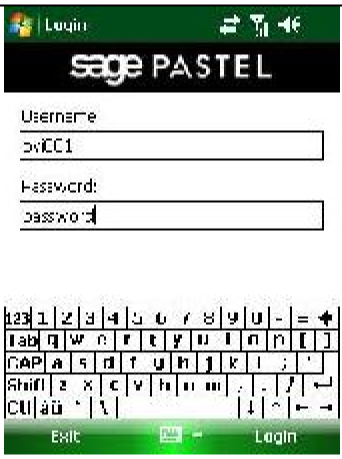
NCCE VanSales Mobile Solution

Van Sales & Sales Force Automation User Manual

Table of Contents

1. Login

<table>
<tr>
<td>
</td>
<td>The first screen you will be presented with when loading the application will be the login screen.

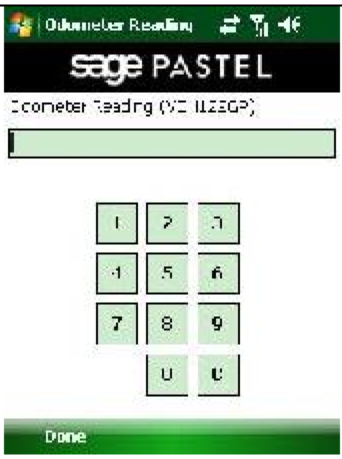
Here you have to specify your assigned user name and password.

Use the stylus and click anywhere inside the “Username” box. The onscreen keyboard will automatically open. Enter your username.

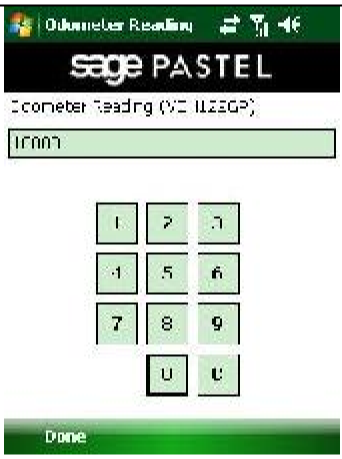
Do the same for your password, and then click on “Login” in the lower right hand corner of the screen.</td>
</tr>
<tr>
<td>
</td>
<td>The application will authenticate you and if the login was successful, it will begin synchronizing data with the server.

The first time you login on a particular mobile device, the sync will take some time because all the data associated with your username needs to be copied to the device.

Subsequent logins on the same mobile device will be much faster.</td>
</tr>
</table>

<table>
<tr>
<td>
</td>
<td>After synchronization is complete, you will be presented with the start of day ODO reading screen.

If you do not have a vehicle associated to your username you will be taken directly to the home screen.

Please note that this screen will only be displayed if a vehicle is associated with your username.</td>
</tr>
<tr>
<td>
</td>
<td>Enter your vehicle’s current odometer reading. Click on “Done” in the lower left hand corner of the screen to continue.

Please note that this screen will only be displayed if a vehicle is associated with your username.</td>
</tr>
<tr>
<td>
</td>
<td>You will now be at the application’s home screen, where the most common functionality will be displayed in the form of icons, namely;

• Delivery Notes
• Customer Visit
• Day End Report
• Synchronize
• Inventory</td>
</tr>
</table>

2. Inventory View

To view the stock currently on hand, click on the "Inventory" icon on the home screen.

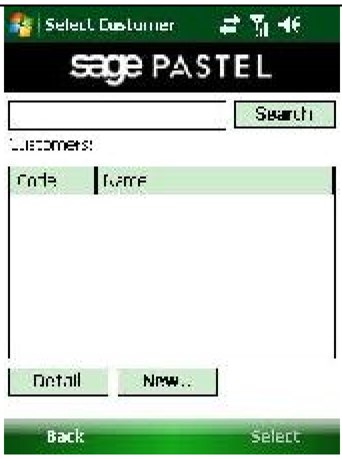
All stock assigned to your warehouse or delivery vehicle will be displayed.

To return to the home screen, click on "Done" in the lower left hand corner of the screen.

