iPad User Manual

Version 6.1

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1. General Information

1.1 Solution Overview

Inzant Sales is an intuitive product developed for mobile platforms and personal computers that will streamline an organisations sales and ordering process. It achieves its goals by catering for the entire sales process whether it be performing Stockcounts, Presentations, Campaigns, or simply ordering individual items requested by a client. All orders are created in real time and when complete they are submitted to the cloud where an order is automatically created and available to suppliers allowing more time for sales reps to focus on what they do best.

1.2 Revision Control

Revision Number	Date	Issued By	Checked By
5.7	13th Dec 2013	NK	SK
5.8	5th Dec 2014	SLK	SK
6.0	25 March 2015	DW	NK
6.1	28th September	SK	nk

1.3 Helpdesk and Support

For support enquiries please contact Inzant on:

Telephone: +61 2 4957 0281
Facsimile: +61 2 4913 5456
Email: support@inzant.com.au
Web: www.inzant.com.au

1.4 Icon Listing

The following table lists all icons used throughout the application and their associated function.

Function	Icon	Function	Icon	Function	Icon
Add		Add Items to Order		Associated order	
Back		Campaign		Cancel	
Clear Order		Contact Information		Edit	
Feedback		Financials		Forward	
Goods Return		Help		Information	
Location Information		Loyalty		Menu	
Multiple Orders		New Order		Notifications	
Order Comments		Order History		Presentation	
Product Category 1		Product Category 2		Product Category 3	
Products		Reports		Remove	
Retailer Custom Notes		Retailers		Retailer Category 1	

Retailer Category 2		Retailer Category 3		Retailer Notes	
Review Order		Sales Order Total		Save	
Statistics		Stocktake Order		Submit to Cloud	
Supplier Information		Sync Status		Wide Screen	

1.5 General Tips & Information about using the Inzant Sales App

1. There are some configuration items which are set by the administrator of the system and cannot be changed by the user. Some items discussed in this manual might not appear at on your system. If you have any concerns please contact your administrator or Inzant Support.

2. When creating a new order, always remember to select one of the following icons.

'Add Items to Order'		**'Campaigns'**	
'Stocktake Order'		**'Barcode'**	

3. It is possible to view the total $ value of a sales order by selecting the **'Sales Order Total'** icon on the **'Sales Order Review'** screen.

4. You can look up product information from the order screens by selecting the line and touching the **Product** icon.

5. When entering information using scroll wheel selectors or numerical keypad popups always remember to touch the **'Done'** button.

6. When attempting **to 'Add Items to Order'** if a selected product category does not display any products ensure that the correct suppliers are set up for the selected retailer.

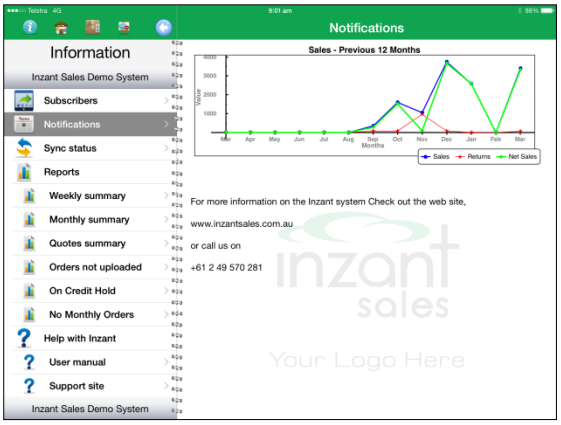
7. When attempting to edit a retailer, ensure that the **Edit** icon is selected before attempting to make any changes.

8. If for any reason your iPad becomes unresponsive and unable to turn on, perform a hard reset by holding both the **'Power'** and **'Home'** buttons on the device for 10 seconds.

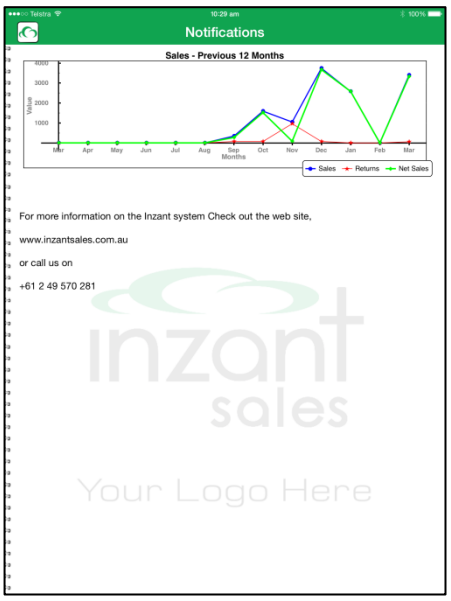
9. If for any reason a synchronisation fails, a popup will be displayed after 1 hour as a reminder to perform a full synchronisation.

