

iTuple User Guide

Version 2.0.1



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What's New in iTuple 2.0.1

iTuple 2.0.1 features two-way CRM (read and write), support for enhanced authentication logins, and a new Inventory module that can be used manually or in conjunction with a Linea-pro mobile barcode-scanning sled (which in turn requires an iPod Touch).

Introduction to iTuple

iTuple – a mobile version of xTuple – brings select xTuple functionality to the palm of your hand. Sync iTuple with your existing PostgreSQL xTuple database, and enjoy the convenience of having the data you need at your fingertips when you need it. Call your customer contacts to check on the status of potential orders, look up the street address of a customer you'll be visiting later in the day, send an email to your business manager letting him know a purchase order needs to be placed, enter inventory counts quickly and accurately – all from iTuple.

Getting Started

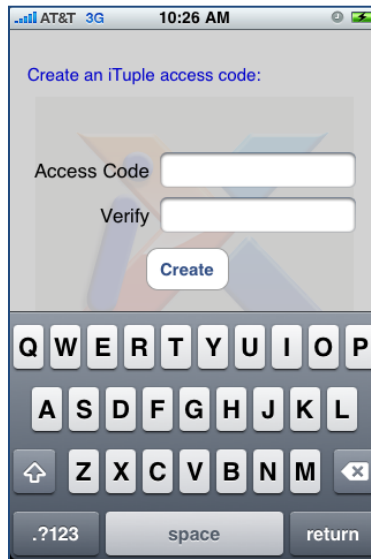
iTuple requires an iPhone, iPad, or iPod Touch device, as well as a xTuple ERP database (xTuple version 3.3.0 or later). For convenience, a compatibility matrix is provided here.

Device	Hardware Requirements	Software Requirements	Linea-pro Compatible
iPod Touch	2 nd or 3 rd Generation	iOS 3.2 or greater	Yes
iPad	None	iOS 3.2 or greater	No
iPhone	None	iOS 3.2 or greater	No

xTuple data is sent to your device through a direct sync. The direct sync requires your device to have a WIFI, Edge, or 3G connection, and also requires that your host server and database have a port open to accepting wireless connections - that is, your server and database must be accessible through the WIFI, Edge, or 3G signal on your device.

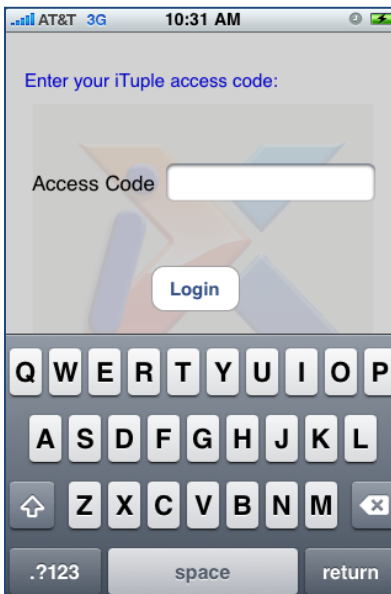
Logging In

When you first launch iTuple, the following screen appears.



For your first login, you will create an iTuple Access Code that will be used on this first and all other subsequent logins. Other than requiring at least one character, there are no restrictions on the Access Code.

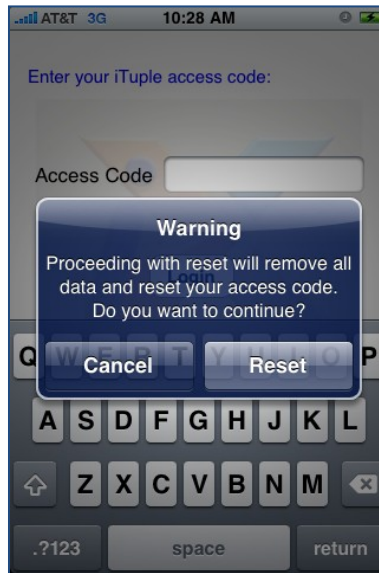
On subsequent logins, you will see a screen asking for your already created iTuple Access Code.



