mSeller

Next generation mobile sales platform

mSeller iPhone User Manual

Contents:

Content Page

Dashboard and Report Overview

Dashboard

Report

Internet connection Status;
Green indicates **'on line'**
Red indicates **'off line'**

Reports:
See Page 4 -5

Full Sync:

Transmits any unsent transactions back to head office, and then uploads the entire database of products, customers and history. Use when iPhone 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.

Fig. 1

Catalogues Tab   **Customer Tab**   **Transactions Tab**

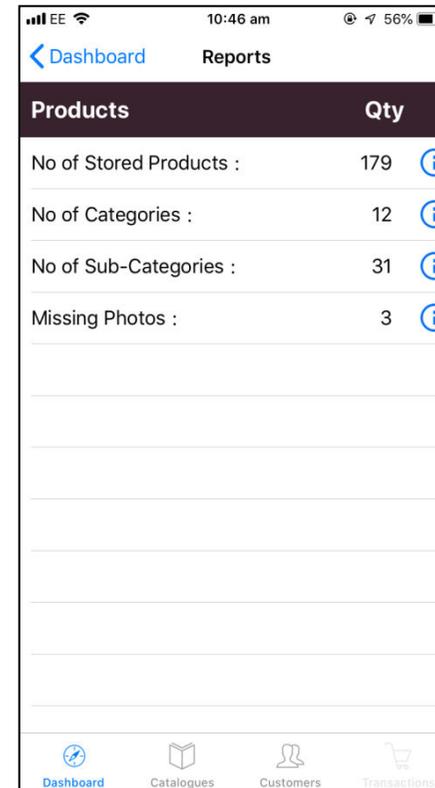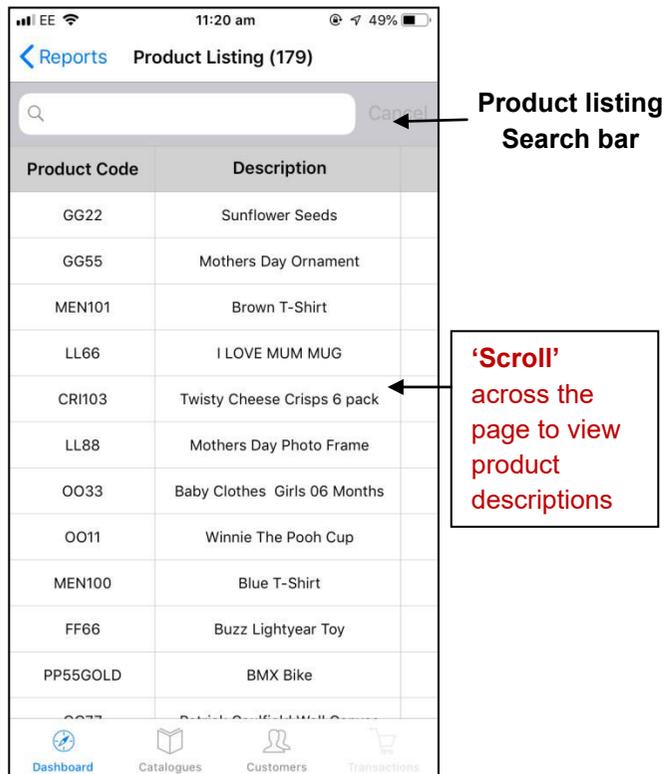| Products	Qty	
No of Stored Products :	179	ⓘ
No of Categories :	12	ⓘ
No of Sub-Categories :	31	ⓘ
Missing Photos :	3	ⓘ
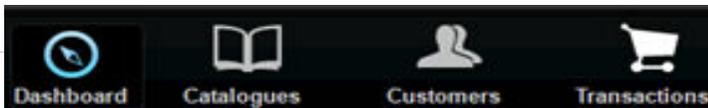
No of Stored Products listing

No of Categories listing

No of Sub Categories listing

Missing Photos listing

Fig. 2

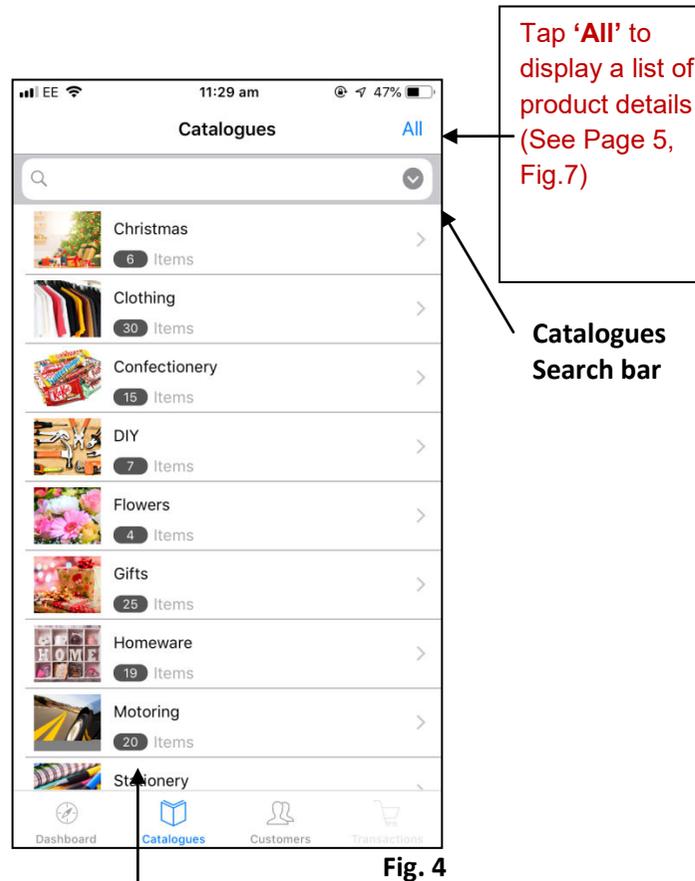**Tap on '(i)' icon** of the products sub-heading to display product details

Report Categories

The product report consists of four sub-categories. These are as follows;
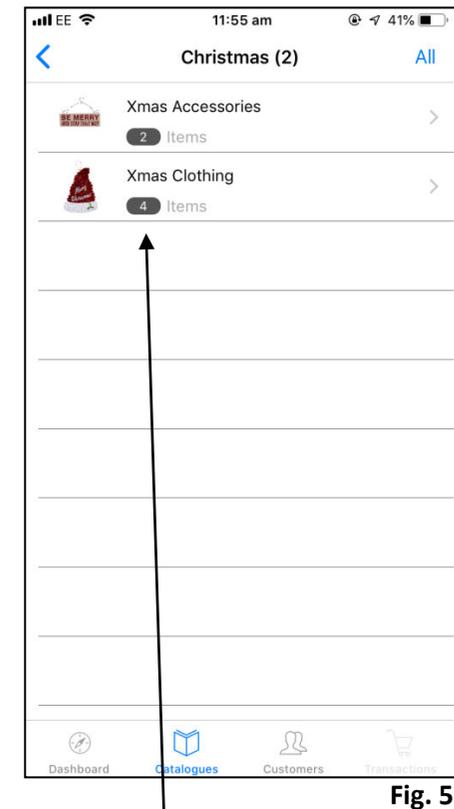
1. No of Stored products:

Product listing Search bar

'Scroll' across the page to view product descriptions

Fig. 3

Product listing displays stored products.

2. No of Categories

Tap **'All'** to display a list of product details (See Page 5, Fig.7)

Catalogues Search bar

Fig. 4

Categories listing and total number of products are indicated here.

3. No of Sub-Categories

Fig. 5

Sub-Categories listing and total number of products are indicated.

4. Missing Photos

Fig. 6

This report indicates missing Photos.

All Products screen

Fig. 7

The **'All products'** screen displays the full product listing and their descriptions.

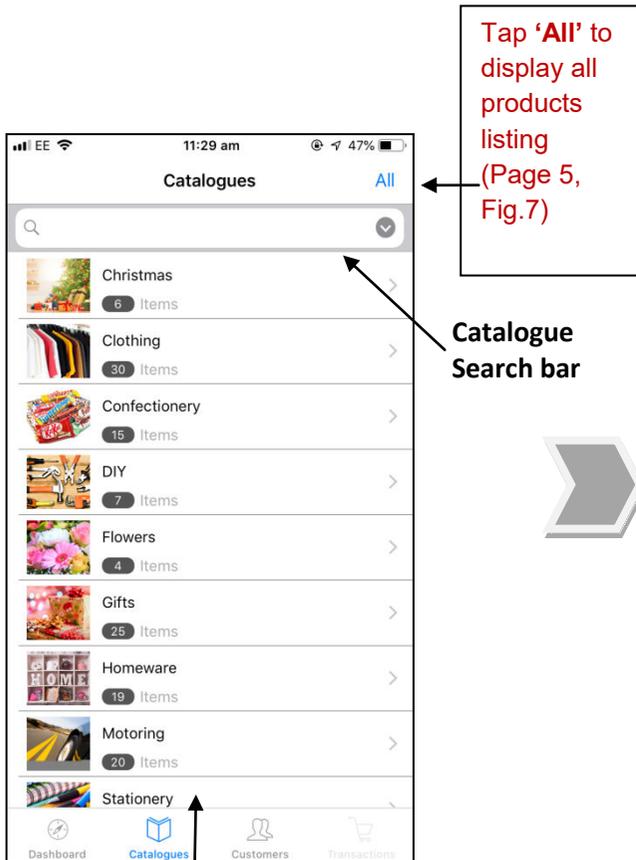# Catalogues - Product Browsing:

