



# mSeller iPad User Manual

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## Full Update:

Transmits any unsent transactions back to head office, and then uploads the entire database of products, customers and history. Use when iPad has not received data for more than 10 days or has never been loaded with data.

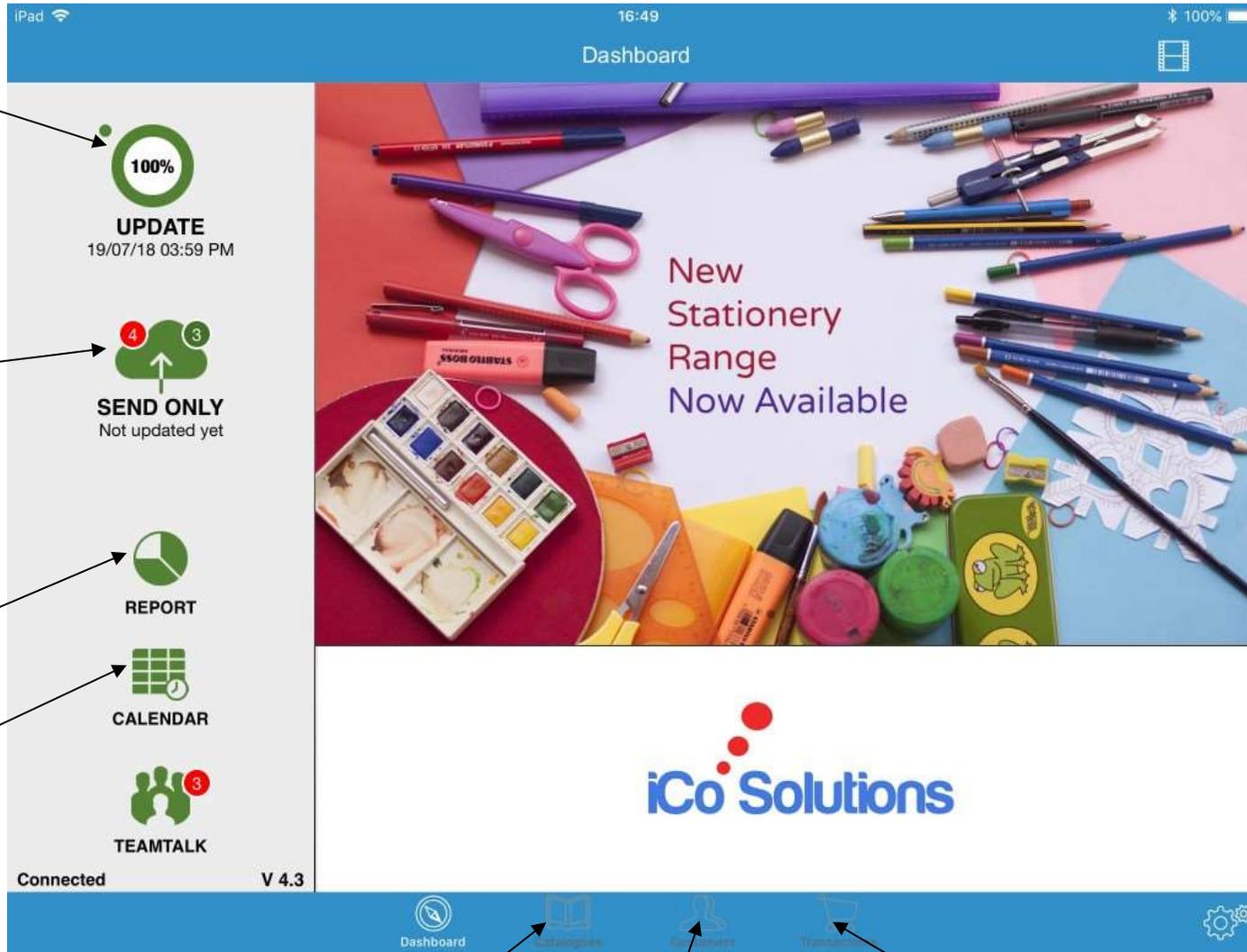
## Send Only:

Transmits any unsent transactions back to head office without collecting new data.

Reports: See pages 5-9

Calendar: See page 4

## Dashboard:



Catalogues: See page 10.

Customers: See page 20.

Transactions: See page 26.

# Calendar



Fig.1

## Viewing the Calendar:

The mSeller calendar works in conjunction with the standard iPad calendar, meaning that any events/appointments made in the calendar app will appear here and vice versa. The small dots contained under certain days indicate one or more events logged.

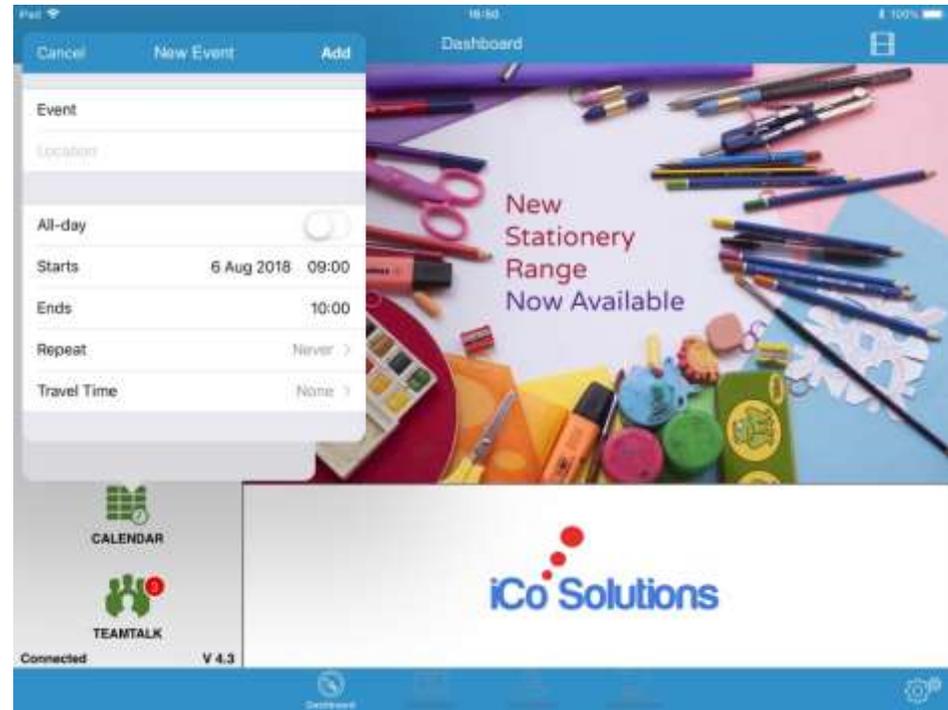


Fig.2

## Creating Appointment:

Tap the + button in Fig.1. 'Add Event' screen will appear. User can create appointment, including a name, location and date/time. To finish, tap 'Done' in Fig.2.

# Reports:



Product Sales (page 8)

Targets (page X)

Customer History (page 9)

Shortcuts e.g. 'sent transactions' will direct user to 'manage transactions' (page 26) and filter only 'sent'.

Back to statistics (page 5)

Display transaction summary by month, quarter or covering a specific date range



Tap to display a list of transaction details (page 7)

Quarter	No of Transactions	No of Orders	Order Value	No of Proformas	Proforma Value	Total Value
1	146	140	£896,603.17	6	£1,652.50	£898,255.00
2	152	152	£120,833,329.22	0	£0.00	£120,833,329.00
3	155	155	£27,311,679.74	0	£0.00	£27,311,679.00
4	44	43	£23,333,709.12	1	£6,833,250.00	£30,166,959.00
<b>Total</b>	<b>497</b>	<b>490</b>	<b>£172,375,320...</b>	<b>7</b>	<b>£6,834,902.00</b>	<b>£179,210,222...</b>



Filter by order/quote/proforma call log. Quotes are excluded by default.

Filter by All/Sent/Unsent/Held

specific date range. Date range view offers a period selection (defaulted to current month).

Back to Statistics (page 5)

Filter by Rep

Sort by most criteria, except for 'Del ID' and 'Ref'.