10. Always remember to recharge your iPad overnight.

2. Screen Layout



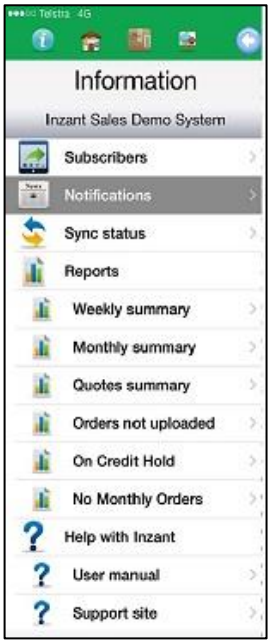
Inzant Sales - Landscape



Inzant Sales - Portrait

The application has two main zones:

2.1. Navigation Zone



The Navigation Zone is used to move between the different functions of Inzant Sales.

When using Inzant Sales in landscape mode the Navigation Zone is on the left side.

When using Inzant Sales in portrait mode the Navigation Zone is not shown. The Navigation Zone can be displayed by touching the **Menu** button.

Also the Wide Screen button , can be used in landscape to hide the Navigation Zone. The Menu button will allow it to be exposed again.

The navigation zone also allows filtering and searching depending upon which area of the App you are in.

2.2. Work Zone

The Work Zone is where Orders and other Data are collected.

When using Inzant Sales in portrait mode the Work Zone becomes whole screen.

The navigation zone can be displayed by touching the **Menu** button.

2.3. Navigating the App

The Inzant Sales App provides the ability to navigate or select actions by either using “Drop Down” Menus, or simple Icons to provide the functions.

Whilst navigating using the Icons provides a faster workflow, it can be beneficial when first using the App to use the “Drop Down” Menus until familiar with the workflows and the actual icons. When in Menu mode a “Drop Down” Menu will appear where the icons normally exist.

It is possible to change between Icon and “Drop Down” Menu mode in the iPad Settings to match your personal preference.

To move between the Work Areas of Inzant Sales we have provided the Icons/Menu in the top of the Navigation Zone. Simply touch the icon and you will be taken to those pages.

There are **four** different Work Areas:

Information Screens

This icon will take you to the information screens. This includes screens like the Notifications, Reports and Help screens. In the Work Zone of Retailer Details, this icon will take you to the basic details of the Retailer. In the Work Zone of Product Details the icon will take you to the screen which shows the basic details of that Product.

Retailer Screens

This icon will take you to the Retailer (or client) screens. This includes screens like the retailers details, order history and the screens used to take new orders.

Product Screens

This icon will take you to the Product screens. This includes screens that allow you to view the product catalogue including and configured suppliers and discounts.

