SKYSOFT SYSTEMS

inForm^{TM} V2.0.16 – for the BlackBerry^{TM}

inForm User's Guide

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Table of Contents

1 - Getting Started

inForm Overview

The inForm solution for the BlackBerry allows users to build wireless enabled custom forms, databases or applications which can be used for either personal or business use. inForm provides a simple application for use on a Microsoft Windows^{TM} PC allowing for quick creation and distribution of custom applications without the use of any programming. Once forms are completed they are sent to one or many devices directly using a local USB connection to the device or wirelessly using email. Data records on the device can be stored locally on the device or submitted between inForm users wirelessly as well as downloaded directly to the desktop using the PC editor.

This User's Guide is designed to help you both get started quickly with inForm and also to provide a reference for your ongoing use of the application. If you have any additional questions or concerns with installing and using inForm, please contact our support team at support@skysoftsystems.com.

System Requirements

BlackBerry Device Requirements:

- BlackBerry Devices: 7xxx Series, 8xxx Series, Pearl, Curve, Bold

- BES/BIS/Lotus Notes Server Not Required, but is compatible.

PC Requirements (inForm Editor):

- Microsoft Windows^{TM} Operating System (Windows 98 or Later).

- Microsoft .NET Framework 3.5 or later (Installed Automatically)

- BlackBerry Desktop Connector (All currently supported versions) is required for USB connectivity support to the device.

Network Requirements:

- inForm leverages secure email to send and receive forms and data from devices. As a result, the desktop application must be able to connect to a POP/SMTP server from within your network.

Installing the inForm Desktop Application

Download the **inform.zip** file to your PC. If you do not already have the file, it is located here:

http://www.skysoftsystems.com/inform.zip

- Open the zip file using either WinZip or your native Windows file compression utility.

- Double Click the **Setup.msi** file.

> **Note:** *If you are installing on a Windows Vista 64 Bit platform, you need to use the Setup.msi file in the subfolder labeled (Vista_64).*

Follow the instructions provided by the install application. The Icon to launch inForm will be placed on both your desktop and in your Windows Start menu once the application is installed correctly.

Installing inForm on the BlackBerry

Method 1: Installing inForm over wireless from your BlackBerry Device:

1. Launch your BlackBerry Browser.

2. Select 'Go To'… to specify the URL.

3. Type: **http://skysoftsystems.com/inform.jad**

4. Select OK.

5. Select the 'Download' Button.

6. Follow the prompts on the device.

Method 2: Installing inForm from the BlackBerry Desktop Manager
inForm can also be installed from the BlackBerry Desktop Manager after you have installed the inForm PC application:

1. Unzip the **inForm.cod** and **inForm.alx** files from the .zip folder **inform.zip** and specify a storage location, such as your desktop.

2. Launch the BlackBerry Desktop Manager, typically found in your Windows 'Start' Menu

under **'BlackBerry' → Desktop Manager**

3. Double Click the 'Application Loader Icon'

4. Click the 'Next' button.

5. Select the port to which your device is connected.

6. Click the 'Add Button'

7. Choose the '**inform.alx'** File that you had unzipped in the first step.
8. Ensure that 'inForm' is selected under 'Application Name' and click 'Next'
9. The application shall install on the device.

Registering your Device(s)

A license key is not required for the inForm PC application. A license is only required for the device. To register your copy of inForm please do the following:

- When you first open inForm on your BlackBerry device, the End User License Agreement will be displayed. Once you have read and agree to the EULA, click your track wheel and select **'I agree'.** Once complete, registration screen will appear.

- If you choose the register button, you will be required to input your unlock code. Enter the registration key (which can be purchased from http://www.skysoftsystems.com), and press the OK button.

2 - Using inForm on the BlackBerry Device

This section provides a brief overview of the inForm BlackBerry Client. The best way to learn about inForm is to practice building and using your own applications. Don't be shy – you can always delete applications that you no longer want on the device. We have also included a variety of sample forms on your device to get you started. Use these examples to learn about the different ways in which you can build your applications. For this section we're going to walk you through all the device features using one of our sample applications called the '**The Tip and Payment Calculator'.**

Note: *We have installed some sample applications on your device to help you get started. These applications are also available at '<Target Drive and Directory>/Skysoft Systems/inForm BlackBerry Edition/My Forms/Samples' on your PC after you have installed the Windows application. If you do not wish to use these examples, you can simply delete them from the device using the "Delete" menu option on the device.*

Note: *Do the fonts on your device seem too large? If so, inForm uses the BlackBerry system font settings, so to fit more onto a screen of the device select Settings→Screen/Keyboard to reduce your font size.*

Main Screen – the Form Listing Screen

The Form Listing Screen is the main screen that will appear when you launch the application from the device.

Forms are sorted by categories as defined in the PC Application when you create the form. You can have multiple forms in a category. If you do not define a category for the form, inForm assumes a category called 'General'.

To see the menu options that you can perform on a category, scroll to a category and click the BlackBerry Button (Button to the left of the track ball) or depress the track ball:

Figure 1 - Main Screen - The Form Listing

You will get a pop-up menu with the following options:

Category Menu Options:

- **Expand –** Expands the highlighted category.

- **Expand All-** Expands all categories to display the forms within the category.

- **Collapse** – Collapses the highlighted category.

- **Collapse All –** Collapses all categories.

- **Hide Selected –** Hides the current form or category.

- **Show All –** Shows all hidden forms or categories.

- **Exit –** Exits the application

- **About –** Displays the application splash screen

Note: *The Expand, Collapse, Hide and Show features are useful for organizing your forms..*
They also help to reduce clutter on the screen.

To view the menu options that you can perform on a form or application, scroll to an application such as the **Tip and Payment Calculator** and click the BlackBerry Button or trackball:

Figure 2 - Main Form Menu Items

Menu Options:

- **New –** Creates a New record based on the form template that you have selected. In the Figure 2, a record with 'Tip and Payment Calculator' is depicted.

- **View All –** Shows all the records on the form template that are selected. This opens the '***Record Listing'*** screen shown below.

- **Delete –** Deletes the form template.

- **Hide Selected –** Hides the form template.

Important Note: *If you delete your Form Template you will also delete all corresponding Records! If you delete a template you can easily re-create it by sending it from the PC application, however you will not be able to restore records that were previously delete.*

The Record Listing Screen

The record listing screen allows you to view, edit, sort, search and submit the records which you have completed for a form template, wirelessly. The record listing screen for the Tip and Payment Calculator example is illustrated below:

Figure 3 - The Record Listing Screen

Listing Columns: The listing columns are displayed in the order specified when you design the form. We will discuss this in Chapter 3, when we talk about the PC editor. For this particular form, Date, Location, and Total were used as the Listing columns. Clicking on the trackball allows you to bring up several menu items for performing operations on your records:
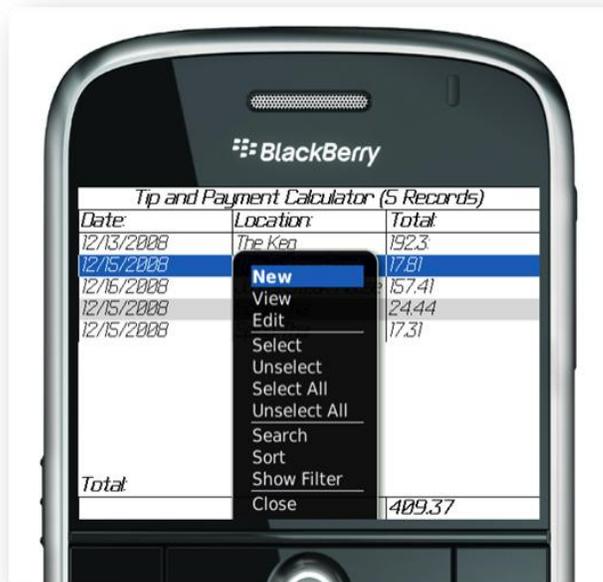
Figure 4 - Record Listing Menu Options

Menu Options:

- **New** – Allows you to create a new record which will open the form view to allow you to collect data for a new record.

- **View** – Opens the record in View mode which your scroller is currently over. The record that will be displayed is the one which is highlighted in blue as illustrated inFigure 4. . Note that in View mode you will not be able to edit the record, only view the record.

- **Edit** – Opens the record in edit mode which your scroller is currently over. The record that will be displayed is the one which is highlighted in blue as illustrated in Figure 4. **Select** – Allows you to select the record which your scroller is on. The Select feature is used to perform actions on the record, which we clarify in more detail below.

- **Unselect** - Allows you to unselect the record which your scroller is on.

- **Select All –** Selects all the records in the current view. The Select feature is used toperform actions on the record, which we will explain in more detail below.

- **Unselect All – The** Unselect feature is used to unselect all the records in the current view.

- **Search –** Launches the search screen, allowing you to search for a specific record. We discuss the search capabilities of the product in more detail later in this chapter.

- **Sort -** Launches the sort screen, allowing you to sort all of your records based on the listing columns. We discuss the sort capabilities of the product in more detail later in this chapter.

- **Show Filter** – Enables the dynamic record filter at the top of the screen. We discuss the Filter in more detail later in this chapter.

- **Close** – Closes the record listing screen and returns you to the Main Screen (Form Listing).

Record View/Edit Screen

From the main record listing screen you can view or edit an individual record by selecting the record with the cursor and clicking on either 'view' or 'edit':
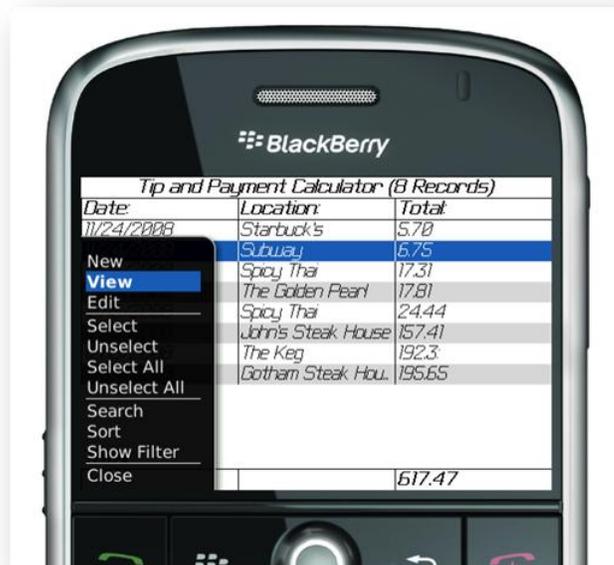
Figure 5 - View or edit individual records

The main record screen appears as it has been designed using the form designer (More on this in Chapter 3)
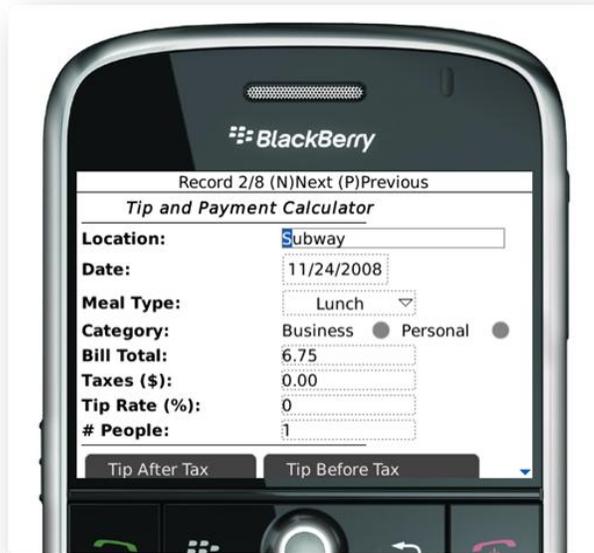
Figure 6 - Using (N) and (P) to scroll through records

In View mode you can select the 'N' key to go to the next record in the set, or 'P' to go to the previous record. From the view mode you can choose to Edit the record, Email the record, or submit the record.

