



Sales Rep App MANUAL

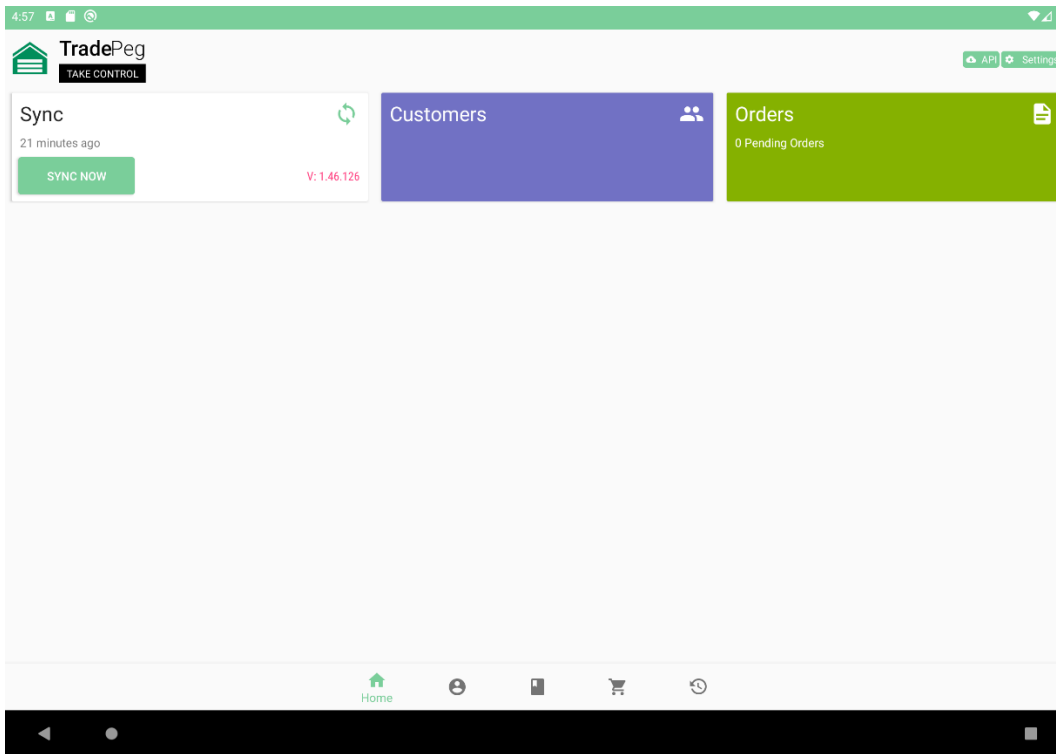


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Home



On the first page of the Sales Reps app we can see three things:

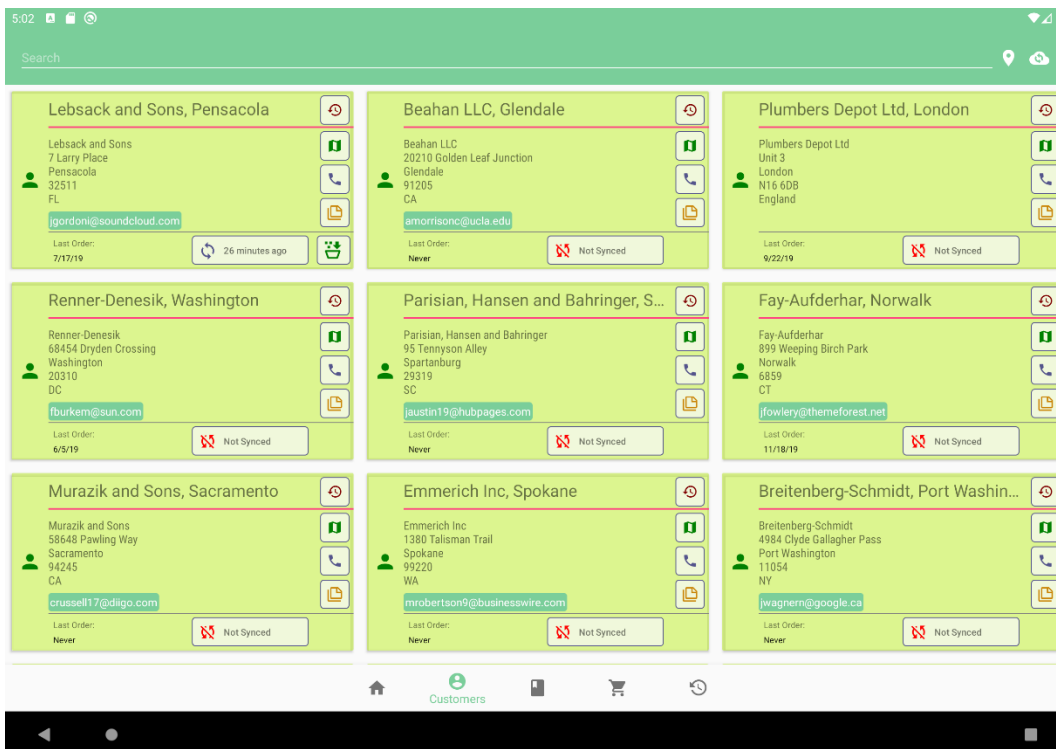
1. Sync
2. Customers
3. Orders

Sync shows the last time that the device was synced, as well as allowing us to trigger a sync now.

This sync synchronises products, customers, images, stock levels and categories, but NOT pricing. Pricing is synced separately for each customer.

The general sync should be done once per day or as often as products are being changed

Customers

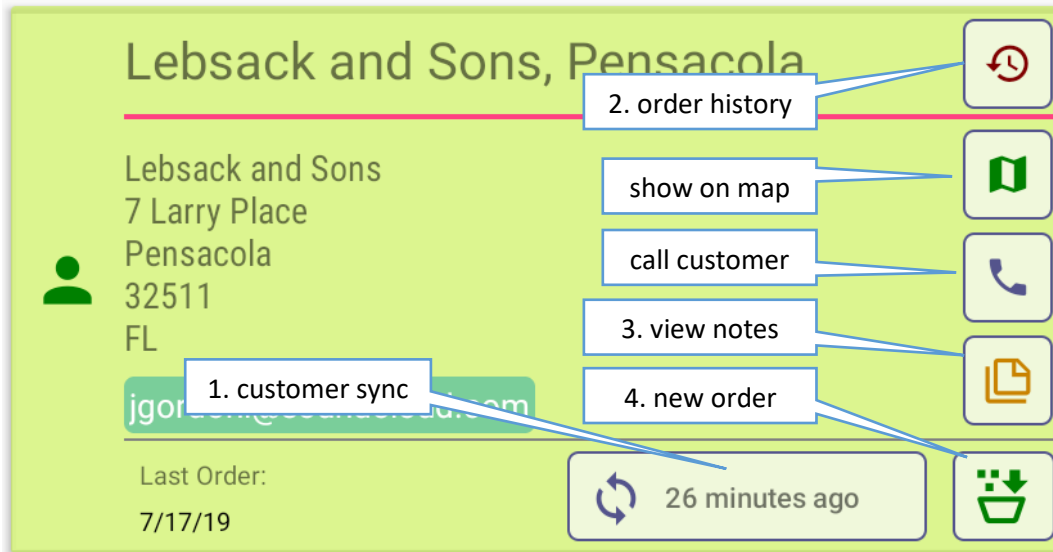


Pressing Customer (either on the home page, or on the navigation bar across the bottom of the app) takes us to a list of Customers.

The customers listed here can be configured in the backend to:

- hide inactive customers
- hide customer that have exceeded their credit
- hide a specific customer
- hide contact information



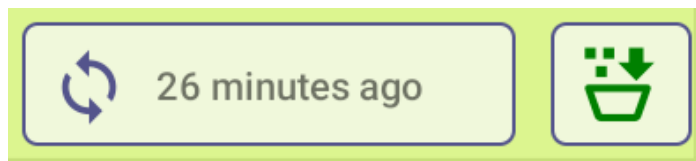


Each customer has a separate sync button which shows last sync.

The customer must be synced to be able to **create an order**.

Last order will be red when a visitation is due.