Campaign Screens

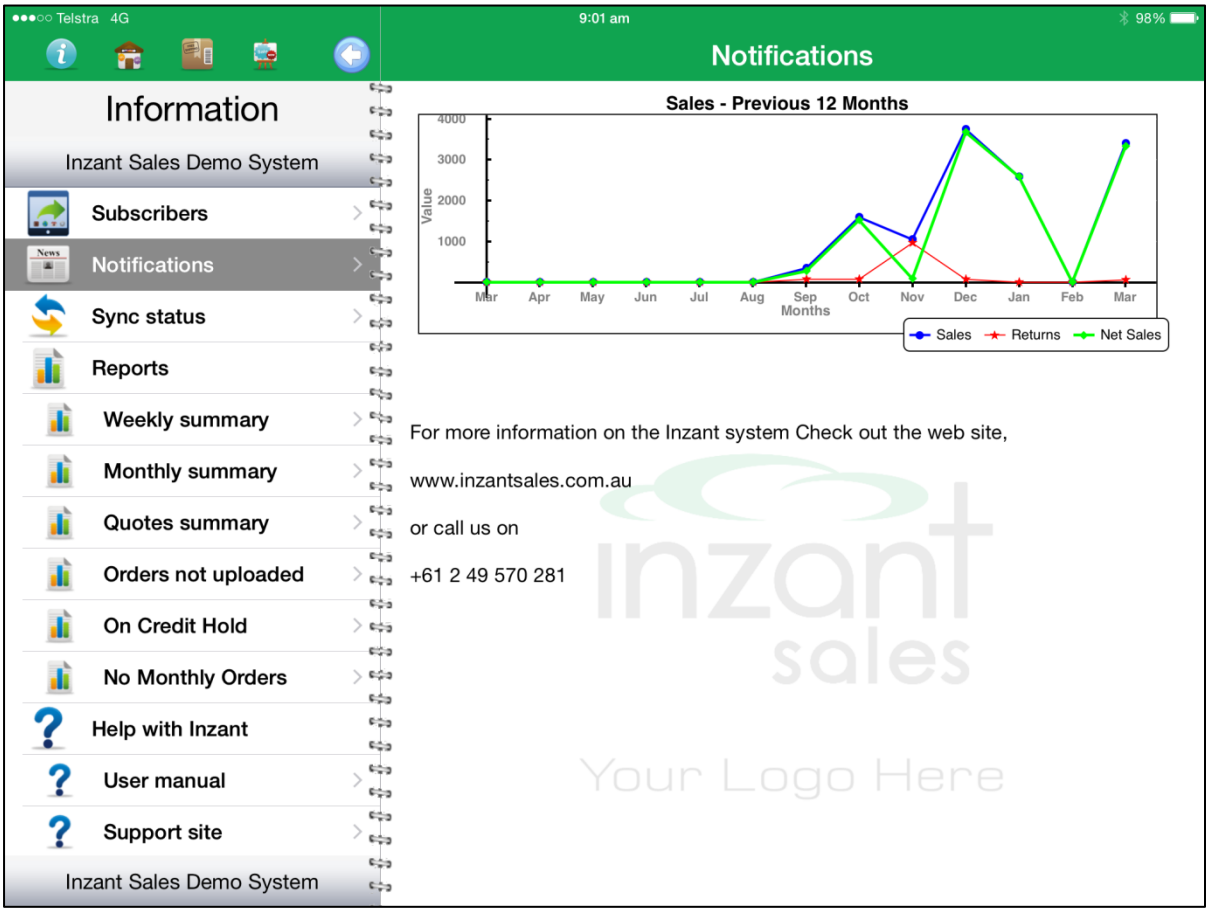
This icon will take you to the Campaign screens. This includes screens that allow you to view the image and PDF catalogues.

3. Information Screens

The information screens that can be viewed are listed in the Navigation Zone. To display a screen touch the screen name.

3.1. Notifications Screen

This screen allows for messages and notifications to be sent to all users of the system. New notifications are downloaded during the Sync process and can then be viewed on this screen. Following the daily Sync this screen will be displayed for you to review new notifications. The Sales Trend chart will always be displayed on this screen.



Walkthrough – Viewing Notifications

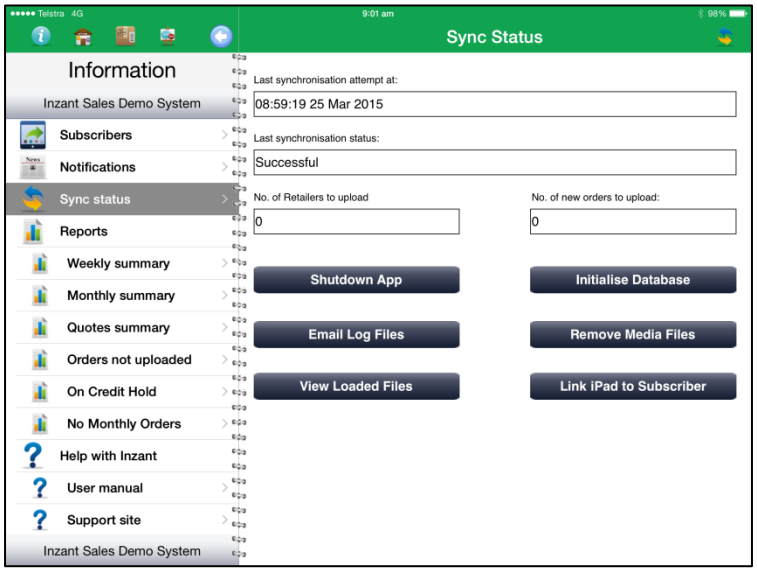
1 Touch the Information navigation icon.

