SOP
User Guide

Version 0.2

Prepared for:

Applies to version 7.3.8

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1 Introduction

The SOP application is used for the generation of handset data (customer and product extracts), entering of sales orders and the processing of imported handheld (remote) sales orders.

This manual is meant for the users of the system and describes the most commonly used functions within the application.

This guide does not cover the installation or configuration of the SOP system, nor the operation of the handheld software. These are covered in separate related documents, available on request.

2 Conventions

Throughout this manual several conventions are used to highlight menu commands and interaction that the user must take.

2.1 Menu Commands

If the user is required to click on a menu command, the name of the command is given in ***bold italic*** font. If the user must navigate through a hierarchy of such menu commands then each command is separated by the → character. For example:

Tools → Synchronise → Head Office → Import Data From Back Office

Figure 2-1 - Menu Command

Indicates the user should first click on the 'Tools' menu, then on the 'Synchronise' sub menu, then the 'Head Office' sub menu and finally the 'Import Data From Back Office' menu item as shown in Figure 2-1.

2.2 Button Commands

In a similar way to menu commands, button presses are indicated to the user by ***bold italic*** font. Simply click on the button with the relevant text.

3 Login

To login to SOP, click the SOP icon in the Start Menu. This will bring up the SOP splash screen and the application will load. You will then be presented with the login screen as shown in Figure 3-1.

Enter 'Manager' in the user name field and leave password blank, then press ***OK***.

When you login for the first time, your *User Name* will be manager and the password will be blank. Change this as soon as you can by following the instructions in section 17.5.

Figure 3-1 - Login Screen

4 Importing Back Office Data

Once you have set up your company and configured the parameters, you are ready to import your back office data into SOP. This will allow you to access all your product and customer information and export the data that is required by the handheld devices (see section 5 for more information).

To manually import the back office data, go to the ***Tools → Synchronise → Head Office → Import Data From Back Office***.

After the import is complete, handheld data is automatically generated and placed on the server, ready for download to the handheld devices.

If any errors occur with the data import or handheld data generation processes, they can have a serious effect on the remote ordering system as a whole. If any error messages occur, contact Computoy as a matter of urgency.

5 Creating Handheld Lookups

In order for the mobile sales reps to place orders using the handheld devices, they must download customer, product and related data. This data is contained in 'lookups' which need to periodically generated to ensure they are up to date. Full lookups are generated each time the back office data is imported into SOP, but updates can be generated manually by clicking

Tools → Synchronise → Handhelds →Export Handheld Updates

This will create updates for each of the reps and place them on the server ready for download to the handhelds. These update files are smaller than the original full extracts and only contain new or updated records so that the reps can load their device with the latest data, without having to download the full data extract.

6 Entering an Order

Once the back office data has been imported into SOP, all of your customers and products will be available for you to create sales orders.

In addition to being able to enter sales orders on the handheld devices, you can manually input orders directly into the SOP.

To open the order entry screen, click on the ***New Order*** icon on the top left of the main screen. The standard order entry screen is displayed as shown in Figure 6-1.

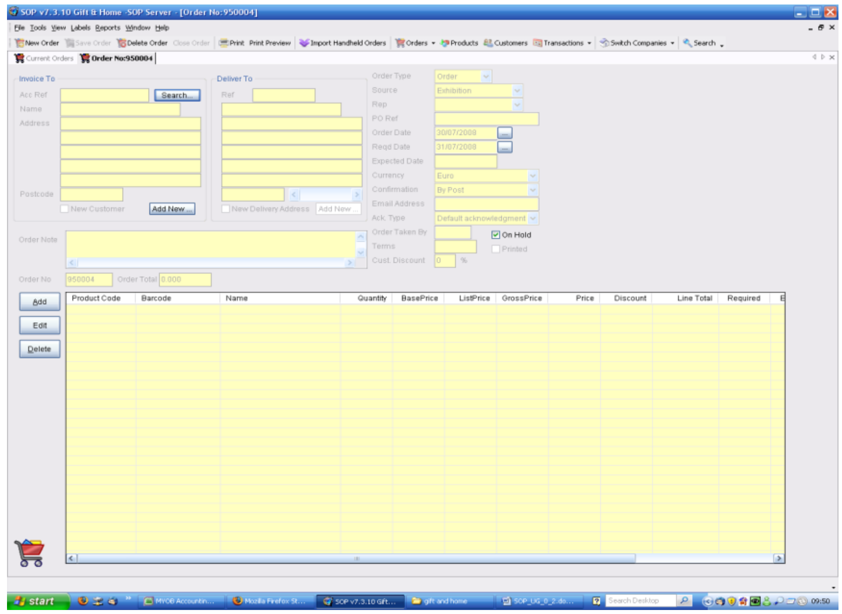


Figure 6-1 - Order Entry Screen

6.1 Assigning a customer to an order

The first task is to assign a customer to this order; this is done by clicking the ***Search*** button next to the *Acc. Ref* field. Alternatively you can enter the customer account code in this field and press the *Tab* key. The customer's details will be loaded to screen.