Catalogues screen

Sub-Catalogue screen

Product listing screen

Tap **'All'** to display all products listing (Page 5, Fig.7)

Catalogue Search bar

Fig. 8

Catalogues list with total number of items are shown here.
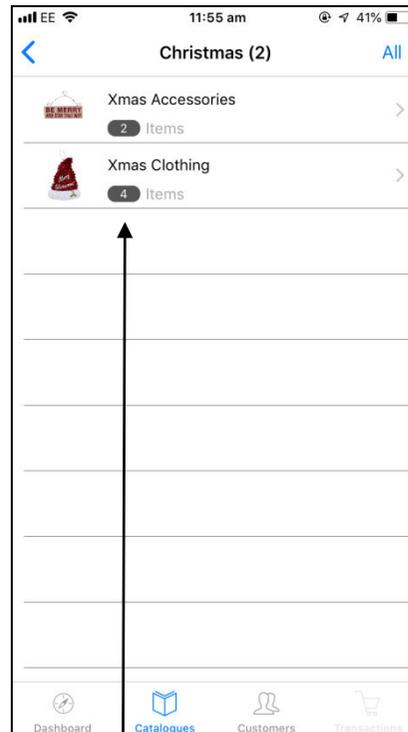
Fig. 9

Sub Catalogues list and total number of items are indicated here

Tap to 'Scan' a barcode

Tap on the 'Filter icon' to view filter list (See Page 10,11)

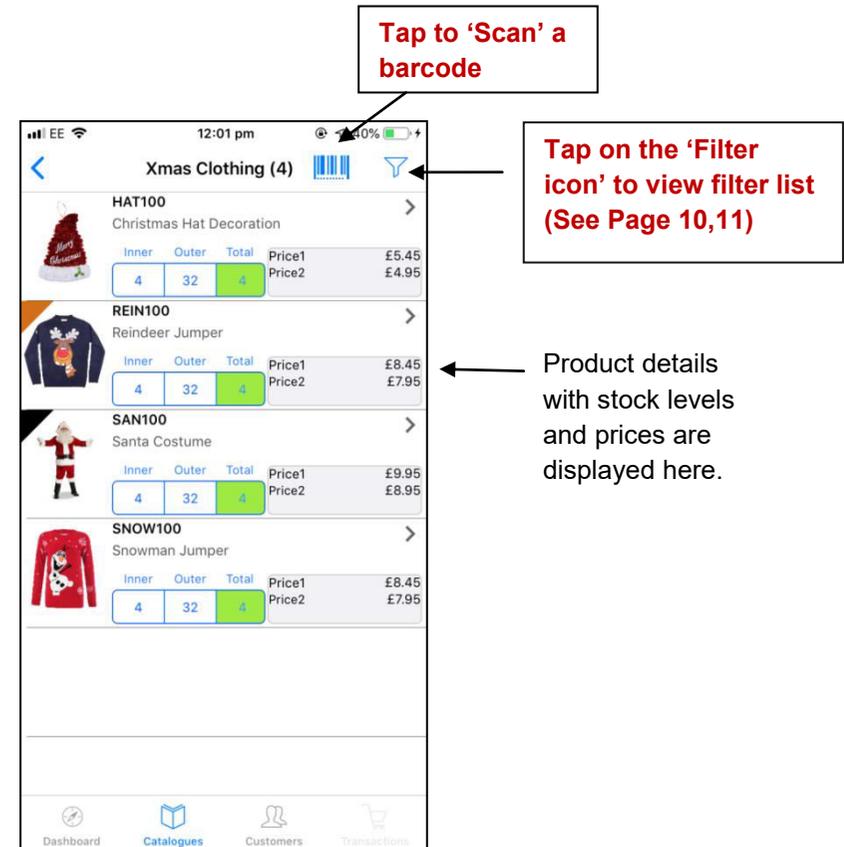Product details with stock levels and prices are displayed here.

Fig. 10

Note: Once the customer has been selected, tapping on the 'Inner' or 'Outer' cell will amend the order quantity and change the cell colour.

'Tap' on the right arrow to move to the product detail screen

Catalogues screens

Here are the following tabs within the Catalogues screen.

<u>Image Tab</u>   <u>History Tab</u>
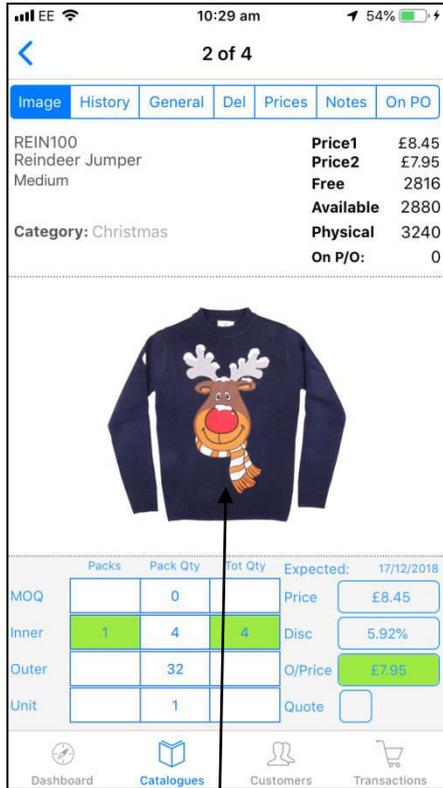
Fig.11

Fig.12

Fig.13

Fig.14

'Tap' on the image to zoom in.

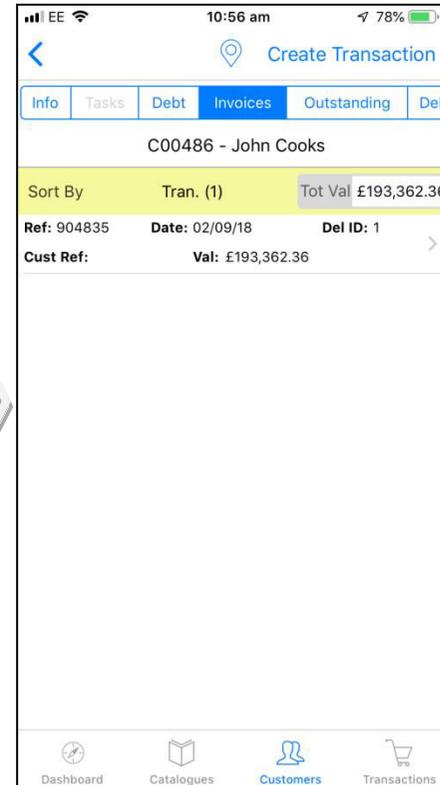**'Tap'** on the **'History'** tab to display the customers previous invoices.

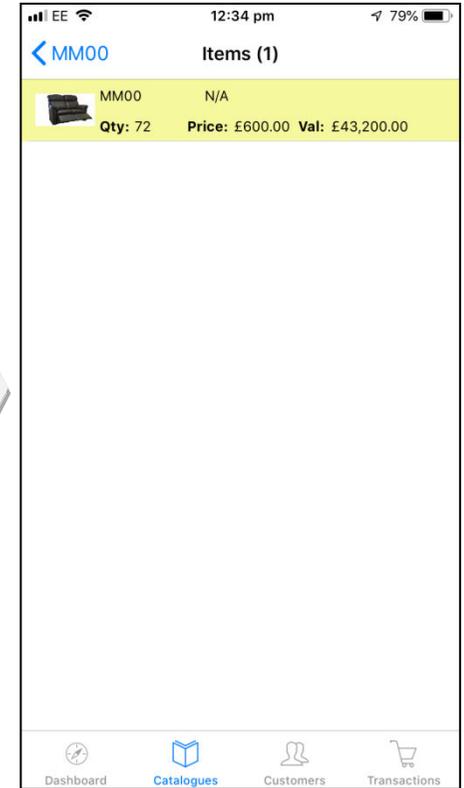'Tap' on the **'invoice'** tab to display previous items purchased and product description

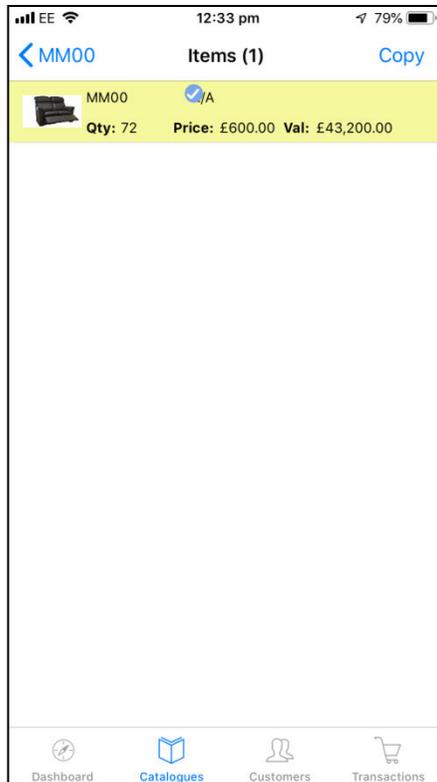**'Tap' on the item to display the 'Copy' feature.**

Fig.15

'Tap' on the item to copy the product. A '**Copy**' button will appear on the right hand corner of the screen.

Once copied, a notification message '**X Items added successfully**' will be displayed at the bottom of the screen.

General Tab

Fig.16

'Tap' on the '**General**' pricing screen to display pricing details.