Note: We go into more detail on Record Emailing and Submitting in Chapter 3.
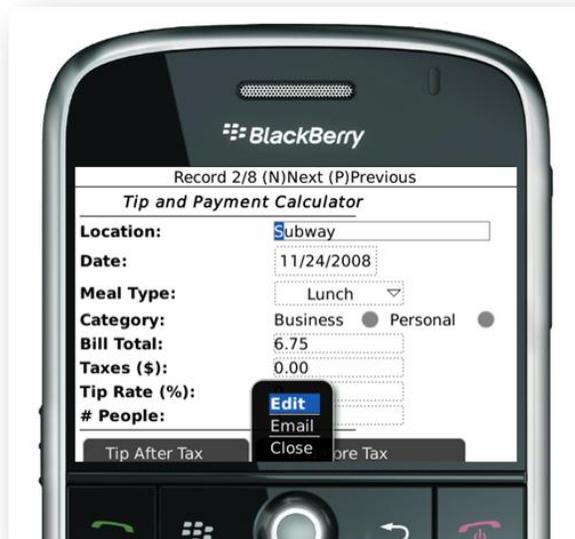
Figure 7 - Editing the open record

Once the record has been edited, you have several options/operations you can perform on the record:
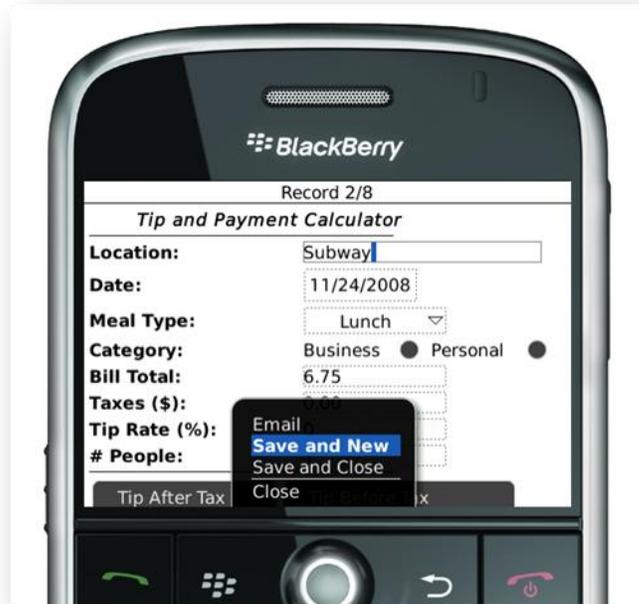
Figure 8 - Performing Operations on the Edited Record

- **Email –** Emails the record to a specified email address in either Text, CSV, or XML format. (Note: Email formats are discussed in more detail in chapters 3 and 4 of this document).

- **Submit –** Emails a record to a pre-defined 'Submit' addressed. This option only occurs if a Submit address has been defined in the form setup on the PC editor.

- **Save and New –** Saves the record and creates a new blank record to enter. This is a very useful feature if you are entering many successive records, one after another.

- **Save and Close –** Saves the record and returns you to the pervious screen.

- **Close –** Closes the record, and gives you the option to save or close without saving.

Selected Record Operations

Once records are selected in the Record listing they appear in blue to indicate that they are selected.

Figure 9 - Selecting Multiple Records

Once records are selected, the menu system shows the following actions can be performed on them:

Figure 10 - Performing operations on multiple records

- **Email –** The selected record(s) will be emailed to an email address. You can use the email addresses in your address book on the device or click 'use once' to manually enter an email address.

- **Delete –** The selected records are deleted from the device.

- **Submit –** The selected records are submitted. Submission is the same as emailing, but allows the user to define a predefined 'submit' address in the form design. This allows the user to save time when submitting records if they are all going to the same destination. It also allows for easy integration with back end systems such as with the inForm Data Connector, which is discussed in more detail later in this document. The Submit target address is defined when the form is created using the PC editor described in Chapter 3.

Basic Record Search

Record Search provides two levels of search capability. A *basic search* (which offers a search based on the listing columns of the form) and a *full search* which offers a search based on every field within the form. By default, selecting search within the record listing displays the basic

search. In our Figure 11. , a basic search is performed for all records where more than $100 was spent at the restaurant.

Figure 11 - Basic Record Search

Note that because we did not check the 'Date' or 'Location' a search cannotbe performed on those fields.

Note: *Selecting the checkbox beside a field implements 'AND' logic, not 'OR' logic.*

Figure 12 - Define Search Criteria

Once you have selected the search criteria, use the BlackBerry button (to left of trackball) to select the search menu option as illustrated above.

Your search results will be displayed on the screen:
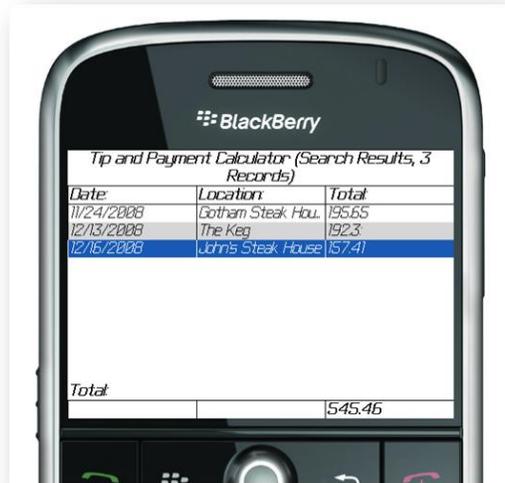
Figure 13 - Search Results

You can view, edit, and enumerate records just like you can in the regular record listing view in your search result set.

When you are navigating a search result set, two new menu items display:

Figure 14 - Search Result Set Menu Options

- **Restore All:** Removes the search and displays all records.

- **Back to Search:** Returns you y to the search criteria screen.

Advanced Record Search

The advanced record search is similar to the Basic Record search functionality, except it produces search capabilities on all fields in the application, not just the listing column fields. To select Advanced Search first go the Basic Search Screen. From the Basic Search Screen,use the BlackBerry Button to pull up the menu option and choose **'Advanced Search'.**

Figure 15 - Advanced Search Menu Option

You will see that all fields for the form are displayed and are searchable:
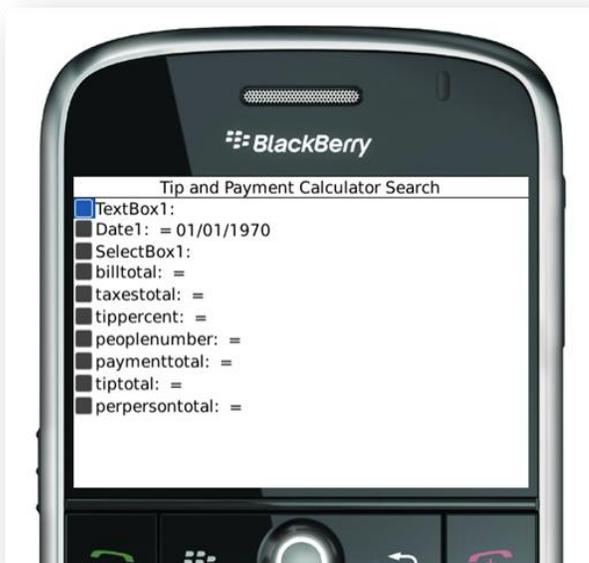
Figure 16 - Advanced Search Criteria Screen

The Advanced Search functions the same way as the basic search.

Saved Searches

From the basic search and advanced search screens you have the ability to save a search as a query that can be used in the future. .

Figure 17 - Saving a Search

To save a search which you've created simply retrieve the menu from the search or advanced search page using the BlackBerry Button and select 'Save Search'. You'll be presented with a dialog to name the search.

Figure 18 - Save Search Dialog

Enter a name for the search and then select the 'OK' button.

When you are searching through your record set you can Load a Saved Search at any time and execute it.

Figure 19 - Loading a Saved Search

Note: *After loading the search you still need to commit the search by selecting 'Search'. The saved search recalls the search criteria but does not execute the search automatically.*

Saved searches can be deleted by using the 'Delete Search' menu item.

Figure 20 - Deleting a Saved Search

Sorting Records

You can sort the records based on the fields in the listing columns. From the Record listing screen, select 'Sort' from the menu system.
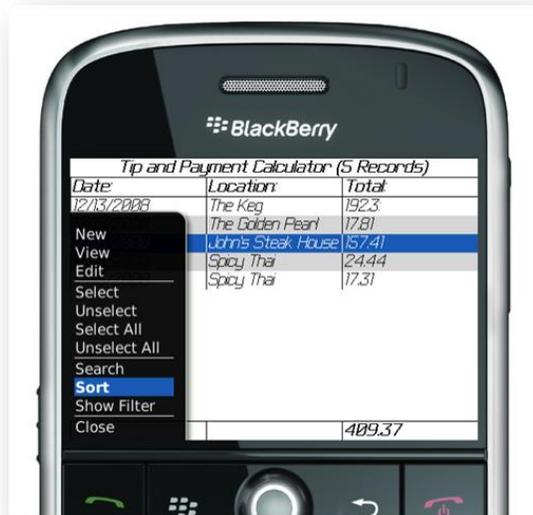
Figure 21 - Sort Menu Option

The sort screen enables you to sort by up to 3 fields simultaneously. To select the appropriate fields on the sort, hold down the trackball or tap the space bar on the device:

Figure 22 -Defining a Sort Order

Your resulting sorted records will appear on the record listing in the correct sort order:
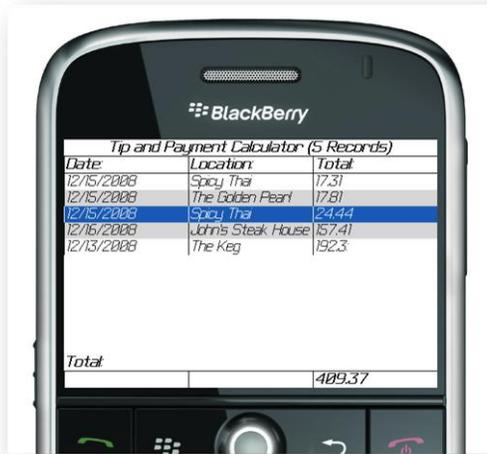
Figure 23 - Records after Defining Sort

Note: *In Chapter 3 we will demonstrate how to define a default sort when creating the form using the PC form editor.*

The Record Filter

The record filter allows you to dynamically filter records from your set based on criteria in the listing columns. First, to enable the record filter, select 'Show Filter' from the main menu on the record listing screen:

Figure 24 - Showing the Record Filter

The filter appears just below the titles of the listing columns on the record listing screen:
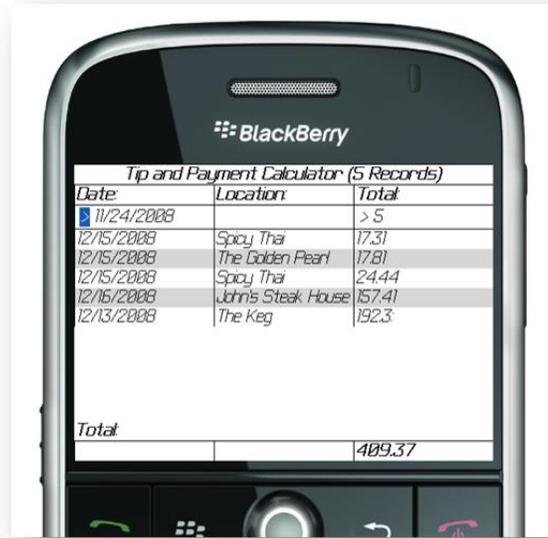
Figure 25 - The Record Filter

On the left hand side of each filter column are the criteria. There are different criteria for different device controls. Some of the main filter options include:

- **Text:** Text Match

- **Date:** Greater Than (>), Less Than (<), Equal To (=)

- **Number:** Greater Than (>), Less Than (<), Equal To (=)

- **Select Box:** One of the options in the Select Box.

