

# AUTO SALES POCKET NOTES

<http://www.pnapps.com/aspn/index.html>

## INSTRUCTIONS



Version 1.9

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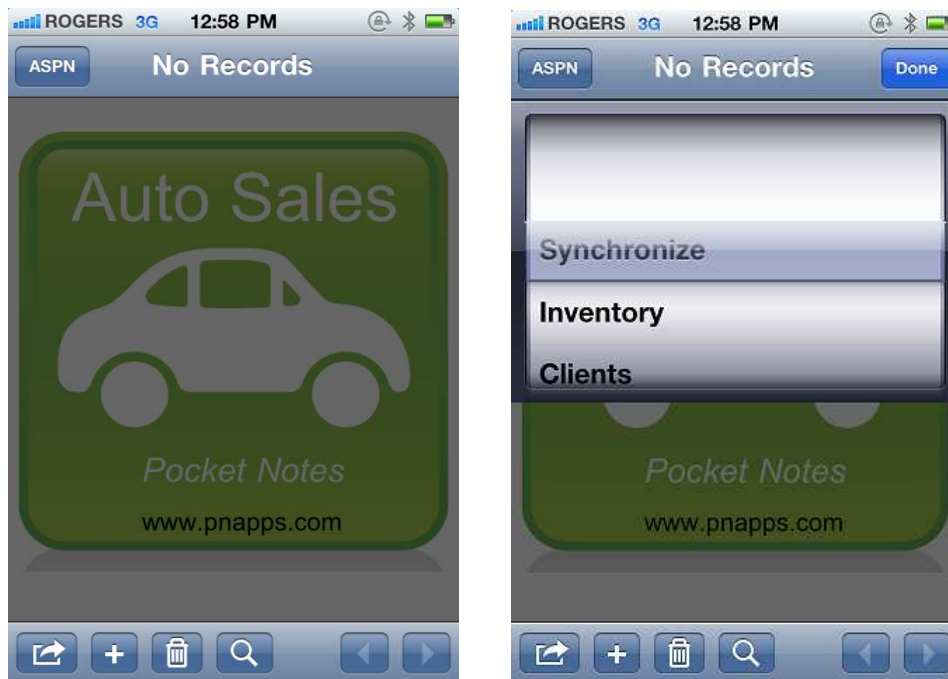
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## 1.0 – Modules & Navigation

Auto Sales Pocket Notes © contains 6 modules to assist your Auto Sales data tracking needs. The application includes an inventory module/database that is linked to the Client, Agent and Client Activity modules. Many of the fields throughout ASPN are pre-populated or add your previous entries to a drop list for a fast “Tap-N-Go” entry. More on editing drop lists will be addressed in detail.

**Navigation:** After tapping on the ASPN icon and launching the app, you will see the Index/Splash screen. To navigate within the application, simply select the desired module from the navigation drop list and then tap “Done”.

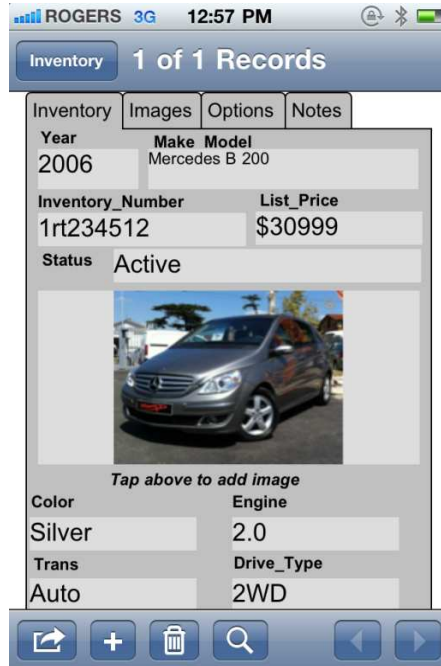


**Inventory:** The Inventory module functions as the main module. As mentioned, the modules are linked and relational. As an example, before attaching a Client to a piece of inventory, as in a consignment, the individual must be entered into the Client module first. Data is organized by tab and includes Inventory details, Images, Options and general notes. Numerous fields are available for data entry in the Inventory details area. At a minimum though, a make model, year and price must be entered. This allows for the listing entry to be uniquely identified

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within the application. Some of the special features included, in this and other modules, allow for images to be attached to the entry on the Inventory details and Images tabs. Individual records or record sets can also be emailed from the modules. These functions will also be explained in further detail.



**Agent:** The Agent module functions as an agent directory. An image or logo, voice memo or sketch can be attached to each entry. You can also direct dial or email the agent from within this area. An important note to consider is that this module supplies the agent data for the Inventory module. ("Sold By" field)



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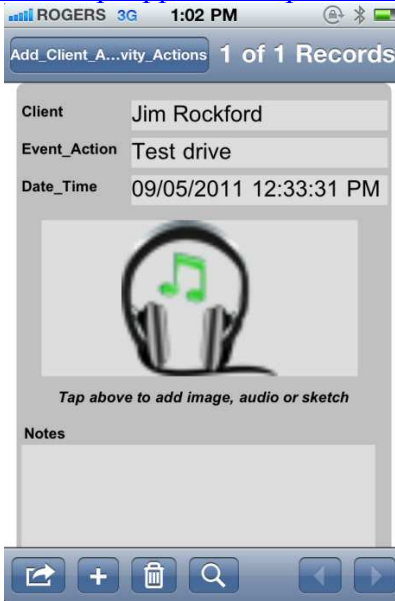
**Client:** The Client module functions as a client directory and has two tabs; Client Data and View Client Activity/ Actions. As in the Agent module, an image or logo, voice memo or sketch can also be attached to each entry. You can also direct dial or email the client from within this area. An important note to consider is that this module supplies the client data for the Inventory module. (“Sold To” and “Owner” fields)



**Add Client Activity/Actions:** You will be able to track any action or activity relative to a client or possible lead in this section. Conversations, follow ups, cold calls, test drives and whatever else you require can be logged. These entries can be filtered, searched and will display in a tabular format in the View Client Activity/ Actions tab of the Client module. An audio recording has been added to the record showing below.