Email/print

Back to transaction summary (page 6)

Rep ID	Cust Code	Cust Name	Ref	Type	Date	Del ID	Value	Status
SHAR	11T0126	abhishek	111482	Order	20/03/18		£450.00	Sent
SHAR	11T0126	abhishek	111755	Order	18/07/18		£121,609.77	Sent
SHAR	11T0126	abhishek	111757	Order	18/07/18		£121,609.77	Sent
LANG	11T0136	Dummy Cu...	111413	Order	06/03/18	Dummy Ad...	£648.00	Sent
LANG	11T0136	Dummy Cu...	111778	Order	23/07/18	Dummy Ad...	£92,109.30	Sent
LANG	11T0149	ALOK TEM...	111513	Quote	29/03/18		£648.00	Sent
LANG	11T0149	ALOK TEM...	111738	Order	13/07/18		£1,760.00	Sent
SHAR	11T0158	abhishek te...	111695	Order	13/07/18		£119,690.58	Sent
SHAR	C00001	Do It Yours...	111691	Order	12/07/18	Brentford	£400.00	Sent
SHAR	C00001	Do It Yours...	111825	Order	01/08/18	Brentford	£1,872.00	Held
SHAR	C00016	Fresh Hom...	111711	Order	12/07/18	Cheshire	£50.00	Sent
SHAR	C00049	Birthday Club	111511	Order	29/03/18	Newcastle-...	£300.00	Sent
SHAR	C00049	Birthday Club	111699	Order	13/07/18	Newcastle-...	£3,136.00	Sent
SHAR	C00320	Interior Lan...	111574	Order	17/05/18	Manchester	£5,334.00	Sent
SHAR	C00505	New Garde...	111810	Quote	31/07/18	Radcliffe M...	£1,552.00	Sent
SHAR	C00516	Festive Inc	041110	Order	29/05/18	Liverpool	£300.00	Sent
SHAR	C00516	Festive Inc	111626	Order	13/06/18	Liverpool	£3,050.00	Sent
SHAR	C00516	Festive Inc	111826	Order	01/08/18	Liverpool	£4,476.00	Sent
SHAR	C00893	Albion House	010529	Order	14/02/18	Liverpool	£3,136.00	Sent
SHAR	C00893	Albion House	111462	Order	15/03/18	Liverpool	£900.00	Sent
SHAR	C00893	Albion House	111468	Quote	16/03/18	Merseyside	£300.00	Sent
SHAR	C00893	Albion House	111562	Order	03/05/18	Liverpool	£1,200.00	Sent
SHAR	C00893	Albion House	111575	Quote	17/05/18	Merseyside	£5,888.00	Sent
SHAR	C00893	Albion House	111584	Order	25/05/18	Liverpool	£1,033.60	Sent
SHAR	C00893	Albion House	111722	Order	13/07/18	Liverpool	£400.00	Sent
SHAR	C00893	Albion House	111724	Order	13/07/18	Liverpool	£400.00	Sent

'Month' tab defaults to product sales for current

Pie chart displaying all categories with sale values

Select date range

Display product sales by specific date range.

Pie chart displaying all sub-categories with sale values

Back to Statistics  
(page 5)

Statistics From 01/08/18 To 06/08/18 Rep Product Sales

Month Quarter Date Range Category Sub-Category

Search

Cat Name	Sub -cat-name	Prod code	Desc	Tot Val	Tot Qty	Jan - Mar		Apr - Jun		Jul - Sept		0
						Qty	Val	Qty	val	Qty	Val	
Confectionery	Chocolate	CHO1	Dairy Milk 6 pack	£300.00	240	3600	£4,416.00	720	£900.00	1080	£1,350.00	0
Confectionery	Chocolate	CHO100	Mars Bar 6 pack	£300.00	240	1561	£1,801.25	1080	£1,350.00	984	£1,230.00	0
Confectionery	Chocolate	CHO109	Rolo pack	£150.00	120	6240	£7,650.00	480	£600.00	960	£1,200.00	0
Motoring	Bikes	PP55GRE	BMX Bike	£2,160.00	12	12	£1,440.00	12	£2,160.00	32	£5,760.00	0
Stationery	Essentials	CC22	Erasers	£432.00	144	1008	£3,024.00	2736	£8,208.00	2880	£43,920.00	0
Stationery	Essentials	CC33	Sharpeners	£2,160.00	432	1152	£5,760.00	22752	£113,760.00	2304	£11,376.00	0
Stationery	Essentials	CC44	Rulers	£2,160.00	432	864	£4,320.00	21312	£106,560.00	2736	£13,536.00	0
Stationery	Essentials	CC55	Set of 10 Ring Binders	£1,728.00	288	432	£2,592.00	1056	£6,336.00	2016	£12,096.00	0
Stationery	Essentials	CC66	Staplers Set of 20	£2,304.00	288	432	£2,304.00	384	£3,072.00	1296	£10,368.00	0
Stationery	Pens	CC77	Pencil Case	£1,440.00	288	432	£1,440.00	288	£1,440.00	1296	£6,480.00	0
<b>Total (Records: 10)</b>				<b>£13,134.00</b>	<b>2484</b>	<b>15733</b>	<b>£34,747.25</b>	<b>50820</b>	<b>£244,386.00</b>	<b>15584</b>	<b>£107,316.00</b>	<b>0</b>

Dashboard Categories Accounts Transactions

Keyword search

## Invoiced Transactions



Inv No	Inv Date	Del Id	Del name	Cust Ref	Val
804851	02/12/2017	0	266		£348.00

Code	Name	Qty	Price	Value
CC66	Staplers - Set of 20	4	£8.00	£32.00
FF22	Paper Shredder	4	£10.00	£40.00
FF33	Oil Paints	4	£20.00	£80.00
CC77	Pencil Case	4	£5.00	£20.00
CC44	Rulers	4	£5.00	£20.00
CC33	Sharpeners	4	£5.00	£20.00
CC22	Erasers	4	£3.00	£12.00
CC11	Pencils 10 Pack including...	4	£5.00	£20.00
CC55	Set of 10 Ring Binders	4	£6.00	£24.00
FF11	Post Pen	4	£20.00	£80.00

Inv No	Inv Date	Del Id	Del name	Cust Ref	Val
804850	01/12/2017	0	266		£7,536.00

Code	Name	Qty	Price	Value
NN11	Swirly Mirror	40	£20.00	£800.00
RR11	Screwdriver Set	80	£15.00	£1,200.00
RR00	Bicycle Mirrors	160	£12.00	£1,920.00
OD44	Baby Blankets	128	£18.80	£2,380.80
LL00	Adele 2CD Set	84	£10.00	£840.00
OD55	Baby Picture Books	138	£4.65	£595.20

fig.c

Tap on search bar for customer selection. Tap anywhere outside of the drop-down list to display selected customer's history (fig.c)

Display all customer history (Invoices and outstanding orders).

Email/print function. User can choose whether to email/print invoices and/or outstanding orders for displayed customer.

Find invoice and outstanding orders for selected customer or user can select 'All history'. NB loading all history will take time to load.

## Catalogues:

**Please note:** Sub-categories (where applicable), depending on company configuration.

**Promotions:** Displays products grouped by promotion/specific tag

**All products:** Displays entire product range.

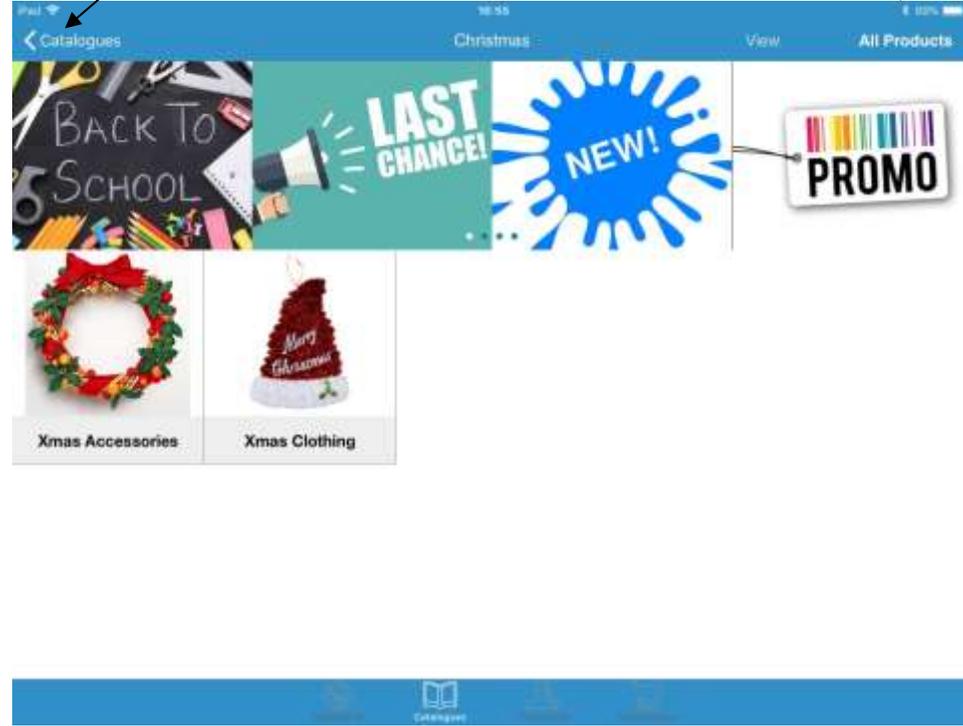
Navigate back to catalogues screen

**All products – Sub Category page.** Displays all products belonging to selected category.



Product Categories:

Category:



Sub-Category:

Tap on a category tile to view sub-categories (if applicable) belonging to selected category. If sub-categories do not exist, product screen (page 7) will be displayed.

To view multiple categories, hold finger on category until  shows. To exclude a category repeat action until  shows. Press 'View' to confirm selection.