- **Checkbox:** Checked or Unchecked

- **Radio Group:** Particular Option Radio

To select the comparator, scroll the cursor over the comparator and click the trackball or hit the space bar on the device. This will give you a choice of comparators:
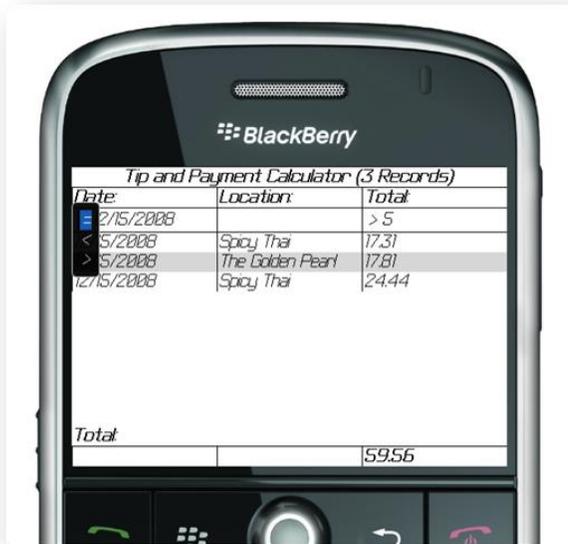
Figure 26 - Selecting a Filter Comparator

Once you start defining your filter criteria, you will notice that only the records that fit the criteria will remain in the listing.
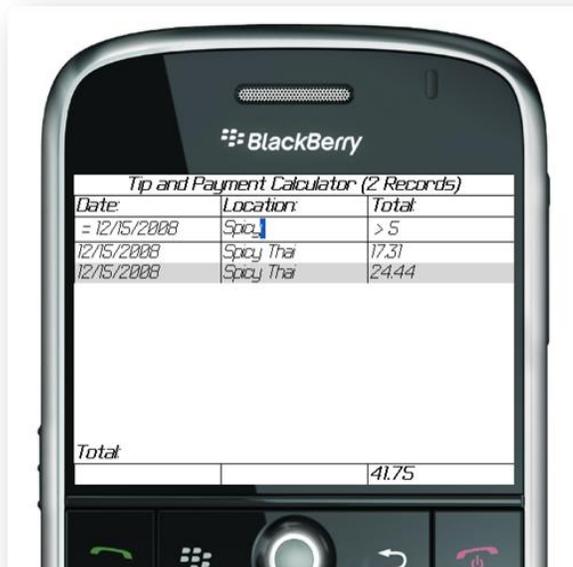
Figure 27 - Filtering Down the Record Set

Note: *If you are using Total or Average Numeric columns, the Total and Numeric Numbers recalculate as you define your filter, as illustrated inFigure 27..*

To remove the filter, go to the main menu and and select 'Reset Filter'.
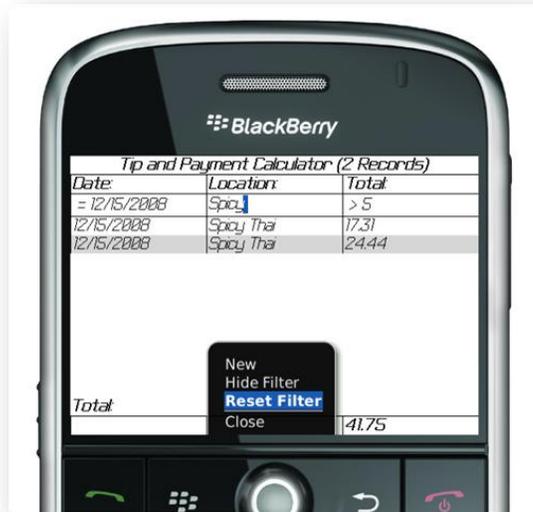
Figure 28 - Reset the Filter

And when you are finished using the filter, you can simply hide the filter.
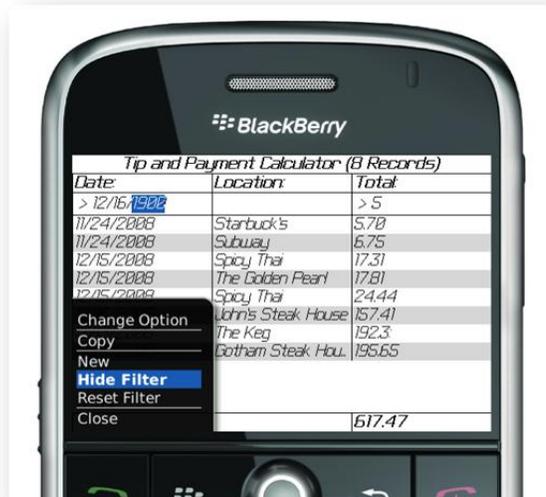
Figure 29 - Hide the Filter
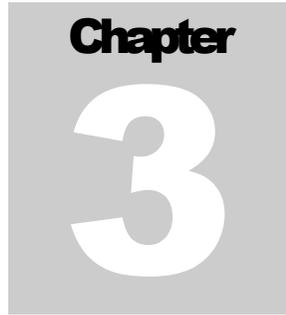
3 - The inForm Editor

Overview

The inForm Editor allows you to build applications from your Windows[TM] PC and send them to one or many BlackBerry devices which have the inForm BlackBerry Client installed. You can save your forms and resend them to the device at a later time should they be deleted on the device or if you would like to modify them. The PC application also allows you to send and receive data from one or more devices using either USB or email. CSV format is supported.

Setup Tab

The Setup Screen is used to define the properties for your BlackBerry application:
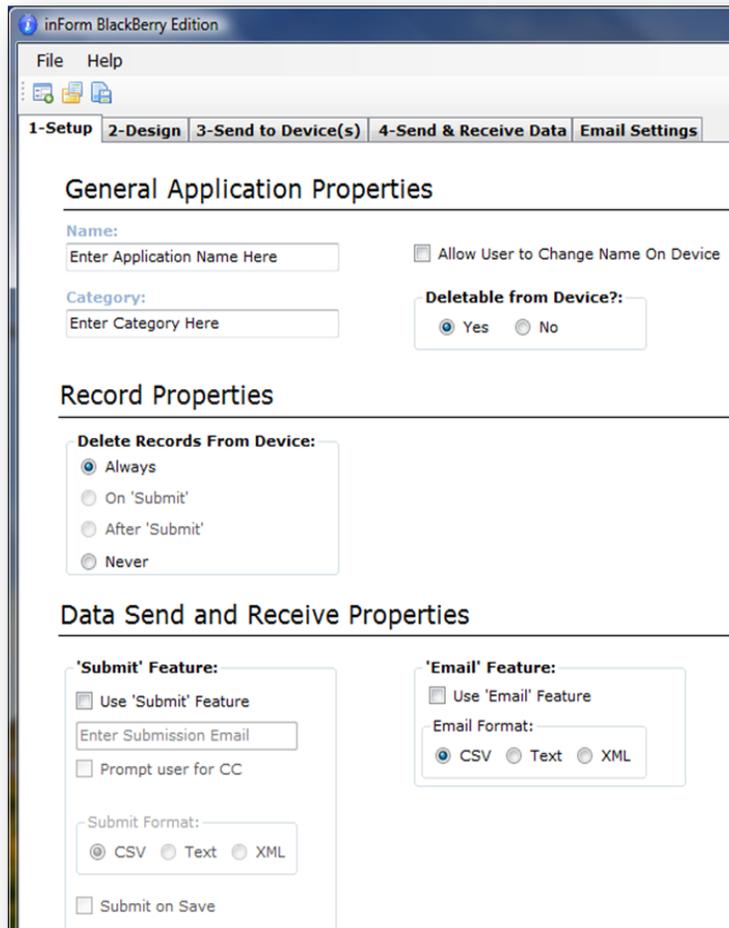
Figure 30 - The Setup Screen

CHAPTER 3 - THE inFORM EDITOR

The following application parameters are configured on the setup screen:

General Application Properties

Name - Name is used to uniquely define the Applications on the BlackBerry ^{tm} device.

> **Note:** *You must enter a unique name for each application created. If you use the same name for a form that is already on the device, it will be overwritten.*

Category - Creating an application category allows a user to logically organize Applications on the BlackBerry device. Examples of categories may be "Financial, Entertainment, To-do Lists, Work Orders", etc. When rendered on the device, applications are grouped by categories which can be expanded, contracted or hidden using a menu tree.

Figure 31 - Name and Category on the Device

Delete From Device? - This option allows the user to choose whether Application Templates can be deleted.   This is a useful feature when there are templates such as Surveys that a group manager does not want to allow a group member to delete. Typically, this feature would be set to 'Yes'.

Important Notes:

If you delete a Form from the Device, the Specific Form, along with all of its corresponding Data, is also removed from the device and cannot be recovered.

If 'No' is chosen for this feature, the only way to remove a form from the device is to uninstall or re-install the inForm Application.

Allow User to Change Name on Device: This feature allows the user to change the name of a form (and its corresponding category) on the device. When this is enabled you will get the 'Rename' menu option on the device when a particular form or category is selected.

Record Properties

Delete Records from Device - There are four ways to delete records stored on your device:

- **Always –** Records are always deleted from the BlackBerry [tm] device.
- **On 'Submit' –** Records are deleted immediately when the user has clicked **'Submit'** from the device while editing a record. This is useful for simple submission applications where you don't want the user to store records on the device.
- **After 'Submit' –** Records can be deleted any time after they have been sent from the device. This is useful for applications where you do not wish for users to incidentally delete records until submitting them. Timesheet applications often use this setting.
- **Never –** Records are never be deleted from the BlackBerry [tm] device. This is useful if you are compiling a static reference of material that you update from the network infrequently such as medical or legal reference material. This feature isused infrequently. .

Data Send and Receive Properties

Submit Feature - Enabling the use of the Submit feature will create a menu option for the user on the device showing text 'Submit'. The 'Submit' action will submit selected record(s) to a predefined email address. You enable the Submit feature by clicking on the textbox labeled **'Use 'Submit' Feature'.**

Submit Email Address - Enter in a submission email address to identify a destination for records submitted from the device(s). This feature is useful in two particular scenarios. The first is if you are integrating inForm to a back-end system and want user's to send the form to the back-end system without needing to type in an address. The second is to ensure that if the form is distributed to a large group, they all submit their responses to the individual coordinating the form. For example, a a leader of a survey team can then compile all submissions using the Data Send and Receive Tab, discussed on page XX.

> **Note:** *The product only supports one Submit email address. If you need multiple email submit addresses, one efficient way to accomplish this is to create a rule on your mail server.*

Prompt User for CC – This feature allows for the option of having an additional email address copied when the form submission is completed. When selected, this prompts the user and then will allow them to pick an address from their address book or type in an email manually by selecting 'Use Once'.

Submit on Save – The record is automatically submitted when it is saved. This is useful if you do not want users to forget to submit their records.   This feature can be particularly helpful when using applications such as the Timesheet application...

Submit Format - There are three submission formats available in inForm:

- **CSV** (Comma Delimited) – The CSV format can be easily used to import into Excel spreadsheets to modify records. When multiple records are submitted simultaneously, they are all appended to a single CSV file.

- **Text –** Text format enables users to review records easily in an email. For each record submitted, a separate email is generated with the contents of the form in the body of the email.

- **XML –** XML format is primarily used for integration purposes. For each record submitted, a separate email is generated with the contents of the form in the body of the email in XML format.

Email Feature - The email feature is used when you want to give the device user the ad-hoc ability to email the record to anyone in their address book or using 'use once' feature to

manually enter a destination email address. When you select **'Use 'Email'** feature**,** an **'Email'** menu option will appear on the device as a record operation.

Email Format - There are three email formats available in inForm:

- **CSV** (Comma Delimited) – The CSV format can be easily used to import into Excel spreadsheets to modify records. When multiple records are submitted simultaneously, they are all appended to a single CSV file.

- **Text –** Text format enables users to review records easily in an email. For each record submitted, a separate email is generated with the contents of the form in the body of the email.

- **XML –** XML format is primarily used for integration purposes. For each record submitted, a separate email is generated with the contents of the form in the body of the email in XML format.