6.1.1 Customer Lookup Form

If the search button is used, you will be presented with the customer lookup box as shown in Figure 6-2.

Search for a customer by entering any part of their account code, name or postcode in the relevant fields. Pressing return or clicking ***Search*** will filter the list of customers in the grid below. Double click the relevant customer record to load their details to the order entry form.

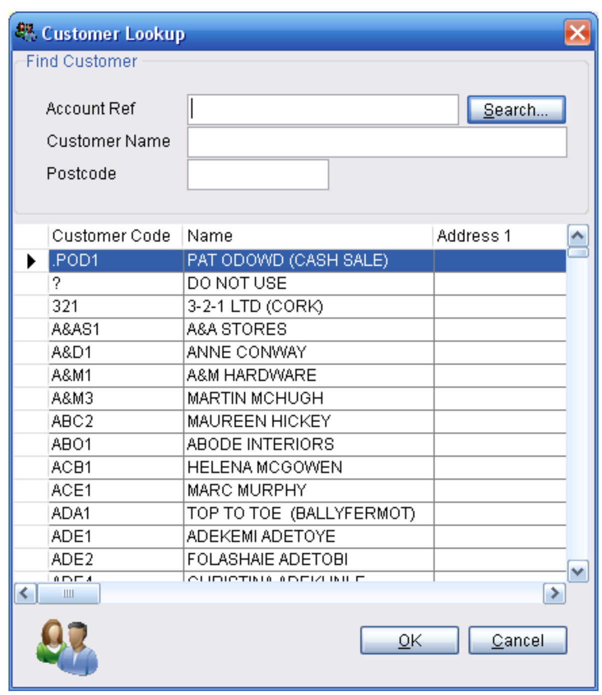
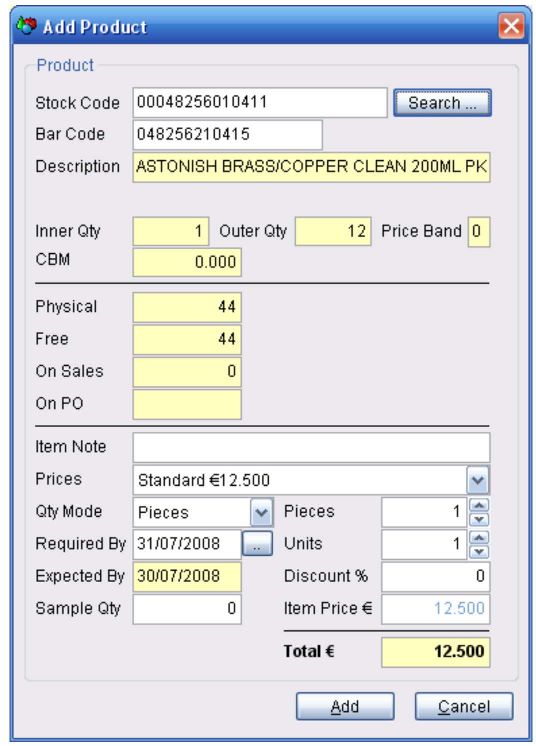


Figure 6-2 - Customer Lookup Form

6.2 Delivery Address Selection

Once the customer is selected, the required delivery address for this particular order can be selected using the slider under the delivery address details. A new delivery address can be created for this customer by clicking the ***New…*** button.

6.3 Adding Products to an Order



To start adding products to an order, click the ***Add*** button next to the order line details grid.

This brings up the order line entry form as shown in Figure 6-3. If the product code is not known then you can search for it by clicking the search button. Alternatively, you can enter the product code into the ***Stock Code*** field and press *Tab* to load the details to screen.

> When a product is selected, any special prices for the product that apply to the currently selected customer are automatically calculated and loaded to the ***Prices*** drop-down box. The equivalent discount from the list price is also calculated and shown in the ***Discount %*** field.

You can select a selling price per unit from the prices drop down. The default price is the customer special price (if it exists) and the standard list price (if it doesn't). The selling price can be changed manually by typing it into the ***Item Price*** field. The equivalent discount from the list price is calculated and show in the ***Discount %*** field. Conversely, you can enter the discount into the ***Discount %*** field and the item Price will be calculated and displayed in the ***Item Price*** field.

You can enter the quantity required using the up/down arrows next to the ***Pieces*** or ***Units*** fields. The ***Qty Mode*** drop down box can be used to change the increments in which the quantities are increased. Changing the unit of measure in the ***Qty Mode*** drop down box changes the increment by which the ***Units*** field is increased.

If either of the *Pieces* or *Units* fields are changed manually then the other is calculated automatically. The quantity that is shown on the order line is always in units. In this way you can always check you have entered the desired quantity correctly.

The order line is added to the order by clicking the ***Add*** button. The view is then returned to the order entry screen.

6.4 Completing an Order

Continue to add items to the order until all the desired items are listed in the order lines grid. Once all the items are added, there are a number of options that can be set to customise how the order is processed. These are on the right side of the order entry screen as shown in Figure 6-4 and are explained in section 6.4.1 below.