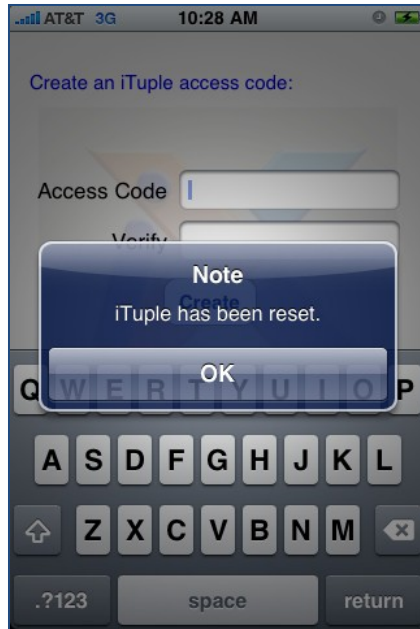
If you forget your iTuple Access Code, navigate to your iPhone / iPod Touch Settings screen and scroll down to the iTuple button. Tap the iTuple button, and toggle the on/off button so that Reset Next Launch is switched to On.



Re-launch iTuple, and you will see a warning message:



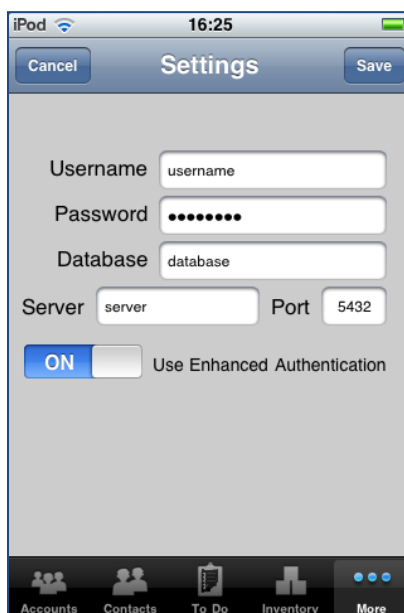
Tap Reset if you wish to proceed. After tapping Reset, you will see the message:



Note that your data has been removed from the device and you will need to re-sync with your xTuple PostgreSQL database in order to view data. From here you can tap Ok and continue with creating a new iTuple Access Code. Also, upon resetting your Access Code, the Reset Next Launch option under your device's Settings screen is automatically toggled back to Off.

Syncing With xTuple PostgreSQL Databases

Once you've successfully logged in to iTuple, the next step is to sync with your xTuple PostgreSQL database. Tap the More tab at the bottom of the application, and then tap the Settings icon.



Here you need to provide iTuple with your xTuple login information. This includes your username, password, database name, full server name (i.e., xTupledb.myserver.com), and the port (the default port is 5432). If you use Enhanced Authentication when logging into your xTuple client, you must also use it when syncing iTuple – tap the on/off “Enhanced Authentication” button to use this feature.

Note: If you are not sure what information to use when filling out the Settings screen fields, please see your Systems Administrator.

When finished adding credentials – all fields must be filled out – tap Save and you will be returned to the More tab. Tap Sync.

If the Settings are complete, tap Sync, and iTuple will attempt to establish a direct connection with your PostgreSQL database and retrieve data.

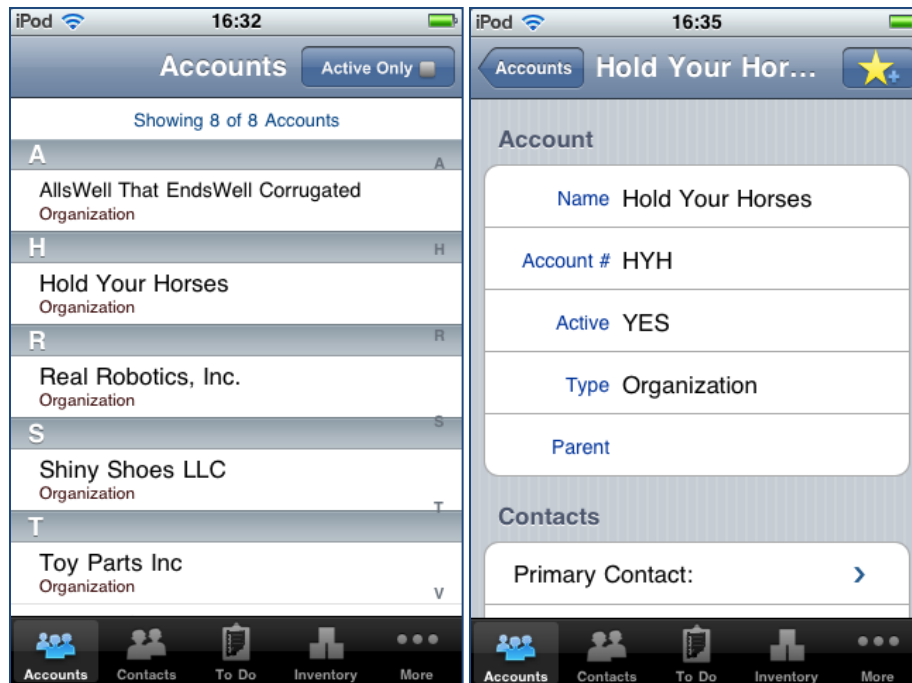
Note: If the Settings have not been completely filled out, the Sync button will remain disabled until all fields are complete.