Form Design Tab

The Form Template Design tab consists of a Form Designer that will enable you to easily create your form or application with no knowledge or experience of computer programming. The general layout of the form designer is shown below.
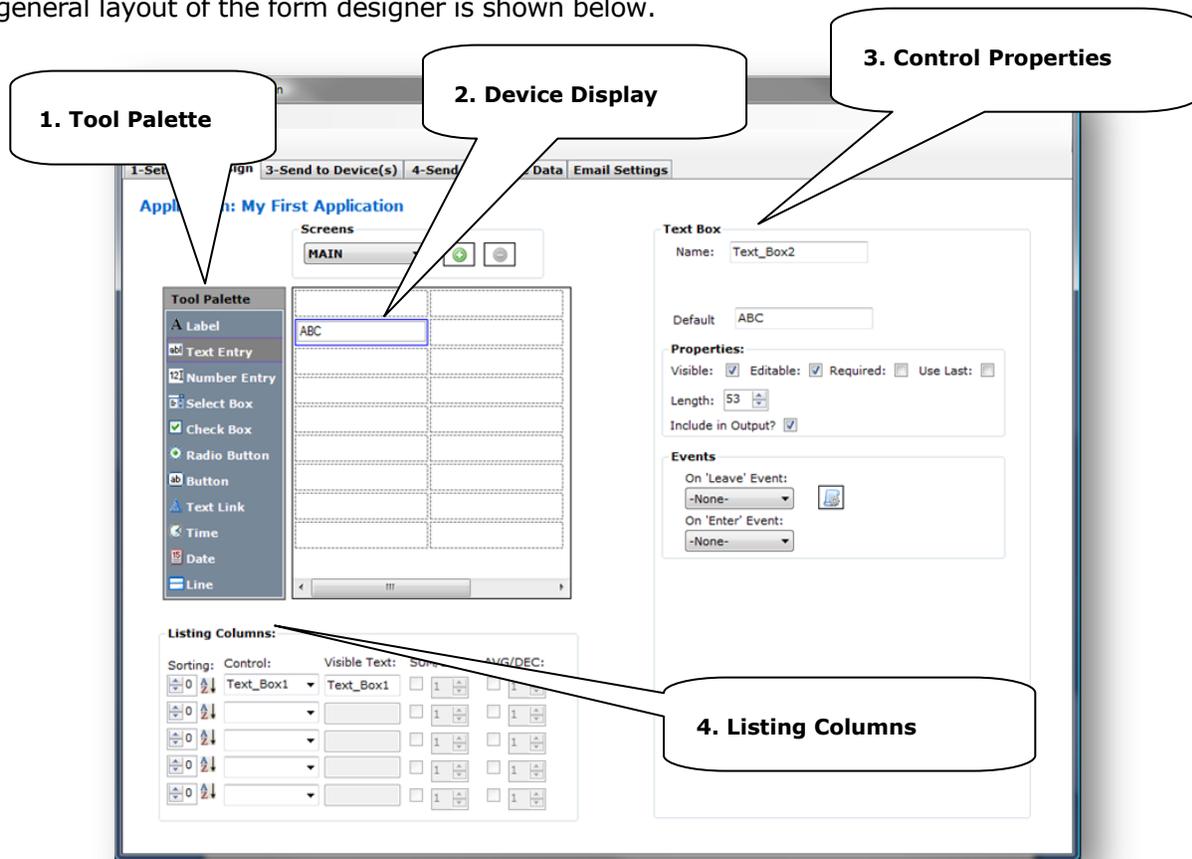
Figure 32 - The Design Tab

The main areas of the design tabinclude:

1. **Tool Palette –** The tool palette displays all of the controls that you are able to drag and drop into the visual editor to create your form. Drag tools from the tool Palette to the Device Display to create your form/application.

2. **Device Display –** The visual editor providesyou with a close approximation to what your form will look like on the device. This replaces the former 'grid' that was used to create forms in mForm 1.0 and is much easier to use.

3. **Control Properties-**When you drag a control onto the Device Display from the tool

palette, all of the properties for that control are displayed.

4. Listing Columns – The listing columns define which fields and controls shall be displayed in the record listing on the device screen. Typically, these fields are needed for searching and sorting records.

The Tool Palette

The tool palette displays all of the controls that you are able to drag and drop into the visual editor to create your form. Simply drag controls from the tool Palette to the Device Display to create your form/application.

Figure 33 - The Tool Palette

The properties of all the controls in the tool palette are discussed in the **'*Control Properties'*** section of this chapter. The controls available in the Tool Palette are:

- **Label:** Creates a label on the device.

- **Text Entry:** Creates a textbox which can collect alphanumeric user input on the device.

- **Number Entry:** Creates a number box which can collect numeric input on the device.

- **Select Box:** Creates a list of items that the user can choose between on the device. The select box will alsotext match when a user starts to type in an entry.

- **Check Box:** Creates a checkbox on the device.

- **Radio Button:** Creates a single Radio Button on the device. Typically, radio buttons are used in tandem with other Radio Buttons and need to be linked to a 'Group'.

- **Button:** Creates a button on the device that can be tied to a form event.

- **Text Link:** Creates a text link on the device that can be tied to a form event. This has the same functionality as the Button control, but with a different appearance.

- **Time:** Creates a time control on the device where the user can select the time, or have a specific time populate automatically, including the current time.

- **Date:** Creates a date control on the device where the user can select the date, or have a specific date populate automatically, including current date.

- **Line:** Creates a graphical line across the screen of the device. This is often used for separating logical sections within a form and is used to make the form more visually structured.

Device Display

The device display gives a graphical representation of how the form will look on the device. Since BlackBerry screen dimensions vary, the device display depicts controls as a percentage width of the device screen width. Consequently, , forms will look slightly different on different devices. For example, on the BlackBerry Pearl, the forms will look more compressed, where as on the Bold, they will look more spread out. The advantage to using this approach is that you can build one single form/application that will work on all BlackBerry devices.

> **Note:** *The width of the device display area represents full width of your device screen. Therefore if you draw any controls outside of this display area (to the right), they will not be visible on the device.*

The Display is consists of a grid of individual cells which you can use to manage the vertical and horizontal alignment of controls on the device.

USING THE DEVICE DISPLAY

Using the device display is straight forward. You start by dragging controls from the Tool Palette onto the Device Display as shown below:
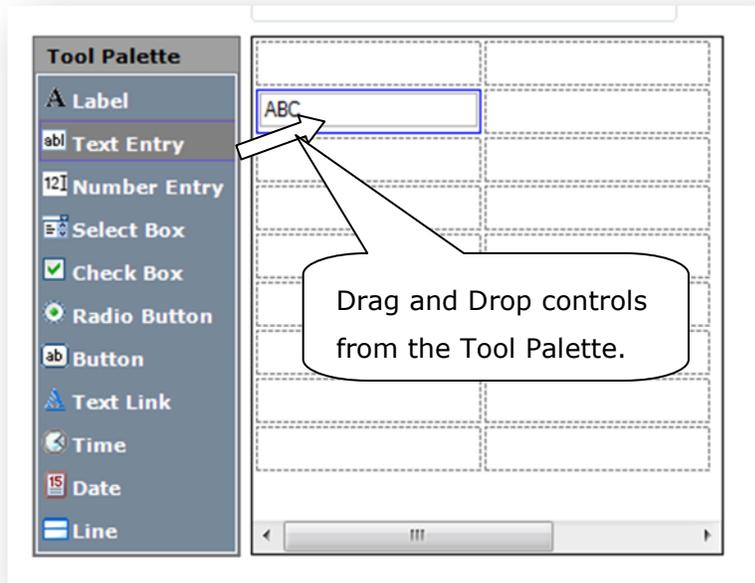
Figure 34 - Using the Device Display

CREATING A CONTROL

To select a control::

1. Scroll your mouse over the desired control in the tool palette

2. Click and hold your left or right mouse button down to pick up the control

3. Drag the control over the desired cell on the device display

4. Release your mouse button, and the control will be drawn on the device display.

MANIPULATING CELLS AND CONTROLS ON THE DEVICE DISPLAY

Moving Controls – You can move controls on the form easily by holding down your right mouse button and dragging the control to a new cell.

Copying Controls – You can copy controls on the form easily by holding down your left mouse button and dragging the control to a new cell.

Deleting Controls and Adding/Removing Cells and Rows:

There are some powerful features on the device display that will help you create your forms. When you click the right mouse button,a popup menu displays and enables with various actions to be performed on controls and cells:
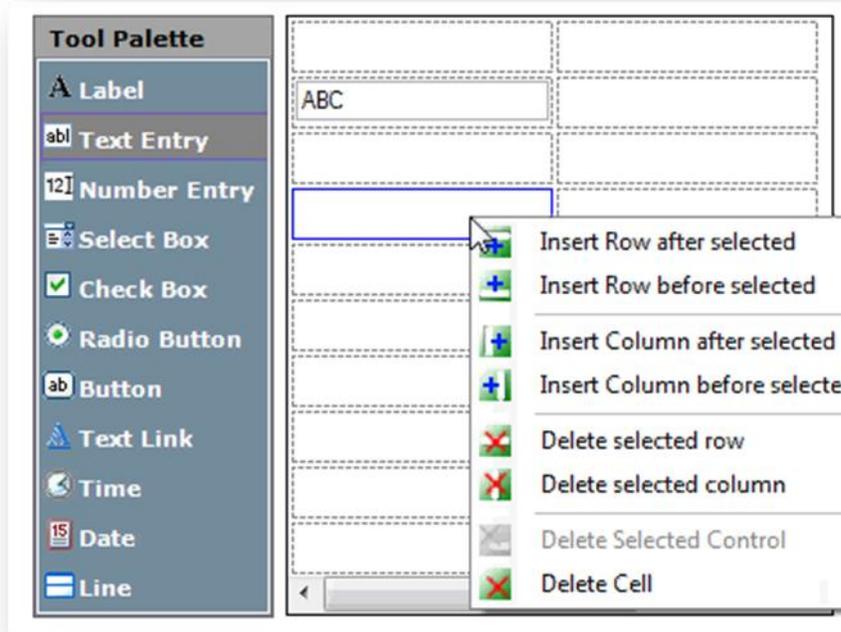
Figure 35 - Popup Menu for Manipulating Layout of Device Display

The menu options can be used to add and remove rows and columns from your form or to delete individual cells or controls.

Note: *When you've finished your form design, you can speed up the performance of the form on the device by deleting any unused cells.*

Control Properties

The control properties area of a form displays based on the current control you have selected on the device display. Different controls have different control properties. This section highlighted all of the control properties, as well as how and why you would use them.
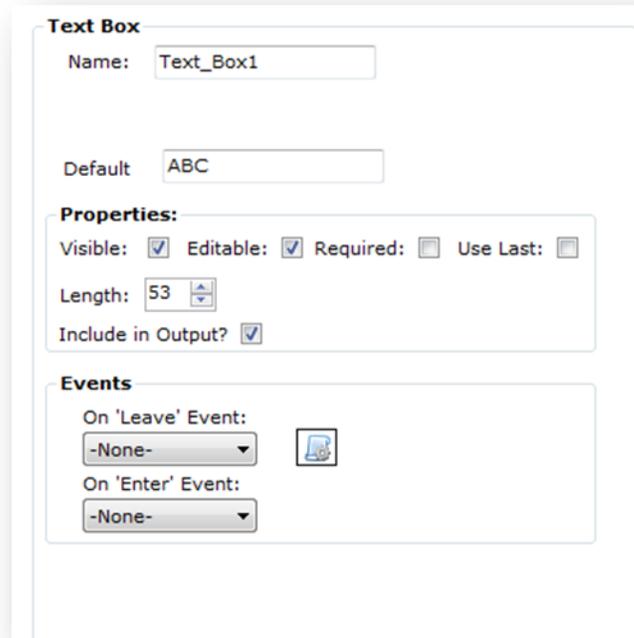
Figure 36 - Example of Control Properties for a Textbox Control

NAME PROPERTY

The name property defines the name of the control. All control names on the form must be unique. Unique names are assigned to controls as soon as they are created. However, it recommended to change the names of some of these controls because when the output is sent from the form these names are displayed. In your output, instead of having a label like 'Textbox_1' you could rename the label to display 'Customer Name'.

DEFAULT/TEXT PROPERTY

This determines the default value that appears on the control. In the case of text labels, this determines the text that appears on the control.

USE CURRENT PROPERTY

This determines if you would like to use the current date or time on the date/time controls. If you do not have this asserted, then you can manually choose the value of date and time.

VALUE PROPERTY

The value of date or time specified to be displayed when the form is loaded.

BOLD PROPERTY

Applies a bold font face to a label.

ITALIC PROPERTY

Applies an Italic font face to a label

UNDERLINE PROPERTY

Applies an underline font face to a label.

VISIBLE PROPERTY

Determines if the control is visible by default when the form first loads. This setting is useful when you wouldd like to show/hide certain controls based on form actions. It is used commonly for conditional questions/answers on items like surveys and questionnaires.