6.4.1 Order Options

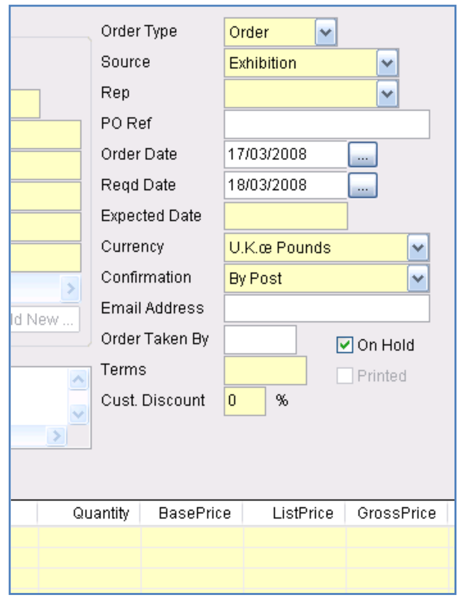


Figure 6-4 - Order Options

1. Order Type

An order can be one of three types:

- Order
- Pro-forma
- Quote

Select the type that is relevant to this order using the dropdown box. Depending on which of these types is selected, the order is processed in different ways. See section 0 for details on how certain order types can be held in the system.

2. Source

The field is for recording where the order was taken. The values in this list are taken from the order sources defined in the system. See section 17.2 for more details.

3. Rep

This is the rep that is responsible for this order (if applicable). This field should hardly ever be changed because it defaults to the customer's normal sales rep.

4. Purchase Order Ref

Enter a customer purchase order reference here if desired. It will be printed on the order acknowledgement.

5. Order Date

This defaults to today's date but can be changed so that you can enter a post dated sales order.

6. Reqd Date

This defaults 30 days the future but can be changed to reflect the date that the customer requires the order by.

7. Expected date

This is a read-only field that shows when all the lines in an order will be available for dispatch and is calculated as the latest date of any outstanding purchase orders.

8. Currency

Change the currency of the order here. See section 17.3 for more details on administering currencies within the system.

9. *Confirmation Type*

This can be set to one of three options:

- By Post – Confirmation will be printed and sent manually by post, no action is taken by the SOP system
- By E-mail – Confirmation will be generated and sent via email to the customer. When selecting this option, an e-mail address must be entered into the ***Email Address*** field. When the order is added to the system, it is automatically queued for sending. For more details on the e-mailing functionality see section 0.
- By B2B portal – (Future Development) – Send confirmation to your customer using your chosen Business to Business (B2B) portal.

10. *Order Taken By*

Enter your initials here.

11. *Terms & Customer discount*

These are information fields that give information regarding the customer that has been associated with this order.

6.4.2 Adding an order

Once you are happy with all the details of an order, it can be added to the system by clicking the ***Save Order*** button on the toolbar.

7 Importing Handheld Orders

Once your sales team have been out collecting sales orders on the handheld devices and have sent those orders back to Head Office, you must import them into SOP to process them further.

To import any new orders from the handheld devices, click the ***Import Handheld Orders*** on the toolbar. The SOP will search for any new handheld orders and load them into the current orders grid as shown in Figure 7-1.

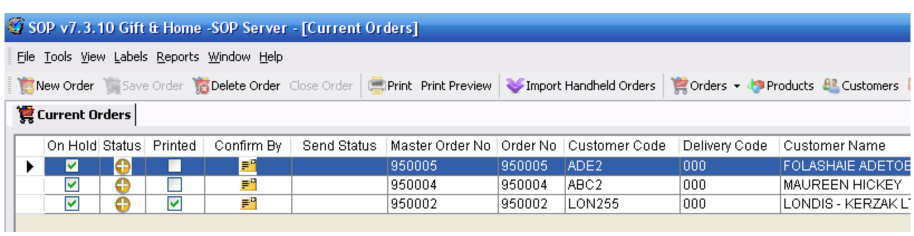


Figure 7-1 - Current Orders Grid

If the order is being held for any reason, this is indicated by a tick in the *Hold* column. Orders can be held for a number of reasons that are configured using the *Order Hold Reasons* dialog as described in section 0.

8 Reviewing Orders

8.1 Editing Orders

You can edit an order by double clicking it in the current orders grid (click the ***Orders*** button on the toolbar). This allows you to change any aspect of the order in much the same way as entering a new order as described in section 6.

You will be warned of you are attempting to edit an order that has already been exported to the back office. If such an order is modified then it will be exported again, the next time that a back office export is generated.

8.2 Deleting orders

An order can be deleted by highlighting it and clicking the ***Delete Order*** button on the toolbar.

9 Order Printing

You can print an order acknowledgment by highlighting the relevant order and clicking the ***Print*** button. This will print the order acknowledgment on the default printer using the layout selected when the rep entered the order. The default layout for this is the text acknowledgement layout. If you would like to preview this printout before printing, or you would like to change the layout of the acknowledgement, click the ***Print Preview*** button. This will open a dialog asking you to confirm the desired layout for printing. The three options are:

- Default Acknowledgement
- Small photo acknowledgment
- Large photo acknowledgment

Once you have chosen the required layout, you can also select a sorting order for the products on the order. The three options are:

- By product code
- By product description
- By sequence entered – this option displays the items in the report in the sequence they were entered into either SOP or the handheld device.