2 Touch the Notifications icon or **"Notifications"** in the Navigation Zone

3 All current notifications along with the Sales Trend chart will then be displayed in the Work Zone

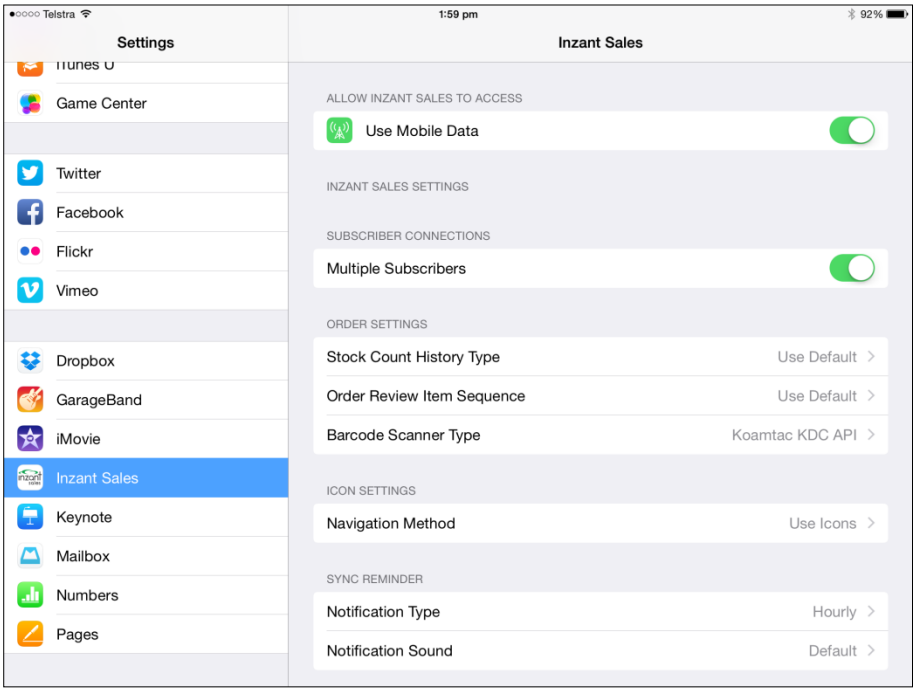
3.2. Sync Status screen

The Sync Status screen allows the iPad user to manually sync the Inzant Sales App to the cloud to download the latest changes. This screen also provides diagnostic information regarding the sync status, presentations and images loaded; and allows for log information to be sent to Inzant support Staff.