3. Stock Count

To be documented.

4. Customer Visit



A customer visit refers to the time spent at the client. As soon as you arrive at the client, click on the "Customer Visit" icon on the home screen.

This will take you to the "Select Customer" screen.

At the “Select Customer” screen, you can search for clients assigned to your warehouse or rep code, depending on your organizations specific setup.

To list all customers assigned to you, click on “Search” while leaving the input field empty.

You can also search for a specific client by name. Do this by clicking anywhere inside the “Search” input field. The onscreen keyboard will automatically open.

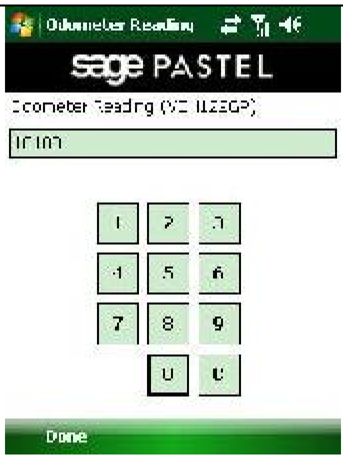
Type in the client’s name or part thereof.

In this example we searched for Dan’s Bakery by using only “dan” as search criteria.

If more than one client’s name contained the text “dan”, they would also have been displayed.

You can search for clients by using any part of their name, for instance “bake” would return the same search results.

	Once the client you are at has been located, select the client by clicking anywhere on the client's name. Once selected the client's name will be highlighted in green as illustrated. To view details about the selected client, click on "Detail". To start a customer visit for the selected client, click on "Select" in the lower right hand corner of the screen.
	If you clicked on "Detail" in the previous step, the client's details will be displayed. To return to the "Select Customer" screen, click on "Back" in the lower left hand corner of the screen.
	After clicking on "Select", a prompt will be displayed where you will have the choice of either "Yes", or starting a customer visit, or "No", which will take you back to the application home screen. To start a customer visit, click on "Yes". By starting the customer visit, you initiate a customer visit event which includes a timer to determine the time spent at the client.

<table>
<tr>
<td>
</td>
<td>
The first screen you will be presented with after initiating a customer visit event is another odometer reading.
If you do not have a vehicle associated to your username you will be taken directly to the customer visit home screen.
Please note that this screen will only be displayed if a vehicle is associated with your username.
</td>
</tr>
<tr>
<td>
</td>
<td>
Specify your current odometer reading and click on “Done” in the lower left hand corner of the screen to continue.
Please note that this screen will only be displayed if a vehicle is associated with your username.
</td>
</tr>
<tr>
<td>
</td>
<td>
The customer visit home screen is displayed, which includes the “Actions” menu and also customer specific details including credit limit, balances and terms.
If the customer is on hold, a message will be displayed indicating this.
</td>
</tr>
</table>

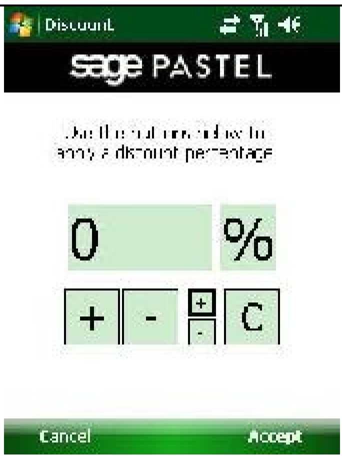
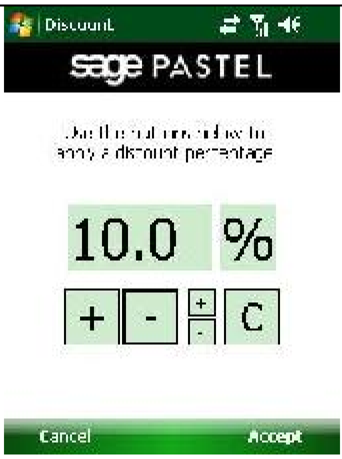
	To continue with either a sales order or delivery note (invoice), click on the "Actions" menu in the lower right hand corner of the screen. Three options will be displayed; • Delivery Note • Sales Order • Inventory Select the action you wish to continue with.