Customer Sync



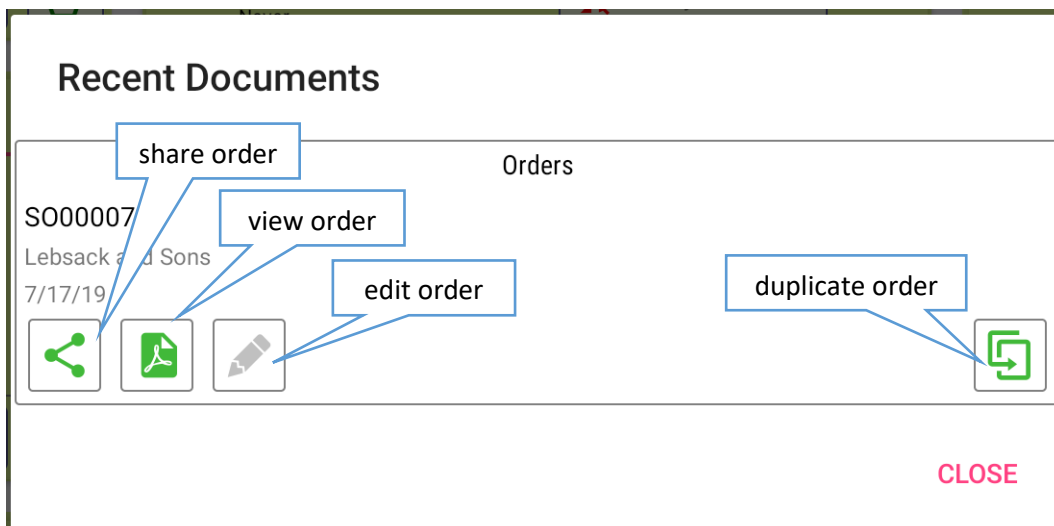
Customer sync is separate from the general sync on the home page.

Customer sync synchronises the pricing and discounts for that customer.

This sync will also update stock levels.

The customer sync should be done every time a customer is visited to ensure the correct pricing is shown

Order History



Pressing the order history button shows us a list of all prior orders made by the current Sales Rep for this customer.

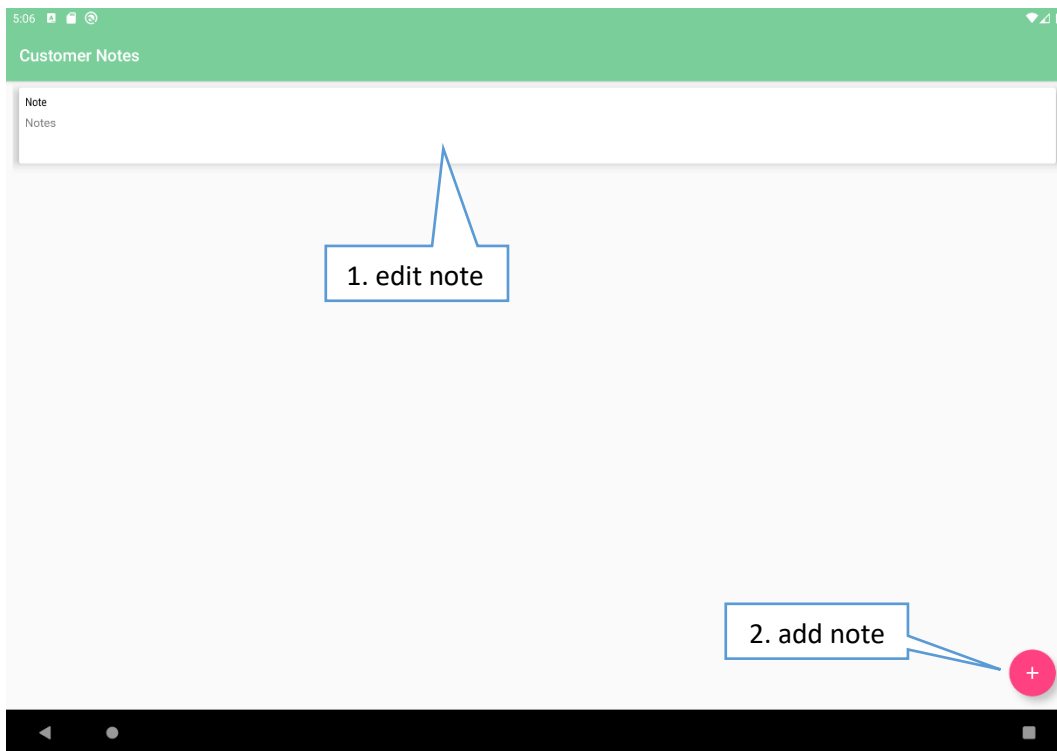
Note that the order can only be edited if:

- Editing of un-confirmed orders is allowed
- Editing un-packed orders is allowed

And the order is un-packed or un-confirmed.



