

# Managing your Business with Mobile Technology

---

presented by a la mode



## Course Highlights

- ❑ Mobile XSites keep you in touch when you're on the go
- ❑ Accept orders, schedule appointments and process payments all from your mobile device
- ❑ Stay on top of your business with mobile access to your e-mail
- ❑ Retrieve instant maps and driving directions to any address

# Managing your Business with Mobile Technology

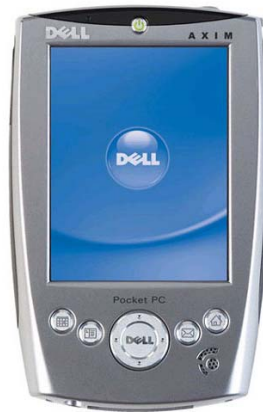
## Introduction to Managing your Business with Mobile Technology

### Introduction to Managing your Business with Mobile Technology

Mobile devices have evolved significantly since the first Palm Pilots hit the market. Today's state-of-the-art hand held device is more powerful than many PCs sold back then. Couple these tools with the power of your XSite and you've got a combination that can revolutionize how you manage your appraisal practice.

### Notes on Mobile Hardware

- ❑ Pocket PCs, commonly referred to as PPCs or PDAs (Personal Digital Assistants) run the Windows Mobile operating system by Microsoft.
- ❑ Several manufacturers, such as Hewlett Packard (iPaq) and Dell (Axim) are making Pocket PC's.
- ❑ Starting around \$200, Pocket PC's are cheaper than laptops and tablet devices. They're also more durable and have better battery life.
- ❑ Other devices running PalmOS are readily available as well.
- ❑ Even Mobile phones are capable of handling a number of online tasks without the need for a hand held or laptop PC.
- ❑ Wireless technologies like Wi-Fi and Bluetooth allow you to use your hand held devices in an increasing number of public locations, like coffee houses and airports.




### Internet access in the field

Before using your Mobile XSite, your mobile device needs to be equipped for Internet access.

- ❑ Wireless networks such as Cingular, Sprint and Verizon typically offer Internet access and charge by the amount of data you send or receive (not by the minute). Call your mobile provider and see what they offer.
- ❑ Many mobile devices come equipped with Wi-Fi technology so that you can connect to the Internet through the same type of "hot spots" used by laptops. This is increasingly convenient as the number of public hot spots continues to grow rapidly.

---


 **Hint:** To find a hot spot in your area, visit the Wi-Fi-FreeSpot directory at:

<http://www.wififreespot.com/>

---

- ❑ Another common way to connect a mobile device to the Internet is through your mobile phone. How does the mobile device "talk" to your phone? Typically through Bluetooth®, a technology that allows devices to communicate over a short range. A lot of the newer cell phones and handheld devices have Bluetooth® built-in so this option may only require you to pay for Internet access on your mobile phone – no extra hardware.

---

 **Hint:** For more information on hardware and wireless connectivity, try logging into the "Mobile Appraiser Group" on Yahoo! It's a community of appraisers, just like you, who want to keep up with the latest in mobile technology.

<http://groups.yahoo.com/group/MobileAppraiserGroup/>

---

### Mobile XSite

Enterprise level Appraiser XSites have unleashed the power of your mobile Internet connection and make you a true "mobile professional." You're always in touch, even when on the go. Using this combination, you can:

- ❑ Retrieve new orders while in the field
- ❑ Send status on existing orders
- ❑ Send and receive e-mail from your CertMail account

# Managing your Business with Mobile Technology

- Have convenient access to maps, driving directions and other information essential to a mobile pro.

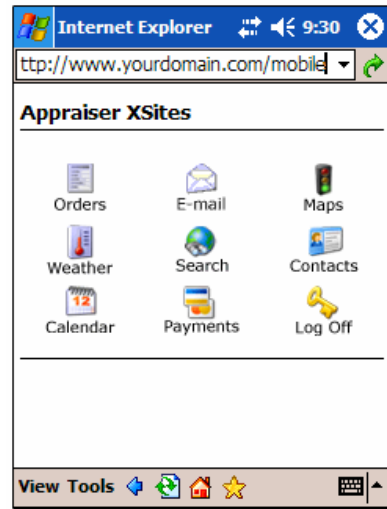
Your clients won't have to wait for you to get back to the office before getting the status information they constantly crave. And you reinforce your image as a responsive vendor who's truly "on the ball."

## To use Mobile XSite features

All of the features on your Mobile XSite are Web based, so your mobile device needs an active Internet connection. Use the Web browser on your mobile device to navigate to your XSite's URL followed by `/mobile`. For example:

`www.yourdomain.com/mobile`

Use your regular XSite **Username** and **Password** or the **PIN** number specified in your **User Account** information on your XSite.



**Hint:** Once you've logged into your Mobile XSite, you'll likely want to add it to the "favorites" on your Pocket PC. On the Pocket PC 2003 operating system, just tap the star in the menu bar and then the Add / Delete tab, followed by Add again.