Clicking the ***View/Print*** button brings up your selected order acknowledgement from where you can print it or export it to PDF.

10 E-mailing an Order

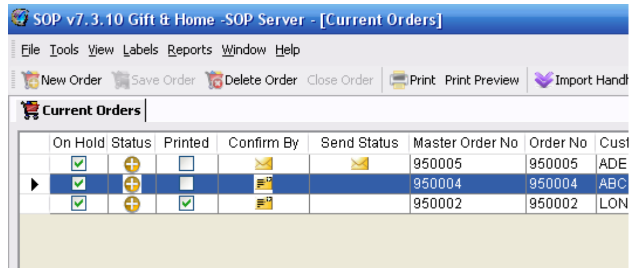


Figure 10-1 - Email Status

By setting the confirmation type of an order to *E-mail,* either using the handheld or SOP (see section 6.4.1), the order acknowledgment is automatically generated as a PDF. This PDF is then attached to an e-mail and sent to the e-mail address given when entering the order.

When an order is added to the e-mailing queue, two icons appear in the *Confirm By* and *Send Status* columns in the order grid as shown in Figure 10-1. The envelope icon in the *Confirm by* column indicates that the chosen method for acknowledgement is e-mail. The same icon in the *Send Status* column indicates that the order has been successfully added to the e-mail queue. This means that at scheduled intervals the SOP will attempt to generate and send the e-mail. Successful transmission of this e-mail is indicated by the *Sent* icon ( ). In the time between the PDF generation and the sending of the e-mail the *Send Status* column will display '1'.

If the sending of the email fails for any reason then the failed icon ( ) will be displayed in the *Send Status* column. It is recommended that you manually send the order acknowledgement (located in the PDF folder within your company's data folder) and contact support to resolve this issue.

11 Exporting Orders to Back Office

Once orders have been gathered from the handhelds, entered and edited in SOP, they need to be exported to Intact for further processing. To export all current orders to Intact, click ***Tools → Synchronise → Head Office → Export Orders***.

To stop individual orders from being included in the export they must be placed on manual hold. Open the order for editing and tick the ***On Hold*** checkbox then click on the ***Save Order*** button. Note that orders that are held for other reasons will also be excluded from the export and will remain in the current orders view.

When orders have been exported to back office they are still available for review (see section 8) by clicking the drop down arrow next to the ***Orders*** button on the toolbar and selecting ***Exported Orders.***

A list of all orders is available by clicking the drop down arrow next to the ***Orders*** button and selecting ***All Orders***.

12 Reporting

SOP offers numerous reports to enable supervisors or managers to easily view information that is crucial to running successful sales operations.

12.1 Day End Summary

This report shows a list of the orders from a particular date range. To access this report click ***Reports → Orders Reports → Day End Summary***. This will open a dialog as shown in Figure 12-1.

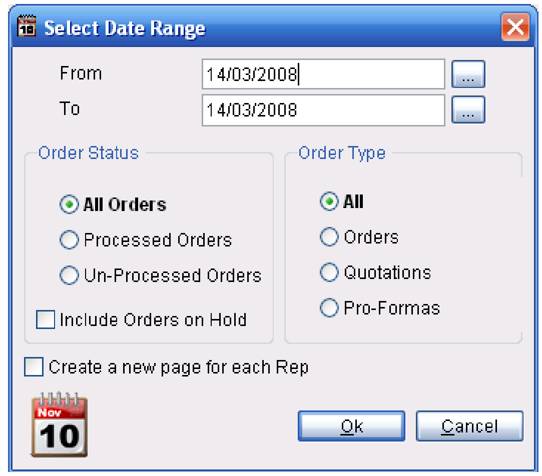


Figure 12-1 - Day End Summary

Select the date range you are interested in using the ***From*** and ***To*** fields. You can opt to view all orders, exported (processed) orders or current orders by using the ***Order Status*** radio buttons. Use the ***Include Orders on Hold*** checkbox to also include orders that are on hold. You can also opt to view orders of a particular type using the ***Order Type*** radio buttons.

The ***Create a new page for each Rep*** checkbox means that the orders for each rep will be on a new page in the report, with a summary of all the orders on the last page.

Clicking on ***Ok*** will generate the report, after which you can print it or export it to PDF.

12.2 Held Orders

This report gives a list of all orders that are currently on hold within the SOP system and the reasons for them being held. To access this report click ***Reports →Orders Reports → Held Orders***. The report is generated and shown, ready for printing or exporting to PDF.

12.3 Top 20 Reports

These three reports show the top 20 products according to value sold, quantity sold or cartons sold. To access these reports click ***Reports → Products Reports → Top 20*** then select the desired report from the three options.