View Notes

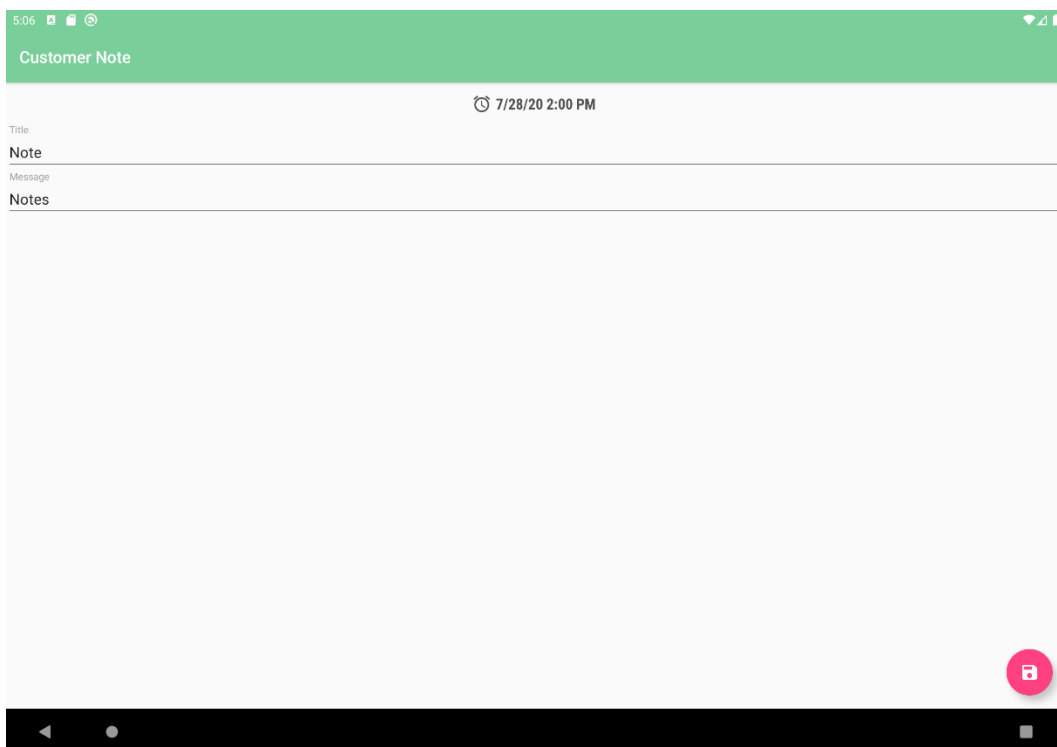


Pressing view notes shows us customer notes and reminders.

Pressing on a note allows us to view and edit it.

To add a new note, press the '+' in the bottom right corner.

3.1 Edit Note



Pressing a note brings up the title and message, as well as the time and date for when the reminder is set.

If you made any editions, remember to press the save button in the bottom right corner.



3.2 Add Note

A new note requires a Title and a Message. The reminder is optional.

Finally press the save button at the bottom right of the app.

If you set a date and time for the reminder then the app will remind you of the note when the time is reached.

New Order

The new order button will bring up a list of products from which we can fill the order.

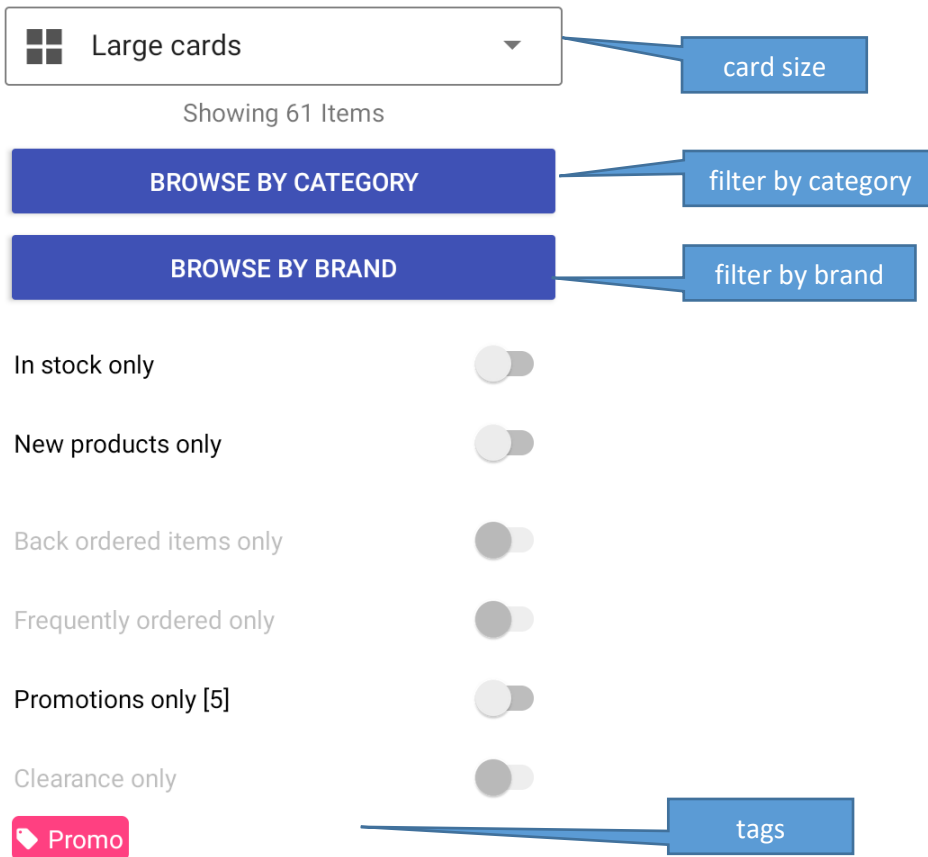
(If configured in the backend, long pressing the icon on the customers page will open a new *credit* sales order)