Delivery Tab
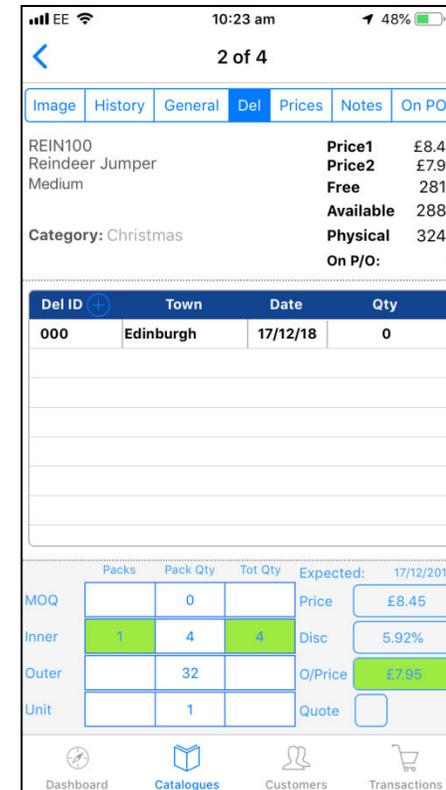
Fig.17

The delivery details screen will display the customer address details here.
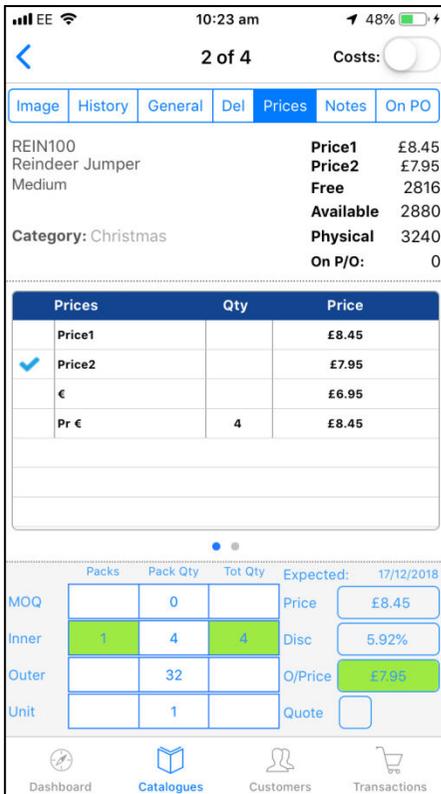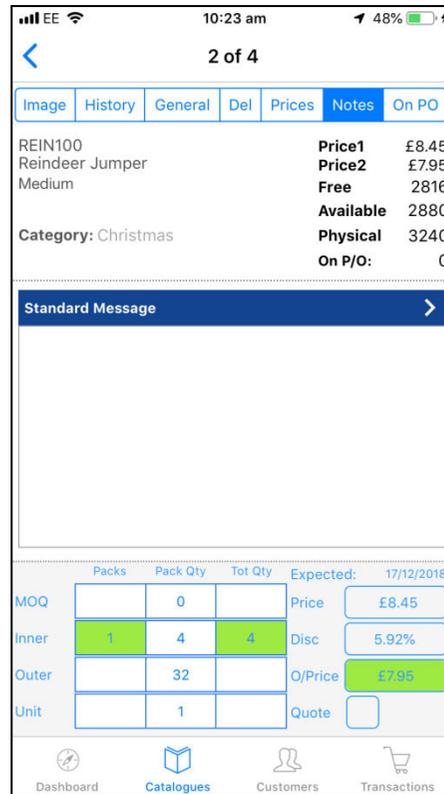
Prices Tab

Fig.18

This is the 'Pricing' tab screen.

To select a different amount, *'Tap'* on the *'Inner'* or *'Outer'* cell to display a numeric keyboard. (**Fig. 45**) Then enter the different amount and press '**Return**'. Then **'Tap'** on the Transaction tab at the bottom of the page

Notes Tab

Fig.19

'Tap' on the **'Standard Message'** bar add a note.

Pre-defined Notes Tab
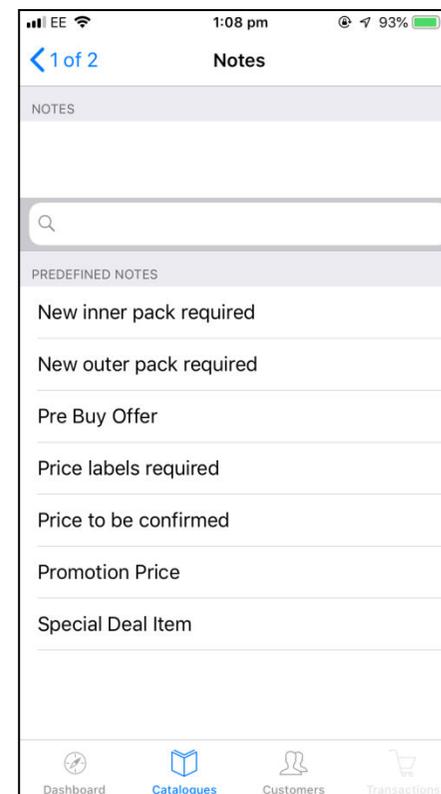
Fig.20

Note: To add a note, type in the notes field at the top of the page or select a pre-defined note from the list displayed at the bottom of the screen.
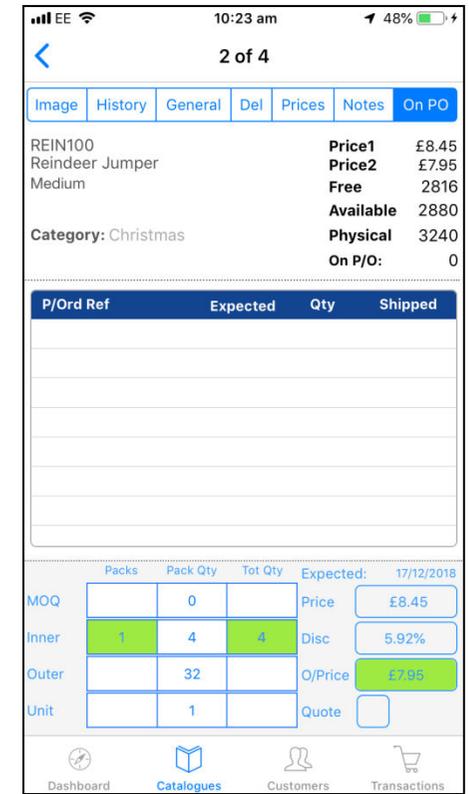
On PO Tab

Fig.21

The **'On PO'** screen displays products on order.

Catalogues - Product Filtering

The product list can be filtered by **Catalogues, Sub Catalogues, Groups, Products, Stocks status** and **Price Ranges**
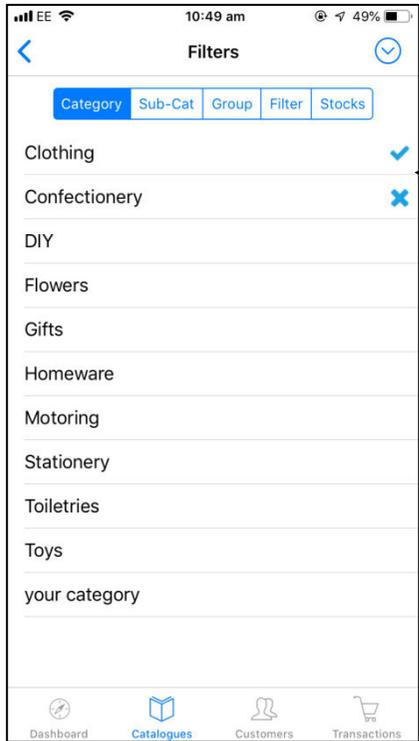
Catalogue	Sub Catalogue	Groups	Filter

Fig. 22

Tap on the catalogue to select or deselect items from the filer
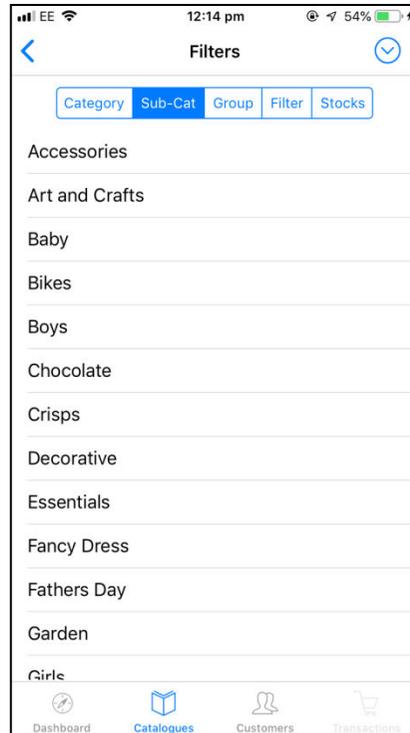
Fig. 23
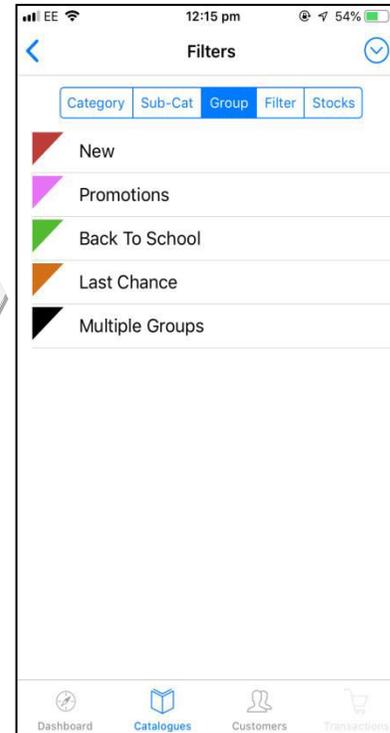
Fig. 24

Fig. 25

Note: Once the Catalogue filers has been setup, select the back arrow (<) to take you to the products listing screen view the results.