Back to previous category/sub-category

Product record count (based on selected category/sub-category)

Change views between 5 per page, 10 per page, mosaic view

Product search bar

Refresh search bar

Flip to product detail page (page 15)

Product status key (see page 12)

Expand to full screen product image

Stock Filter (see page 12)

Status filter (see page 12)

Variants of the product e.g. Different colours (Where applicable)

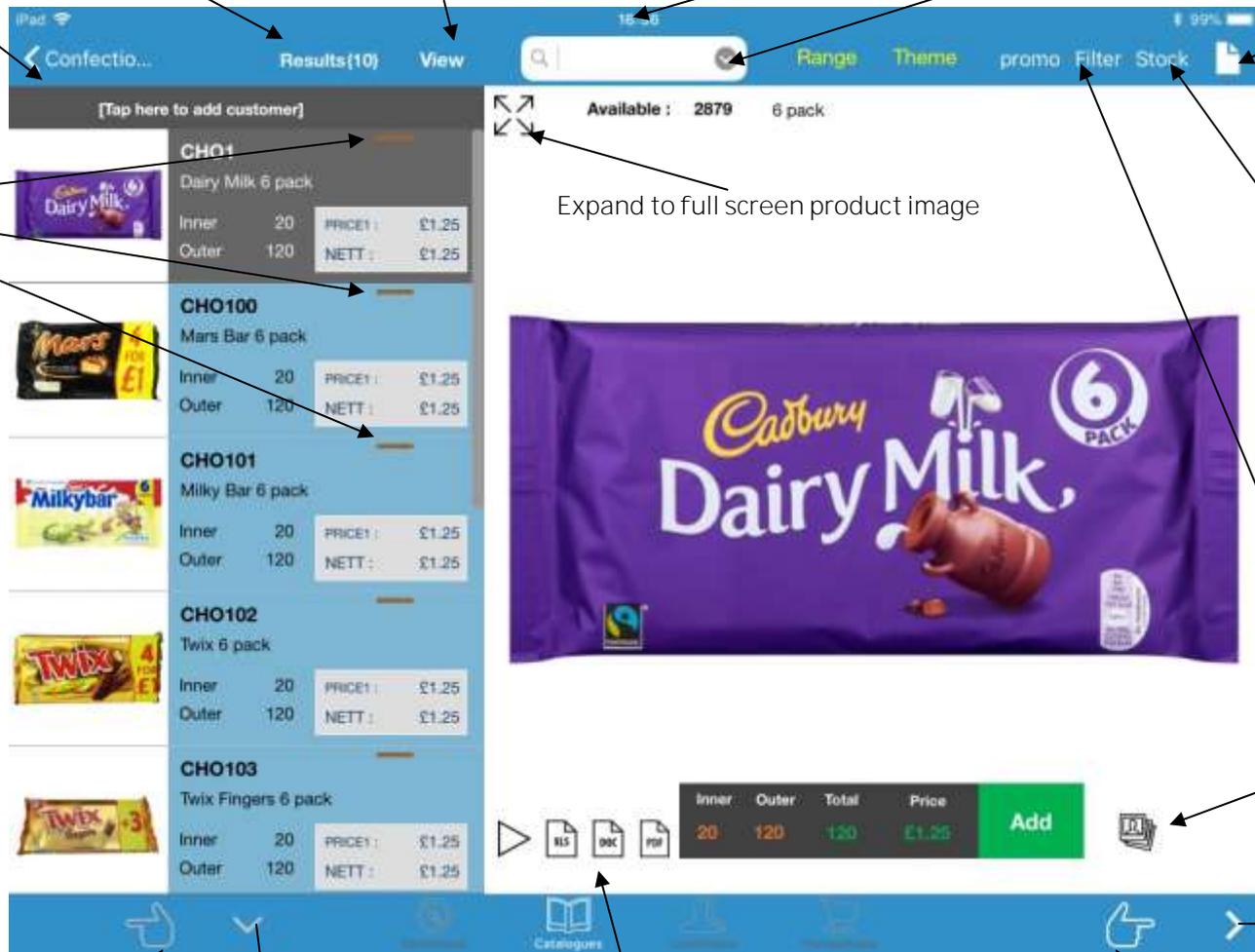
Navigate to next product

Left hand view

Scroll down left sidebar (5 items at a time)

Open file attachments (where applicable)

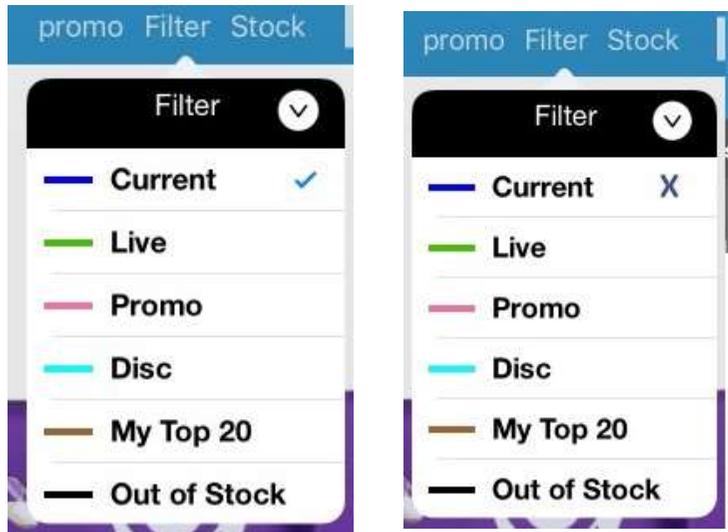
Right hand view



## Catalogues - Product Filtering:

### Product status filter:

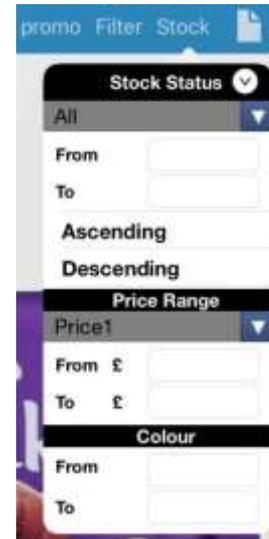
Tap once to include (✓) selected filter(s) in left sidebar. Tap again to exclude (X). Tap again to remove filter. For results to appear, tap anywhere outside the 'filter' drop down box.



Please note 'Current' means items on current order.  
Ordered qty figure will appear in blue for these items.

### Product stock filter:

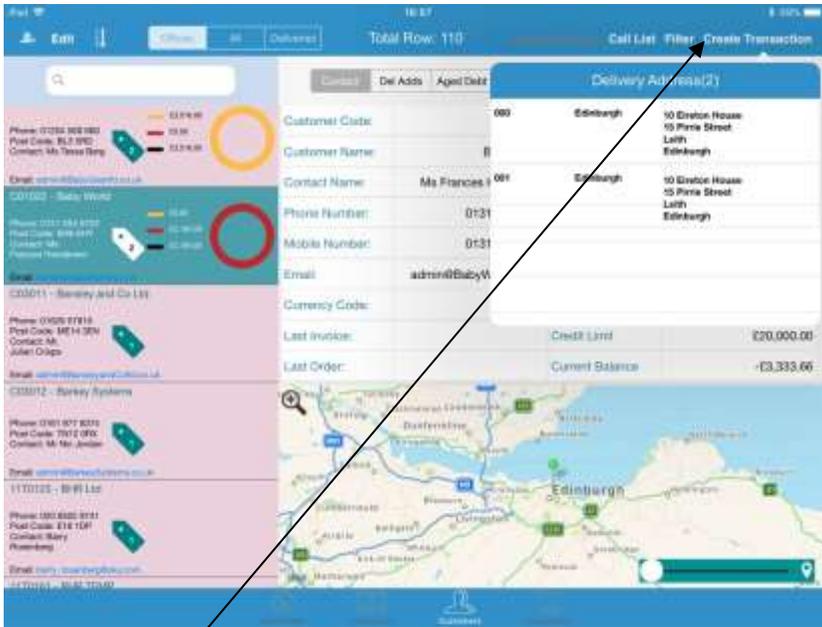
Tap physical, free or available to filter items belonging to selected status on left sidebar. These filters will work in conjunction with any product search criteria currently displayed on left sidebar. Please note, user cannot include/exclude multiple filters here, however can select 'All'.



### Price range filter:

Tap 'from' field to enter a minimum value using the iPad numeric keyboard. Tap 'To' field to enter a maximum price. Tap anywhere outside dropdown box for results to appear on the left sidebar.

There are two methods of creating a transaction. 1) from the 'Customer' screen and 2) from the 'Catalogues - product' screen. Selecting a customer from the catalogues screen will always use customer's first delivery address record. Therefore, use customer screen if you want to choose for customer's multiple delivery addresses.



Customers Page (Fig.3):

Tap 'Create Transaction'. If customer has multiple delivery addresses, a drop-down box will appear with all addresses listed (Fig.3).

Tap on a delivery address to proceed with order. 'Catalogues' screen (page 10). is displayed for selection of product type.



Catalogues Page (Fig.4):

Tap in the {Tap here to add customer} search box, located above the left sidebar. A drop-down list of customers will appear. User can scroll down the list or alternatively search by customer code or name.