EDITABLE PROPERTY

Determines if the user is able to edit a control or if it will be read-only. This is useful when you want to send the user information which they can read, but not modify.

REQUIRED PROPERTY

Determines if user must have a value entered in a control before they attempt to save the form. Required fields are highlighted with an Exclamation (!) mark.

USE LAST PROPERTY

This is a very useful and unique property for inForm. When you assert this, the next new form you load will retain the previous value. This is very useful for cases where many forms with common fields must be filled out over a short period of time, as it reduces data entry. It can also be used on hidden fields and actions to track running subtotals for forms like mileage and

expense tracking.

LENGTH PROPERTY

The length property is the number of characters or digits in a textbox or number box. This is particularly important as the form must reserve memory for the appropriate length/number of characters. You want to design your form so that you are not always using too many characters as this will slow down performance and increase storage requirements on the device.

DECIMALS PROPERTY

Determines the number of decimals that will be stored in a number box.

INCLUDE IN OUTPUT PROPERTY

This determines if you shall have the control data present in the output from the device. As you may only need a subset of the data on the form to actually report on, this is a useful feature to streamline the device output.

ON 'LEAVE' EVENT PROPERTY

Determines an event to be triggered when you leave a particular field.

ON 'ENTER' EVENT PROPERTY

Determines an event to be triggered when you enter a particular field.

ON 'CLICK' EVENT PROPERTY

Determines an event to be triggered when you click on a text link or button control.

ON 'CHECK' EVENT PROPERTY

Determines an event to be triggered when a checkbox or radio button is selected.

ON 'UNCHECK' EVENT PROPERTY

Determines an event to be triggered when a checkbox is unselected.

GROUP PROPERTY

Determines the group that a radio box belongs in. All radio boxes must belong in groups.

If they are not in groups and you try to save the form, the radio buttons are removed. Groups define a list of exclusive radio buttons – only one button in a radio group can be asserted at any one time.

SELECTED PROPERTY

Determines if a checkbox is asserted (checked) or radio button is asserted by default.

SELECT BOX CONTROL PROPERTIES

Select boxes have a unique set of properties associated with them for managing items as illustrated in the figure below:
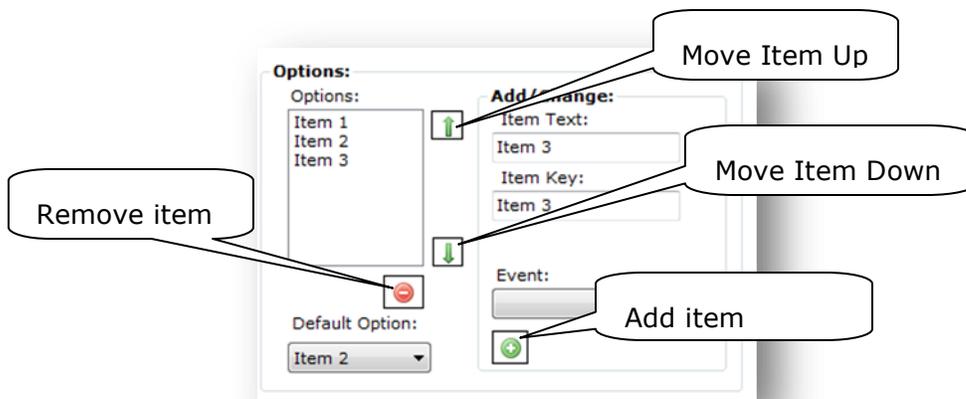
Figure 37 - Select Box Item Management

ITEM TEXT

The text associated with an item. The text is displayed on the form.

ITEM KEY

A key that is used in output for an item or to set the value. In most cases, the item text will be the same as the item key. It is populated automatically. Reasons why you might want to have item text different from the key are because an item may have a code and a text description; and you want to differentiate between the two between the stages of data collection and output.

EVENT

The event that is fired when a particular item is selected.

The item which is displayed by default when the form loads.

Listing Columns

Listing columns determine particular controls that you want to display in a list format when looking at all your completed records simulateously on the device 'Record Listing Screen'. This screen is shown on the device when you select 'view all' to view all records.   You can have up to 5 controls selected as your listing columns.   The illustration below gives an example of how the listing columns translate to your device screen:
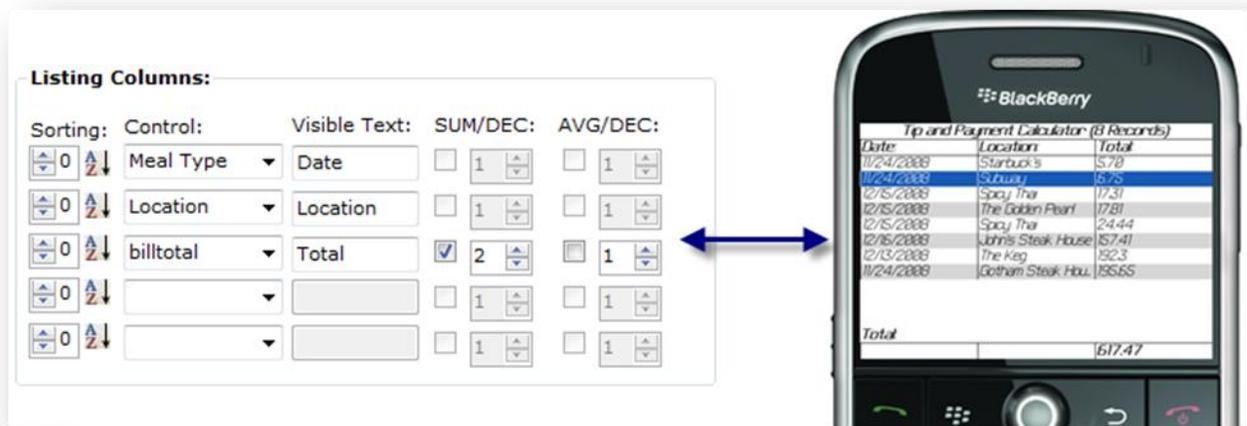
Figure 38 - Listing Columns and How They Appear on the Device

The following are properties of the listing columns:

Listing Colum Properties

- **Control:** The control that you wouldd like to display on the listing column.

- **Visible Text:** The visible text what will be displayed on the heading of the column on the device.

- **Sorting:** Defines a primary sort on the device that will always be displayed by default. This can be overridden on the device by using the sort on the device.

- **SUM:** Determines if you want to SUM a numerical column.

- **AVG:** Determines if you want to display the average for a numerical column.**DEC:**

Number of decimals that you want to display in your Sum or Average.

Events Manager

A powerful feature of inForm is the ability to define events. Events allow you to turn simple forms or databases into applications. They also allow you to create branching in surveys – displaying one particular control depending on the input selected in another control.

> **Note:** *The following examples included in inForm 2.0 are great for learning how to use events property:*

- *Tip and Payment Calculator – shows basic math functions.*

- *Show and Hide – How to show and hide controls based on values selected in other controls.*

- *Time Tracker – Shows and hides controls based on values selected and also shows a time calculation.*

You can open the event manager by selecting the events icon within the properties of an applicable control.

Forms can be linked to events such as when a button is pressed, when a field is scrolled over etc. A given event can have several actions associated with it.

In addition to the ability to create your own events, there are also some predefined events associated with form loading, closing, saving, and submitting:

- **Form_Load_Event** – This event is triggered with the form loads.

- **Form_Save_Event** – This event is triggered when the form saves.

- **Form_Submit_Event** – This event is triggered when the form is submitted.

Any number of actions can be associated with an event. The Event Manager allows you to perform four specific action types for an event:

- **Show:** Shows a Hidden Control or the current form.

- **Hide:** Hides a Visible Control or the current form.

- **Set Value:** Sets the value in a control.

- **Show Dialog:** Shows a dialog box.

The illustration below highlights the main functional areas of the events manager as well as the general steps required to create an event with associated actions.
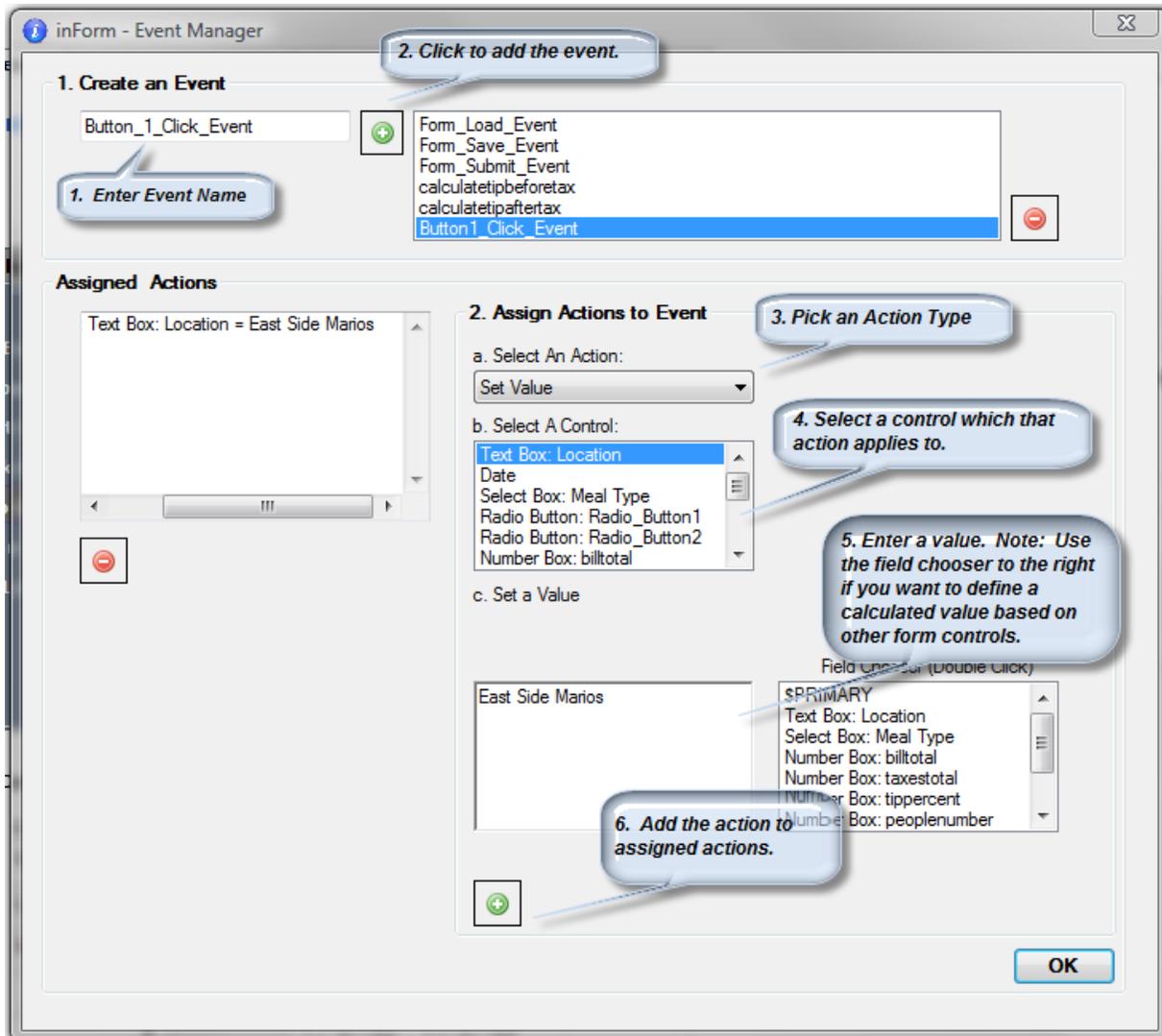

Figure 39 - Events Manager

SET VALUE NOTES

The set value control allows you to set controls to certain values. You can for example

set the value of a textbox to the value of a combobox when that item is selected. You could also take a number and perform math operations on it.

Examples and tips for using set value:

- Do not use an = sign in "Set A Value",it is not necessary.

- You must use " " to set text values.