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**BCard:** This module allows you to customize a basic business card and e-mail it from within the application. Simply insert a photo, add your business name,

business phone, mobile phone, email, fax and a tagline or slogan and you are ready to email the Bcard. When sending, be sure to select the .pdf format.

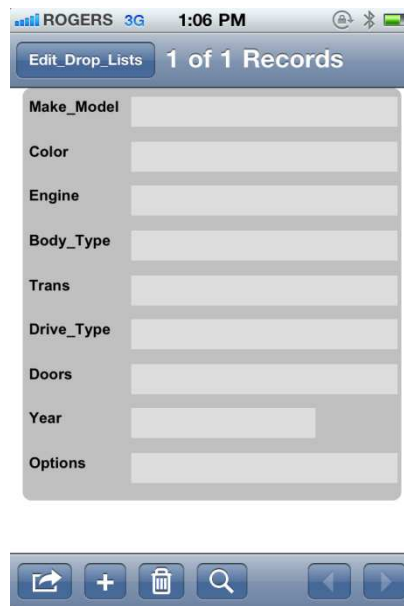


**Edit Drop Lists:** many of the fields within ASPN have been pre-populated. If you wish to edit the drop down contents, add or delete them, this is the module to do so. To add an entry, simply select the "+" icon located in the menu bar at the bottom of the screen. Type in whatever addition you require and it will now be in

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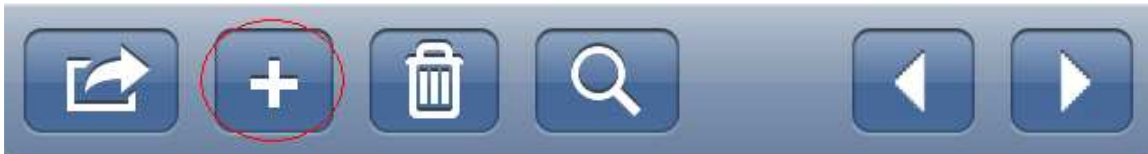
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that list. To edit present entries, use the “Find Records” method as described below. You may also use the “Table View” to locate the desired entry.



## 2.0 – Dealing With Records

**2.1 Adding Records:** If the module is grayed out, it has no record entries. To add a record simply select the "+" button located in the menu bar at the bottom of the screen. The available fields in that module will then become active.



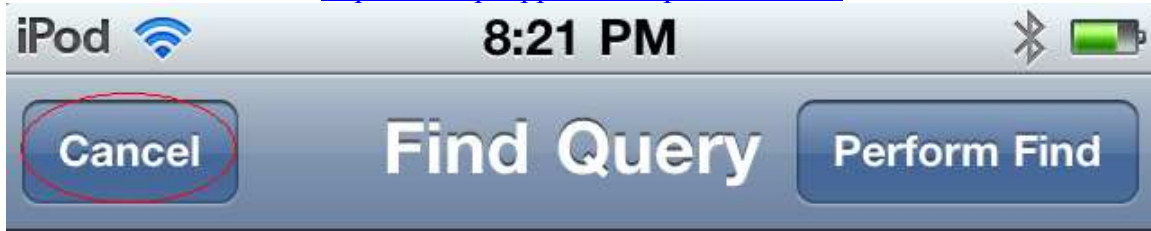
**2.2 Find Records:** Tap on the magnifying glass and then tap on the field you wish to search. A keyboard will appear on your ASPN screen. Enter the text string or value you are looking for. Select “Done” and then “Perform Find”. Any/All records with your criteria will now display.



**2.3 Canceling a Find:** Tap on the “Cancel” button to cancel the find process.

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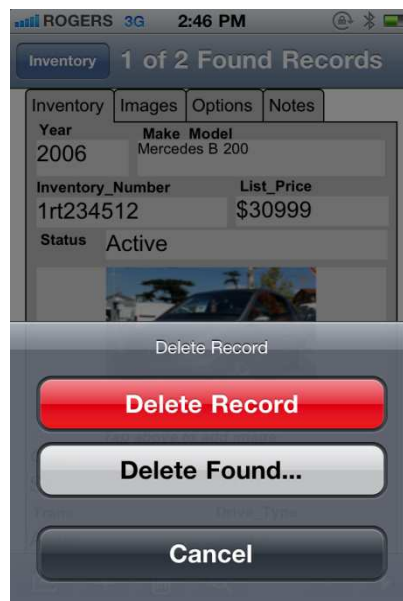
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**2.4 Delete Record:** Tap on the trashcan icon to delete a record. You will be prompted to mitigate accidental record loss.