Filtering my The Sub-Catalogue can be selected here.

Filtering by group can be selected here.

Please note 'Current' means items on current order. Ordered qty figure will appear in blue for these items.
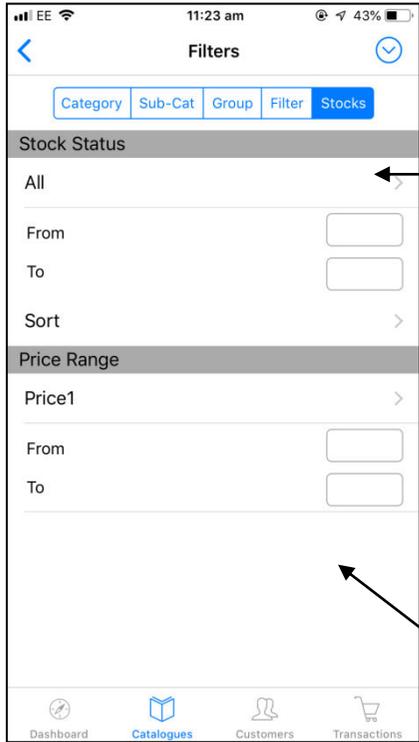
Stock Status and Price Range

Fig. 26

Product stock filter:

Tap 'All' to display a scrolling bar filter at the bottom of the screen.(See Fig.27) All, Physical, Free or Available can be selected to filter items belonging to selected status. 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 keyboard. Tap 'To' field to enter a maximum price. Tap anywhere outside dropdown box for results to appear on the left sidebar
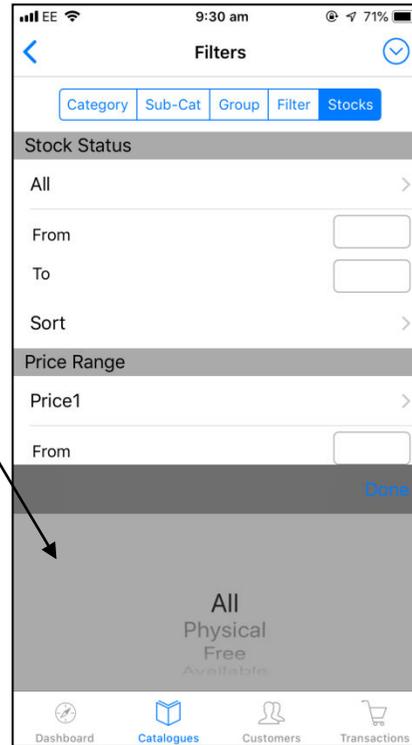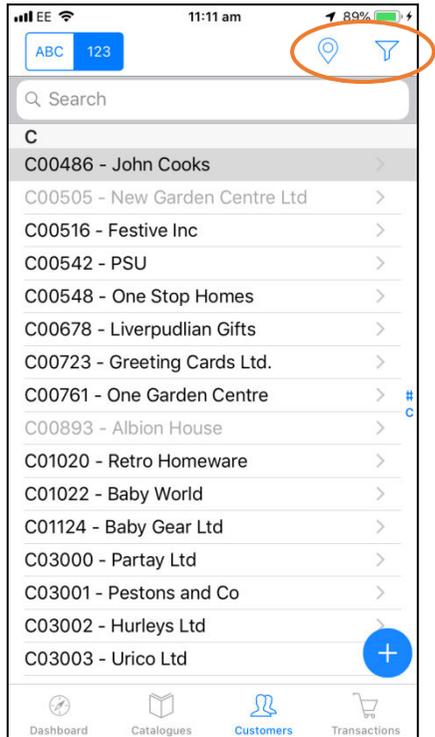

Fig.27

Customer screen

Fig.28

Fig.29

Fig.30

Fig.31

When selecting the **'Customer'** tab, at the bottom of the screen displays the list of customers.

The **'Map'** icon will enable you to view the customer location. (See Fig.29)

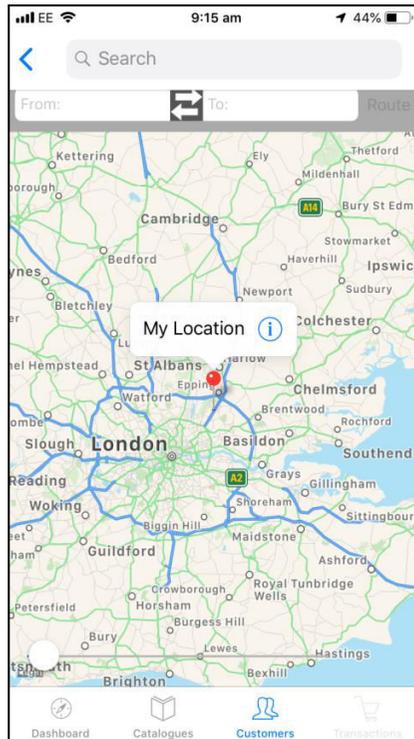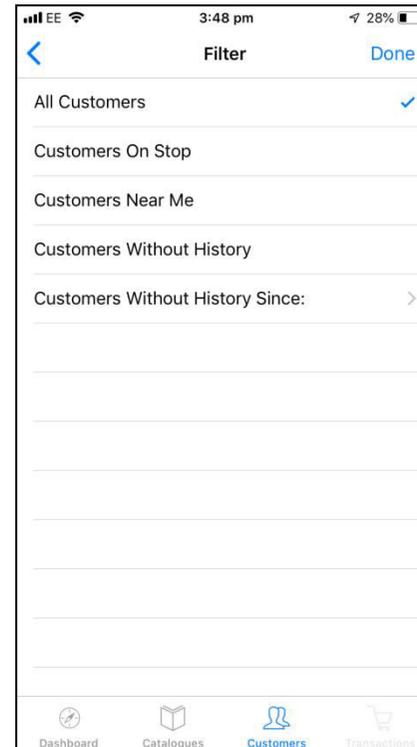The **'Filter'** icon can be selected to filter by customer status. (See Fig.30)

The Map will enable you to view the customers location.
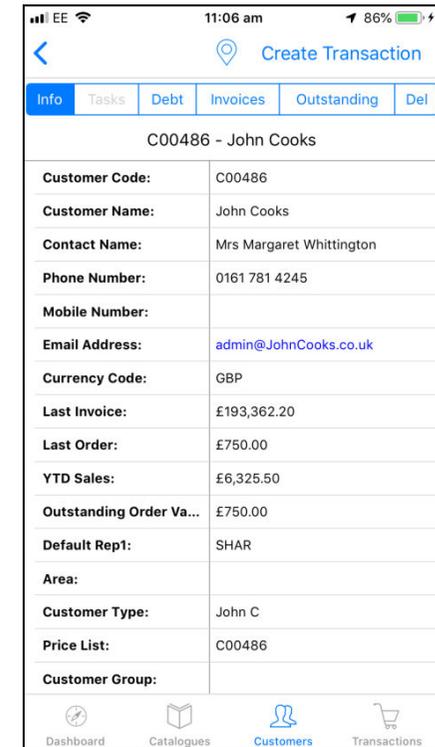
Select from the Customer status filter to view on the map.

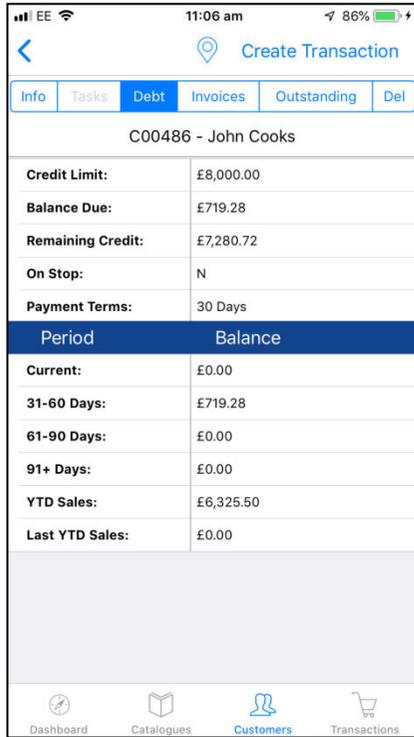Once the customer has been selected, the **'Info'** tab will display the customers contact details

Fig.32

Fig.33

Fig.34

Fig.35

The **'Debt'** tab displays the balance of credit for a customer.

The **'Invoice'** tab displays the total invoice value for the customer.

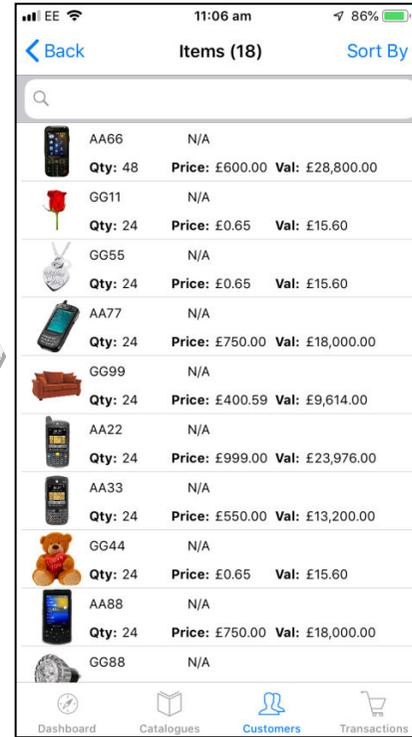Tapping on the right arrow on the invoice displays the list of items purchased.