Swipe in from the right to open up the brands filter.

In the top right corner we can scan a product to quickly find it in the system.



4.1 View Options



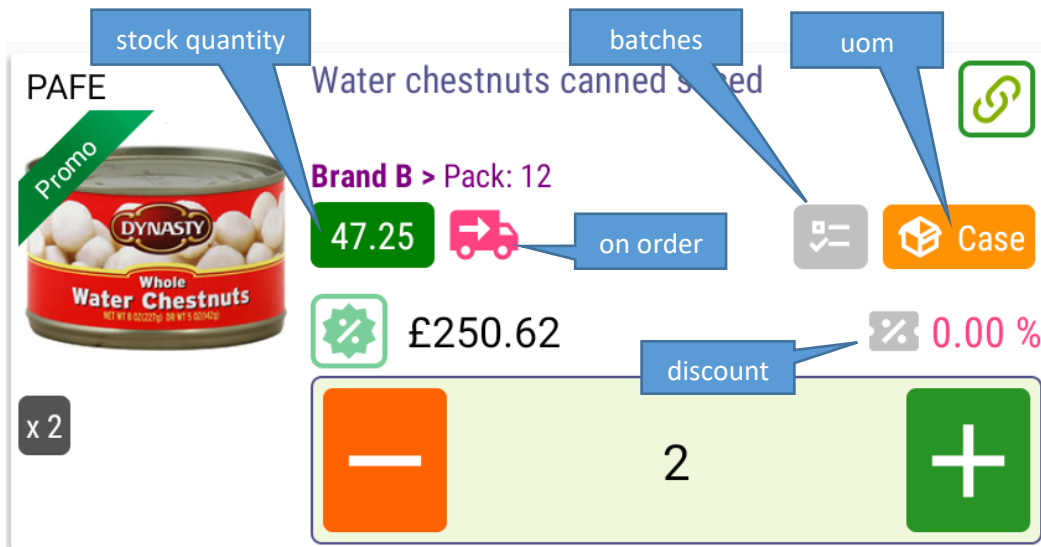
We can change the card size to show fewer or more details.

Filter by brand or category to quickly find the products you're after.

Clicking a tag changes its colour to green and only items matching the tag will be shown.

Long pressing the tag changes the colour to red, excluding this tag.

4.2 Product



Each product has a range of information shown, and options to change.

Batches and UOM can be specified.

The on order icon will turn green if an expected delivery date has been saved. In that case, long pressing the icon will show the expected delivery date.

A discount can be added by touching the discount and typing in a percentage.

Press the product picture to open more images and to see VAT rate and RRP.

If a promotion is available, then the Promo strap will appear over the product photo. An apply promo button will also appear.

Pressing the price allows us to change it, and long pressing it resets it to the default price.

Long pressing the +/- buttons increments and decrements in 10's with a minimum of 0.

Long pressing total added resets it to 0.



4.2.1 Current Added Quantity

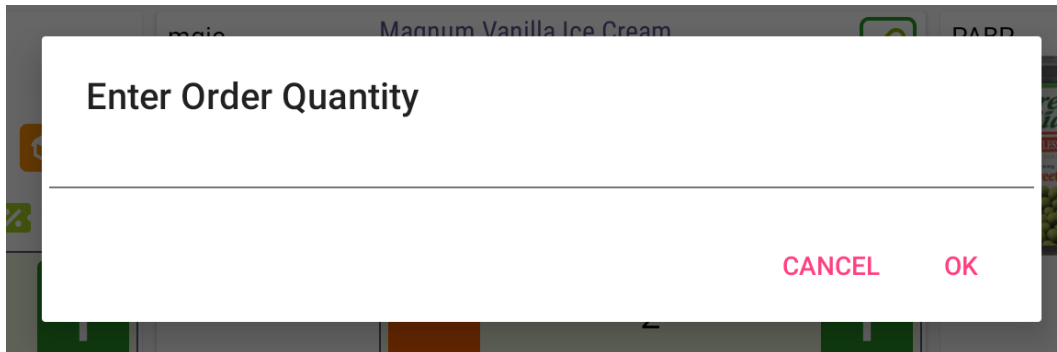
The current added quantity indicator shows how many of the current configuration has been ordered. This could be different to the total quantity indicator which shows how many of this item have been ordered in total.