Tap to select customer from retrieved results. Then when customer name is displayed in blue, tap outside search are to finalise selection. *Please note that once a customer has been selected, it cannot be changed until the order has been cancelled or completed from transactions screen (see page 30).*

## Catalogues: Order Taking



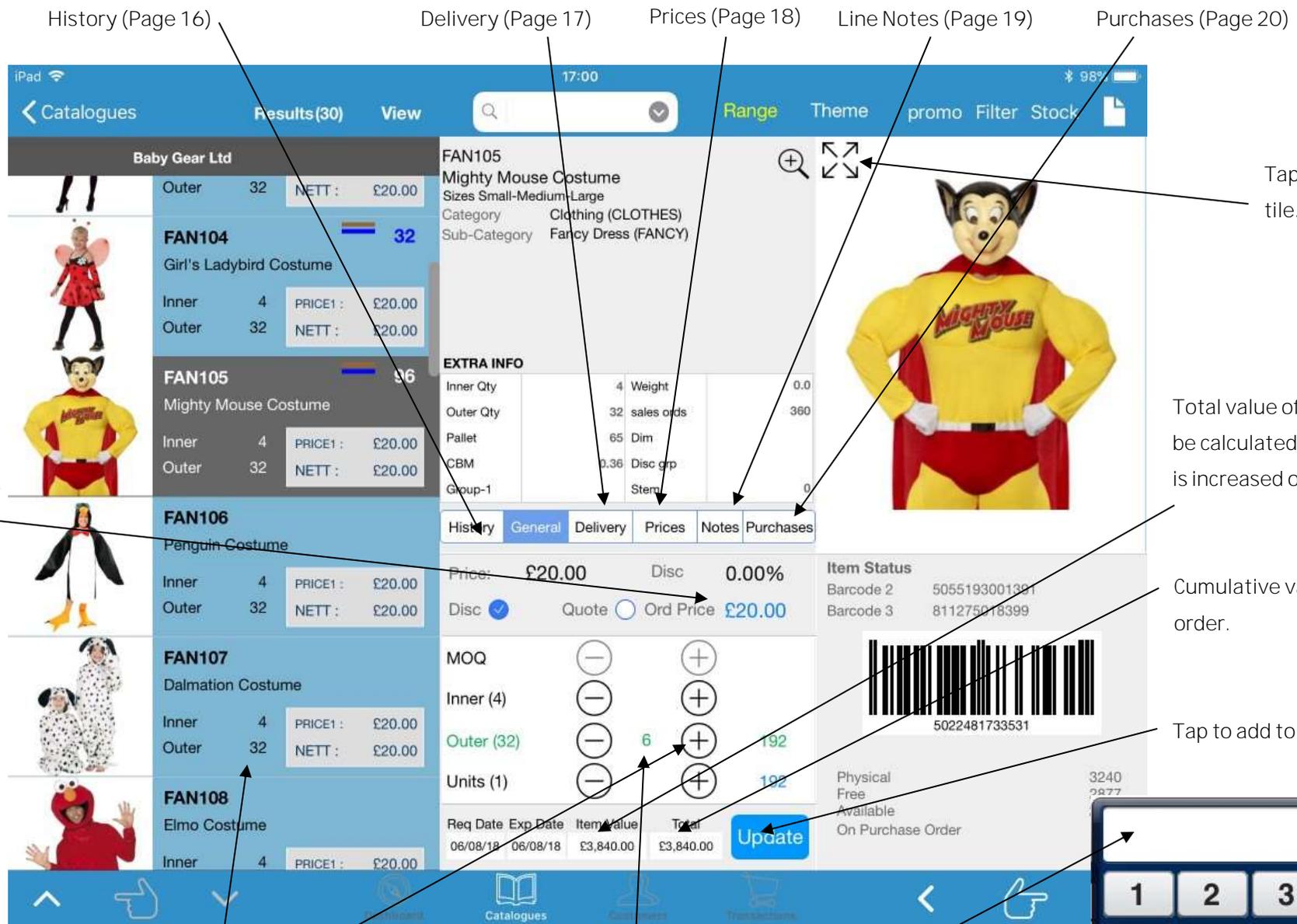
For quick ordering from the sidebar, double tap a product to display a green tick. Tap once again to remove the green tick.

If one or more items have been ticked on the sidebar, two buttons will appear on each side of the customer name, 'Clear' and 'Add to Order'.

'Clear' will deselect all ticked items, with a pop-up message to confirm before proceeding.

'Add to Order' will add default of one pack of each selected product to the order. A message 'X/X items added successfully' will appear on screen.

A blue quantity will display on the left sidebar for each item on order. This is the qty of pieces placed on the order.



History (Page 16)

Delivery (Page 17)

Prices (Page 18)

Line Notes (Page 19)

Purchases (Page 20)

Tap to expand tile.

Total value of this item will be calculated as No of Packs is increased or decreased.

Tap into 'Ord Price' field to amend order price.

Cumulative value of current order.

Tap to add to current order.

First, tap to highlight an item on the left sidebar. Tap the + button to increase number of packs and - to decrease. Default is 1.

For larger quantities e.g. 50, or 100 packs, tap here to display numeric keyboard. Key enter required quantity then tap 'return'.



Tapping a product on sidebar automatically highlights product on history grid if selected customer has ordered the product previously

Double tap item in history grid to enable green tick. This will allow user to tap 'copy'. Tapping 'copy' will place the item on current transaction at the last price and quantity ordered.

Return to previously ordered items (Fig.29)

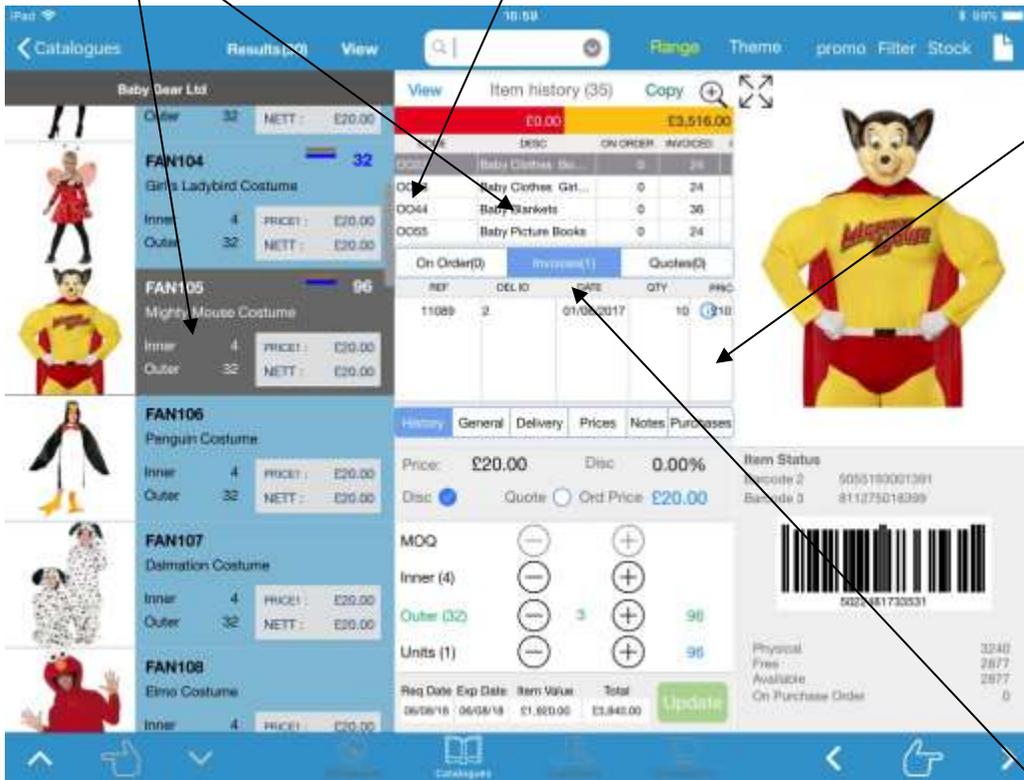


fig.29



fig.30

Toggle between invoices/outstanding orders to view headers of previous transactions.