You will either receive a message of success or failure. A success message indicates that the sync has delivered data to your device. A failure message may mean one of a few things – the first place to check is the Settings screen to ensure that the data you’ve typed in is correct. If this does not solve the problem, then there may be a network problem –see your Systems Administrator to ensure there is an established network available for iTuple to use to sync with the PostgreSQL database and that your device has access to this network.

Viewing Data

After a successful sync, you will be able to view your xTuple CRM data – this includes Accounts, Contacts, and ToDo items.

Across the bottom of the application you will see tabs for Accounts, Contacts, ToDo, Inventory, and More. The first three of these tabs – Accounts, Contacts, and ToDo – will display the respective data from your xTuple database.



Tap an Account, Contact, or ToDo item to view more detail. Tap a phone number, email, or address to activate the relevant and available application (phone, email, or map), so you can call, email, or view the street address for your selection. Tap the Active Only button at the top of the Accounts and Contacts screen to view only Active Accounts or Contacts; tap the button again to toggle this setting off.

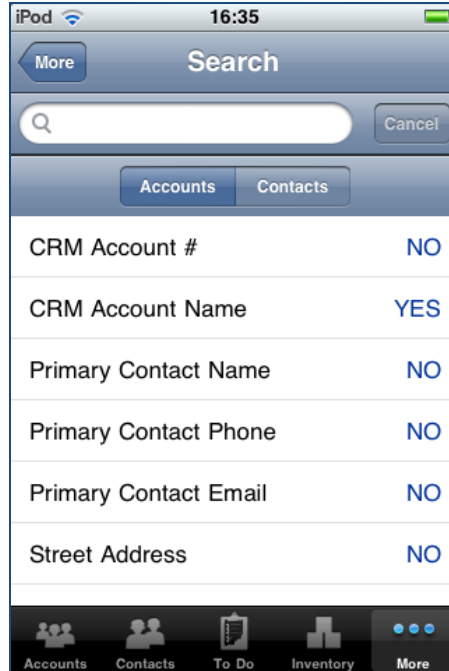
To add a contact to your Favorites list (the Favorites button is available under the More tab), just tap the star on the upper right hand corner of the Account or Contact detail view.

Searching

Tapping the search tab will bring you to a screen where you can search through your contacts and accounts to find the data you're looking for.

The text field at the top of the screen will be used to enter a search string. The Accounts and Contacts buttons allow you to choose to search through either Accounts or Contacts. The list below the Accounts and Contacts buttons is the set of possible data fields that can be searched – the criteria.

Tapping a criterion will toggle the setting for the criterion between “YES” and “NO”. A criterion set to “No” will not be used in the search; a criterion set to “Yes” will be used in the search.



After selecting whether to search Accounts or Contacts, tap the text field at the top of the screen and type the string you wish to search for; when finished, tap search.



Results will then be displayed in the Accounts or Contacts screen as appropriate. Tap the results to show additional detail for the Account or Contact.