- Regular expressions are supported including (,), *, +,/, -, ^(to the power of)

- Date Math expressions are supported such as :

    o Date_Control_Name + 30 (This will Add 30 days to a date control. You can also subtract).

    o Time_Control1-Time_Control2 (This will subtract two different times. You can also add times)

    o Time_Control1 + .5 – (This would add 30 minutes to a time control).

Sub forms

As of inForm 2.0 you can now create subforms under the main form:
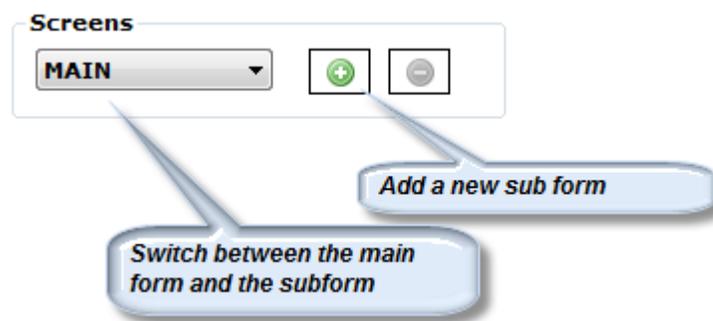
Figure 40 - Navigating Subforms

This is particularly useful if you have too much information to display on the main form or if you want to create an application that requires branching. Branching enables you todisplayspecific or in some cases, additional information in alternate screens based on user responses to questions/selections in the main form. When subforms are created you can access them using

one of two methods:

- Through the menu option on the device as shown in Figure 41. .

- By creating an action to display the subform.

Figure 41 - Subform Available From the Menu System

Chapter

4

4 - Sending Forms to the BlackBerry
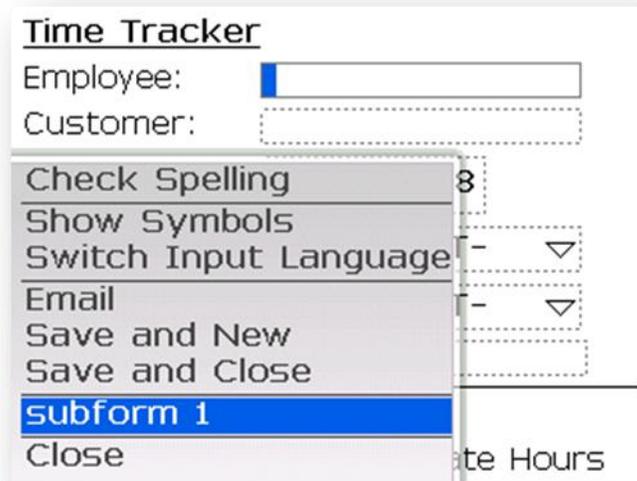
To send your form to the device there are two options, either USB or email.
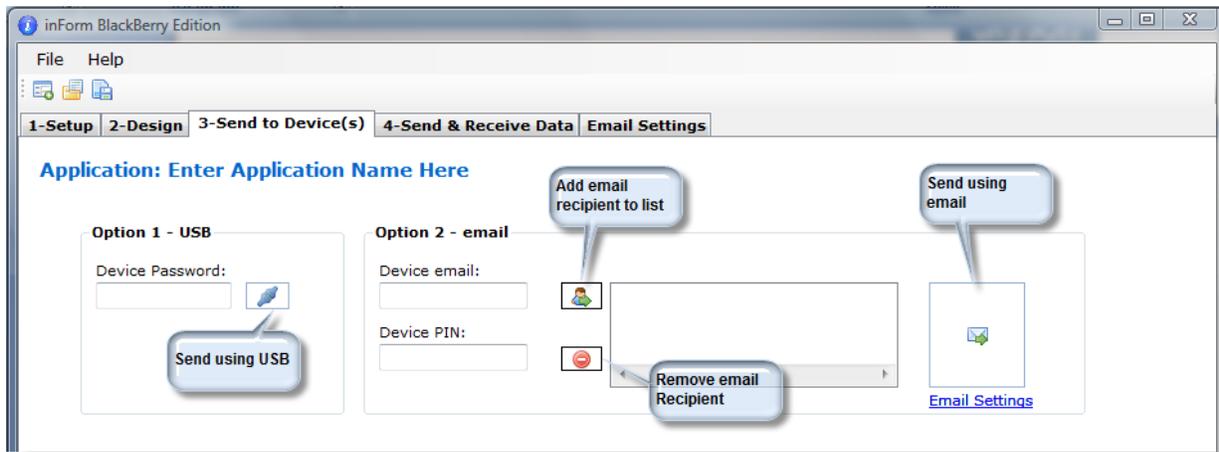

Figure 42 - Sending Forms to the Device

Sending Forms sing USB

To use the USB connection, hook up your device to the USB cable and enter the device password (if you have one set). Then click the [button icon] button.

> **Note:** *To use the USB method to sync your form, the BlackBerry Desktop Manager must be installed on your PC. This software is available at*http://na.BlackBerry.com/eng/services/desktop

Sending Forms sing Email

You can send the form to multiple devices simultaneously using the email feature. To use the email feature you must first enter the email address and PIN for each device. Once completed, click the email button [button icon] .

> **Note:** *Before the email feature can be used, you must first setup the SMTP connection for the email server that you would like to connect to send your form to. More information regarding setting up and troubleshooting the SMTP connection can be found in Chapter 6.*

Chapter

5

5 - Sending and Receiving Data

Version 2.0 of inForm provides the ability to send and receive data to between one or more BlackBerry devices and a PC user through either USB or email. This is accomplished on the **'4-Send & Receive Data'** tab of the PC application illustrated in Figure 43:
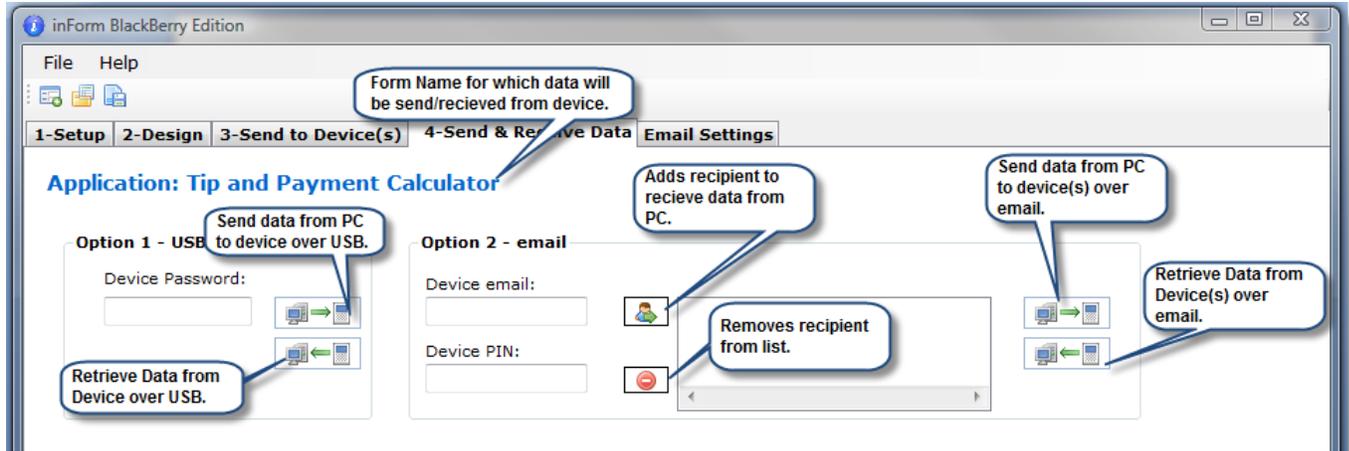

Figure 43 - Sending and Receiving Data Using the PC application

Receiving Data using USB

You can retrieve all the records for any form or send new records to the device through a USB connection. To ensure that you are retrieving the records for the desired form, ensure the top of the screen has the correct form name in Blue as illustratedin Figure 43. . If it does not, you should either change the name on the **'1-Setup'** tab or load the correct .mff file corresponding to your form.

If your device is password protected, enter the password in the **'Device Password'** field. Click the [icon] button to start the process of retrieving records from the device. When you click this button, you will be prompted for a location to save the .CSV file. Choose a storage location on your PC and select **'Save'.**

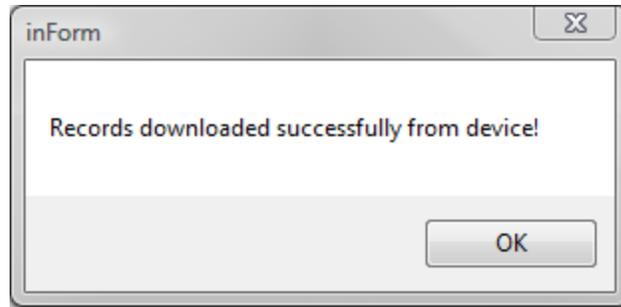When the records are saved successfully you will get a dialog box:

Figure 44 - Successful Download of Records from Device.

> **Tip:** *Before you try sending new records to the device retrieve them as described above so you know what the data format shall be!*

Once you've saved your .CSV file, you can open it using a common tool such as a notepad or Microsoft Excel. The Tip and Calculator Form .CSV file is illustratedin Figure 45:

Figure 45 - Sample CSV Output

Note in Figure 46 that there are several fields added by the device that were not on your form. You can safely ignore/delete the columns if you do not plan to send data back to the device. However, you need to ensure when you create new records from the device that you include those fields otherwise the CSV upload will fail. This is easy to do using cut and paste in a tool Like Microsoft Excel. The following fields are explained below:

update_rule: If you use the word **update**, it will create new records or replace old ones with updated information when the Primary matches.

Primary: This uniquely defines the record and consists of the device PIN, plus a unique integer value. This must be unique. When you are creating new records in Excel, you can use any alpha numeric entry, provided that it is unique. You willsee later why it isimportant to track the device individual when we start merging records from several users over email.

Update Date and Time: These fields can be used to track changes to records. It illustrates the

specific date and time when the record was captured or modified on the device.

Sending Data Using USB

The first step in sending Data to the Device is to ensure that you have a CSV file with and appropriate data set within it. We are going to use the data we collected in the previous section and expand our example and also add some additional records, highlighted in green below in Figure 47.

	A	B	C	D	E	F	G	H	I
1	update_rule	Primary	Update_Date	Update_Time	Business or Personal	Location	Date	Meal Type	billtotal
2	update	246fe5570000001	12/23/2008	22:25	Business	The Keg Steakhouse	12/23/2008	Dinner	215
3	update	246fe5570000002	12/23/2008	22:26	Personal	Starbuck's	12/23/2008	Coffee	4.5
4	update	246fe5570000003	12/23/2008	22:26	Personal	McDonands		Lunch	8.5
5	update	246fe5570000004	12/23/2008	22:26	Personal	Subway		Lunch	4.5
6	update	246fe5570000005	12/23/2008	22:26	Personal	Spicy Thai Place		Dinner	18.54
7	update	246fe5570000006	12/23/2008	22:26	Personal	Golden Palace Chinese		Dinner	32.21

Figure 47 - Additional Records

Note: The *primary field for each new record must be unique but does NOT need to follow the same pattern/structure of those coming from the device. In our example we just used a 'fill series' command in excel to quickly populate the data. For the Update Date and Time columns we just did a quick copy and paste.*

The next step is to click the [icon] button. You will be prompted for a file to select to send to the device. At this point, select your CSV file and click **'Open'.**

Note: *The CSV must have the same name as the form name in the device so the device identifies which form/application to sync the data to.*

Records will be uploaded to the device and you will get a dialog back reporting the results:
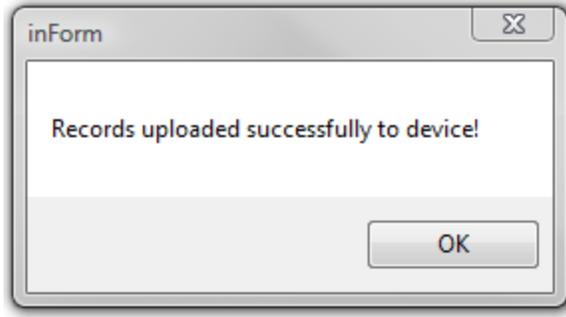
Figure 48 - Records Uploaded Successfully.

On your device when you select 'view all', the new records will display.

Figure 49 - New Records on device.

