting is very easy in Planner. The first screen that we will see right after selecting a company, is the calendar screen. In the Calendar the current date is highlight and on each date that we have meeting already it will be specify by the number of meetings in the right bottom corner.

To start adding new meeting, touch and choose on the date which where you would like to add the meeting.

Add Meeting details

Adding meeting is very easy in Planner. For each meeting you have list of built in parameters to choose from, At first we will choose a Meeting Type (this is the category of the person which we are going to meet with, it can be, for example, Customer, Supplier and so on), on the next step we will choose "Visit time From" and "Visit Time to" to setup a time for our meeting, and as an option we can set a reminder for the meeting (two reminders are available for each meeting).
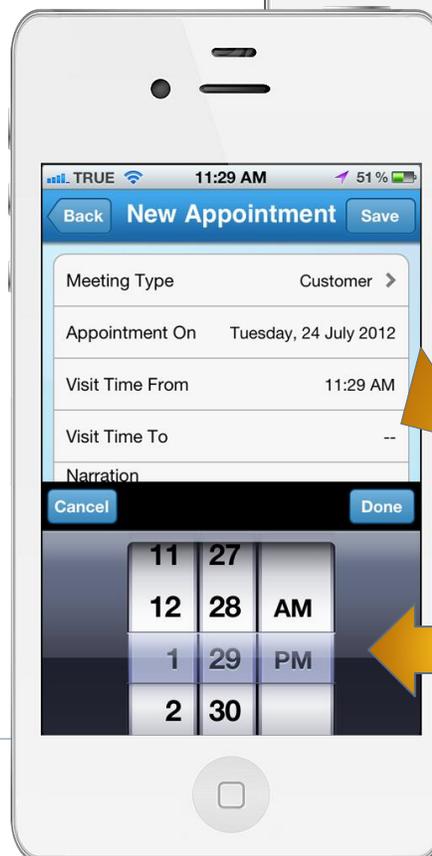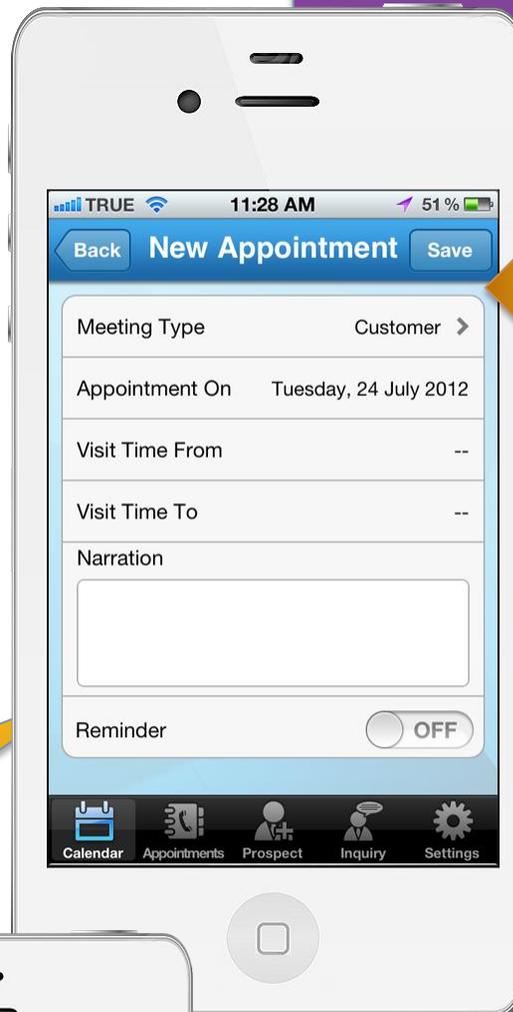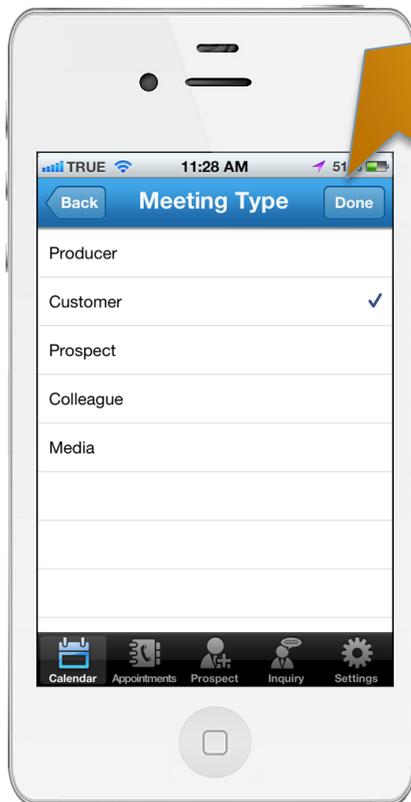
Adding Agenda

Once we save the basic information related to our meeting (includes narration and setting a reminder as optional), we can start setting an Agenda to the meeting. For each meeting we can set multiple Agenda, these will be subject to talk and discuss in our meeting and follow up later on.

Agenda can be for example, "Introduce the Company", "Present New Product", "Complain from customer" and so on.

For each Agenda we will add Subject in three levels, which are Group, Sub Group and Category. For example, if our Agenda is to "Present new Product" , our Group can be "Fruits" , sub Group can be "Orange" and category can be a specific Orange type "Jaffa".