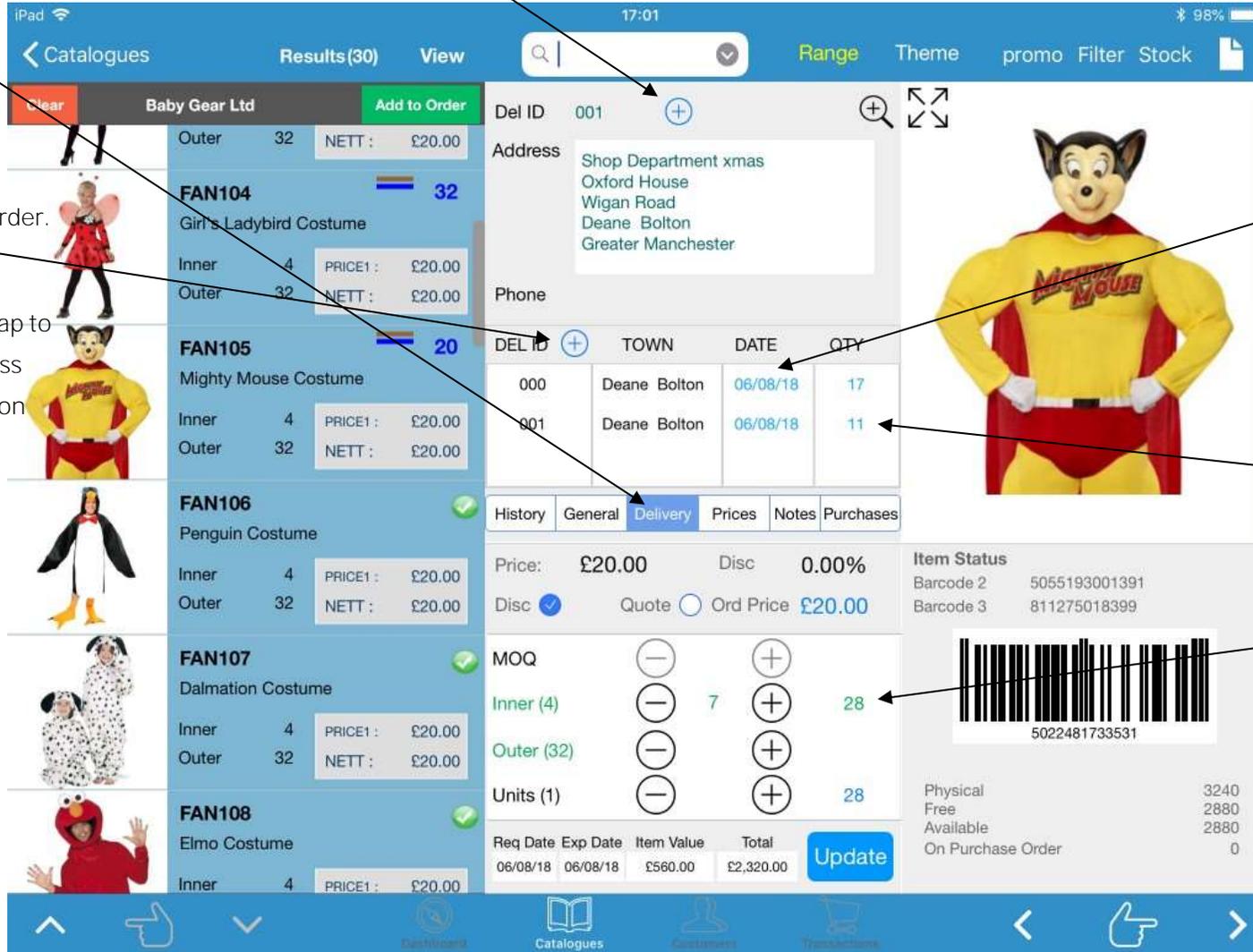
Expand view of history grid

'History' tab is only active when a customer with previous invoices and/or outstanding orders has been selected. The two grids on the history screen represent:

1. Previously ordered products
2. Transaction(s) containing highlighted product.

Tap on 'Delivery' Tab

Add a new delivery address



Add multiple delivery addresses to current order.

Tap to display pop up delivery address list. Tap to select a delivery address and insert as new row on 'delivery' tab.

Tap into date cell to select or edit date from displayed calendar.

Tap into 'Qty' field to display numeric keyboard. The quantity entered deducts from first row quantity.

Sum of quantity entered in each row equals total quantity entered to order panel.

A breakdown of delivery address allocation is visible on the 'Transaction Delivery Breakdown' screen (page 31).

# Catalogues: Ordering - Prices

The screenshot shows a mobile application interface for ordering costumes. The main screen displays a list of items with details such as quantity and price. A detailed view for the 'Mighty Mouse Costume' is shown on the right, including a price table, a 'Prices' tab, and an 'Item Status' section with a barcode.

PRICES	QTY	PRICE
Price1		£20.00
Price 2		£17.50
€		€15.00
Item Cost		£13.50
Margin%		32.50

PRICES	QTY	PRICE	DATE
Price:		£20.00	
Disc		0.00%	
Disc	<input checked="" type="checkbox"/>	Quote <input type="radio"/>	Ord Price £20.00

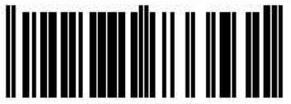
  

MOQ		
Inner (4)	7	28
Outer (32)		
Units (1)		28

Req Date	Exp Date	Item Value	Total
06/08/18	06/08/18	£560.00	£2,320.00

Item Status	
Barcode 2	5055193001391
Barcode 3	811275018399
 5022481733531	
Physical	3240
Free	2880
Available	2880
On Purchase Order	0

If a customer has a special price available, this will always override the price list and will automatically be inserted to the order panel as order price.

'Last price' refers to most recent invoice where this item was sold. Double tap row to use this price as order price for current order.

If no customer default price level is available, select price level from the list by double tapping a row to display a green tick.

'Prices' tab activated by tapping 'Ord Price' field on order panel.

# Catalogues: Ordering - Purchases

Tap to display dropdown list of pre-defined notes (if applicable).

Alternatively, tap into the input field, which will enable keyboard.

Tap 'Save' when finished. Line notes can be viewed on all transaction screens (page 27).

The screenshot displays a mobile application interface for ordering. The top navigation bar includes 'Catalogues', 'Results (30)', 'View', a search bar, and filters like 'Range', 'Theme', 'promo', 'Filter', and 'Stock'. The main content area is divided into two sections: a list of items on the left and a detailed view of the selected item on the right.

**Item List (Left):**

- Baby Gear Ltd** (Clear button, Add to Order button)
- FAN104** Girl's Ladybird Costume: Inner 4 (PRICE1: £20.00), Outer 32 (NETT: £20.00)
- FAN105** Mighty Mouse Costume: Inner 4 (PRICE1: £20.00), Outer 32 (NETT: £20.00)
- FAN106** Penguin Costume: Inner 4 (PRICE1: £20.00), Outer 32 (NETT: £20.00)
- FAN107** Dalmation Costume: Inner 4 (PRICE1: £20.00), Outer 32 (NETT: £20.00)
- FAN108** Elmo Costume: Inner 4 (PRICE1: £20.00)

**Item Detail View (Right):**

- FAN105** Mighty Mouse Costume
- NOTES** (dropdown menu)
- Save** button
- History** | **General** | **Delivery** | **Prices** | **Notes** | **Purchases** (tabs)
- Price: £20.00, Disc: 0.00%
- Disc  Quote  Ord Price £20.00
- MOQ: Inner (4) 7, Outer (32) 28, Units (1) 28
- Req Date: 06/08/18, Exp Date: 06/08/18, Item Value: £560.00, Total: £2,320.00
- Update** button
- Item Status**: Barcode 2: 5055193001391, Barcode 3: 811275018399
- Barcode: 5022481733531
- Physical: 3240, Free: 2880, Available: 2880, On Purchase Order: 0

Tap on 'Notes' tab.

'Purchases' tab refers to any outstanding purchase orders relating to the selected item. This can include a PO reference number, expected date and details of the quantity shipped

The screenshot displays a mobile application interface for managing product catalogues. At the top, there's a navigation bar with 'Catalogues', 'All Products (179)', and 'View'. A search bar and utility icons like 'Range', 'Theme', 'promo', 'Filter', and 'Stock' are also present. The main content area is divided into three columns:

- Product List (Left):** A vertical list of products including 'Love Heart Teddy Bear', 'Mothers Day Ornament', 'Fathers Day Jumper' (GG66), 'Patrick Caulfield Wall Canvas' (GG77), 'Halogen Lights' (GG88), and 'GG99'.
- Product Details (Center):** The 'Fathers Day Jumper' (GG66) is selected. It shows a table with columns for 'P/ORD REF', 'EXPECTED', 'QTY', and 'SHIPPED'. Below this, there are tabs for 'History', 'General', 'Delivery', 'Prices', 'Notes', and 'Purchases' (which is active). The price is £12.00 with a 0.00% discount. Quantity controls for 'MOQ', 'Inner (4)', 'Outer (32)', and 'Units (1)' are visible. A table at the bottom shows 'Req Date', 'Exp Date', 'Item Value', and 'Total'.
- Item Status (Right):** This section includes 'Barcode 2' (5055193000172) and 'Barcode 3' (811275017705). A barcode is shown with the value 5022481129822. Below the barcode, it lists 'Physical' (2892), 'Free' (2704), 'Available' (2796), and 'On Purchase Order' (60).

The bottom navigation bar contains icons for 'Dashboard', 'Catalogues', 'Customers', and 'Transactions', along with back and forward arrows.

# Customers - Overview

Tap to add new customer.

Tap to edit new customer. This will only work for a new customer whose transactions have not yet been sent back to head office

Search for customer(s). This can refer to any criteria e.g. city location, customer code/name, etc.

Page 22

Page 22

Tap to sort customer list by 'customer code' or 'customer name'. Default is customer name.