Receiving Data Using Email

A common use of inForm is to wirelessly distribute and collect survey or field data from an individual or small teams in the field.. In this example, the form will be designed to use the 'Submit' feature to a submission address as defined on the **'1-Setup'** tab. Data is then collected by all users and then submitted to this submission address.

Note: *The submit format on '1-Setup' tab MUST be set to CSV in order to use this feature.*

You can retrieve all the records for any form or send new records to the device through email. inForm 2.0 includes two powerful new features:

- You can merge existing data files with new records from the inbox.

- You can merge records from multiple users simultaneously.

To ensure that you are retrieving the records for the desired form, ensure the top of the screen has the correct form name in Blue as illustrated in Fgure 50. If it does not, you should either change the name on the '1-Setup' tab, or load the correct .mff file corresponding to your form.

Note: *In order to properly retrieve device data using email, you MUST have a POP server configured, and the POP account configured MUST be the same as the submission email address as defined in the form definition. Instructions for setting up the POP server are given in the following chapter of this document.*

The first step to retrieving data from one or more users is to first click the [image] button under **Option 2-email.** You will then be prompted for a location to save the file.

TIP: If you have an existing file and would like to merge new records with that file, select appropriate file in the 'Save' Dialog. If you don't have an existing file a new one will be created for you.

A report will display indicating the number of records that have been merged and added to the new or existing file.

Sending Data Using email

In order to send a CSV to one or more users you must first define their email address and device PIN. The device PIN is used by security so that the recipient of your message can validate that it is coming from a trusted source.

Note: *Before you can send records to devices you MUST have an SMTP server connection configured. This is covered in more detail in the following chapter.*

To begin, add addthe desired users to the recipient list:
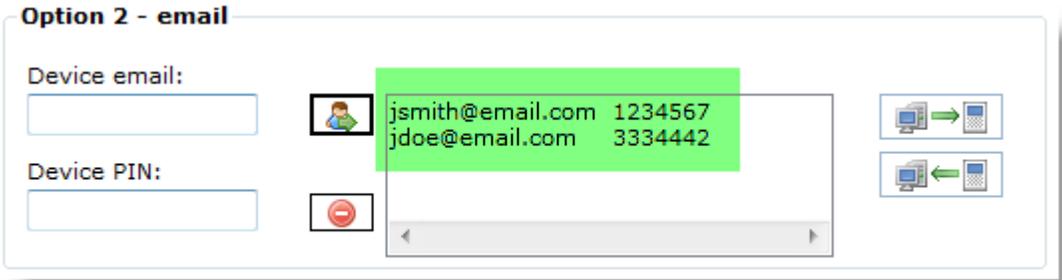
Figure 51 - Add Recipients to the Email List to Receive Data.

Next, select the button. You will be prompted to select a CSV file name that you would like to send to the devices. Then click 'Open'. You will get a dialog reporting the records have been sent:
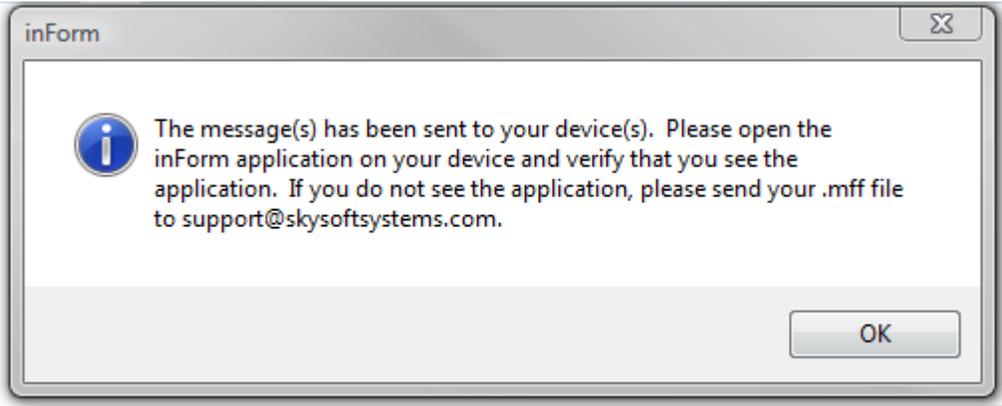
Chapter

6

6 - Email Configuration

You can typically determine your SMTP settings by using the same settings in your desktop email client, such as Microsoft Outlook.

Note: *We recommend that you create a separate, dedicated account for sending and receiving forms and data to/from the device. When the PC application checks a large mailbox with your existing email, performance can be impacted. Refer to the section below on using a Gmail account for further instructions on how to set this up.*
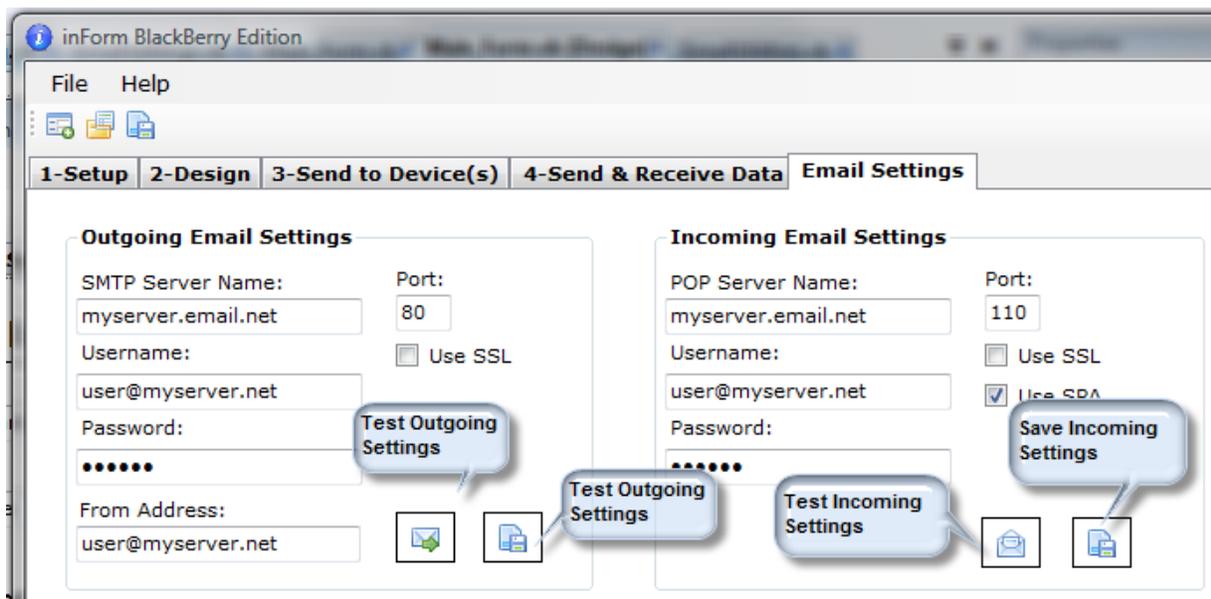
Figure 52 - Email Configuration Settings

Outgoing Email Settings

The outgoing emails settings are used to send form definitions to the device (3-Send to Device(s) Tab) and also to send data to the device (4-Send and Receive Data Tab). Once you have configured these settings test the connection by using the [icon] button.

- **SMTP Server Name:** The name of the SMTP sever for submitting email.
- **Username:** Account username on the SMTP server.
- **Password:** Account password on the SMTP server.
- **From Address:** The email will be sent with this from address. To keep it simple you can typically use your own email address, which is often the username for the SMTP server.

- **Port:** The SMTP port to be used.
- **Use SSL:** Specify if SSL is to be used.

Incoming Email Settings

These settings are used to receive completed records from any number of devices (4-Send and Receive Data Tab). Once you have configured the incoming emailsettings, test the connection by using the [ ] button.

- **POP Server Name:** The name of the POP sever for submitting email.
- **Username:** Account username on the POP server.
- **Password:** Account password on the POP server.
- **Port:** The POP port to be used.
- **Use SSL:** Specify if SSL is to be used.
- **Use SPA:** Specify is Secure Password Authentication is to be used.

Troubleshooting

If your connection to either the incoming or outgoing email servers is failing, please verifythe following:

1. Ensure your PC is connected to the Internet.

2. Ensure that you are not running firewall software in Windows (such as Windows Defender, McAfee, Norton, etc) as it may be blocking either the application or the port from sending and receiving email. This is especially important to confirm when using Windows Vista.

3. Ensure that your email server (Microsoft Exchange) has the correct configuration settings (SMTP must be enabled).

4. Ensure that you do not have any network firewalling blocking specific POP or SMTP ports.

5. If these troubleshooting steps fail, try using a free internet email account to get up and running on inForm.

Note: *If you have tried the 5 troubleshooting steps outlined above and are still having difficulty sending or receiving records to orfrom the device, please contact us at* support@skysoftsystems.com

Using a Free Internet Email Account (Gmail)

If you are having difficulty getting your own work or ISP server working due to network or configuration issues, you can also set up a free email account with a service provider such as Gmail.   This email address could be used for the purpose of sending and receiving records to and from devices in a secure manner, so there is no real need to use your own work or ISP server. In fact, the Gmail service is often much more reliable than corporate or business email servers and is also secured using SSL. To get started:

1. Create a new Gmail account at http://mail.google.com
2. In your email account at Gmail click "Settings"→"Forwarding and POP"→"Enable POP For All Mail"
3. In the inForm PC client set the following settings:

   - SMTP Server Name: **smtp.gmail.com**
   - Username: **youraccount@gmail.com**
   - Password: **your password**
   - From Address: **youraccount@gmail.com**
   - Port: **465**
   - Use SSL: **Checked**

   - POP Server Name: **pop.gmail.com**
   - Username: **youraccount@gmail.com**
   - Password: **your password**
   - Port: **995**
   - Use SSL: **Checked**
   - Use SPA: **Unchecked**

For more details on setting up a Gmail account for your device, please go to: :

http://mail.google.com/support/bin/answer.py?answer=76147

7 - Sending Records between BlackBerry Devices

In inForm 2.0, we have introduced you to an innovative new feature which allows you to send records between devices without the need to use a central server. This is a very useful feature for small mobile teams which do notwant to invest in any expensive or complicated IT infrastructure.

Once configured, users shall be able to create, update and submit records between devices.

Figure 53 - Using the D2D capabilities of inForm

Setup D2D between Multiple BlackBerry Devices

The following steps can be used to setup D2D between any number BlackBerry devices:

1. In your Form Setup (1-Setup Tab) ensure that the 'email' feature is enabled. ('Use Email Feature' checkbox should be verified).

2. Ensure that the Email Format is set to 'CSV'.

3. On all BlackBerry Devices that you want to use the D2D feature on, do the following:

    a. Open the Device Address Book

    b. Create an Address Book entry for All users in your D2D group. You must have the minimum fields for the users in the D2D group:

        i. First Name

ii. Last Name

iii. Email

iv. PIN *(Note that PIN is very important and is used for security purposes. D2D will not work unless you have the PIN entered for each D2D member).*

c. From the main address book screen on the device, select 'New Group' using the trackball or BlackBerry button.

d. From the Group Creation screen, type a name for your Group such as 'Expense Sheets Work Group'.

e. From the Group Creation screen, using the Trackball or BlackBerry button, choose the 'Add Member' menu option.

f. When prompted, select the email address for the user that you created in step b.

g. Repeat steps e and f for all users you want to include in your D2D group.

Using D2D after Setup

h. Now you are ready to use the D2D capabilities of inForm. Create a new record based on one of your existing Forms.

i. You can select any number of records from the form listing screen and select 'Email' menu option or select the 'Email' menu option from the record edit screen.

j. When prompted, select the group that you created.

k. Your selected records will be synchronized with the rest of the devices in the group.