4.1 Customer Visit – Delivery Note

	After selecting “Delivery Note” from the “Actions” menu, you will be presented with the “New Delivery Note” home screen. To start adding items to the delivery note from your inventory, click on “Add”.
	After clicking on “Add”, the “Select Product” screen is displayed. To start searching for items, click anywhere in the “Search” input field. The onscreen keyboard will automatically open. To list all items in your inventory, click on “Search” without entering anything in the input field.
	A warning prompt will appear stating that it could take long to display all items associated with your warehouse or inventory. Click on “Yes” to continue.

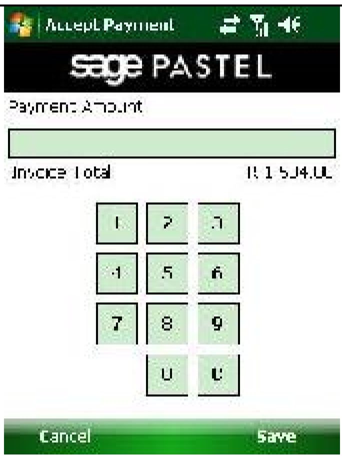
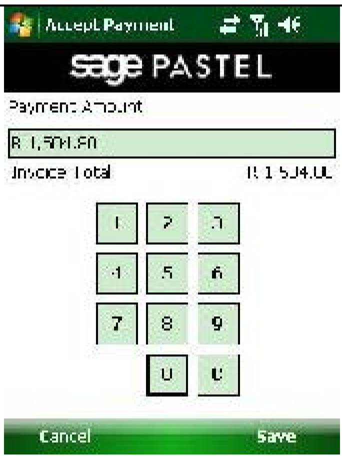
	All items in your warehouse or inventory will be displayed along with the quantity on hand. **You can also search for specific items by either the description or code. It functions the same way as searching for customers by name.**
	To select a product, click anywhere on the item description. When selected the item will be highlighted in green. To view additional details about the item, click on “Detail”. To return click on “Back”. To adjust the quantity of the selected item to be added to the delivery note, click on the up and down arrows next to the “Quantity” input field. To specify large quantities, you can use the mobile device’s numeric keyboard. Once the desired item has been selected and the quantity specified, click on “Select” to add the item to the delivery note.
	A prompt will appear asking if you would like to discount the item. Click on “No”. *(Discount per line item is covered under the “Customer Visit - Sales Order” section).* **The discount screen will only be displayed if you are allowed to apply discount.** **You can only apply discount to either individual line items or the delivery note as a whole and not to both.**

	The selected item will now appear on the delivery note. You can add more items following the same steps.
	If the client requires an order number, you can specify it in the “Customer Order Number” input field. The onscreen keyboard will automatically open when clicking anywhere in the input field. Once all desired items and the customer order number has been specified, complete the delivery note by clicking on “Save” in the lower right hand corner of the screen.
	A prompt will appear asking whether you would like to apply discount to the delivery note as a whole. Click on “Yes” to apply discount. **If you applied discount to individual line items, the prompt will not appear.** **The discount screen will only be displayed if you are allowed to apply discount.** **You can only apply discount to either individual line items or the delivery note as a whole and not to both.**

	The “Discount” screen will be displayed.
	Specify the desired discount percentage to be applied to the delivery note by using the “+” and “-“ icons. To clear click on the “C” icon. Once the percentage is specified, click on “Accept” in the lower right hand corner of the screen. To cancel applying discount, click on “Cancel”.
	A prompt will appear asking if you are sure you want to apply discount to the delivery note. If you click on “No” you will be taken back to the “Discount” screen. Click on “Yes” to apply discount to the delivery note.

<table>
<tr>
<td>
</td>
<td>Next you will be asked if you wish you wish to accept payment for the delivery note.

Click on “Yes” to accept payment for the delivery note.