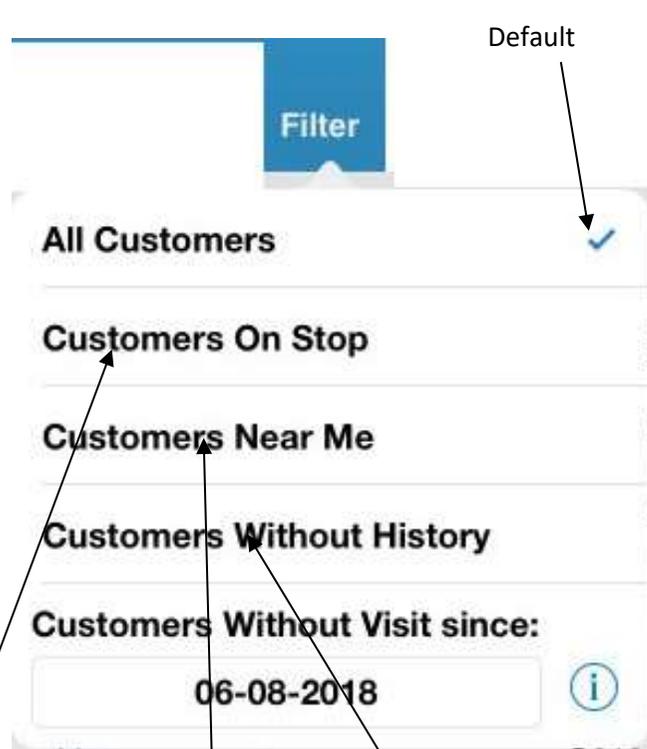
Tap 'Customers' button to access customers screen.

Map expansion

Radius tool

## Customers - Filtering - Creating Transaction

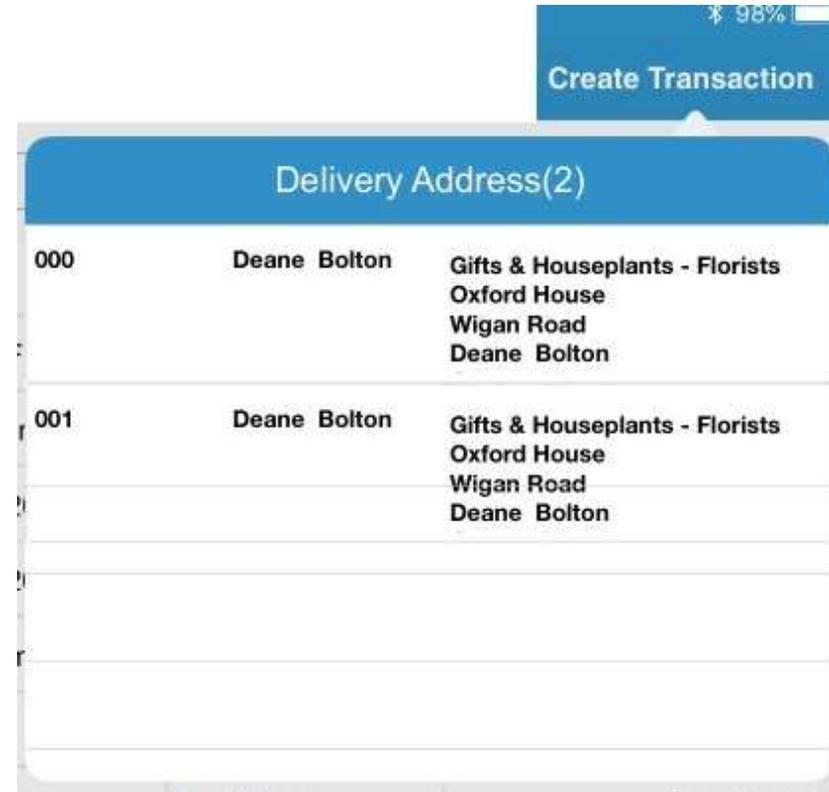
Filter customer list by the following:



Customers on stop appear highlighted with a red border.

Displays customers within a chosen proximity (page 24).

Customers without any invoices or outstanding orders.



If a customer has multiple delivery addresses, when 'Create transaction' is tapped, a drop-down list of delivery addresses will appear. Tap on a delivery address to begin the transaction. (page 10).

## Customer Information Tabs

Sort sequence drop down list.

Sort	Transactions (10)	Tot Val:	£44,843.41	Items (10)	Sort By
Ref: 904851	Date: 02/12/2017	Val: £348.26		CC66 Qty: 4	
Cust Ref: 296	Del Id: 0			Staplers Set of 20 Price: £8.00	
Ref: 904850	Date: 01/12/2017	Val: £7,535.00		FF22 Qty: 4	
Cust Ref: 296	Del Id: 0			Paper Shredder Price: £10.00	
Ref: 904849	Date: 05/11/2017	Val: £8,931.33		FF33 Qty: 4	
Cust Ref: 296	Del Id: 0			Oil Plants Price: £20.00	
Ref: 904848	Date: 02/11/2017	Val: £5,595.08		CC77 Qty: 4	
Cust Ref: 296	Del Id: 0			Pencil Case Price: £5.00	
Ref: 904847	Date: 01/11/2017	Val: £1,920.00		CC44 Qty: 4	
Cust Ref: 296	Del Id: 0			Rulers Price: £5.00	

Invoice headers

Items included on highlighted invoice

Total value of outstanding orders for highlighted customer.

Sort By	Orders (1)	Tot Val:	£192.00	Items (2)	Sort By
Ref: 10968	Date: 24/11/2017	Val: £192.00		CC11 Qty: 24	
Cust Ref:	Del: 24/11/2017	Del Id: 1		Pencils 10 Pack Price: £3.00	
				including a variety... Val: £72.00	
				CC22 Qty: 24	
				Erasers Price: £5.00	
				Val: £120.00	

Outstanding order header

Items on selected order

Total value of quotes for highlighted customer.

Sort By	Quotes (10)	Tot Val:	£120,464.20	Items (15)	Sort By
Ref: 110118	Date: 07/02/17	Val: £13,198.00		CHO1 Qty: 120	
Cust Ref:	Del Date: 07/03/17	Del Id: 000		Dairy Milk 6 pack Price: £1.25	
				Val: £150.00	
Ref: 110121	Date: 07/02/17	Val: £11,148.00		CR1100 Qty: 120	
Cust Ref:	Del Date: 07/03/17	Del Id: 000		Burger Rings Price: £1.25	
				Crisps 6 pack Val: £150.00	
Ref: 110043	Date: 15/06/17	Val: £8,477.38		CHO102 Qty: 120	
Cust Ref: Fghumyd	Del Date: 15/06/17	Del Id: 000		Twix 6 pack Price: £1.25	
				Val: £150.00	
Ref: 110058	Date: 15/09/17	Val: £1,000.00		CR1105 Qty: 120	
Cust Ref:	Del Date: 15/09/17	Del Id: 000		Bacon Crisps Price: £1.25	
				6-pack Val: £150.00	
Ref: 111147	Date: 13/11/17	Val: £17,991.00		CHO107 Qty: 120	
Cust Ref: KgyweW	Del Date: 30/11/17	Del Id: 000		Kit Kat Way pack Price: £1.25	
				Val: £150.00	

Quote header

Items on selected quote

Del ID:	Town:	Post Code:	Del ID:	Town:	Post Code:
000	Doncaster	DN1 1SW	000	Bourne House	
001	Nottingham...	S80 2JR	001	69 Station Road	
117001	xdstrth	indsdhbrtn	001	Stainforth	
			001	Doncaster	
			001	South Yorkshire	
			001	DN1 1SW	

Add new/additional delivery address for an existing customer

Current	Balance due
£0.00	£322.95
31-60 Days	
£0.00	
61-90 Days	
-£19,088.82	
91+ Days	
£21,584.70	
YTD Sales	
£49,134.80	
Last YTD Sales	
£0.00	
	Credit limit: £225,000.00
	Remaining Credit: £224,677.05
	On Stop: 0
	Payment Terms: 30 Days

Sort By	Transactions(2)	Notes
Ref: 010524	Date: 08/02/2018	User ID: 11
Cust Ref:	Date:	Del Id: 000
		Buyer Not In
Ref: 021584	Date: 09/10/2013	User ID: 02
Cust Ref:	Date:	Del Id: 001

16:45 Tue 18 Sep 100%

**Edit** Offices All Deliveries Total Row: 4 Add to Call List Filter Create Transaction

---

Search:

Contact Del Adds Aged Debt Invoiced On Order Quoted Call Logs Targets

<b>Customer Code:</b>	C01022	<b>Ytd Sales:</b>	-£1,694.35
<b>Customer Name:</b>	Baby World	<b>Outst. Order Value:</b>	£2,184.00
<b>Contact Name:</b>	Ms Frances Handerson	<b>Default Rep:</b>	SHAR
<b>Phone Number:</b>	0131 554 6722	<b>Area:</b>	
<b>Mobile Number:</b>	0131 554 1112	<b>Customer Type:</b>	
<b>Email:</b>	admin@BabyWorld.co.uk	<b>Price List:</b>	C01022
<b>Currency Code:</b>	GBP	<b>Customer Group:</b>	
<b>Last Invoice:</b>		<b>Credit Limit:</b>	£20,000.00
<b>Last Order:</b>		<b>Current Balance:</b>	-£3,333.66