## Viewing orders

The convenience of the Internet has raised our expectations on response times. The public wants everything now, and your clients are no exception. Why make your clients wait until you're back in the office to accept orders? With your Web-enabled mobile device, you can acknowledge orders the minute they arrive. Here's how.

1. From your Mobile XSite, tap **Orders**. You'll see a list of status items followed by the number of orders that match that status.

2. Tap **All Open Orders** or another category you wish to see.

From here you can post status on the order or take other actions using the shortcuts below the order details.



- For status, just tap **Status**, make any additional notes, and tap **Save**.
- For orders where an inspection hasn't been scheduled, you can simultaneously put the inspection date and time on your calendar, have it logged in the order online, and notify your client via e-mail.

**Note:** Instead using the browser's Back button, use the Main Menu links inside on the Mobile XSite screens.

## Scheduling an inspection

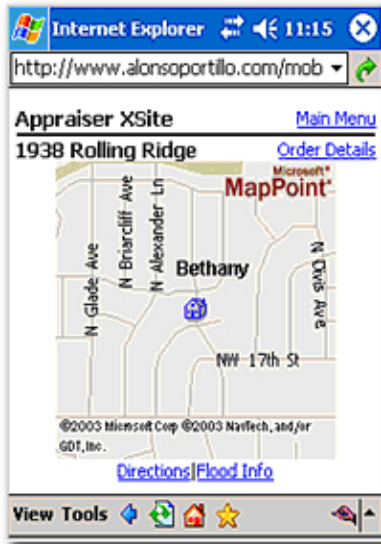
In addition to posting status in the field, you can also schedule an inspection on any open order. When you schedule the inspection on your Mobile XSite, it's logged in your online calendar, and the client is notified.

1. Open an order on your mobile device.
2. Tap **Schedule Inspection**.
3. Fill in the dates and times for the inspection, if you need a reminder e-mailed to you before the inspection and if you want your schedule to reflect available, busy, etc. Note that you'll need to scroll through this screen to get to all the items.

# Managing your Business with Mobile Technology

4. Click **Save** and stand by as the appointment is added to your online calendar.

## Maps and driving directions



Need a map or driving directions while in the field? No problem. The Mobile tools on your Enterprise level XSite have you covered.

You can start from one of two places: An acknowledged order from your XSite ordering system, or the Mobile XSite **Home** screen. Let's find a map for an order that's already on the Pocket PC.

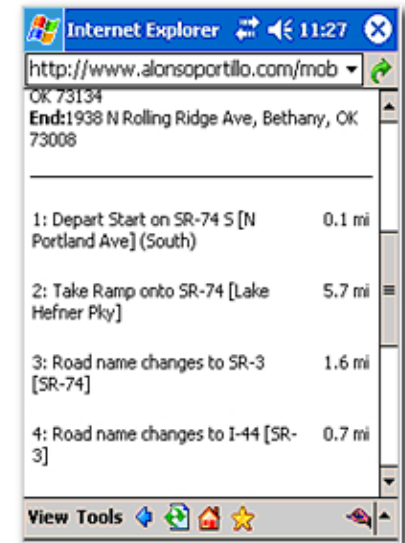
1. After logging into your Mobile XSite, tap **Orders**.
2. Then, select the status under which that order falls. If it's a new order, it's probably under **Accepted** or **New**.
3. Now, tap the order for which you want a map to see its details.
4. Then, tap the link for **Map** below the details. You'll see your map appear on screen.

That's it! From here you can download driving directions as described next.

## Driving directions

Once the map has been downloaded, we can also retrieve driving directions.

1. From your Mobile XSite map, just tap **Directions** and choose your starting point:
2. If you're at the office, tap **My Office**, and you'll get directions starting from your profile in your address book.
3. Or, if you're not at your office, tap **Other Address**, enter your starting point – either the address or a nearby intersection - and tap **Get Directions**.
4. Now, just scroll through the directions to see which roads to take.



## Download driving directions independently from orders

You don't have to have an open order to use the XSite mapping features.

1. Start at the Mobile Tools home page. Just tap **Maps**.
2. Now, enter the address you need, and tap **Find**. In some cases, you may be prompted for additional clarification on your address.
3. Once the map is displayed, you can request driving directions from your office or another location just as before.

## Sending files to Pocket TOTAL

Pocket TOTAL, our field gathering tool, is designed to eliminate duplicate data entry when it comes to collecting property information. When used with online orders on your Enterprise XSite, you can also download directly to Pocket TOTAL so you don't have to start a report in the office just to merge in the order data.