Configuration means the exact price, discount, batch, UOM and promotions that have been added to a product.

For example, if you add 2 of an item with no discount and then add a further 3 with a 10% discount, the current added indicator will show 3 because the current configuration is 10% off. However, the total quantity will show 5 as this is the total ordered.



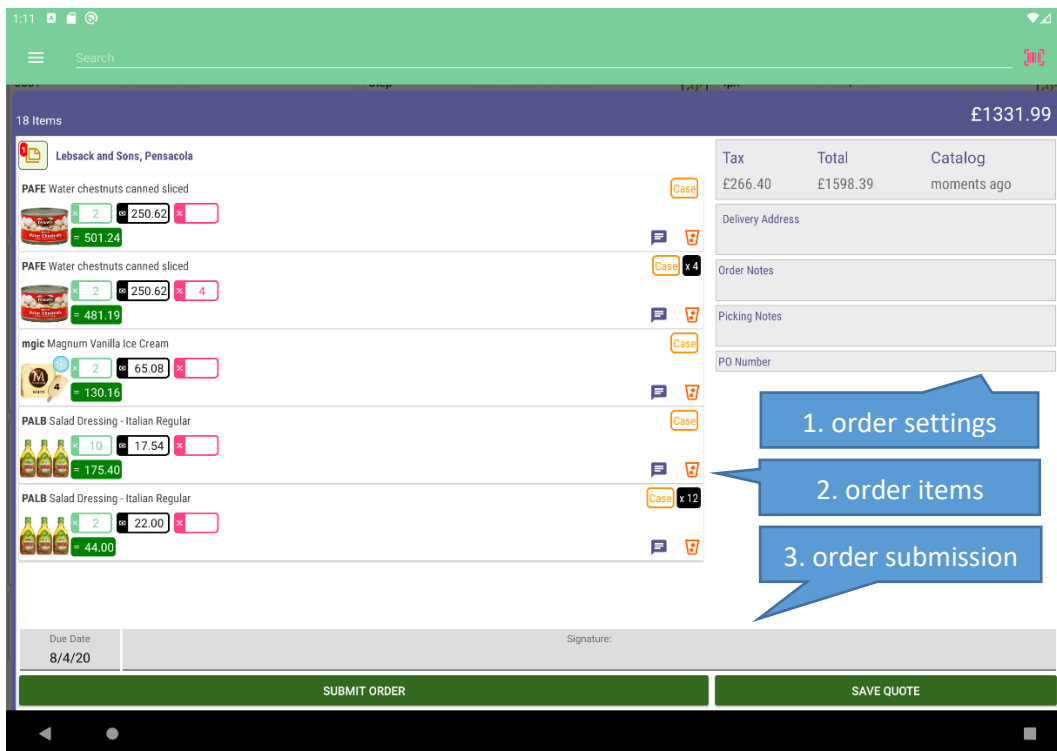
4.2.2 Total Quantity



Pressing the total quantity allows you to manually enter the quantity.

Using a formula of $a + b$ allows you to quickly do buy a get b free promotions. Eg 10+2 adds 10 items with no discount, and 2 with a 100% discount.

4.3 Basket



Clicking the bar along the bottom opens the basket view.

On the right-hand side are the order settings.

On the left-hand side is the order items.

Along the bottom is order submission.



4.3.1 Order Settings

Tax	Total	Catalog	sync status
£266.40	£1598.39	order total	order total
Delivery Address			
Order Notes			
Picking Notes			
PO Number			



To refresh the catalog (eg to get the latest prices) press Catalog.

If the customer has multiple addresses saved on the system, you can set it by pressing Delivery Address and selecting the correct address.

Alternatively, long pressing the address allows us to manually enter a shipping address or use the current location.

Notes and PO number can be added by pressing on the relevant box and adding it.