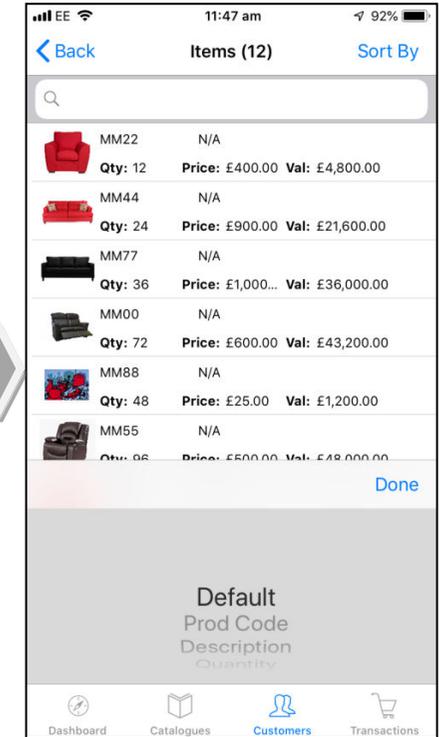The **'Items'** screen displays the list of items purchased

'Tap' on the '**Sort By'** filter to filter by Product Code, Description, Quantity, Price or Value

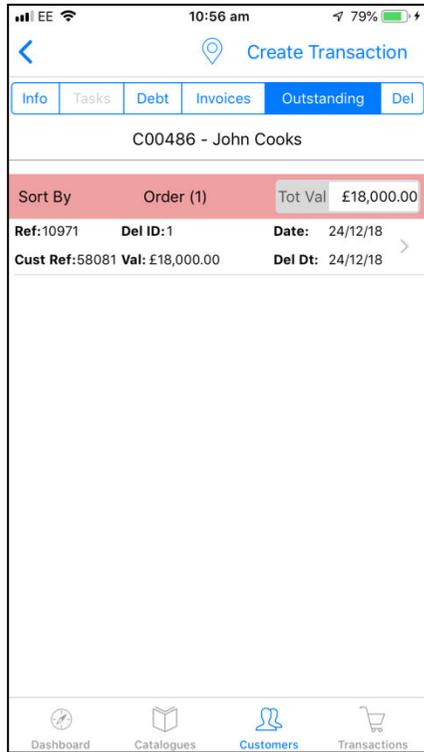**Fig.36**

Fig.37

Fig.38

'Tap' on **'Outstanding'** tab to display total value of outstanding orders.

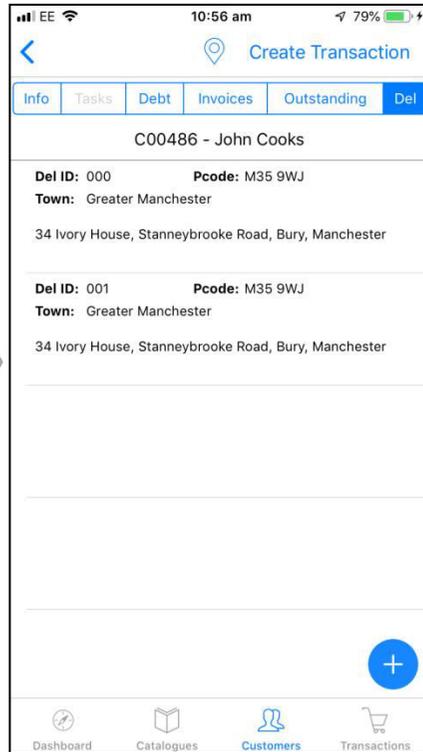The '**Map'** icon will enable you to view the customers location.

'Tap' the **'Del'** tab to display the multiple delivery address.
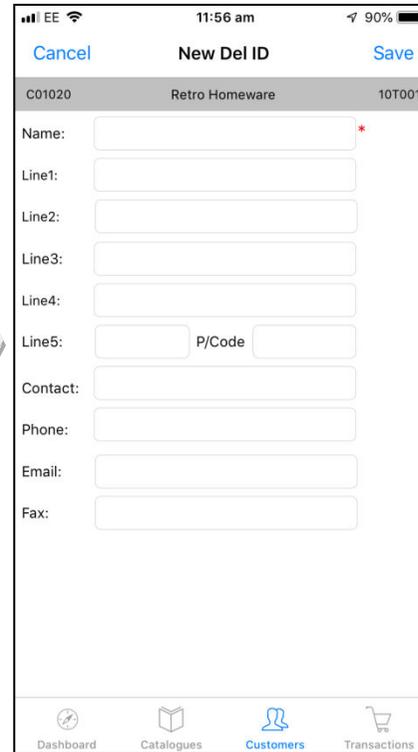
'Tap' on the (+) icon to add a deliver address

Complete all details to add new delivery address and then tap **'Save'**.

Creating an Order Transaction
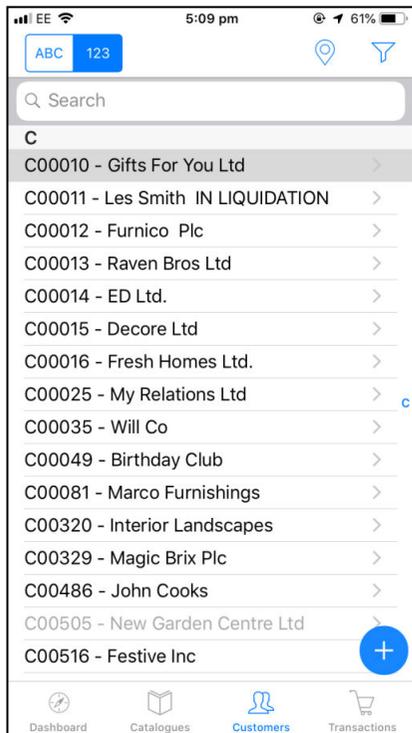
Steps to create an Order Transaction

Customers screen	Customer Details screen	Delivery Details screen	Catalogues screen

Fig. 39

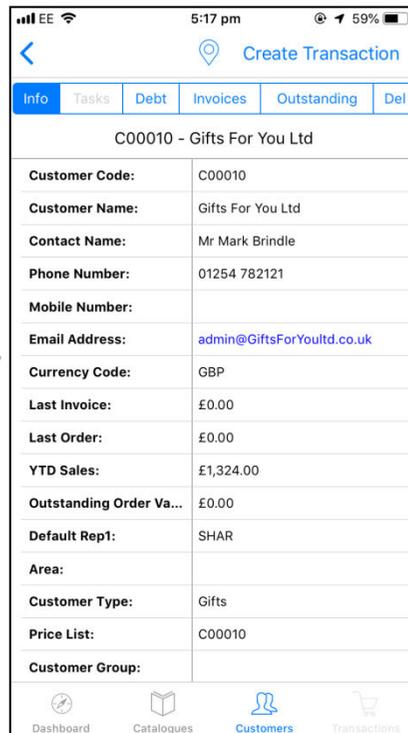1.Once the '**Customer**' tab has been selected from the Dashboard, select the customer from the list.

Fig. 40

2. Tap on '**Create Transaction**' displayed at the top of the screen

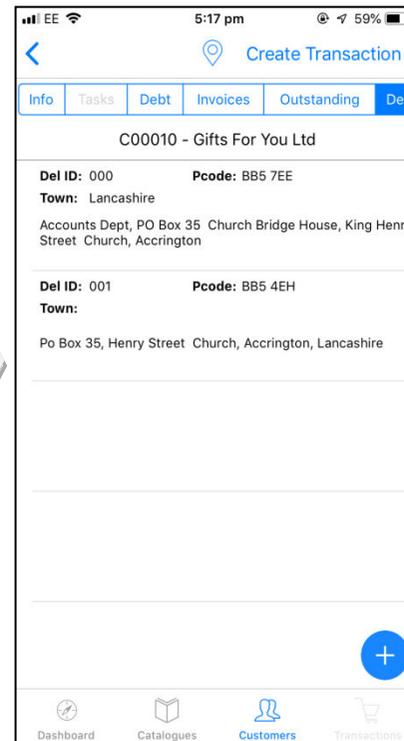**Fig. 41**

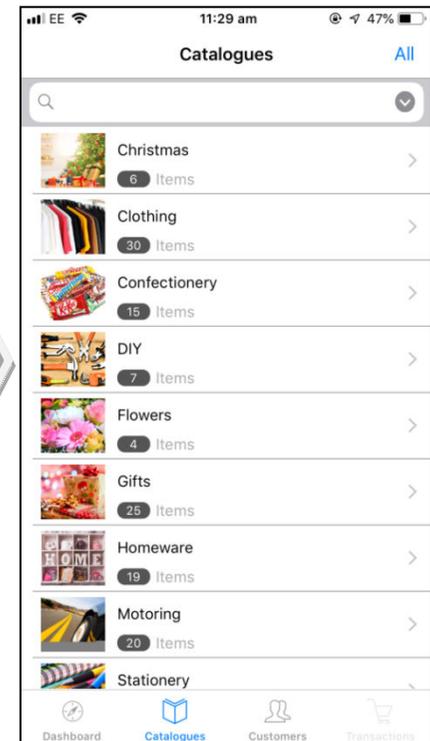**3**. Choose correct the customer address (If multiple addresses are shown)

Fig. 42

4. Select the products to purchase from the Catalogues section. Once selected, the pricing screen will then be displayed.
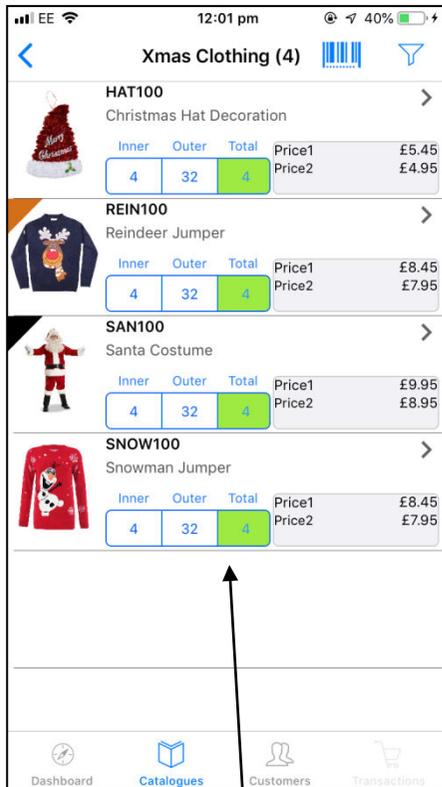
Catalogues screen

Fig.43

Price Tab screen

Fig. 44

Fig. 45

Transaction screen

Fig. 46

5. Product details and prices are listed here.

'Tap' on the *'Inner'* or *'Outer'* cell to amend the total quantity amount. Once the amount has been amended, the 'total' value cell will change colour.