Chapter

8

8 - Integrating inForm with your Business or Enterprise

There are several approaches for integrating inForm into a small/medium business or enterprise. inForm works by sending and receiving email messages with both forms and form data to and from the device. Applications can easily be built to send data to the device in either XML or CSV format as well as retrieve messages from a pre-defined mail box and parse them into an application. Skysoft Systems also has several enterprise products pending release to integrate with existing applications and databases, such as:

- inForm Connector for MS Excel
- inForm Connector for MS Access
- inForm Connector for ODBC

If you would like more information about any of these products or are interested in obtaining a beta release of the product please contact us at **sales@skysoftsystems.com**

You can send and receive records to and from any number of Blackberries using either a USB connection or via email. inForm works 'out of the box' with spreadsheet applications and databases which support CSV or XML formats such as Microsoft Access and Excel.

inForm client to inForm client (D2D)

One of our unique and patent pending features within the product is the ability to share data between a workgroup of devices without the need to send data back to a central server or database. Using this feature, inForm allows small workgroups and teams to quickly and easily mobilize and share forms and data between their devices in real time.

Figure 54 - Using inForm D2D Feature

Wireless (Email) to Text

Text records can be sent from any device to any email address.
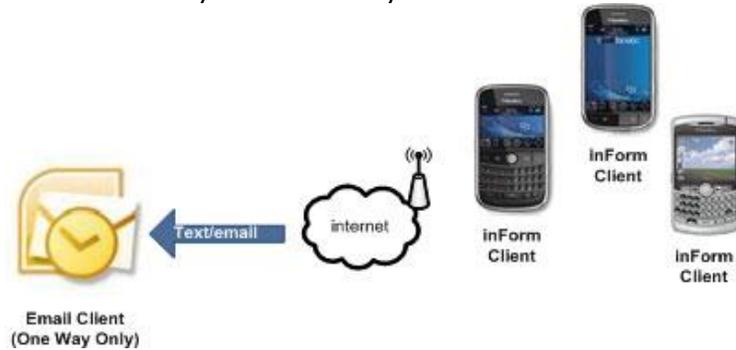

Figure 55 - Wireless Email to Text

USB to CSV

Manual 2-way synchronization from one device to a CSV file.

Figure 56 - Synching via an USB Connection

Wireless (Email) to CSV

Manual 2-way synchronization from one or more devices to a single CSV file.
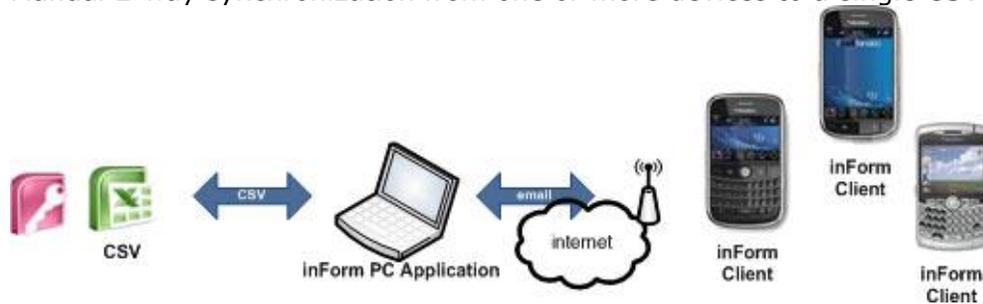
Wireless (Email) to XML

XML records can be sent to and from the device from a server platform through custom

integration. Skysoft Systems provides this type of integration as a professional service and can also assist an IT department in performing their own integration.
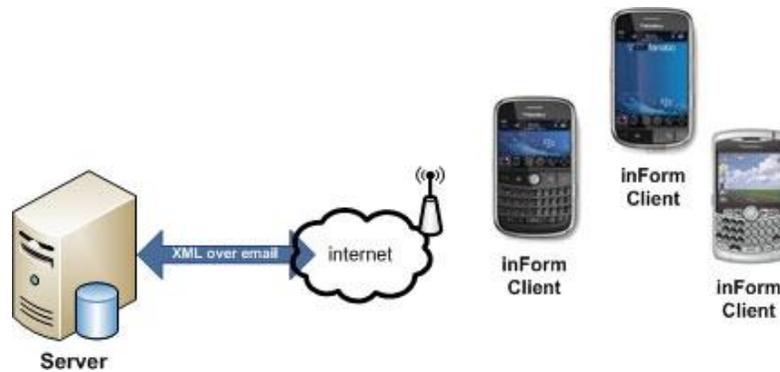
Inform Connectors

If you require real-time continuous synchronization for multiple devices, you can use our inForm Connector products. Contact sales@skysoftsystems.com for more details.

Figure 57 - Inform Connector Products

9 - Additional Services

Form and Application Development

Having trouble getting exactly what you want out of your own form or application using our inForm Application Builder? The inForm platform is very flexible and powerful and you may want to consult with us about the best way to mobilize your wireless application as you get started. If the bundled examples or the examples posted in our users' forum do not help, let us help!
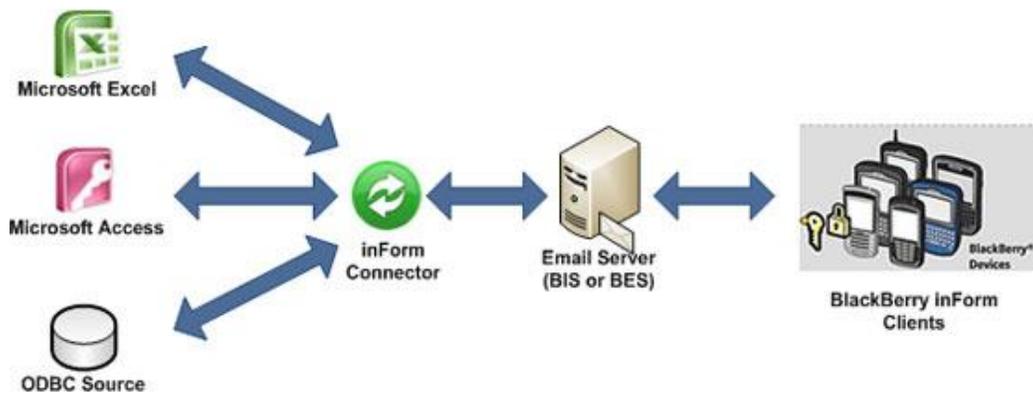
For a one-time charge we will provide you with consultations and build your form for you. We'll make sure that you leverage all of the powerful aspects of the inForm platform to its full potential. Contact **sales@skysoftsystems.com** to get started today. In preparation for the consultation, please provide any copies of existing forms, documents, spreadsheets that you are able to share that would assist us in effectively designingyour form.

> ***Note:*** *We provide this service free of charge when you purchase 10 or more device licenses of inForm for your organization.*

Integration Services

Do you have an existing CRM, Accounting Package, Retail, ERP or system that you would like to wirelessly Extend to the BlackBerry™? If you have tried our inForm™ product and connectors and think you need something a bit different to mobilize your workforce, we can help.

Figure 58 - Skysoft Integration Services

Our team is happy to engage with you to understand your requirements for wireless applications. Where possible, we like to use the inForm productand provide an integration to your existing back-end systems.

We follow a regimented process of analyzing requirements, implementingand field testing our integration. We provide our quotations up front and at a fixed-cost so you know exactly what you're getting, how much it will cost, and when you will get it!

Contact our sales team today (sales@skysoftsystems.com) with any questions you have for integrating inForm to your business.

Figure 59 - Integration Process Flow

Training

We offer instructor-led training packages for our inForm™ solution. Contact us today (sales@skysoftsystems.com) to schedule training or receive a custom training quote.

We have the following training packages:

1. **inForm Admin 101** – Provides an overview of the basic uses for the inForm application. Creating basic forms, distributing them to users and sending/receiving data. Ideal for users or administrators whom will be building forms and distributing them for their organization.

   Delivery Modes:
   - Online (GoTo Meeting) - 2 Hours
   - Classroom - 2 Hours

2. **inForm User 101** - A basic overview of how to use the inForm client on the BlackBerry™ device. Great for users whom are not very experienced with the BlackBerry platform.

   Delivery Modes:
   - Online (GoTo Meeting) - 1 Hour
   - Classroom - 1 Hour

3. **inForm Advanced** - Delves a little deeper into the usage of Form Events and Actions, Subforms and creating dynamic applications.

   Delivery Modes:
   - Online (GoTo Meeting) - 2 Hours
   - Classroom - 2 Hours

10 - Developer's Reference

Overview

This chapter provides a brief overview for developers or systems integrators that would like to use inForm as an OEM product in their existing applications or frameworks. By no means is this chapter a conclusive development guide. For further assistance, please contact support@skysoftsystems.com for with further technical questions you may have about existing inForm to suit your needs.

Sending Data to the Device using CSV

To send data to the device you can send one or more records simultaneously using CSV format.

1. Create the correct CSV format containing your record information. You will want to follow the format described in Chapter 5 of this document.

2. Attach the CSV to an email message.

3. Address the email message to the device recipient address.

4. In the subject line of the email message you will need:

inform_csv_update_<PIN>

Where PIN is the PIN number for the device you are sending the update.

Sending Data to the Device using XML

To send data to the device you can send one record using XML format.

1. Create the correct XML format for your record information. The correct XML format can be determined first by submitting the record from the device using XML format. You can then use this XML output from the device to define your schema.

2. Create an email message. Ensure the format of the email message is plain text.

3. Insert the XML as the BODY of the message.

4. Address the email message to the device recipient address.

5. In the subject line of the email message you will need:

Inform_xml_update_<PIN>

Where PIN is the PIN number for the device you are sending the update.

Receiving Data from the Device using CSV or XML

Automating the receiving of data from one or more Blackberries is simple using most programming languages.   When forms are submitted from the device you can configure a central 'form mailbox'. You can then retrieve messages from the mailbox in either CSV or XML format, parse the record and insert it into a corresponding back-end system.

Examples of scripts used to integrate inForm to the enterprise are available on our user's forum:

http://www.skysoftsystems.com/forums/index.php?fid=21

Automating The Creation of the XML Form Definition

The basic XML definition for the Form on the device can be understood by creating sample forms in the form editor, saving these forms (saving the .mff file) and then opening the form in an XML editor. Note that when a form is sent to the device that the full form definition starts with the <form> attribute. The <application> attribute is not sent to the device, but rather is used only by the PC editor.

```
<form>
<pin>1234567</pin>        ←Note:  You MUST contain the PIN for the device.
<name>Hello World</name>
<allowformnamechange>False</allowformnamechange>
<alerts>False</alerts>
<type>Development Example</type>
<emailtype>CSV</emailtype>
<submittype>CSV</submittype>
<copyonsubmit>False</copyonsubmit>
<deletable>TRUE</deletable>
<dateformat>mmddyyyy</dateformat>
<instancedeletable>Always</instancedeletable>
<emailable>Yes</emailable>
<submitto>test@skysoftsystems.com</submitto>
<listingcolumns>
<col1>
<var>Text_Box1</var>
<name>Text Entry</name>
</col1>
</listingcolumns>
<row>
<column>
<width>53</width>
<text>
<name>Text_Label1</name>
<visible>True</visible>
<value>Hello World Example</value>
</text>
</column>
<column>
<width>53</width>
<hs>1</hs>
</column>
</row>
<row>
<column>
<width>53</width>
<textbox>
<name>Text_Box1</name>
<output>True</output>
<visible>True</visible>
<editable>True</editable>
<last>False</last>
<default>Hello World</default>
<length>53</length>
<required>False</required>
</textbox>
</column>
</row>
</form>
```

Sending Updated Form Definitions to Devices Remotely

Once you have created a form definition, you can automatically send these to the devices using email.   Email the new form definition to the device directly by attaching the form definition as an **XML file as an attachment** to the email and use the following subject line:

Skysoft_inform_new

Deleting Form Definitions from Devices Remotely

You can remotely remove form definitions from the device by using the following subject

line:

<p align="center">***Skysoft_inform_remove_<formname>***</p>

Where <formname> is the name of the application or form.

Redistributing Your Application – Custom Branding

If you are an individual, developer, ISV small business, or organization and have built Forms, Databases, or MicroApps using the inForm product, you can redistribute your work to other users using a custom build from Skysoft. Our customers use this option commonly in the following scenarios:

- You are an individual that wants to build, market and sell BlackBerry Applications

- You are an ISV and want to create a basic BlackBerry application with your own Branding to redistribute to your customers.

- You are a small, medium or large enterprise that wants to distribute a package of pre-built forms or reference data throughout your organization using a 'one click' wireless install.

Contact sales@skysoftsystems.com today if you would like to participate in our Rebranding or Reseller Programs.