**2.5 Delete Found Set:** To delete a found set of records, simply perform a find, and then click on the trashcan icon. You will be presented with a choice of options. As above, you can choose to delete the current record, or the found set of records.



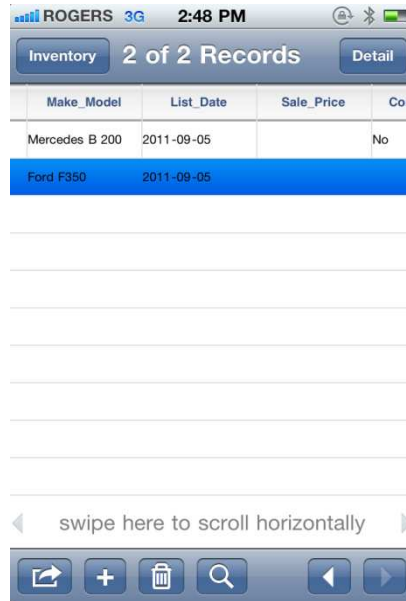
**2.6 Delete All Records:** Simply double click the "magnifying glass to display all of the records in the database. Click the trashcan icon. You will be presented with a menu, as shown above, that allows you to delete all of the records.



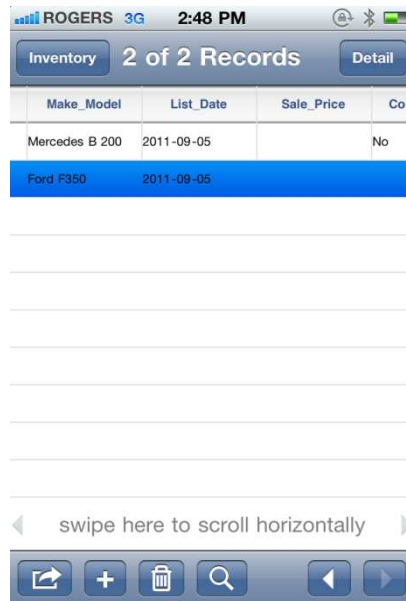
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**2.7 Table View:** To view your records in a table, simply click the "Action Sheet" button. Select the "Table View" button.



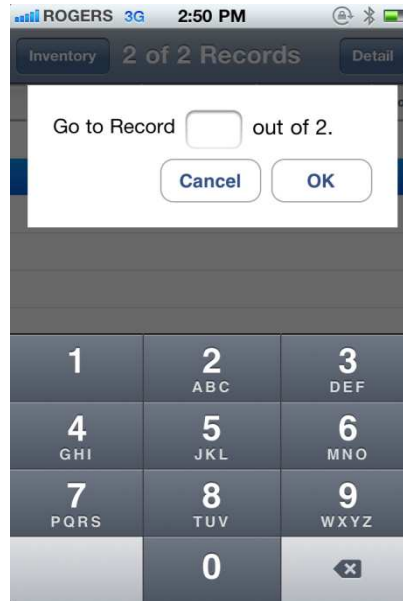
**2.8 View Single Record Detail From Table View:** While in table view, click the "Detail" button to view a single record.



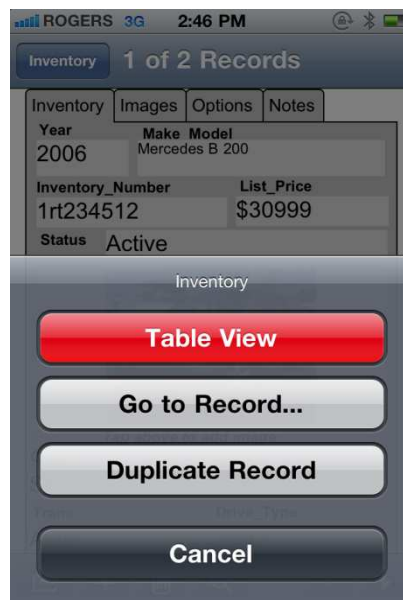
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**2.9 Locate a Single Record:** To view a single record in a table, simply click the "Action Sheet" button. Then select the "Go to Record" button. Type the record number and then click "OK".



**2.10 Duplicate Record:** To duplicate a record, click the "Action Sheet" button. Select the "Duplicate Record" button from the pop-up list.



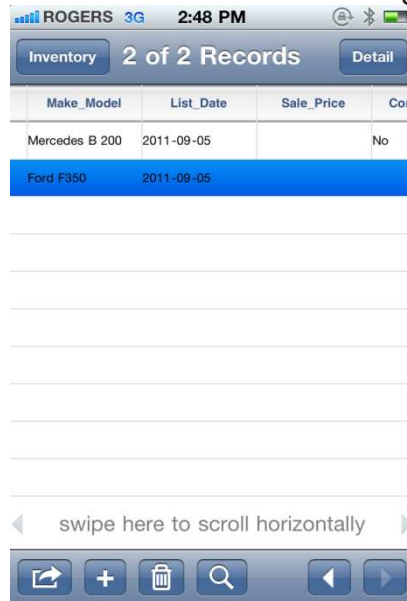
**2.11 Previous & Next:** Navigate through your records one at a time by selecting the previous < > and next arrows.