Tap on the right arrow to move to the next screen
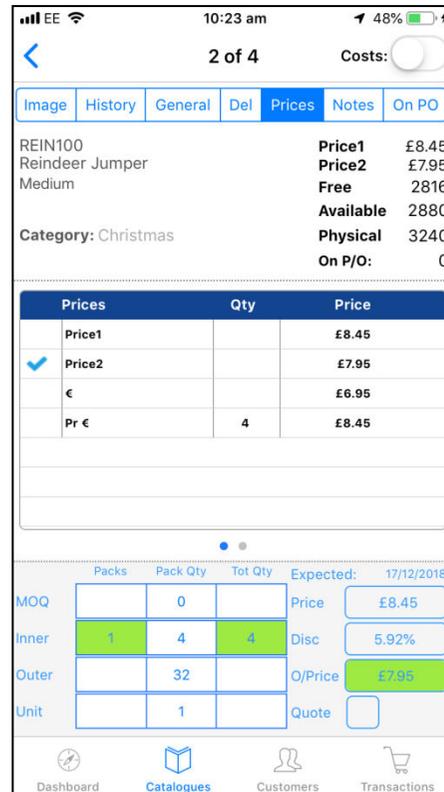
Price details are displayed here. One product per page is displayed. To view other products, 'Scroll' across the page to confirm all details are correct.

To amend the amount, *'Tap'* on the *'Inner'* or 'Outer' cell to display a numeric keyboard. (Fig. 45) Then enter the amount and press '**Return'.**

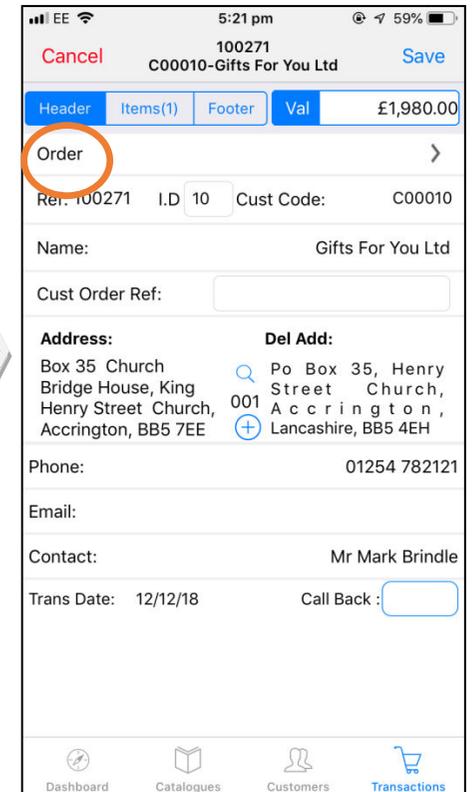**6**. 'Tap' on the '**Transaction**' tab at the bottom of the screen

The Order details including the deliver address and contact details are displayed here.

7. Once details have been checked, To proceed 'Tap' on **'Save'** displayed on the top right corner of the screen **OR** Tap on the 'item' tab to see product details

Tapping on '**Call Back'** will add a date.
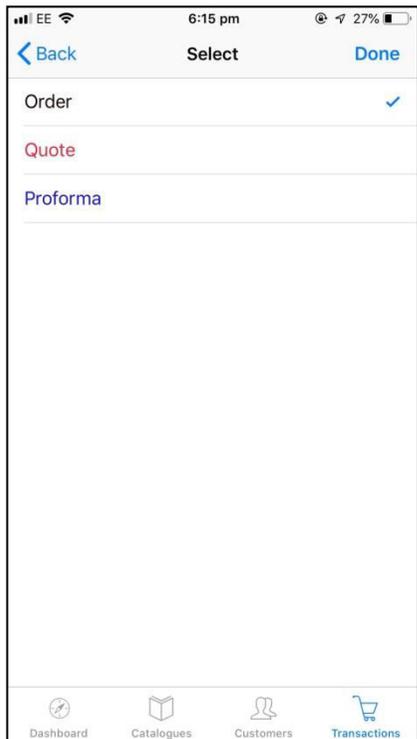
Item tab screen

Footer tab screen

Delivery notification

Fig. 47

Fig. 48

Fig. 49

Fig. 50

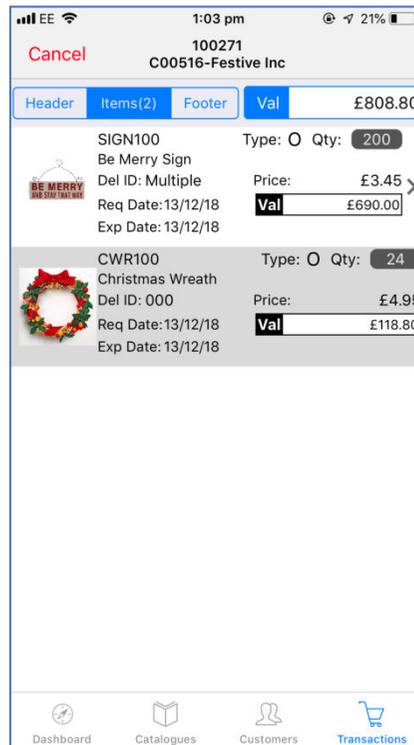Select if you would like to create a **Order, Quote or Proforma** and tap 'Done'.

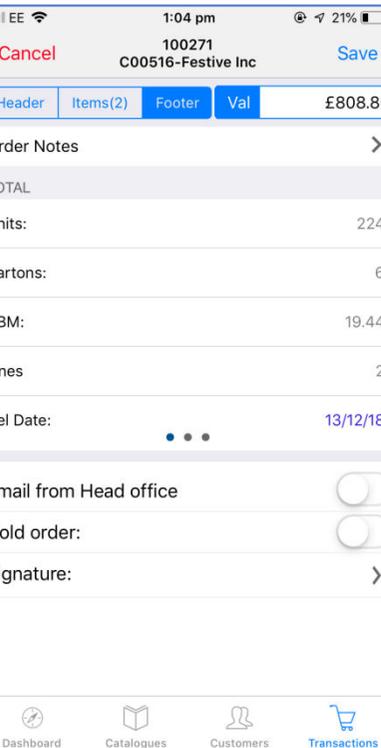**8**. Tap on the **'Item'** tab to view the item details

9. 'Tap' on the **'Footer'** tab to view the Order details.

'Email from Head Office' can be selected to send an email order to the customer.

'Hold Order' can be selected to place the order on hold. This order will be saved in the app.

'Signature' enables you to enter the customers.

Tap **'Save'** to complete the order

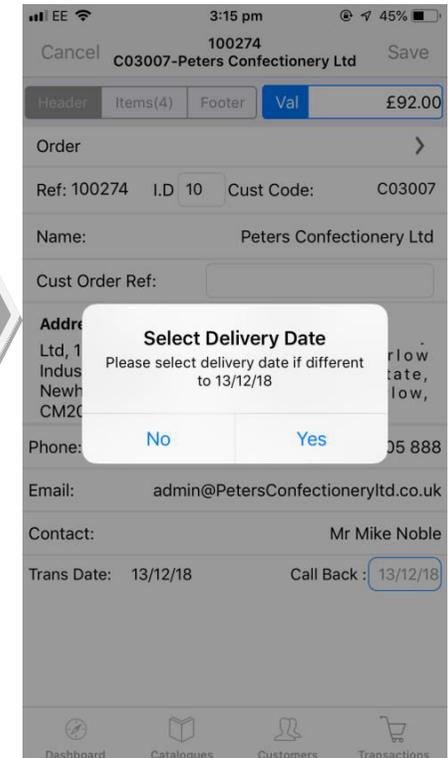**10.** Select the Deliver Date if different to today.