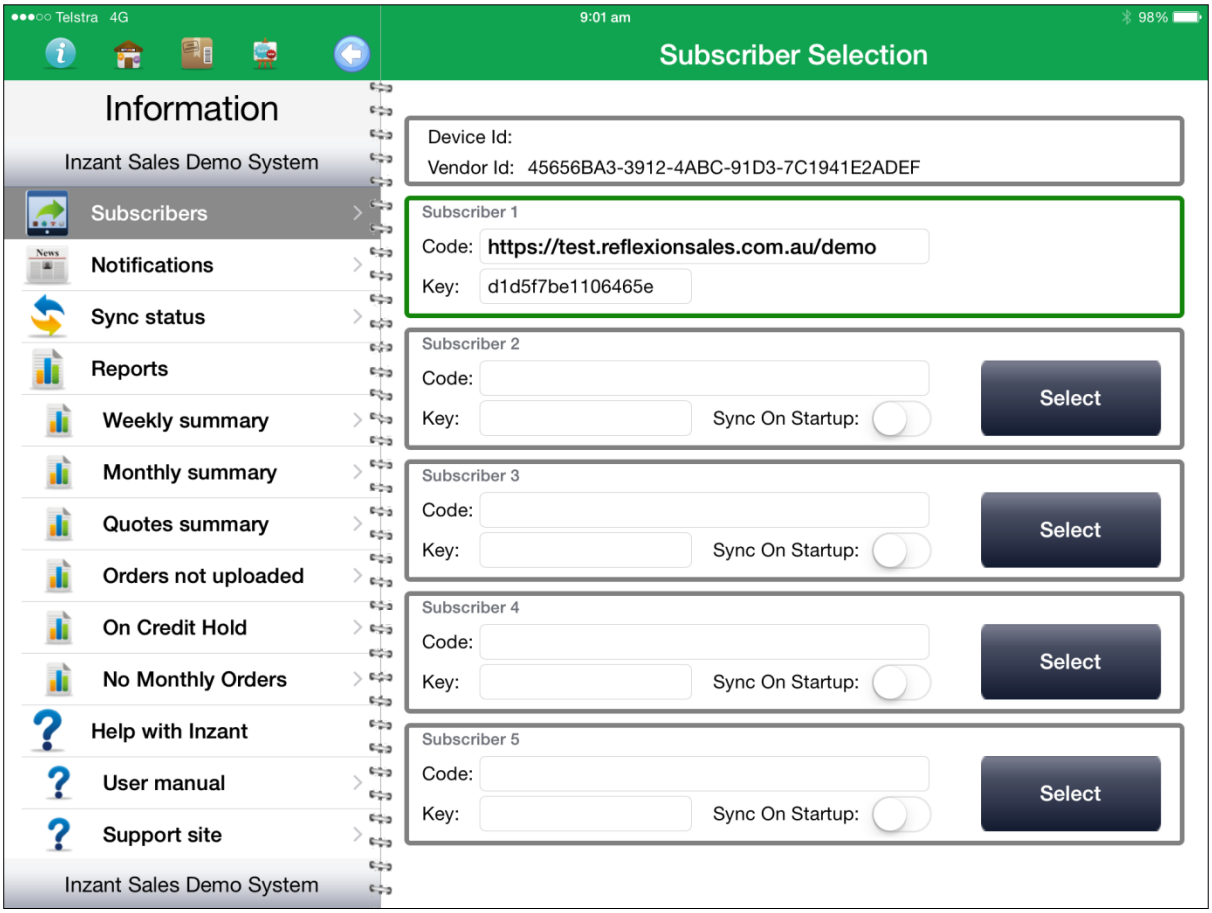


Link iPad to Subscriber

This is the button that will ink an iPad to an Inzant Sales System, a pop-up screen will appear where the log in details are entered. It is possible to configure for multiple subscribers and this can be chose in iPad settings under the Inzant Sales App as shown below:



If Multiple Subscribers are configured then a Subscriber Selection will be available on the Information screen as shown below:



Diagnostic Functions

Shutdown App

If asked by support staff to shut down the App, this may be done using this button.

Email Log Files

The Email Log Files button will generate an email with information that can help us diagnose any issues with the Inzant Sales App.

Initialise Database

This button deletes the database from the iPad after asking for a confirmation.

View Loaded Files

To view the presentation and image files loaded on the iPad this button will raise a popup listing of the file names.

Remove Media Files

This button will allow all PDF and image files associated with campaigns and products to be deleted after asking for a confirmation.

Note: The diagnostic functions should only be used if directed by Inzant support staff.

Walkthrough – Performing a Manual Synchronisation

1. Touch the Information navigation icon. 
2. Touch the Sync Status icon or "Sync Status" in the Navigation Zone 
3. To start the manual Sync touch the Sync Icon in the **top right of the Work zone** 
4. A screen will then be displayed showing that a synchronisation is occurring

Note: If the Sync is unsuccessful a popup will be displayed to indicate that the sync has not occurred and that a reminder to manually synchronisation will be issued in 1 hours' time.