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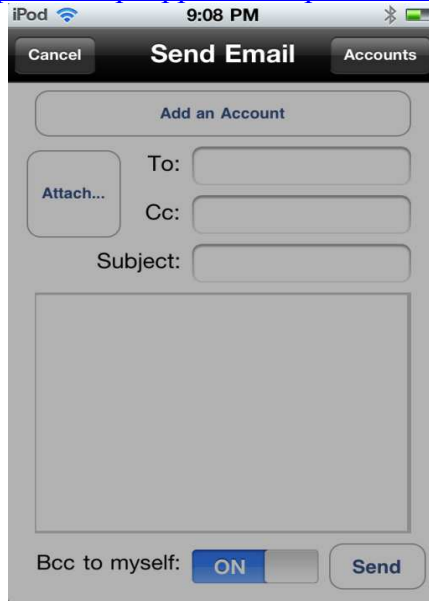
**2.12 Sorting:** While in table view, simply click the table header to sort the fields. Click once for ascending and click twice for descending.



**2.13 Email Records:** (Your device must be configured with an active email account for this feature to work.) Another very useful feature from within ASPN is the Email Records function. This will allow you to export and email either a .pdf or .csv file. With the .csv file, you can import the records into any other ODB database. To start, find the record or record set you wish to email. If you do not isolate an individual record through “Find Record”, all the records in the set will be exported. Then tap the “Email” button found on the bottom of the form. An email window will display and allow you to add recipients and add the .csv or .pdf attachment. To add an attachment, simply tap on the “Attach” button.

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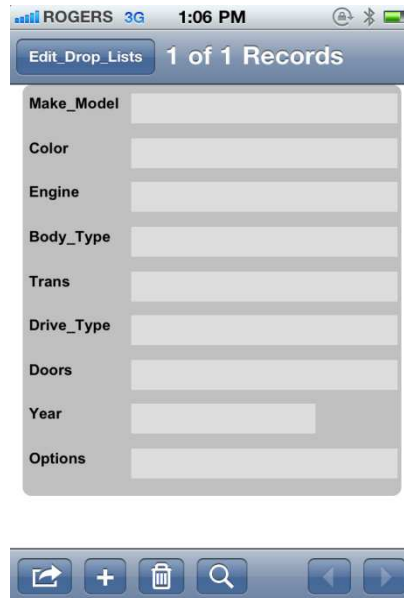
**2.14 Call Phone # :** ASPN will allow for a stored phone number to be dialed from within the application. Simply tap on the “Dial” button and the device (If phone enabled) will place the call. Enter the 10 digit number with no spaces or hyphens.

**2.15 Attaching an image, audio file or sketch:** To attach an associated image, audio file or sketch, tap on the Img, Audio or Sketch field. You will be presented with the options of; take a photo with the camera, use a photo from an album, insert a signature/sketch and play or record a sound.

**2.16 “Smart” Drop Lists:** Some of the fields come pre-populated with data. If a drop list has no pre-populated entries, simply tap on the field again and the text keypad will display. You will then be able to enter free text into the field. It will then remember the previous entries and include them in the list for future selection. To Edit the list contents of a pre-populated list, use the Edit Drop Lists module. To add an entry, simply select the “+” icon located in the menu bar at the bottom of the screen. Type in whatever addition you require and it will now be in that list. To edit present entries, use the “Find Records” method as described above. You may also use the “Table View” to locate the desired entry.

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## 2.17 – Synchronization with Desktop Application

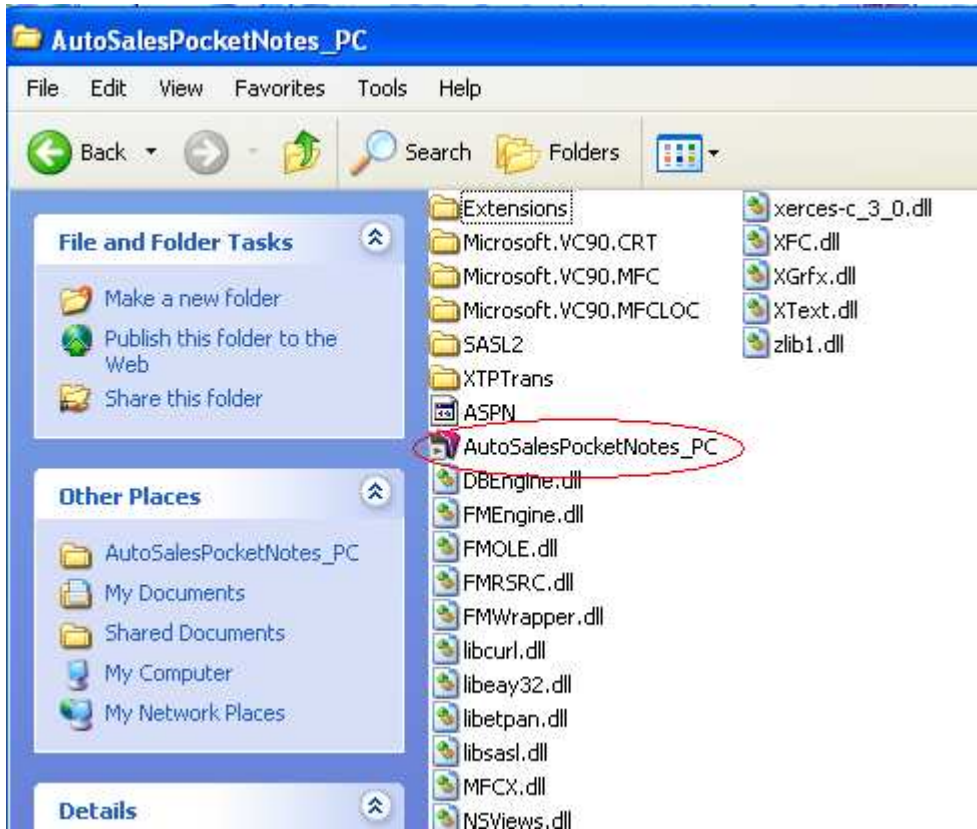
We are extremely excited to now offer Synchronization of data between your handheld device app and a desktop or laptop computer. In order to accomplish this, you must have both the iPhone or iPad software, and the Desktop version as well. Mobile device software can be purchased directly through the iStore.