**C01440 - Presents For All**

Phone: 01506 685 739  
Post Code: EH48 5PN  
Contact: Mr Phillip Jameson  
Email: admin@PresentsForAll.co.uk

€0.00  
€3,072.00  
€3,072.00

**C01020 - Retro Homeware**

Phone: 0131 542 7171  
Post Code: EH3 6NZ  
Contact: Ms Shana Adams  
Email: admin@RetroHomeware.co.uk

€282,340.00  
€0.00  
€282,340.00

**C01440 - Presents For All**

Phone: 01506 685 739  
Post Code: EH48 5PN  
Contact: Mr Phillip Jameson  
Email: admin@PresentsForAll.co.uk

€0.00  
€3,072.00  
€3,072.00

**C01022 - Baby World**

Phone: 0131 554 6722  
Post Code: EH6 6HY  
Contact: Ms Frances Handerson  
Email: admin@BabyWorld.co.uk

€0.00  
€2,184.00  
€2,184.00

103 Miles

Map Customers Customers Transactions

Customer pins key:

- Current Location
- Selected customer's location (enabled by double tapping customer row)
- Customers within chosen radius.
- Purple = Delivery address location (Enterprise version only)

Set distance radius from current location if using 'Customer near me' filter, or distance from selected customer

## Customer Directions

Tap to enable expanded map screen to set 'to' and 'from' locations.



Tap on a pin to view customer card, which includes their full address, ability to add this card to iPad contacts and get directions from one customer to another.

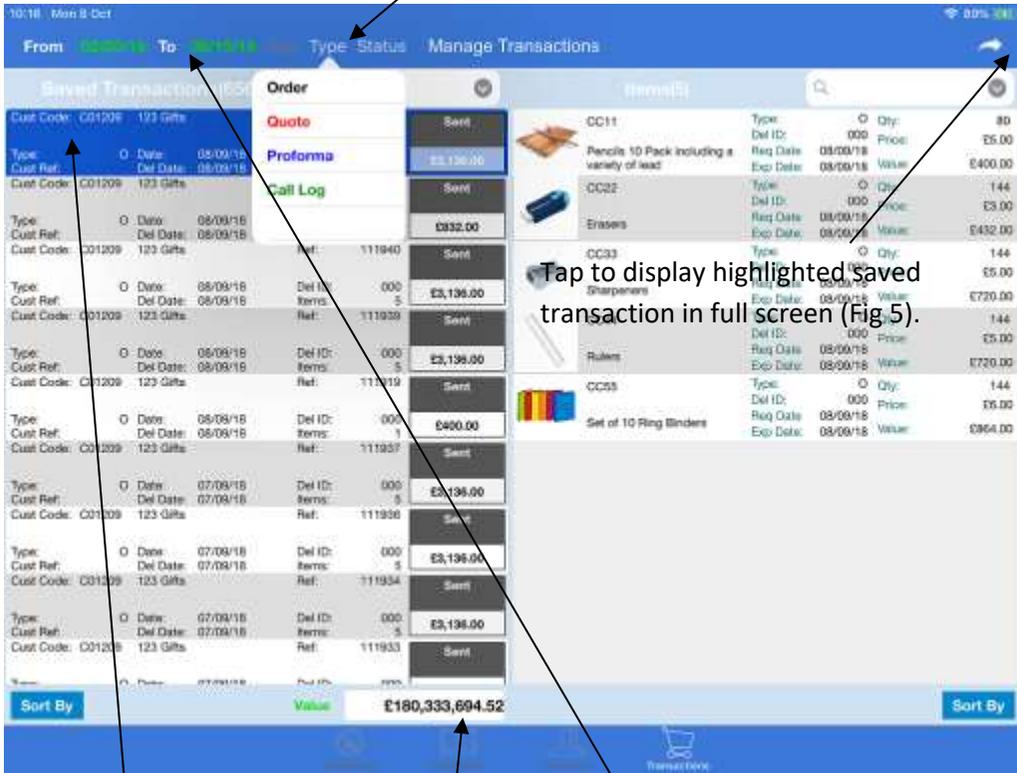
Customers (red pins) located within chosen radius of selected customer (green pin)

# Transactions Overview

If saved transactions exist:

When a current transaction under way 'Transactions' will display a split screen. The left side displays 'saved' transactions' and the right side displays current transaction.

Include/exclude transaction types to display (orders, quotes, proformas and call logs). All types are displayed by default.



Return to 'Manage Transactions'.

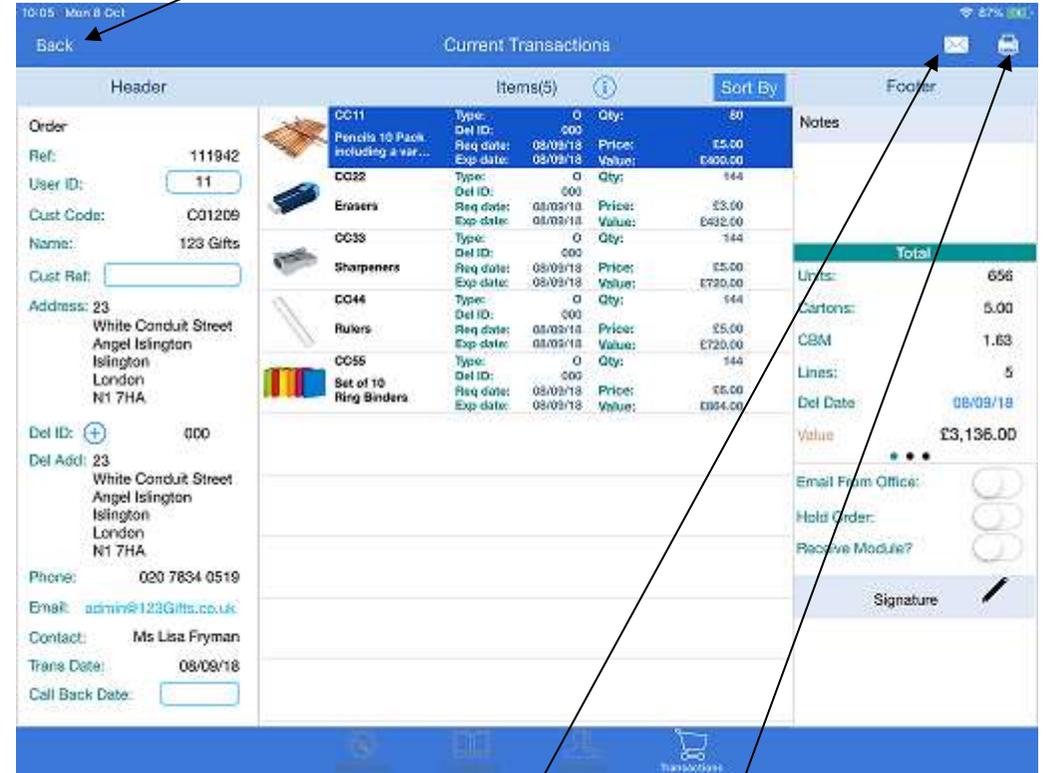


Fig 5

**Status of transaction**

Include/exclude transaction status:

**Unsent** = transactions that have **not** been sent back to head office.

**Sent** = transactions that have been sent back to head office.

**Held** = transactions held by user in current transaction (page). These transactions will not be transmitted to head office until 'Held' status switched off in 'current transaction'.

10:18 Mon 8 Oct 89%

From 03/03/18 To 08/10/18 Ref Type Status Manage Transactions

Saved Transactions(656)

All  Sent  Unsent  Held

Cust Code	Date	Del Date	Ref	Status	Value
C01209	08/09/18	08/09/18	111940	Sent	£3,136.00
C01209	08/09/18	08/09/18	111939	Sent	£3,136.00
C01209	08/09/18	08/09/18	111919	Sent	£400.00
C01209	08/09/18	08/09/18	111937	Sent	£3,136.00
C01209	07/09/18	07/09/18	111936	Sent	£3,136.00
C01209	07/09/18	07/09/18	111934	Sent	£3,136.00
C01209	07/09/18	07/09/18	111933	Sent	£3,136.00