12.4 Below Price

This report gives you a detailed view of which products have been sold below 'normal price'. In this case the 'normal price' that the report uses is the customer special price given by the pricing structure and discount matrix. To show this report click ***Reports → Products Reports → Below Price Report***.

12.5 Oversold Report

This report lists order lines that have been sold without the total order quantity being available in stock. The report also shows the quantity on purchase order of each oversold line for planning purposes. To generate this report click ***Reports → Product Reports → Oversold Report.***

13 Product Administration

Once product information has been imported into SOP (see section 3) it can be viewed in SOP by clicking the ***Products*** button on the toolbar.

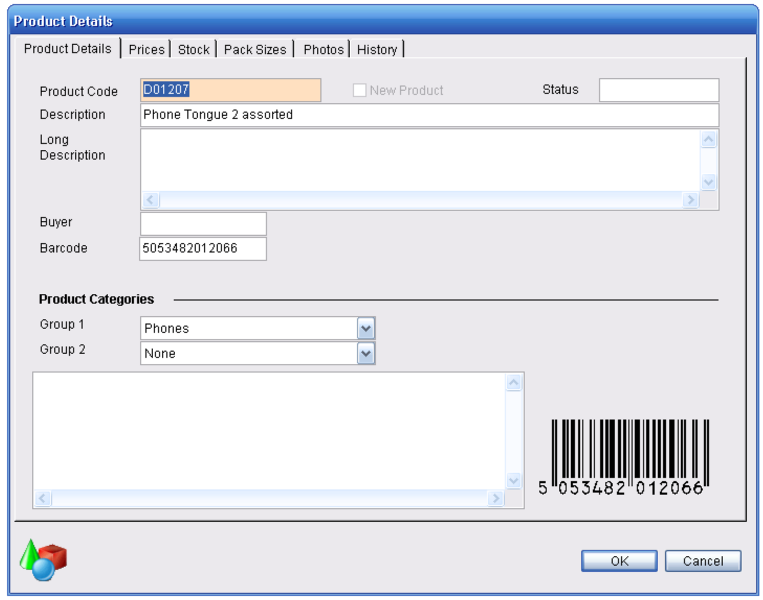


Figure 13-1 - Product Details Form

13.1 Editing Product Data

Double click on a product in the product grid to load the Product Details form as shown in Figure 13-1.

The information relating to the product is split up into four tabs. This data can be changed then saved by clicking the ***OK*** button.

The stock tab provides a view of any purchase orders that are currently outstanding for this product as well as current stock information.

13.2 Printing Product Photos

Product photos can be printed by right clicking on the products grid and selecting ***Product Photos*** or by clicking ***Reports → Product Reports → Product Photos***. This brings up the *Product Photo Selection* dialog with which you can select whether to print all product photos, the current filter (search results) or just the current selection. If a selection of product photos is required then ensure that the desired products are selected in the products grid before opening this dialog. The *Current Filter* option will only be available if a search has taken place on the products grid. Clicking ***OK*** generates the Product Photos Report ready for printing or export to PDF.

13.3 Printing Product Barcodes

In a similar way to product photos, product barcodes can be printed for labelling purposes etc. These barcodes can then be scanned during the sales order entry process on compatible handheld devices. This scanning of barcodes means that your sales reps will not have to search for the correct product, thus reducing mistakes and speeding up the order taking process.

To print product barcodes right click on the products grid and select ***Product Barcodes*** or click ***Reports → Product Reports → Product Photos.*** This will open the *Product Barcode Selection* dialog. If a selection of barcodes is required then ensure this selection is made before opening this dialog. The current filter option will only be available if a search has been carried out on the product grid before opening the selection dialog. Clicking ***OK*** generates the Product Barcodes Report ready for printing or export to PDF.

14 Customer Administration

Once the back office data has been imported into SOP, the customer information can be viewed by clicking the ***Customers*** button on the toolbar.

14.1 Editing Customer Data

Double click a customer in the customers' grid to load the Customer details form as shown in Figure 14-1.

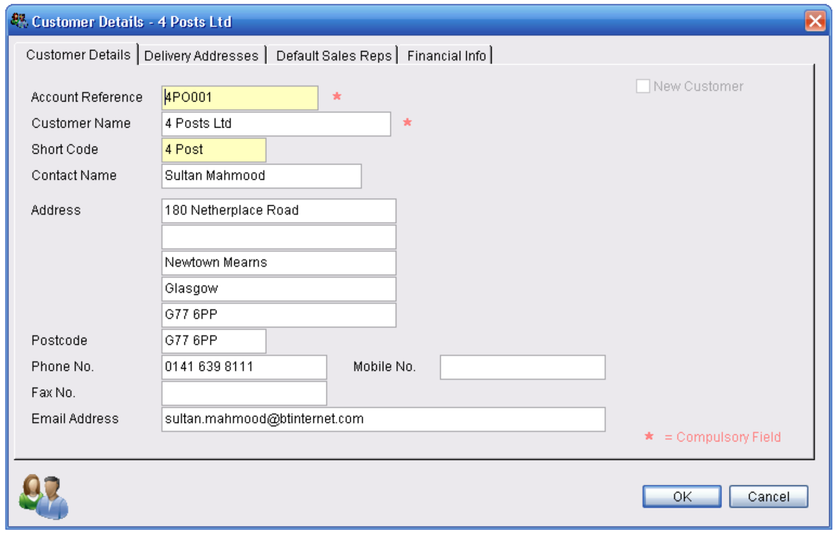


Figure 14-1 - Customer Details Form

The information on this form is divided into tabs for easy navigation. Simply click on the relevant tab to edit the desired data. Clicking ***OK*** will save the changes.