Desktop versions may be downloaded from <http://pnapps.com/aspn/desktop.html> through a secure PayPal transaction. Be sure to check your browsers security alert bar for any messages. It may display below the address box and prompt you to allow the file download.

The folder you will download is in a zipped or compressed format. Extract the files and you will see a folder that has contents similar to the image below. (Mac and Windows versions will differ somewhat) You can place this folder wherever you like on your computer but do not rename or change any of the files within. The only file that you will use is the “Auto Sales Pocket Notes” application file. Simply double click on it to open the application. For detailed instructions on using the Desktop software features, use the “Help” menu from within the application. It is based on a FileMaker Pro 11 © database so alternatively, you can also download instructions [HERE](#) from FileMaker © on using the menu commands etc.

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After successfully installing both applications, you are a few small steps away from seamlessly transferring data.

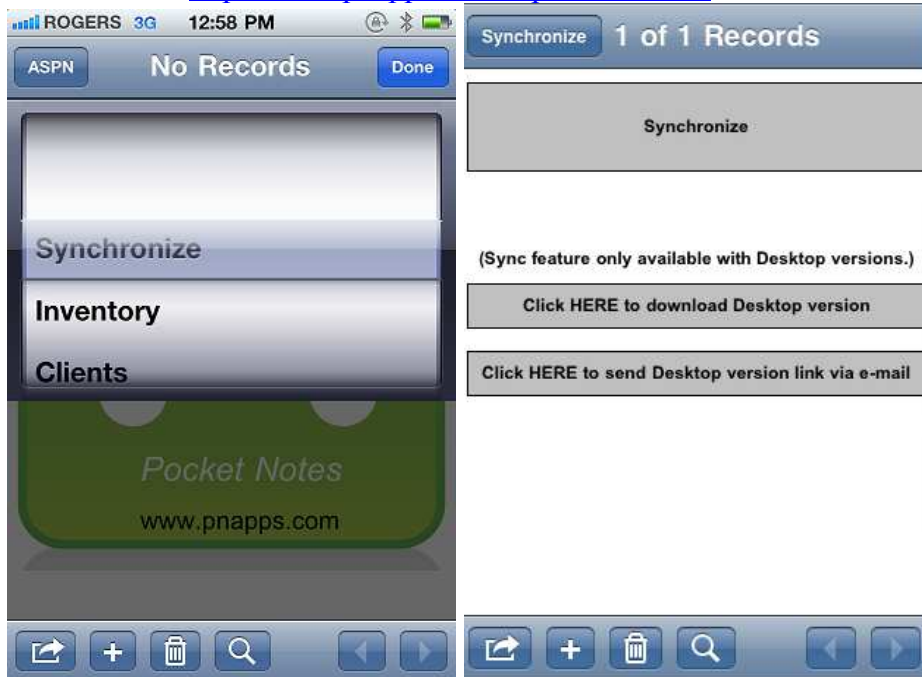
- 1) Make sure that your desktop computer and mobile device both have the Auto Sales Pocket Notes application open and running.
- 2) Connect your mobile device and Desktop machine to the same network. (On your mobile device, go to “Settings” and then “Wi-Fi”. Then simply select the network you are connecting to.)

Again, be sure that Auto Sales Pocket Notes is open and running on both the Desktop machine and mobile device. If you require assistance with creating a Wi-Fi network, see section 2.18 below.

- 3) Synchronization must be initiated from your mobile device. Navigate to the “Synchronize” module from within Auto Sales Pocket Notes and tap on the “Synchronize” button. A window will display telling you if you are connected to the Wi-Fi network. If you see a warning displayed at the bottom of the screen, you are not connected to a network. See section 2.18 below for further troubleshooting.

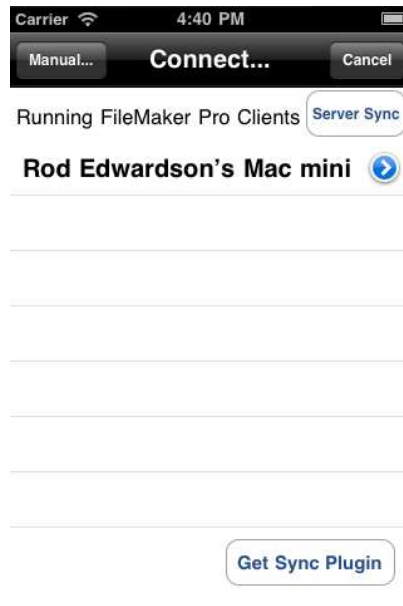
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5) If you do not see the “Wi-Fi not available” warning, select continue and you will see all computers connected to the network that are running Auto Sales Pocket Notes. Select the Desktop computer you will sync with by tapping on it.