Walkthrough – Link iPad to Subscriber

1 Touch the Information navigation icon.

2 Touch the Sync Status icon or "**Sync Status**" in the Navigation Zone

3 Tap the **"Link iPad to Subscriber"** button

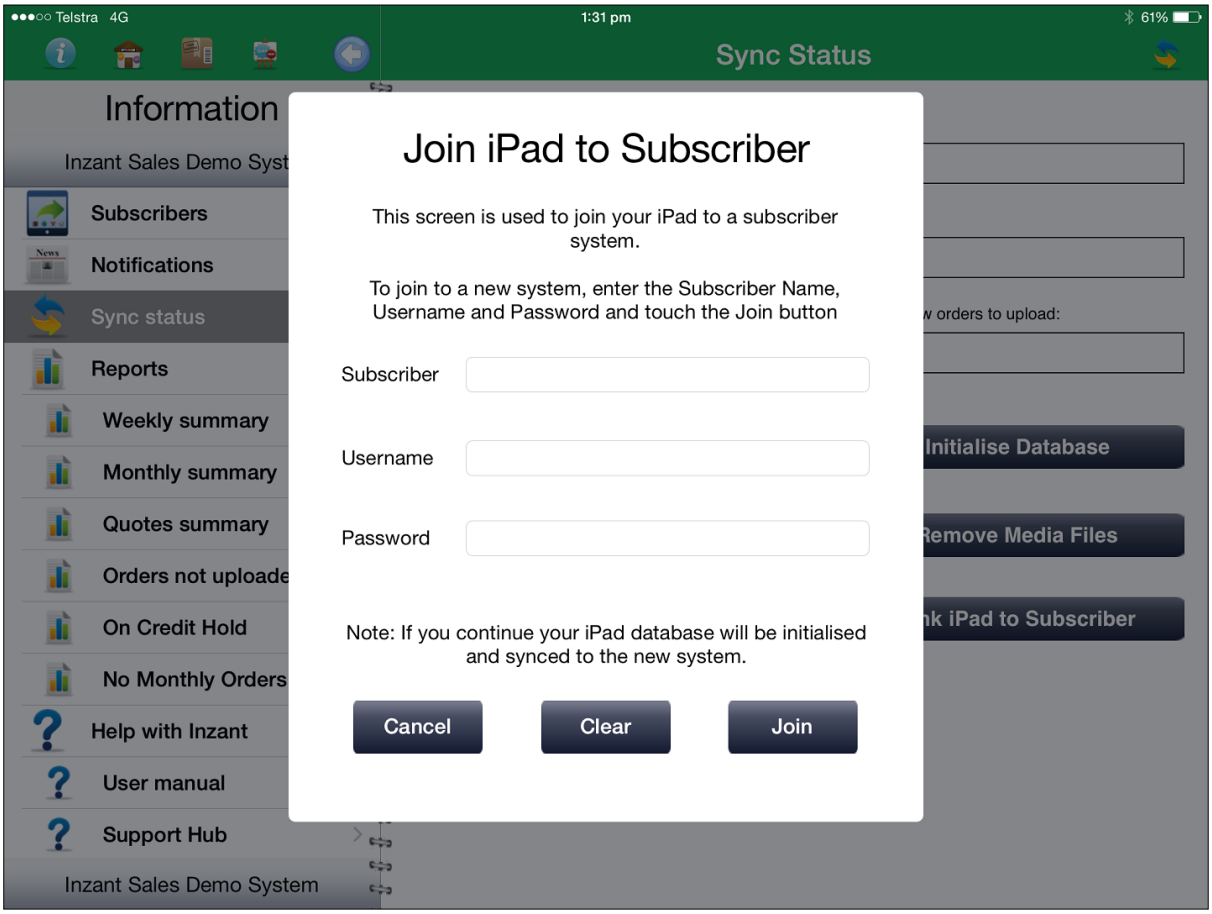
4 A Pop-up screen will appear where the username and password provided by your office are to be entered.

5 Then touch the **"Join"** button.

6 A screen will then be displayed showing that a synchronisation is occurring

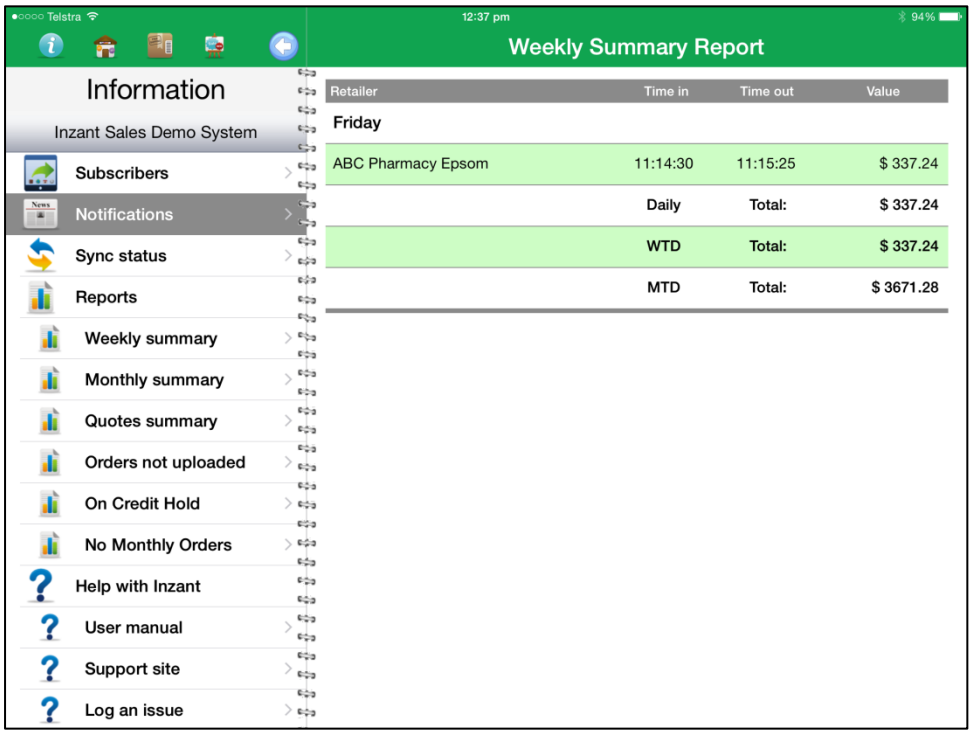
7 Once the App has synched you will land on the **Notifications** page of your companies system

Note: If the Sync is unsuccessful a popup will be displayed to indicate that the sync has not occurred and that a reminder to manually synchronisation will be issued in 1 hours' time.