4.3.2 Order Items

PAFE Water chestnuts canned sliced		price	uom	Case x 4
	x 2	250.62	%	remove
= 501.24	quantity			
PAFE Water chestnuts canned sliced		discount	Case x 4	
	x 2	250.62	% 4	total quantity
= 481.19	sub-total		comments	

We can see all the details of ordered items.

In the example here, the same product was ordered with 2 configurations:

- no discount
- 4% discount

Due to this, the item appears twice on a different line to show the different configurations. The total quantity shows the total of all configurations

4.3.3 Order Submission

Due Date	Signature:
8/4/20	
SUBMIT ORDER	SAVE QUOTE

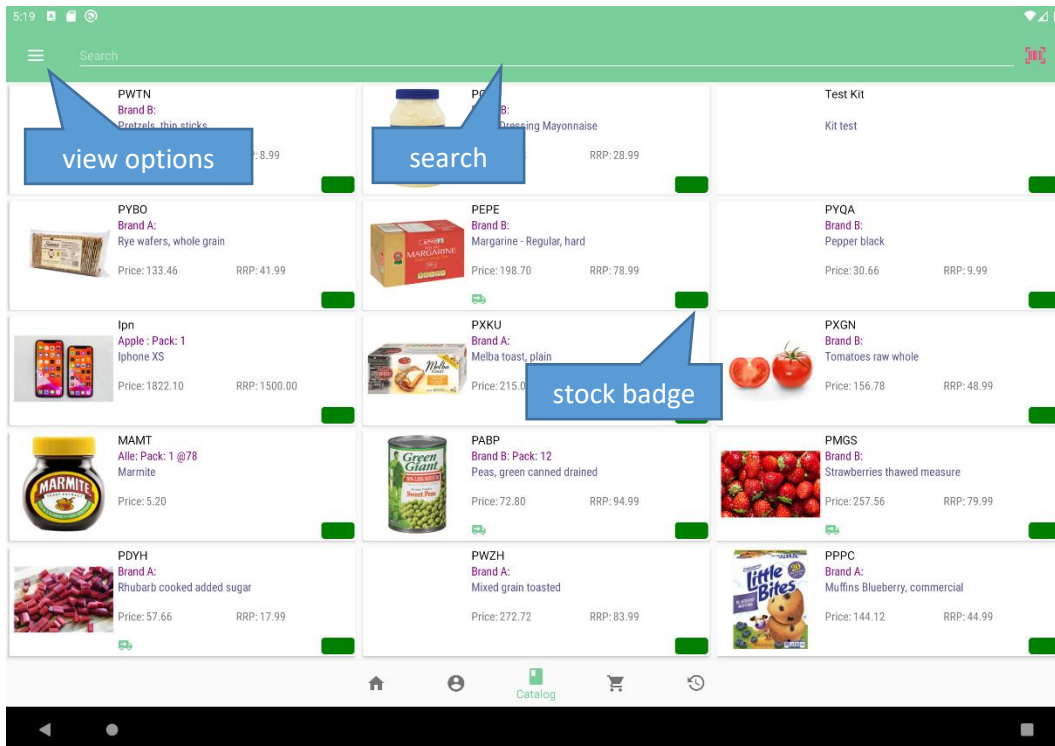
To finish the order and submit it, press submit order. The order will now be placed to be fulfilled.

Saving a quote allows you to save where you are up to with all quantities, and discounts preserved. This will not be



submitted as an order to be fulfilled.