You can only click on “No” if the client has a credit limit, in which case, if the client has enough credit left you will not be prompted to specify amount received, or only for the balance if insufficient credit is available.</td>
</tr>
<tr>
<td>
</td>
<td>The “Accept Payment” screen will be displayed.</td>
</tr>
<tr>
<td>
</td>
<td>Enter the amount received by clicking on the numeric icons. Click on “C” to clear entered value.

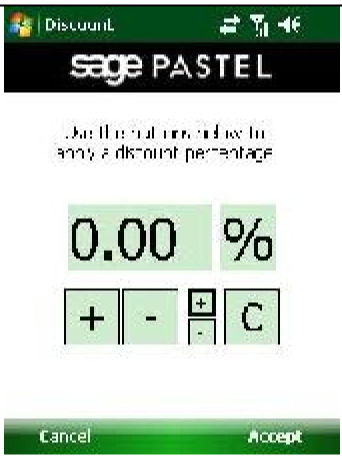
If you specify an amount in excess off or less than what is required, a warning message will be displayed.

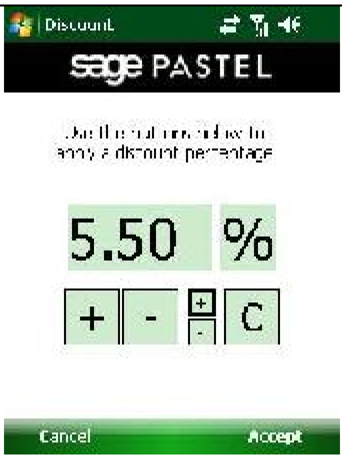
Once the correct amount has been specified, click on “Save” to continue.</td>
</tr>
</table>

	The “Signature” screen will be displayed.
	Using the stylus, a representative from the client that is authorized to sign delivery notes, signs on the screen. To accept the signature and continue, click on “Done”. To clear the signature on screen, click on “Clear”.
	A prompt will appear asking if you would like to print the document. **Ensure that the mobile printer is switched on before clicking on “Yes”.** To continue without printing, click on “No”. The delivery note is now complete and you will be taken back to the customer visit home screen.

4.2 Customer Visit – Sales Order

	After selecting "Sales Order" from the "Actions" menu, you will be presented with the "Capture Order" home screen. To start adding items to the sales order, click on "Add".
	After clicking on "Add", the "Select Product" screen is displayed. To start searching for items, click anywhere in the "Search" input field. The onscreen keyboard will automatically open. To list all items available, click on "Search" without entering anything in the input field.
	A warning prompt will appear stating that it could take long to display all available. Click on "Yes" to continue. If you have a very large number of available items, it could take a while to load. In such cases, it would be easier to search for the specific product name or code.

	All available items will be displayed. **You can also search for specific items by either the description or code. It functions the same way as searching for customers by name.**
	A prompt will appear asking if you would like to discount the item. Click on “Yes”. **The discount screen will only be displayed if you are allowed to apply discount.** **You can only apply discount to either individual line items or the delivery note as a whole and not to both.**
	The “Discount” screen will be displayed.

	Specify the desired discount percentage to be applied to the line item by using the "+" and "-" icons. To clear click on the "C" icon. Once the percentage is specified, click on "Accept" in the lower right hand corner of the screen. To cancel applying discount, click on "Cancel".
	A prompt will appear asking if you are sure you want to apply discount to the line item. If you click on "No" you will be taken back to the "Discount" screen. Click on "Yes" to apply discount to the line item.
	The selected item will now appear on the sales order. You can add more items following the same steps.

	If the client requires an order number, you can specify it in the "Customer Order Number" input field. The onscreen keyboard will automatically open when clicking anywhere in the input field. You will see that when creating a sales order, another option is now available, called "Delivery Date". Click on the arrow to open the calendar.
	Specify the desired delivery date using the calendar. To change months, use the forward and back arrows on the calendar. By default the current date will be selected. Select the date by clicking on the applicable day.
	Once all desired items have been added to the sales order and the delivery date and customer order number have been specified, continue by clicking on "Save". **You will notice that no discount prompt will appear in this example, as we applied discount per line item.** **If no discount per line item was applied, the discount prompt would have appeared as it did under the delivery note and the same procedure would have been followed.**

	The “Signature” screen will be displayed.
	Using the stylus, a representative from the client that is authorized to sign sales orders, signs on the screen. To accept the signature and continue, click on “Done”. To clear the signature on screen, click on “Clear”.
	A prompt will appear asking if you would like to print the document. **Ensure that the mobile printer is switched on before clicking on “Yes”.** To continue without printing, click on “No”. The sales order is now complete and you will be taken back to the customer visit home screen.