3.3. Weekly Summary Report screen

The Weekly Summary report allows the iPad user to view a summary of the weekly orders. The summary report provides a diary style report that lists the orders on the days they are taken. It also provides daily, weekly and a monthly total of the orders taken.



Walkthrough – Viewing the Summary Report

1 Touch the Information navigation icon.

2 Touch **"Weekly Summary Report"** under the Reports list in the navigation in the Navigation Zone

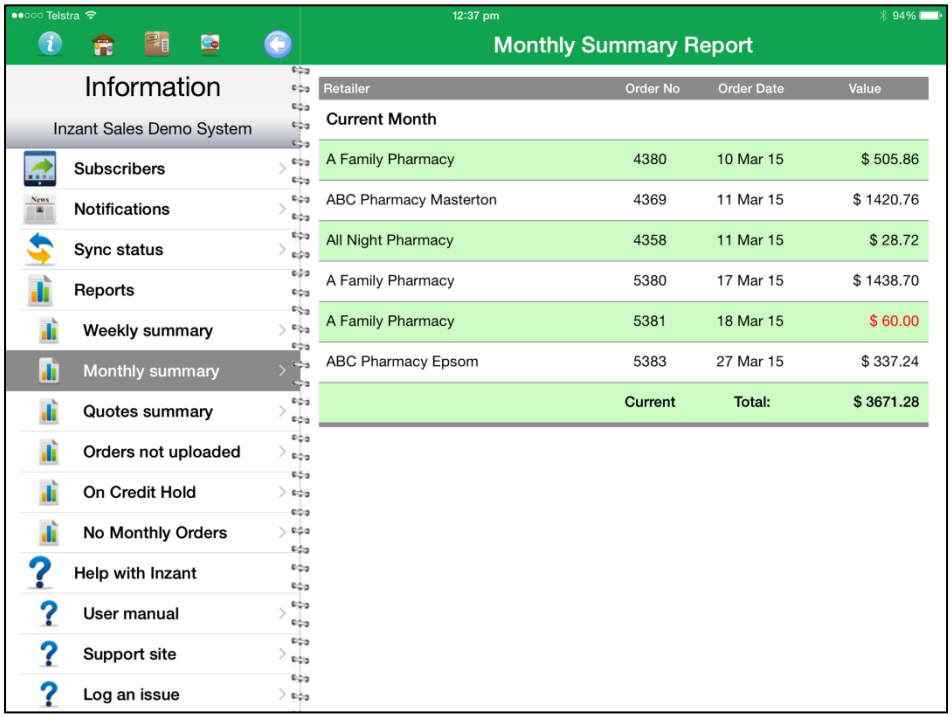
3 The weekly summary report will then be displayed in the Work Zone

4 Touching on a retailer in the list will cause the screen to change to the order history screen for that retailer.

Note: If there have been no orders placed in the current week then a MTD total only will be displayed.

3.4. Monthly Summary Report screen 

The Monthly Summary report allows the iPad user to view a summary of the last, current and future dated orders. The summary report provides a report that lists the orders on the days they will be processed. It also provides totals of the orders taken for the periods.