Sort By

Entered Sequence

Numeric

Alphabetic

Item Sequence

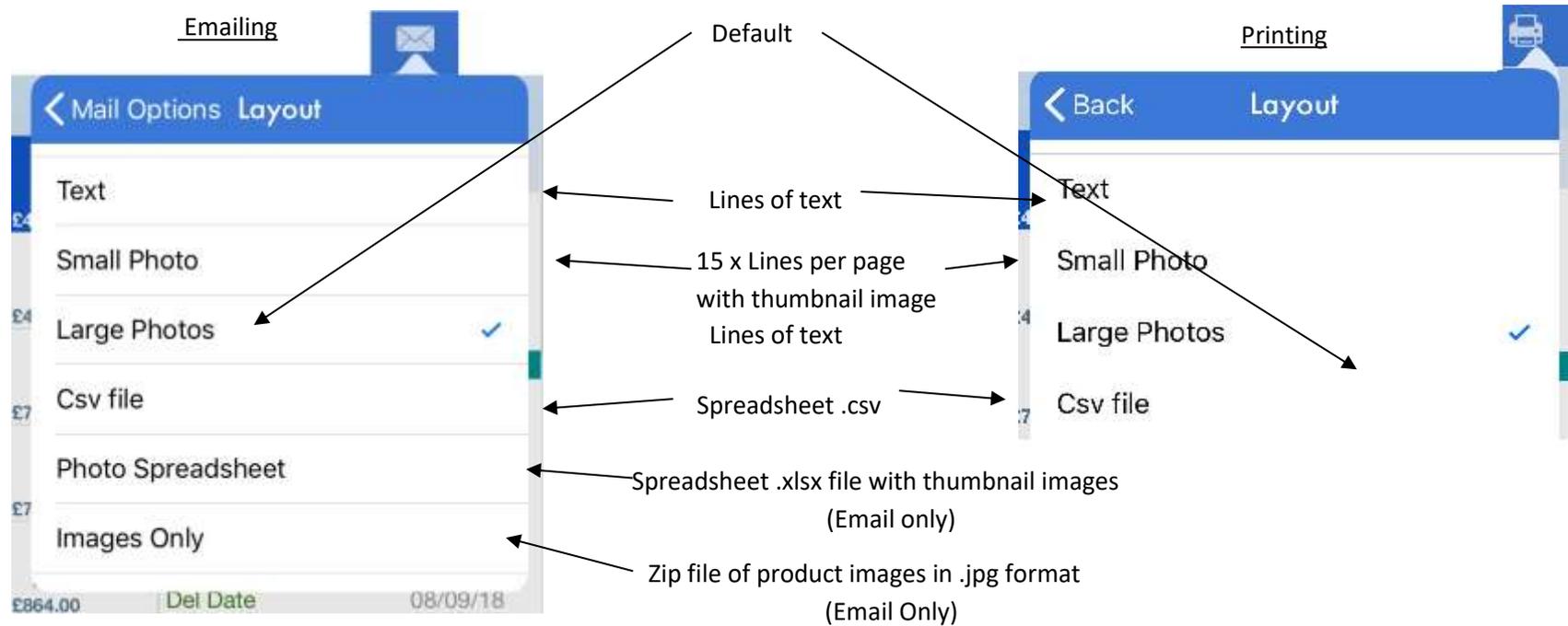
Sort By

Value £180,333,694.52

Sort By

Choose display sequence of transactions/items on order.

## Layouts for Emailing & Printing Transactions



Sales reps have the ability to email and/or print transactions using a choice of several different layouts.

The email is addressed to the default email address on the customers profile. You can add in more recipients as required.

Please note that the file size will increase relative to the layout chosen and the number of products on the transaction and may exceed limit allowed by your mail server.

## Manage Call Log

16:13 Mon 8 Oct

Back

Header Items(0) Sort By Footer

Call log

Ref: 110918

User ID: 11

Cust Code: C00516

Name: Festive Inc

Cust Ref:

Address: Festive Inc  
Acrefield Road  
Gateacre  
Liverpool  
Merseyside  
L25 6JW

Del ID: 000

Del Add: Festive Inc  
Acrefield Road  
Gateacre  
Liverpool  
Merseyside  
L25 6JW

Phone: 0151 428 8144

Email: admin@Festiveinc.co.uk

Contact: Mr Brian Epsom

Trans Date: 04/09/17

Call Back Date:

Notes

Buyer Not In

Total

Units: 0

Cartons: 0.00

CBM: 0.00

Lines: 0

Del Date: 04/09/17

Value: £0.00

Email From Office:

Hold Order:

Receive Module?

Signature

A call log is automatically generated when a customer is selected, but no items are placed on the transaction. This can be used to signify that a customer visit was made but no order or quotation placed.

Pre-defined notes can be selected from drop down box (if available) or/and typed manually. If one or more order items are added from catalogues screen, this transaction will automatically default to an 'Order', though the order can be converted to a quote or proforma (page 30). NB A call log status can't be used if items are added to the transaction.

An intended call back date can be selected here, by tapping into the 'Call back date' field and using the date picker. This will be logged in iPad calendar.

Change transaction type to order, quote or proforma. If no items have been added to a current transaction, this will be marked as a 'call log'.

Cancel this transaction. Prompts for confirmation.

Select pre-defined transaction note (if available).

Alternatively type a note by tapping into field. Pre-defined notes can be edited.

Tap into field to type a customer reference.

Add new delivery address for selected customer

Replace current delivery address with customer's other delivery addresses from pop up list.

Set a call back date for customer using date picker. This logs date into iPad calendar.

Total value of transaction.

Ability to request head office to email an order acknowledgement to customer. Switch to 'on' which will display pop up to select acknowledgement type and type recipients' emails address(s)

Hold order – transaction cannot be sent to head office when this has been switched to 'On'.

Tap to display pop up for collecting customer's signature.

Save Transaction.

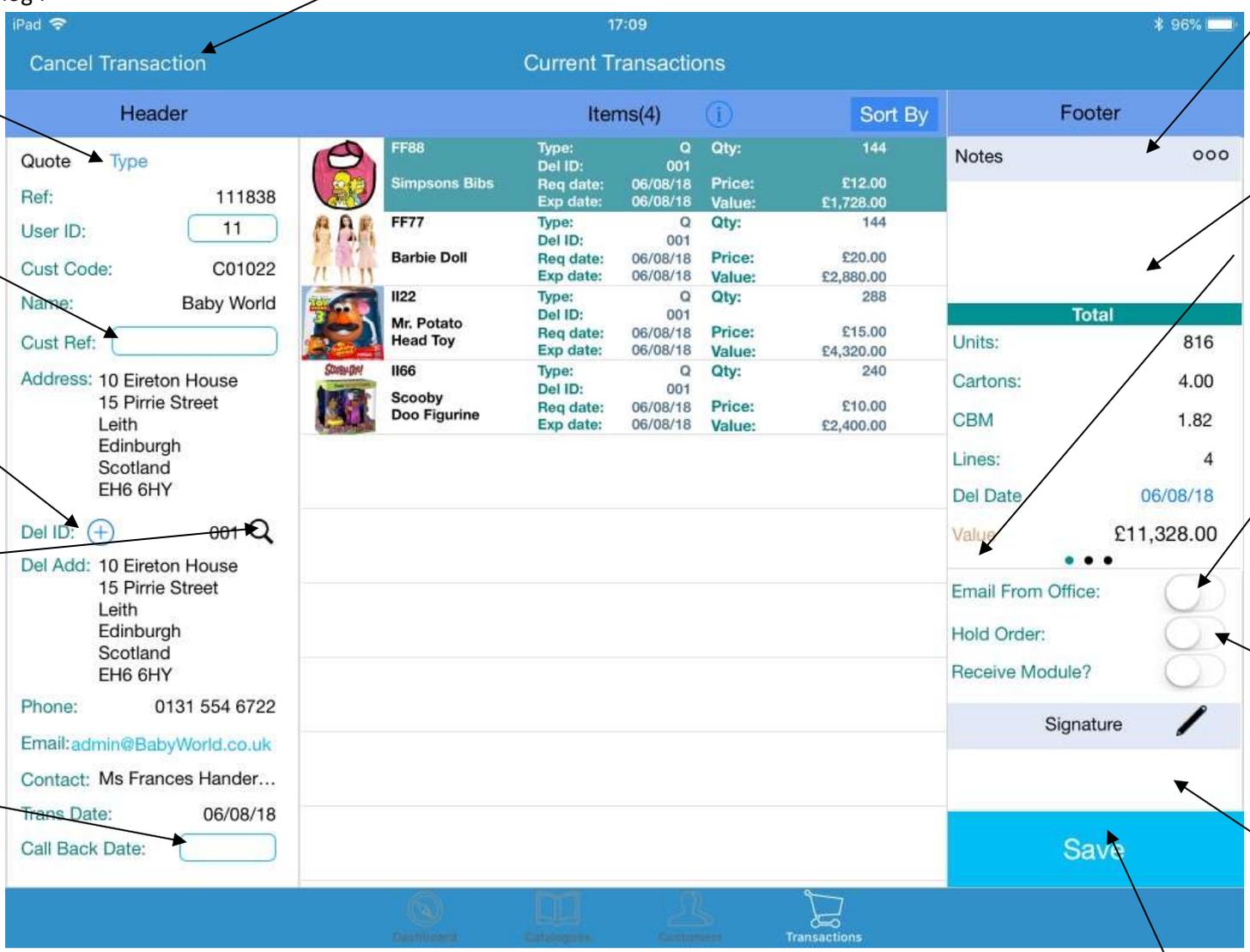


Fig. 7

# Transaction Delivery Breakdown



Items with multiple delivery dates and/or addresses will display a blue 'i'. Tap arrow to display delivery breakdown (Fig. 7)

Tap blue 'i' again to remove delivery breakdown display.