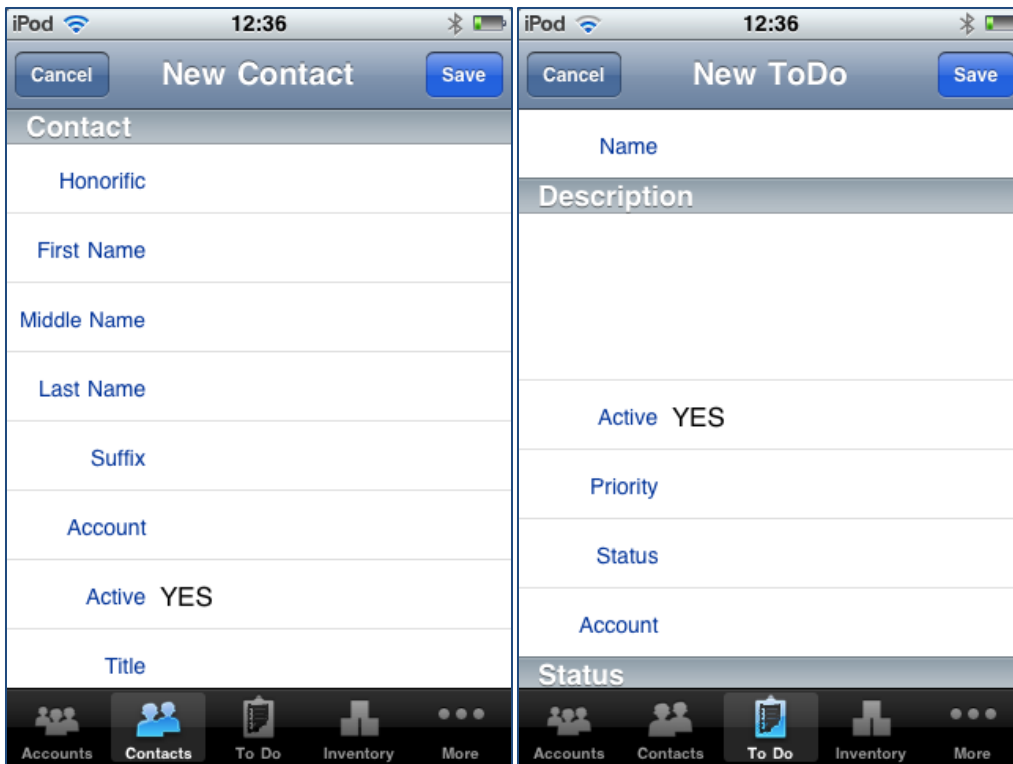
To return to the full list of items, tap the List All button on the top left side of the screen.

Adding Data

To add a new Contact or ToDo, tap the + button in the upper right corner of the Contacts or ToDo screen.

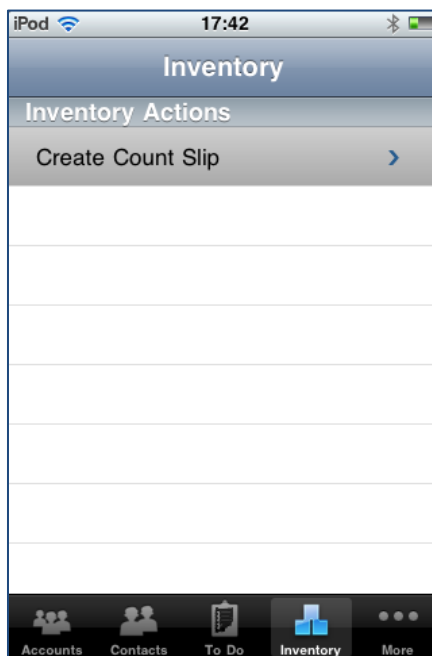


The New Contact or New ToDo screen will be displayed. Fill out the fields, and tap Save when finished. The new Contact or ToDo will be uploaded to your xTuple database the next time you sync your device.