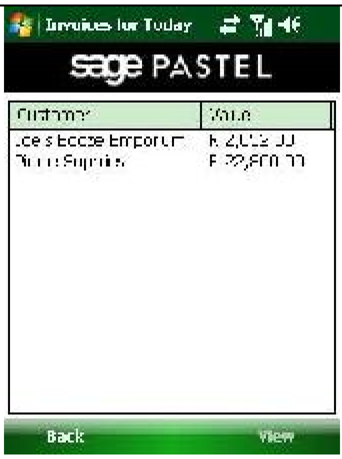
4.3 Suggested Orders

To be documented.

4.4 Customer Visit – Ending a Customer Visit, No Sale or Other

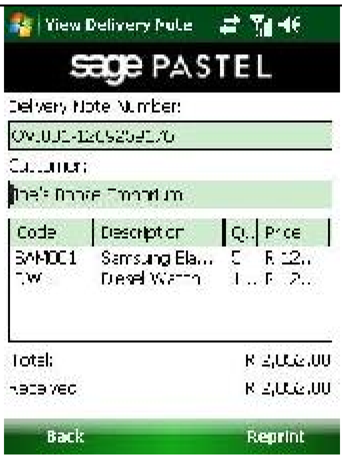
	After a delivery note or sales order has been completed, the customer visit is ended by clicking on "Done" on the "Customer Visit" home screen. When a customer visit is completed without making a sale; no delivery notes or sales orders were completed - you will be prompted to finish without performing any actions. To continue with the customer visit, click on "No", to end the customer visit, click on "Yes".
	If the customer visit was completed without performing any actions as described in the previous step, you will need to specify a reason. The reasons available will be determined by your organization. Select a reason by clicking anywhere on the reason description, then click on "Done" to end the customer visit.

5. Daily Delivery Note Summary

	To view a summary of all the delivery notes completed for the current working day, click on the "Delivery Notes" icon on the application home screen. A screen titled, "Invoices for today" will be displayed. To select a delivery note, click on the client name to highlight it, then on "View".

The selected delivery note will now be displayed.

To reprint the delivery note, click on “Print”, otherwise to return to the delivery notes summary, click on “Back”.



To reprint the delivery note, click on “Reprint”.

Ensure that the mobile printer is switched on before clicking on “Reprint”.

To return to the previous screen, click on “Back”.

6. Day End Report

To view a summary of all the delivery notes and sales orders completed for the current working day, click on the “Day End Report icon on the application home screen.

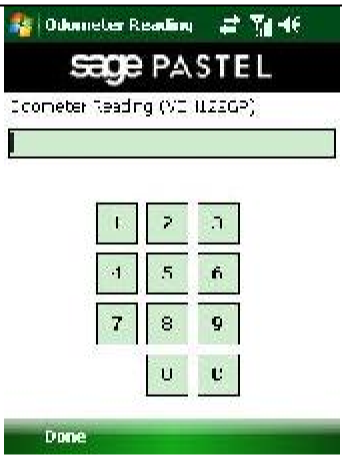
A summary of all transactions completed will be displayed.

To print the day end report, click on “Print”.

Ensure that the mobile printer is switched on before clicking on “Print”.

To return to the application home screen, click on “Back”.

7. Logout

	To logout of the application, click on "Logout". A prompt will appear asking to confirm whether or not you would like to logout. Click on "Yes" to continue.
	If you have a vehicle associated with your username, you will be required to specify your current odometer reading and click on "Done" in the lower left hand corner of the screen to continue.
	The application will synchronize with the server to ensure all data for the day is up to date.