Print notification

Transcription Confirmation

Fig. 51

Fig. 52

Fig. 53

Fig. 54

'Tap' on the email icon to attach the order to an email. See Page.19)
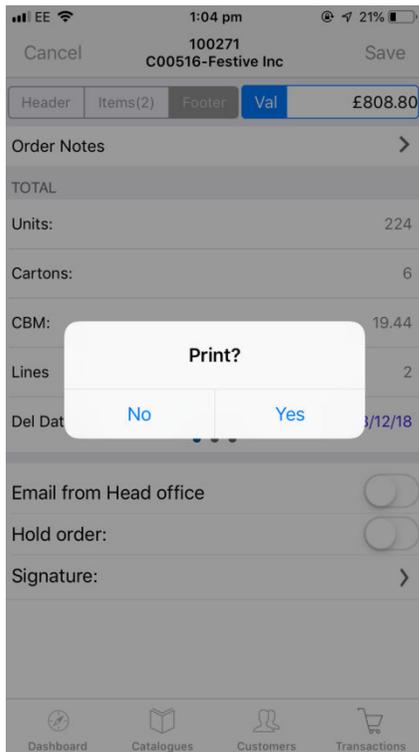
'Tap' on the print icon to print the order (See Page 20)

11. A **'Print'** notification will appear on the screen. Select accordingly. **(See page 20 for details)**
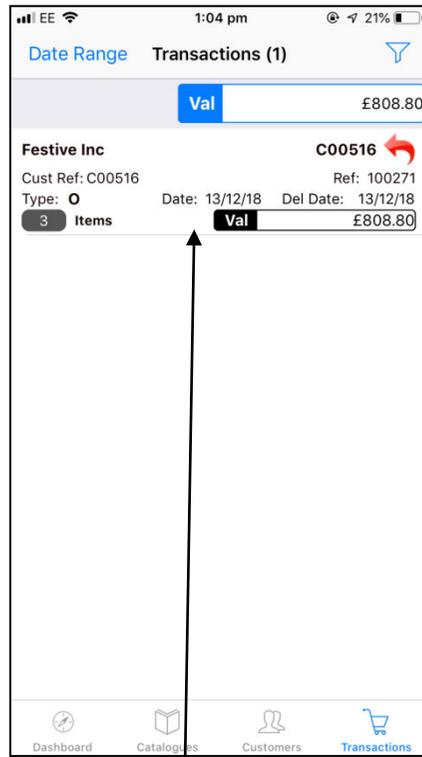
A 'Transaction' confirmation is then generated.

Transactions can also be arranged by **Date Range** displayed in the top left hand corner

'Tap' on the Transaction confirmation and 'scrolling to the right of the screen' allows the option to Copy, Edit or Delete the transaction.

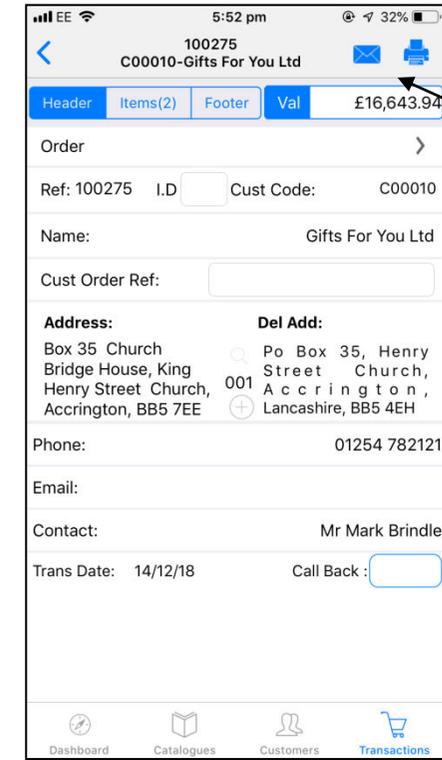To see the order, 'Tap' on the order Transaction (at the bottom of the screen)
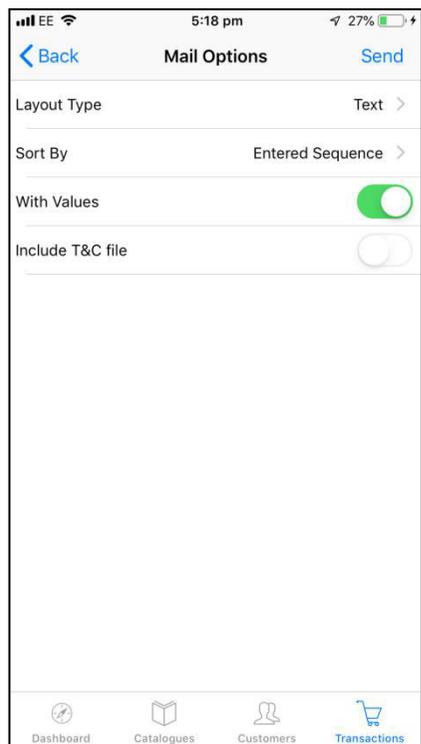
Email Options

Fig. 55

Select Send to send the order vis email. From the 'Layout Type' select the correct layout.
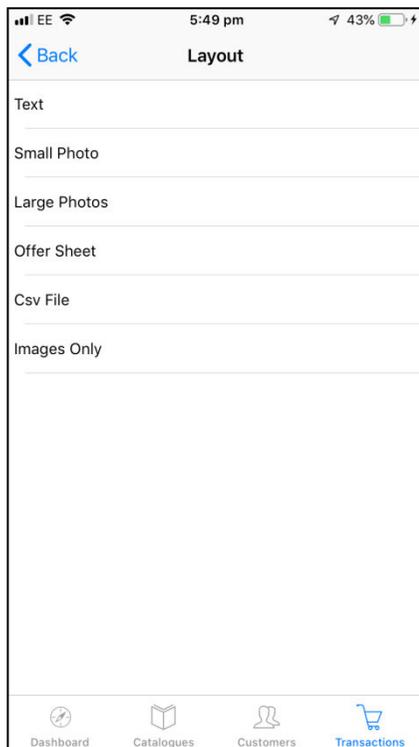

Fig. 56

From the layout Type options select 'Text' or Image size depending on file being sent

Fig. 57

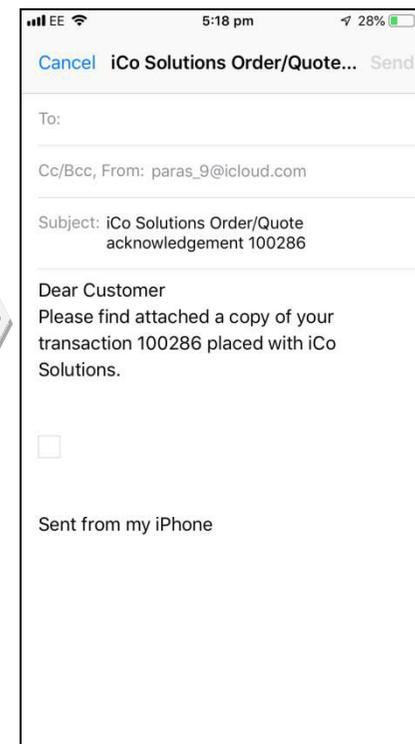From the mail options, Sort By can be selected in the order of document sequence

Fig. 58

The email will be displayed for editing. **Once the Email address has been entered and the email complete, 'Tap' Send**
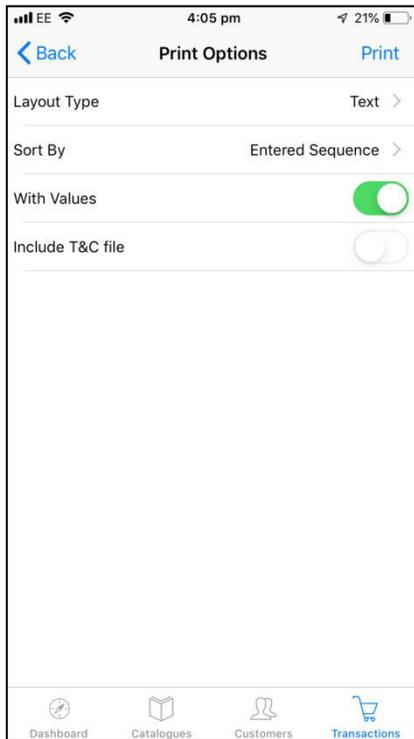
Print Options

Fig. 59

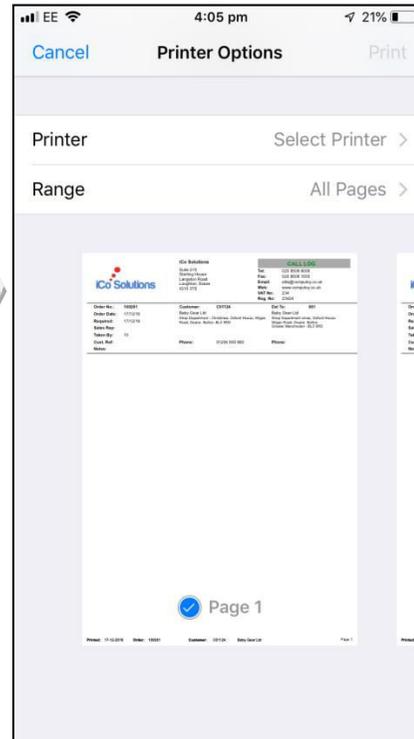Once the 'Print' notification has appeared. Select 'Print'

Fig. 60

Select the printer of choice by Tapping on the Printer bar
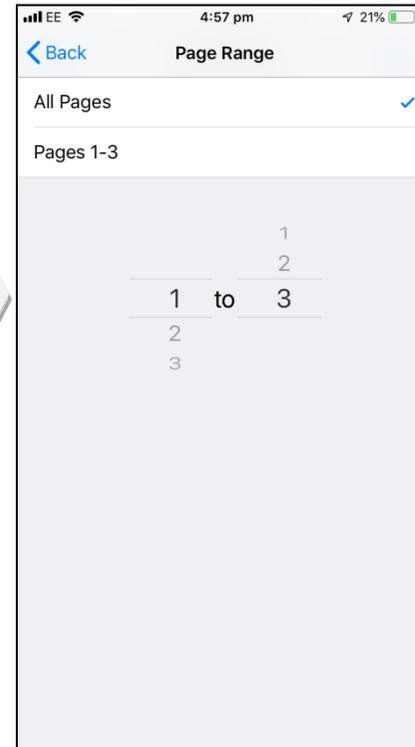
Tap on range to select the number of pages to print.