# Managing your Business with Mobile Technology

- ❑ When viewing the details for either a new or in progress order, just tap **Pocket TOTAL File**.
- ❑ You can save it in the default folder or browse to another. Just mark the option to open the file when done saving, and you'll see it appear in Pocket TOTAL.
- ❑ Once in Pocket TOTAL, you can change the default description if needed, then open the file and proceed with entering data, drawing a sketch, adding voice notes and more.
- ❑ When you're done, move the file to your **Synchronized** folder and it will be copied into WinTOTAL's file cabinet the next time you connect your Pocket PC to your desktop.

## Weather

Need the forecast before you schedule an appointment while in the field or embark on the day's inspections? Your Mobile XSite has you covered. From your Mobile XSite home page, just tap **Weather**.

Once again, using the address already on file, you can receive an up to the minute weather forecast without having to turn on the TV or browse a website from your desktop PC.

## Google Search

Why wait till you get back to the office to find out about something on the Web? Your Mobile XSite has a convenient link to Google's mobile page. Just tap in your topic and then tap **Google Search**.

Your search results are formatted for your small Pocket PC screen. If you see a topic description that matches your search, just click it. Or you can view additional results by tapping the link at the bottom of the list.

## Calendar and Contacts

The calendar and contacts on your Mobile XSite are simplified interfaces to the full versions of your Appraiser XSite – giving you just what you need when you're in the field.

- ❑ To access your contacts, tap the **Contacts** icon. Eight contacts are listed at a time in alphabetical order by last name. Get to the next set of contacts by clicking the ">" below the list. From your Mobile XSite, you can add a new contact – just the basic information, then fill in the rest later – or search for a contact using the links at the bottom of the screen. Since your Mobile XSite shares the same contacts database with your XSite (and with other a la mode products) any change you make here is automatically reflected on the other platforms.
- ❑ When viewing a contact from a mobile device such as a phone, you can tap their number and have it dialed right from the contacts screen!
- ❑ To access your schedule for the current week, simply tap **Calendar** from the main Mobile XSite screen. From here, you can also add a new appointment or task.



**Hint:** If you're scheduling an inspection, use the **Schedule Inspection** link at the bottom of the page while you're viewing an order. That way, the order status is updated, and the client is sent notification at the same time add the appointment.

Remember, when you're through accessing your contacts, click the **Main Menu** link at the top of the screen!

# Managing your Business with Mobile Technology

## Payments

Enterprise level XSites give you the ability to process credit cards on your website. We've taken these tools to your Mobile XSite, too, so you can process orders while in the field. This requires that you first set up your merchant account when you configure your XSite to accept online orders. (Select the **Credit Card Processing** link from the **My Office** admin function of your Enterprise XSite.)

To enter a payment for an order already on your XSite while in the field:

1. Tap **Payments**. Then, tap **Enter a new payment for any order**. Your Mobile XSite displays a list of all your open orders.
2. Locate the order and click **Charge**.
3. By default, the name of the client from the report appears. However, you can find anyone else in your address book by tapping **Search**. Likewise, you can overwrite any of the fields as you fill other information such as the credit card number.
4. Once you've completed the form, click **Next**. If there are no errors in your data entry, you're taken to a summary screen.
5. After reviewing the information, scroll down and click **Submit**. Stand by as the payment is processed and that's all there is to it.



To enter a payment for something other than an order already on your XSite, tap **Enter a miscellaneous payment**. It's the same as entering in the payment for an order, except you have to type everything from scratch.

## Transaction History

This is where you can see what you've charged as well as issue a chargeback for a refund if needed.



1. While in the payments menu, tap **Transaction History**.
2. Now, select the date range of payments you wish to see. After selecting an item from the list, tap **Refresh** to re-query your website.
3. Once you've found the payment, just click the link to view the details. If the transaction was a payment that had not been previously charged back, you can refund it from there by tapping **Refund**.

**Note:** For security purposes, your transaction history only shows the last 4 digits of the credit card that was used.

## E-mail

Once again, why wait until you're back at the office to receive or send e-mail? Your Mobile XSite offers a simple and quick interface for your CertMail account.

# Managing your Business with Mobile Technology

It starts with the login for your Mobile XSite which is simply your CertMail address and password. Once you're logged in, tap **E-mail**.

- ❑ You first see your inbox and most recent messages. To read a message, just tap the subject line. Once you're in a message, it's just like regular e-mail, you can reply to or forward the message. To get back to your message list, tap **Close**.
- ❑ To get to folders other than your **Inbox**, tap **Folders**. You'll see a list of subfolders under your **Inbox**. To access one of the folders and the messages in it, just tap it. To get back to your Inbox, just tap **Go up**.
- ❑ You can get to other folders, not just those under your Inbox, by tapping **Go up a level...** Here, you'll see your **Sent Items**, **Deleted Items**, **Drafts**, Etc. Once again, just tap the folder you need.
- ❑ To send an email, tap **Compose**. Type your recipient's e-mail address in the text box, or tap **Search** to look through your **Contacts**. Enter the **Subject** and **Message** and then tap **Send** to complete your message.<sup>3</sup>

NOTES:

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