Note: Disregard any other buttons on this screen as they are for advanced web server synchronization and custom application specific data. You will also see reference to FMTouch on some of the dialogue windows. Auto Sales Pocket Notes uses an FMTouch “Plug-in” for synchronization.



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6) Your Auto Sales Pocket Notes Desktop application will now display a window asking if you want to allow once or always.



You will then be provided a 4 digit "Sync Key" on the desktop machine. Enter this 4 digit number on your mobile device.



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7) Select the "Start Sync" button. And all tables will synchronize data.



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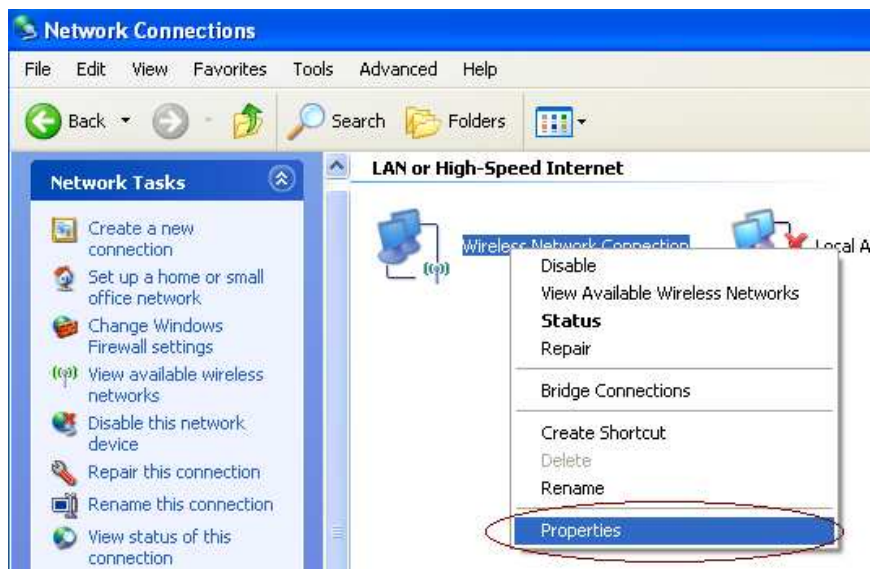
## 2.18 – Wi-Fi Network and Synchronization troubleshooting.

Your pnapps.com software uses a wifi network and both devices need to be connected to this network. If you do not already have a network set up, follow the instructions below to do so.

An ad hoc network is created when a computer shares files or internet connection through its own wireless capabilities. This is different from networks created using a wireless router in that there is no external hardware managing the network. An ad hoc network can be useful in situations where a simple wireless network is needed. The computer itself acts as the wireless router, hosting the wireless connection and managing communications between external devices such as your iPad or iPhone.

### WINDOWS OS

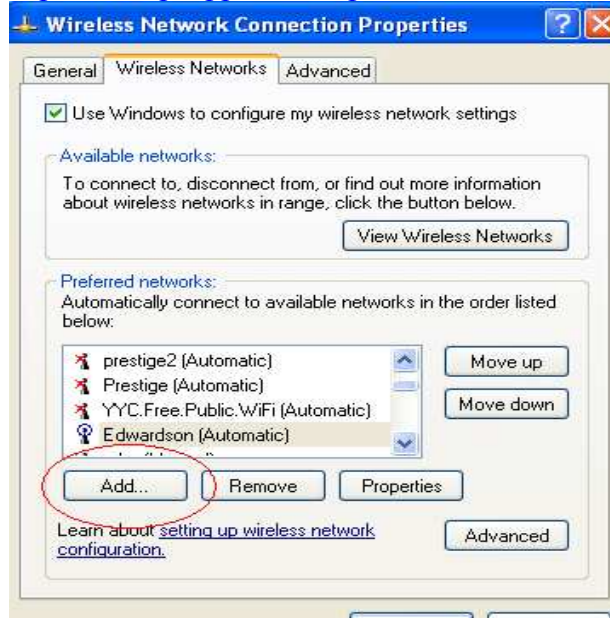
- 1) Click "Start," open the "Control Panel" and double-click on the "Network Connections" option.
- 2) Right-click on the wireless network connection and select "Properties." This will display the settings of your built-in wireless network adapter.



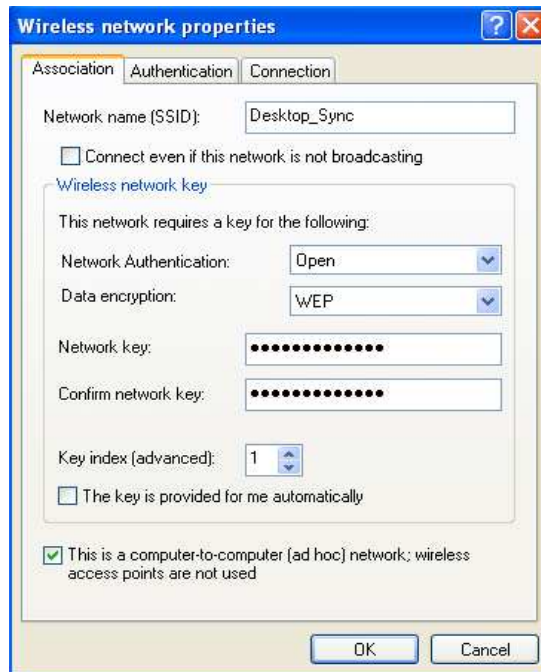
- 3) Select the "Wireless Networks" tab and click "Add" in the "Preferred Networks" section.