Fig. 61

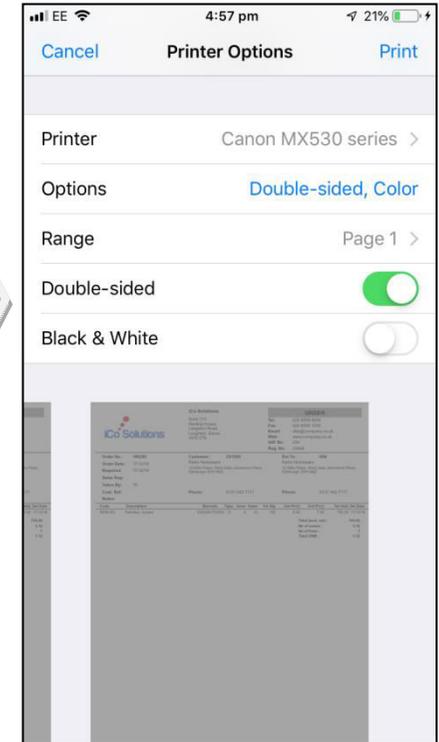Select the Page range to be printed by scrolling 'Up &'Down' on the numbers

Fig. 62

Once the printer has been selected, select additional printer options if required i.e. Double sided or Black & White.

Tap on Print to print the document.
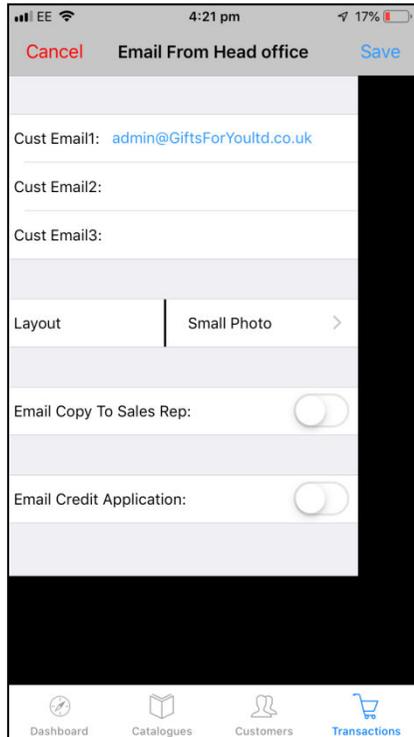
Transaction Email Options

Fig. 63

Email from Office screen

Email address can be added to send copies to Sale reps

Creating a new customer profile

<u>Customer Screen</u>   <u>New Customer form</u>

Fig.64

Fig. 65

Fig. 66

On the customer page, '**Tap**' on the (+) Plus sign to add a new customer
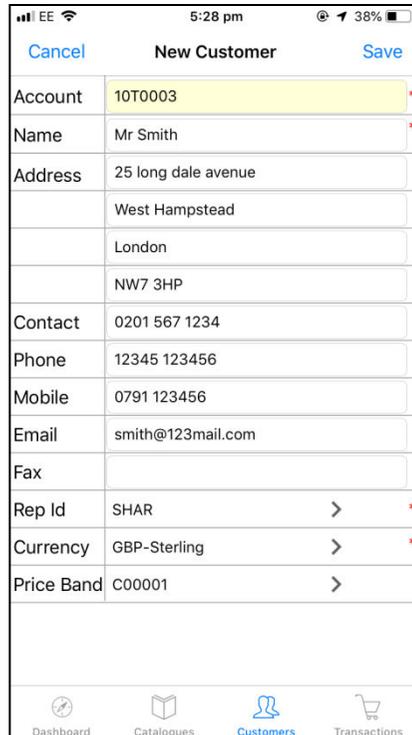
To add new customer detail complete the form and Tap on '**Save**'.
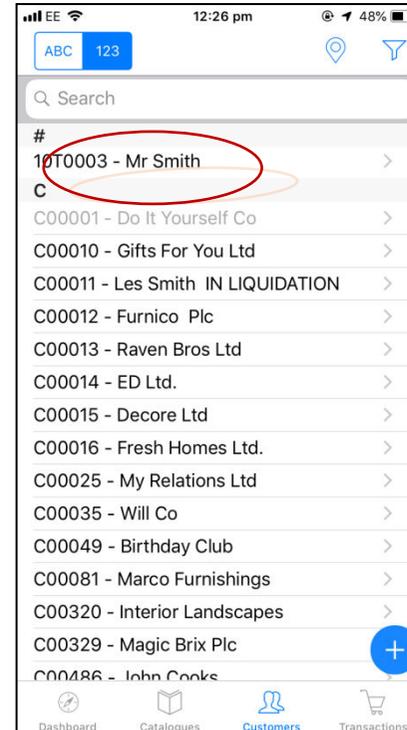
The new customer details will then be displayed in the list

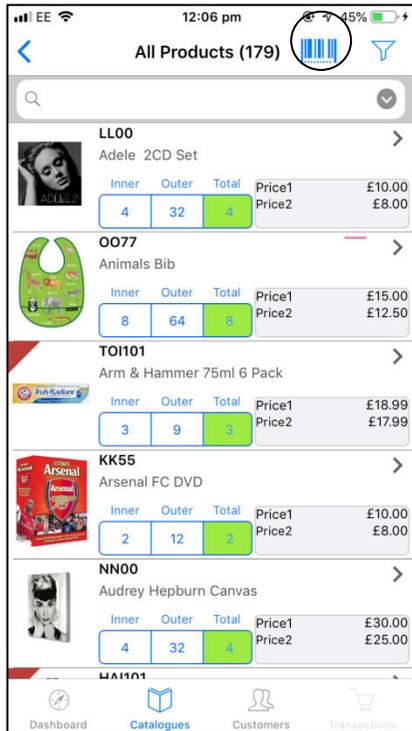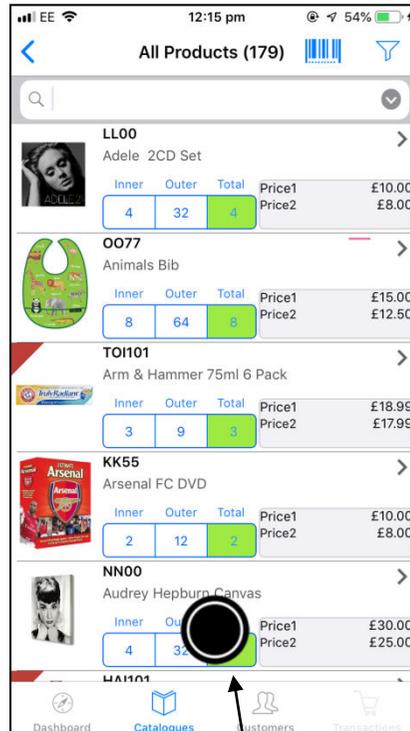# Scanning a Product

Catalogue Product screen

Fig. 67

Fig. 68

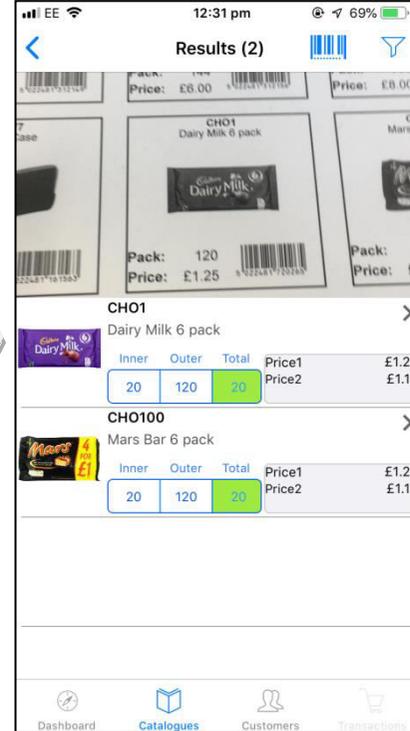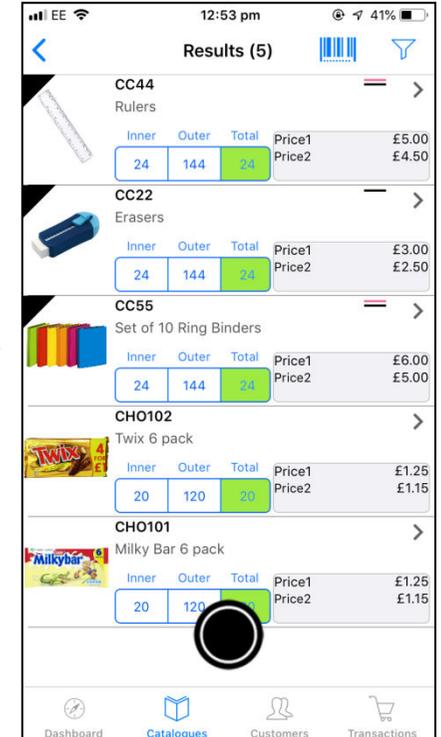

Fig.69

Fig. 70

1. To '**Scan**' a product**, Tap** on the '**Barcode**' icon at the top of the page.

2. A photo button will appear at the bottom of the page. .Tap' on the button to display the camera feature

3. To '**Scan**' a product**, 'Hover'** your IPhone over the barcode. The barcode will be recognised and added to the list.

4. A list of products will be created as shown above.