Catalog

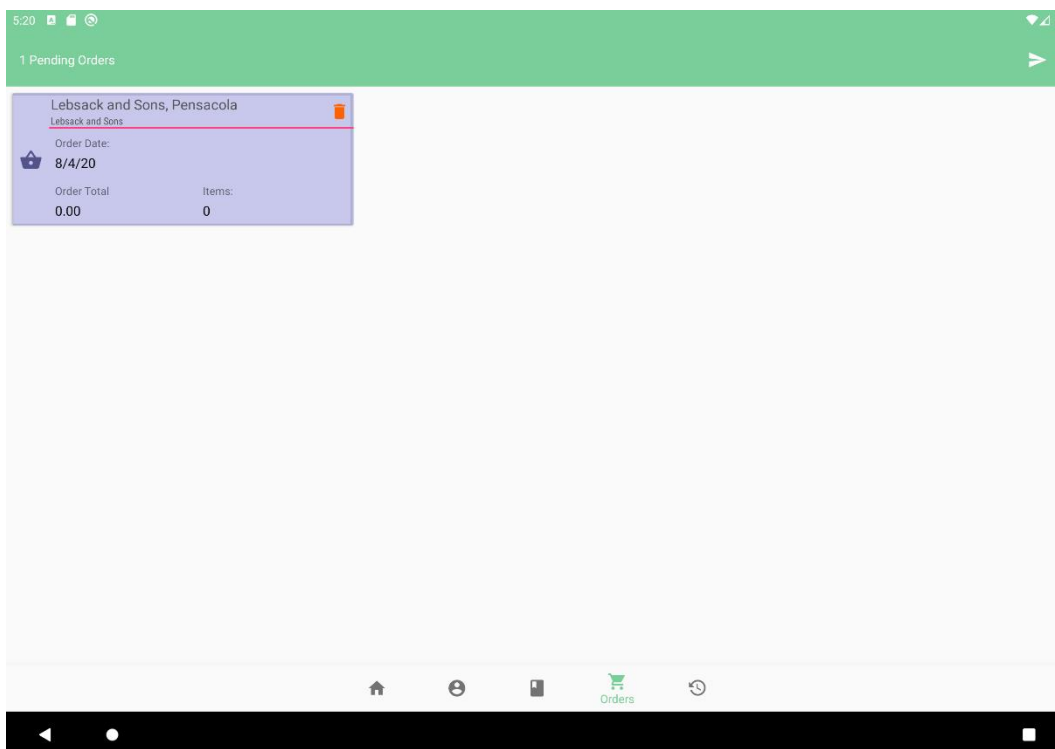


The catalog tab displays the items in the catalog.

View options allows us to filter the products by brand or category, as well as restricting to in stock items only.

The green badge indicates the item is in stock. Red indicates out of stock.

Orders



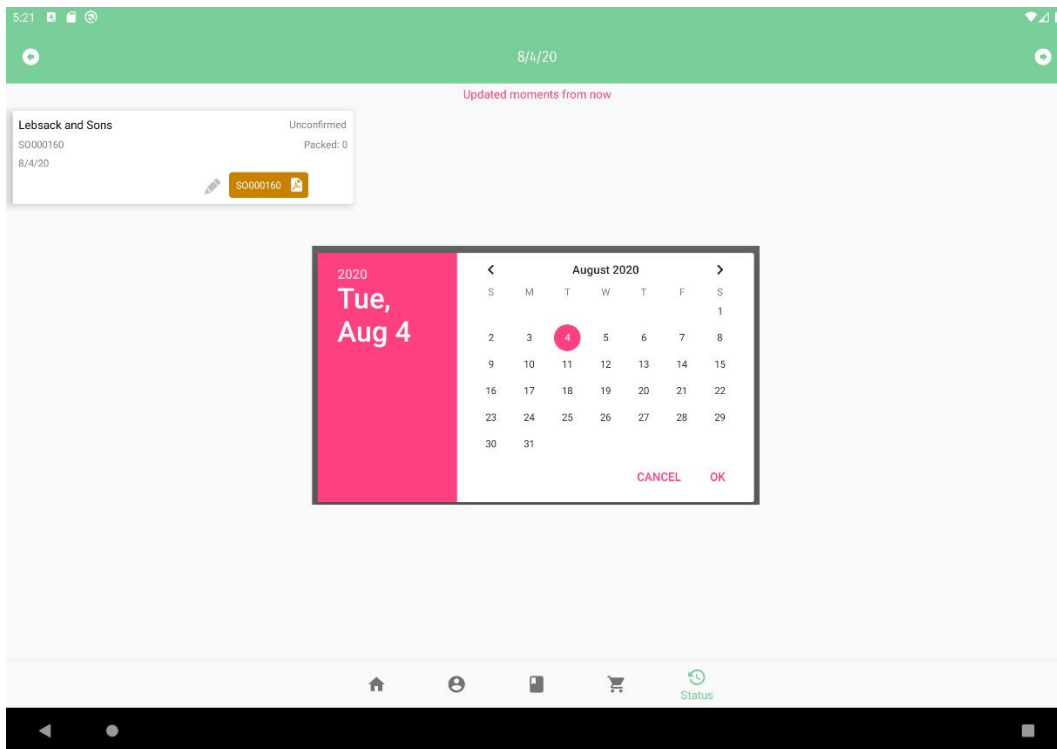
The orders tab shows any in progress orders that have not been submitted, or saved as a quote.

Pressing the order allows you to jump back into it and continue.

If you are unable to submit an order due to network conditions, the order will appear here, and it can be submitted when you are connected.



Status



In the status tab we can enter a date and see all orders submitted by the currently logged in Sales Rep on that date.

We can see the order status, and the packing status.

We can download the Sales Order document, and if available, it can be edited.