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4) Type the desired name of your ad hoc network in the "Network name (SSID)" field. Uncheck the box next to "The key is provided for me automatically" and check the box next to "This is a computer-to-computer (ad hoc) network." Type a 13-letter password key into the "Network Key" and "Confirm Network Key" boxes. Click "OK" to save your changes.



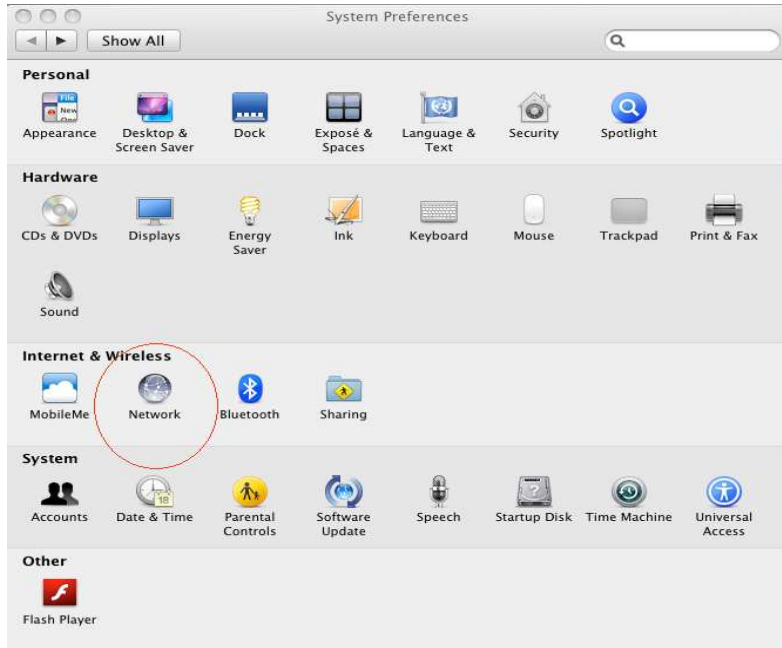
5) Connect to the network you just created on the other computers. Use the network key you provided when prompted for a password. PC and Mac users will be able to connect to this network.

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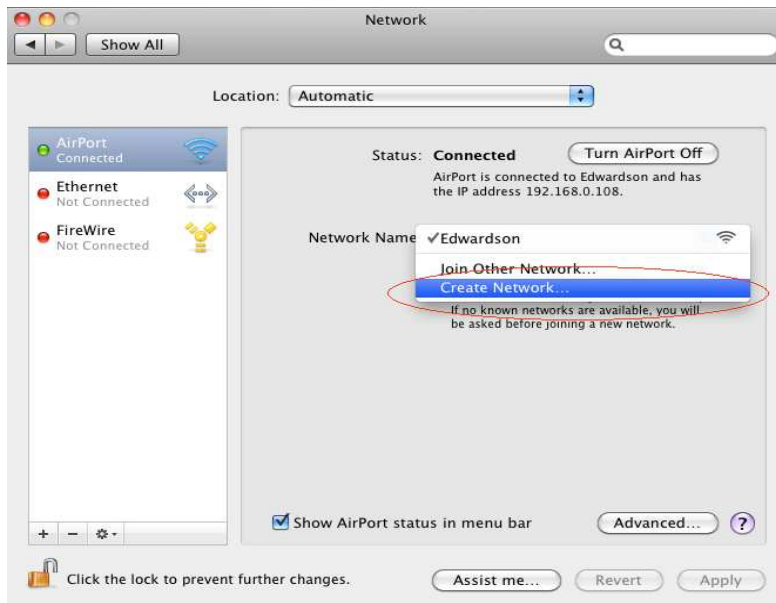
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## Mac OS

- 1) Navigate to System Preferences and select Network.