14.1.1 Default Sales Reps

The setting on the Default Sales Reps tab affects how handheld lookups are generated for this customer. Using this tab, it is possible to define one or more default sales reps for this customer. If a rep is associated with a customer in this way then this customer data will be available on their handheld device i.e. this customers data will be included in their lookup files. Note that the customer's data will not be available immediately. Lookups must be generated then the rep is required to do an update on their handheld before the extended coverage is visible.

> If it is required that a rep takes over another rep's customers on a temporary basis then it is preferable to use the *Edit Reps* functionality rather than editing the reps' customers individually. See section 17.4 for more details.

14.2 Printing Customer Barcodes

A customer listing report can be generated for SOP that includes barcodes so sales reps can quickly load a customer's details to screen when entering a handheld order. Select ***Reports → Customer Reports → Customer Listing*** to launch this report. The *Customer Report* dialog is shown which allows the listing for a particular rep to be selected. Clicking the ***View/Print*** button generates the report for printing or exporting to PDF.

15 Previous Transactions

If the data is available then it is possible to view a list of outstanding orders and invoiced orders within the SOP. Click on the drop down arrow next to the ***Transactions*** button on the toolbar and select either ***Invoiced Orders*** or ***Outstanding Orders***. This brings up a grid, similar to the products and customers grid that shows a list of all the types of transactions selected.

16 Searching

It is possible to perform a search on all the main grids used within SOP. These main grids are:

- Orders – Current, All and Exported orders
- Products
- Customers
- Transactions – Outstanding Orders and Invoiced Orders

Click the ***Search*** button on the toolbar when one of these grids is displayed on screen to bring up the search pane as shown in Figure 16-1.

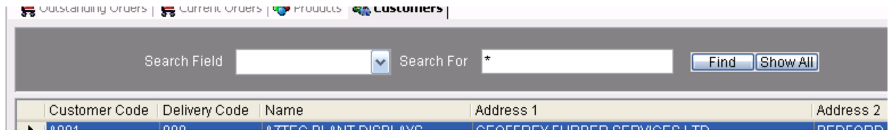


Figure 16-1 - Search Pane

To search the grid, select the search field from the drop down box and enter the search term in the ***Search For*** box. Click ***Find*** to filter the grid below by the criteria entered.

The current filter can be cancelled and the view reset by clicking the ***Show All*** button.

17 Configuration Options

The vast majority of SOP configuration options are set upon installation but there are a number of simple configuration options that may need to be changed from time to time.

17.1 Order Hold Reasons

SOP can be set up so that orders that match certain criteria are automatically held in the system. The holding of an order simply means that SOP will not include such orders in the order extract that is imported into Intact.

These *'Order Hold Reasons'* are configured using the ***Order Hold Reasons*** dialog, which is accessed by clicking ***View → Order Hold Reasons.*** This dialog is shown in Figure 17-1.

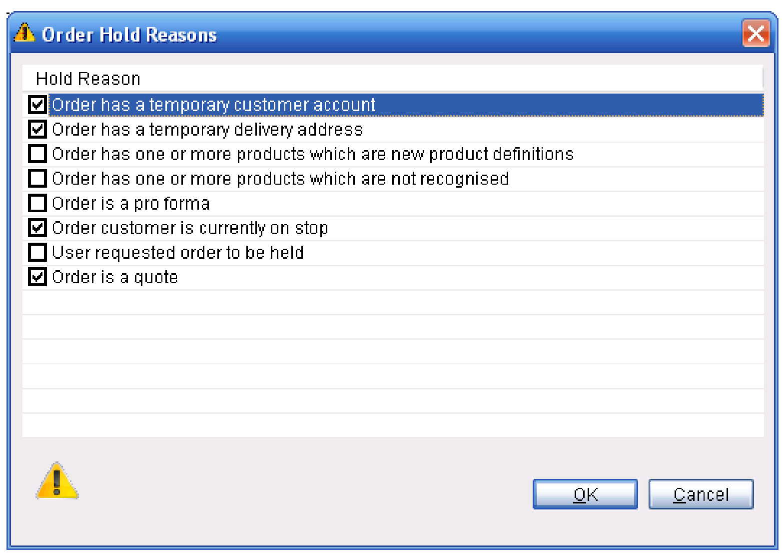


Figure 17-1 - Order Hold Reasons

Use the checkboxes next to each reason to enable/disable each one. If an order matches any of the reasons that are ticked then it will be held. You cannot take an order off hold if it meets any of these criteria.