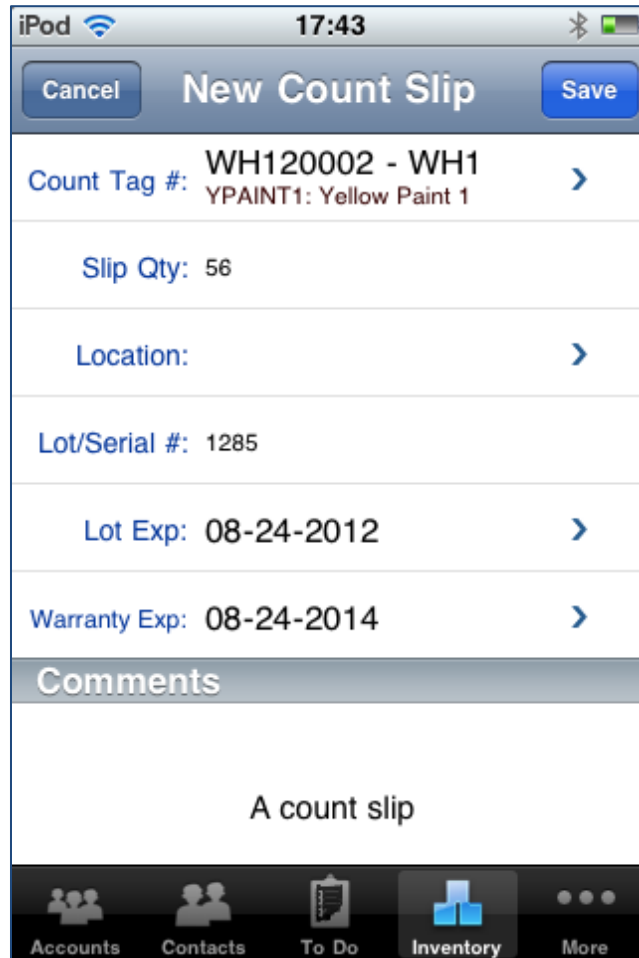


Inventory

Tap the Inventory button. The following screen is displayed.



Tap Create Count Slip, and the Count Slip screen is displayed. If you have a Linea-pro device, use it to scan the item site barcode *and the Count Tag # field will automatically populate. If you do not have a Linea-pro device, you can tap the Count Tag # field and make a selection manually.



After selecting a Count Tag #, fill out the rest of the screen as appropriate, and tap save. Your Count Slip will be uploaded to the database the next time you sync your device.

*You can obtain the iTuple Item Site Labels package here: <http://www.xtuple.com/node/2283> This free package prints barcoded labels to identify item sites. Scan the barcode to identify the item site, and if there is an outstanding count tag for the item site you can enter the count slip from your device.

Security

One way of keeping the data on your device secure is to leave the option of resetting your iTuple access code upon next launch set to "on". This ensures that if your device is lost or misplaced, no one can access the data on your device, as resetting your access code also removes any existing iTuple data.

Another method that may be used to keep your data secure is that of Apple's remote wipe service through MobileMe.

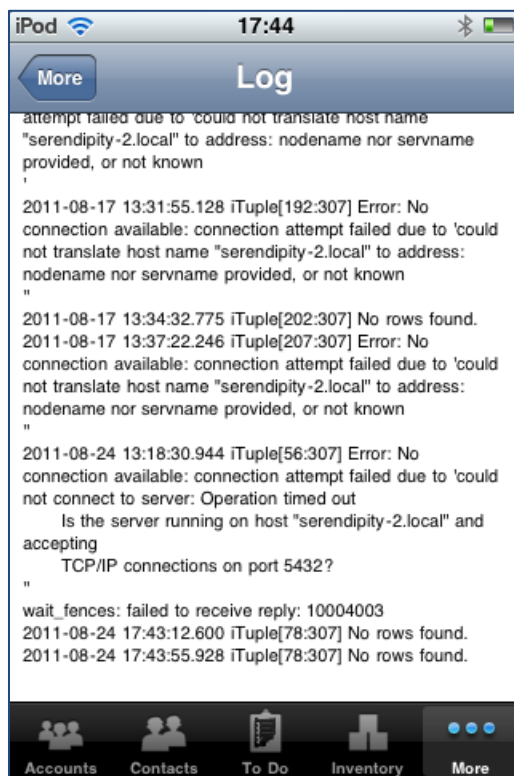
You can initiate a remote wipe...which restores your iPhone to its factory settings, ensuring that your personal information is nobody's business but your own. If you eventually find your iPhone, you can restore your latest email messages, contacts, and calendars easily.

(taken from www.apple.com/mobileme/features/iphone.html).

For more information on how to use MobileMe and how to subscribe, visit www.apple.com/mobileme.

System Log

Tap the more button and tap the Log button. Here you will see text output – essentially, a system log. When contact us regarding a possible bug, this log can be emailed to our support team for use in troubleshooting. Just copy and paste the log into an email to us.



Contacting Us

To report a bug, please visit our website at www.paladinlogic.com and click Contact Us, or send an email to ituple@paladinlogic.com.