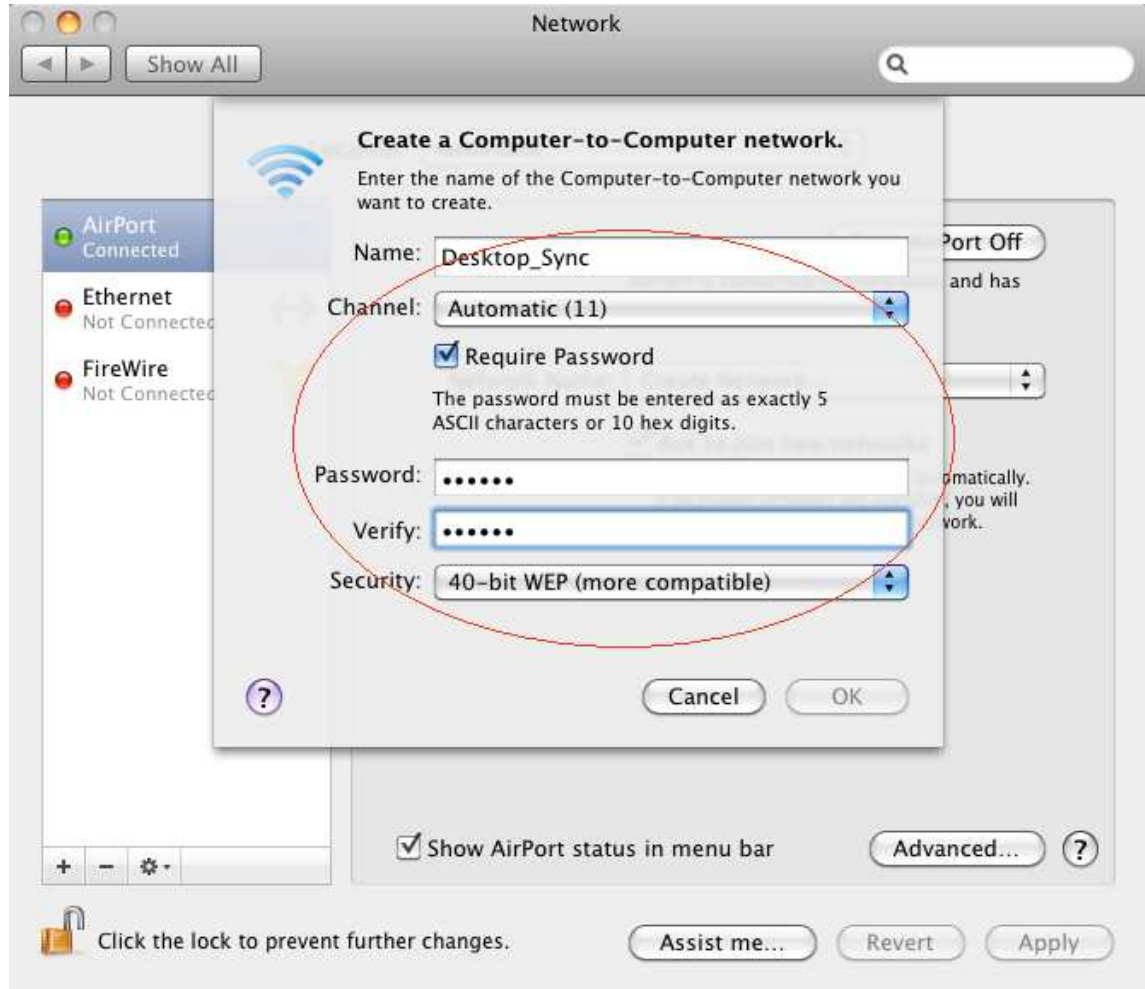
- 2) Under the Network Name drop list, select Create Network.



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3) Enter a name for your network and add a password.



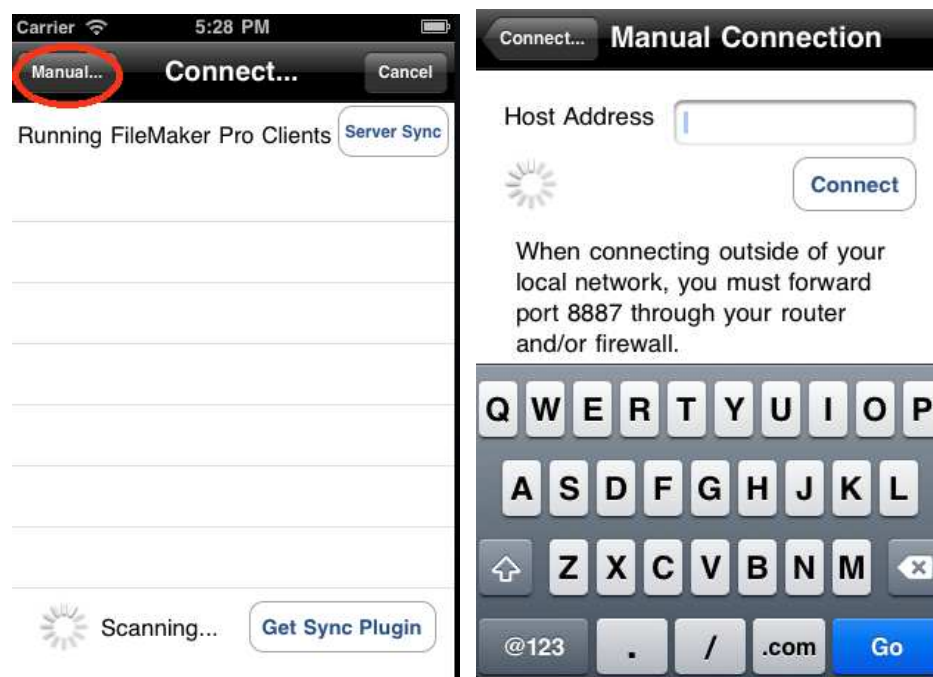
4) Select OK and your network will be created. You may now connect to this network from your mobile device or any other wireless enabled device.

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Other troubleshooting notes: Auto Sales Pocket Notes uses Bonjour Print Services to allow your desktop computer to see other devices, such as your iPhone/iPad, on your network. Usually this is installed with iTunes. If for some reason, you are unable to communicate between devices on your network, try downloading and installing Bonjour from Apple <http://support.apple.com/kb/DL999> . You may also want to try disabling any third party firewalls temporarily and see if this works.

If you are still having issues with connecting, you can try to establish a sync manually. To accomplish this, you will need to know the IP address of the computer you wish to connect to. Tap on the “manual button as indicated below. Enter the IP address in the field and tap “Connect”.



If this does not resolve your issue, please send an email to [admin@pnapps.com](mailto:admin@pnapps.com) with any screenshots or error messages you receive. We will do our best to get you up and running ASAP.

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