If an order is on hold for any of the reasons and you try and you try and take it off hold, the order will remain on hold and you will be notified why. If you still wish to take the order off hold it is necessary to resolve the reason it is being held first.

17.2 Order Sources

When entering an order in SOP there is a drop down box of ***Order Sources***. These items are configured using the Order Sources dialog which is accessible by selecting ***View → Order Sources***.

A new order source can be added by clicking the ***Add*** button. You can edit the name of an existing source by clicking the ***Edit*** button. The default order source is selected by highlighting it and clicking the ***Set Default*** button.

17.3 Currencies

The currencies within the SOP system are setup using the currencies dialog shown in Figure 17-2 which is accessed by selecting ***View → Currencies.***

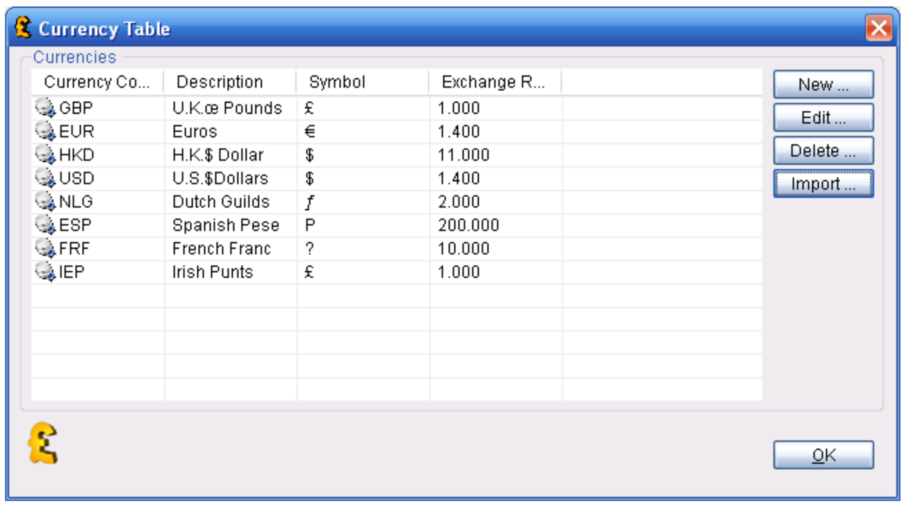


Figure 17-2 - Currencies Dialog

This screen is populated when the back office data is imported into the system and therefore the currencies here should reflect those that your company uses.

A new currency can be added to the list by clicking the ***New*** button.

Edit an existing currency e.g. its exchange rate by highlighting it in the grid and pressing the ***Edit*** button.

A currency can be deleted from SOP by highlighting it and clicking the ***Delete*** Button.

If you wish to import the currency table (from the back office import data) click the ***Import*** button.

17.4 Reps

You can view and edit information regarding all of the sales reps using the *Edit Reps* dialog which is opened by clicking ***Tools → Edit Reps*** and is shown in Figure 17-3.

This list is initially populated when a back office import takes place. A new rep is generated every time a new rep code is found on a customer record.

You can ***Add***, ***Edit*** or ***Delete*** reps by clicking the appropriate buttons.

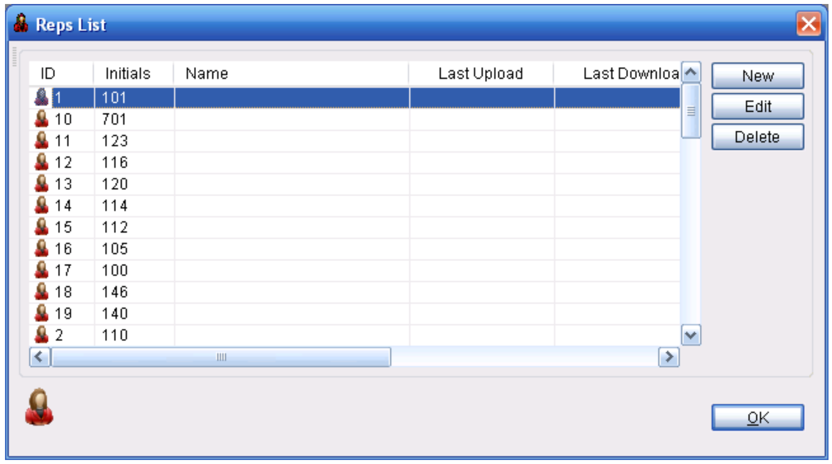


Figure 17-3 - Edit Reps Dialog

Highlighting a rep and clicking the ***Edit*** button brings up the *Rep Details* dialog as shown in Figure 17-4.

This screen is divided into three tabs for easier navigation. The *Details* and *Handset Type* tabs contain fields that relate to the rep and the handset they are using. The *Coverage* tab is of particular importance as it is here that temporary rep coverage can be configured. If you wish to let a particular rep download another rep's customers to his/her handset then you would use this screen. By checking the boxes next to the reps in the list, the current reps coverage will be extended to include the default customers for the rep that is ticked. By selecting the ALL checkbox then the rep will be able to download the data relating to all of the customers in the system. This setting is convenient if a particular rep is unavailable for a period of time and you wish to have another rep covering their customers.