View Meeting Details

We can view all our meetings details, includes Agenda or Minutes which were attach to it. At this stage we can also remove Meetings, update Meetings with New Agenda and more. In order to view a Meeting we need to login to the System, select a Company and view the calendar with list of Meetings. Each day that was setup with meeting will have a notify number, which represent the number of meetings for the selected day.

Check In/Out and Minutes

While we view a meeting we may want to check-in (when we start the meeting) or to check out (once the meeting is finish) , as well to add "Minutes" to describe what was discuss in the meeting , and what need to be done to achieve what we talk about.

We can add to each Agenda multiple "Minutes" which can describe the results of our meeting.
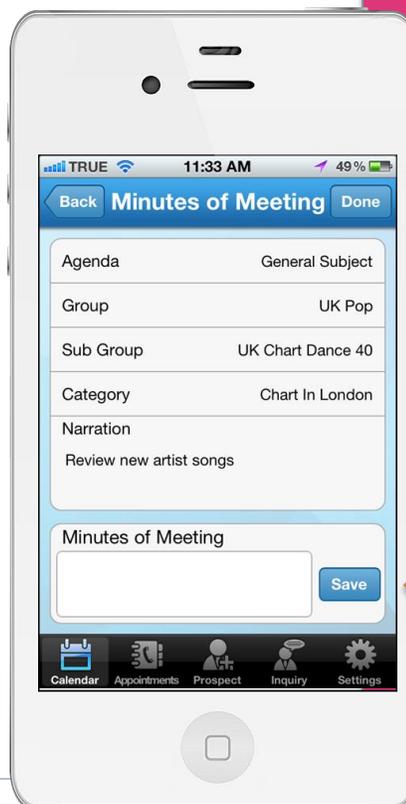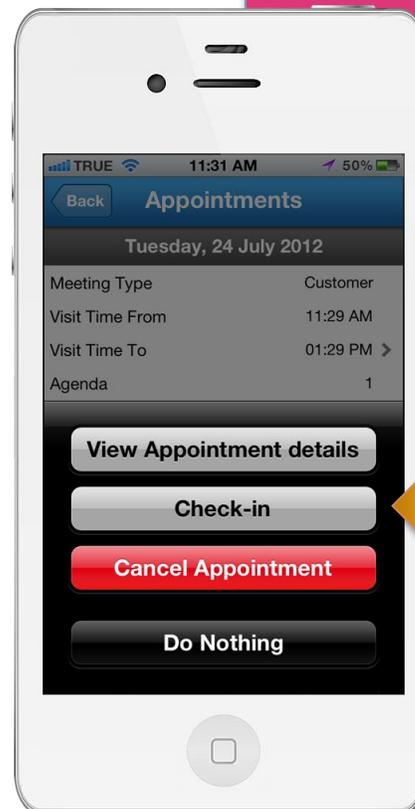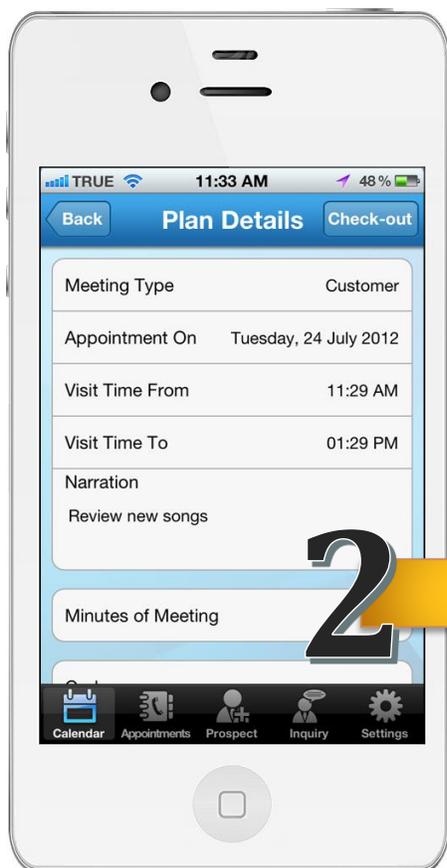
Sync data and Analyzing

The data of Planner is store in the device (iPhone) but you can Sync the data with the Server and user it later on with compatible Web Application, which can use on Desktop, Notebooks and Tablets.

Also, you can view few available reports, related to Meetings, to help you to follow up meetings and the content which is related to it.
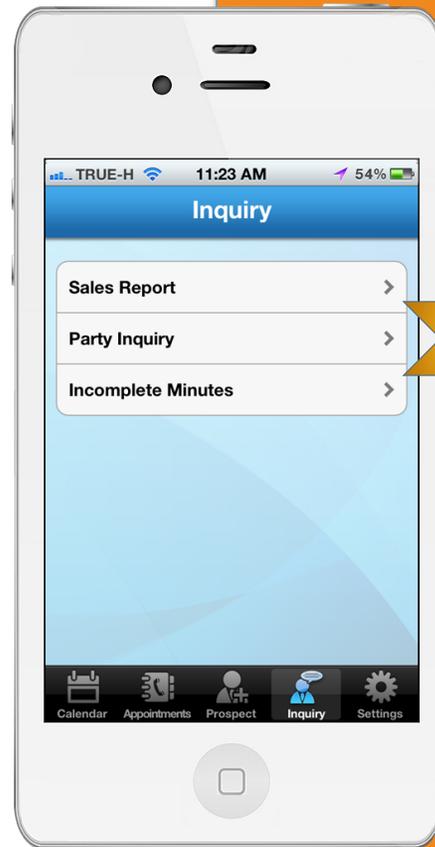
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