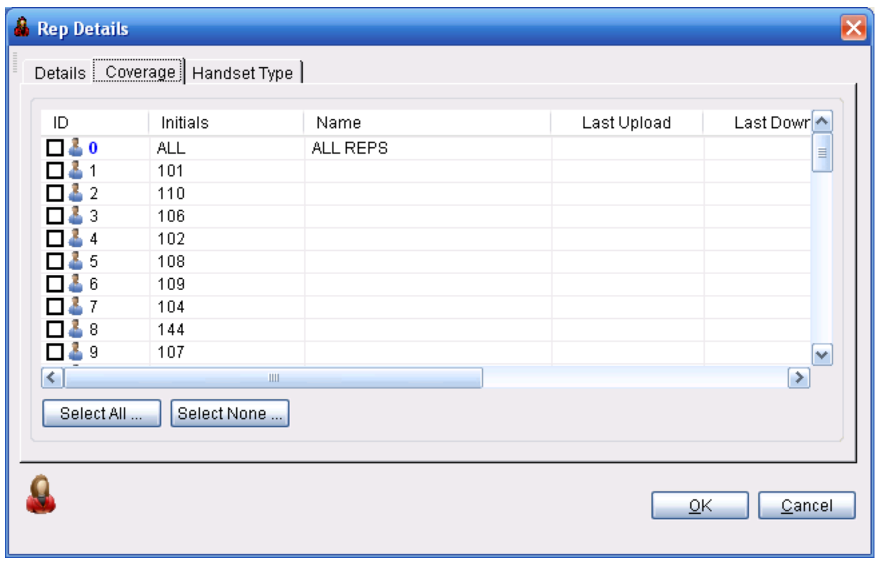


Figure 17-4 - Rep Details Dialog

17.5 Users

The users of the SOP system are configured using the *Edit Users* dialog which is opened by clicking ***Tools → Edit Reps***. You can add a user to the system by clicking the ***New*** button and edit existing users by highlighting them and clicking the ***Edit*** button.

18 Maintenance

18.1 Compacting the Database

When back office data is imported into the SOP the database is compacted automatically which removes any unnecessary transaction logs, thus reducing the size of the database file. It may be necessary to compact the database from time to time, especially if numerous transactions have been processed, as compacting the database will reduce the footprint of the SOP system on your computer.

To manually compact the database select ***Tools → Data → Compact Database***.

18.2 Clearing the Database

Note: This action CLEARS ALL YOUR DATA. Only use this functionality of you have been told to do so by Computoy. This operation is NOT REVERSABLE.

To clear all the data from the SOP system, select ***Tools → Data → Clear All.***

19 Housekeeping

Several of the processes within the SOP system can be scheduled to occur at set intervals throughout the day. Some processes are required to be scheduled such as the e-mailing functionality. The application that is responsible for these tasks is the *SOP Housekeeper* and is automatically launched upon start up of the computer. The SOP application does not have to be running in order for the *Housekeeper* to function but both applications can function side by side during the working day.

The housekeeper program runs in the system tray, at the bottom right of the screen (next to the clock) and the icon for it looks like this - .

To open the housekeeper for editing the schedule, right click on the icon in the system tray and select ***Edit Schedule***. The opens the housekeeper configuration screen which lists the task that are available to be scheduled. This screen shows you if the task is enabled, when it was last run and when it will run next. To edit the scheduling of a process, highlight it and click the ***Edit Process*** button which will open the *Configure Process* dialog shown in Figure 19-1.

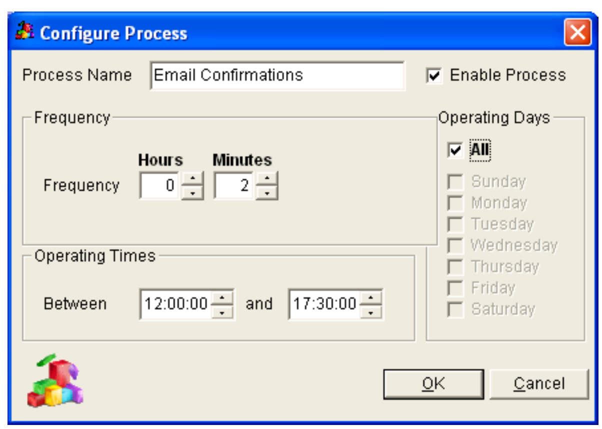


Figure 19-1 - Configure Process Dialog

Enable/disable the process by using the *Enable Process* checkbox on this screen. The frequency of the execution of this process can be configured using the Frequency fields and the operating times set using the *Operating Times* fields at the bottom. The process can be set to only operate on certain days of the week by using the *Operating Days* checkboxes on the right. Click ***OK*** to save the changes to this process.

While the housekeeper scheduling screen is open, the housekeeping processes are all paused. Do not forget to close the scheduling screen when you are finished by clicking the ***OK*** button.

When a housekeeping process is running the icon on the task bar will change to the *Running Process* icon ().