Walkthrough – Viewing the Monthly Summary Report

1 Touch the Information navigation icon. 

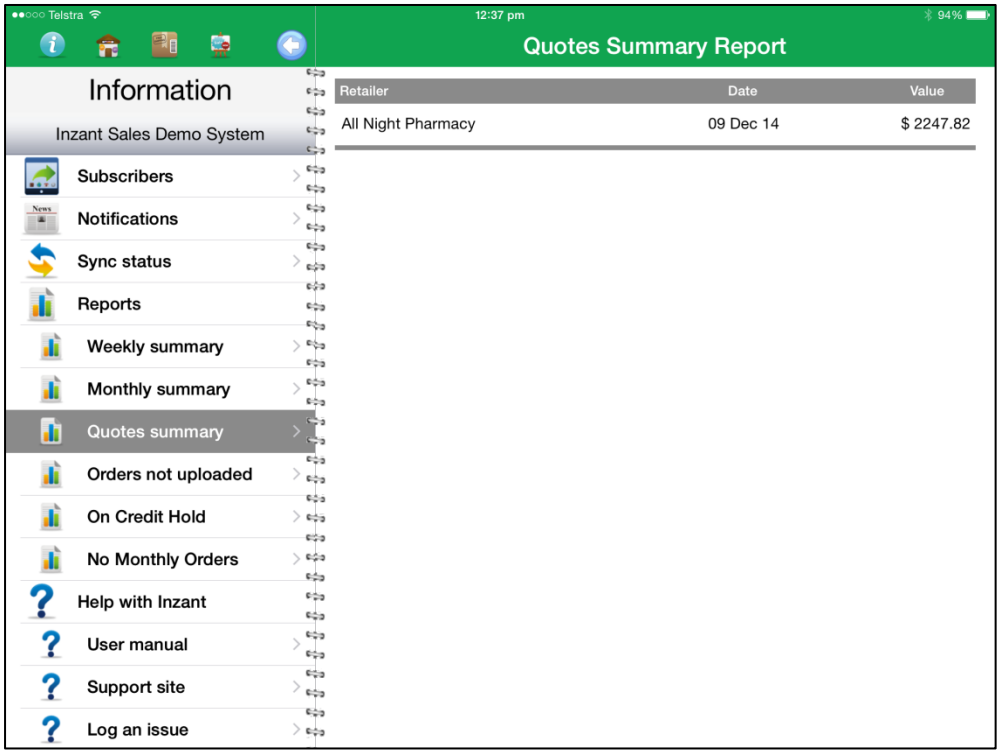
2 Touch **"Monthly Summary Report"** under the Reports list in the navigation in the Navigation Zone 

3 The Monthly Summary report will then be displayed in the Work Zone

4 Touching on a report in the list will cause the screen to change to the order history screen and display the selected order

3.5. Quotes Summary Report screen 

The Quotes Summary report allows users to view a list of any orders on the iPad that have been raised as quotes. A quote can be selected and edited from this page.



Walkthrough – Viewing the Quotes Summary Report

1 Touch the Information navigation icon. 

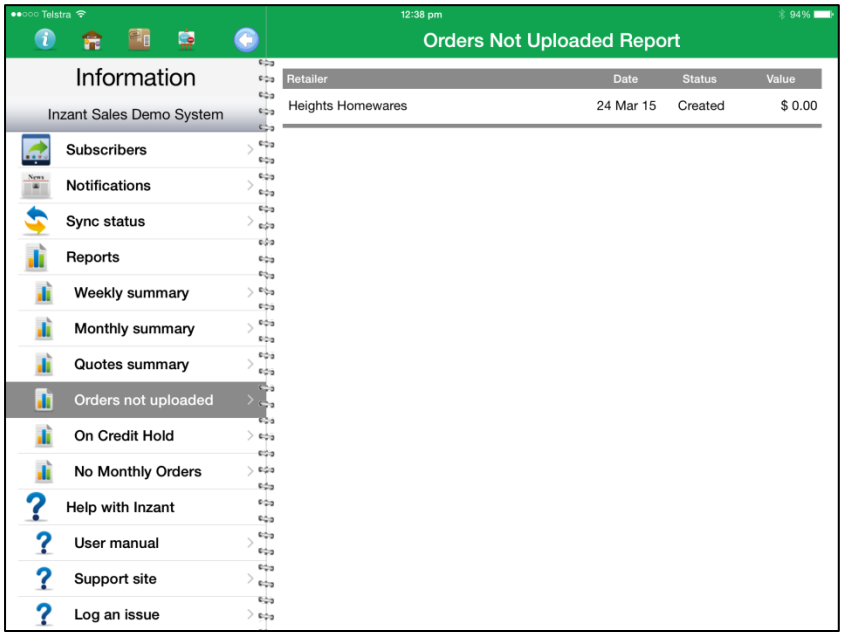
5 Touch **"Quotes Report"** under the Reports list in the navigation in the Navigation Zone 

2 The Quotes Summery Report will then be displayed in the Work Zone

3 Touching on a report in the list will cause the screen to change to the order history screen and display the selected order

3.6. Orders Not Uploaded Report screen

The Orders Not Uploaded report allows the iPad user to view a list of any orders on the iPad that have not been uploaded to the cloud services. The user can also call up the order by touching the order line in the listing. These orders may be edited from this screen.



The report details all orders that have not been uploaded from the iPad. The **Status** field indicates the following:

Created: An order has been started and not yet submitted to the cloud.

Submitted: An order that has been submitted to the cloud but not yet transferred. This is typically due to poor 3G/4G signal strength.

Walkthrough – Viewing the Orders not Uploaded Report

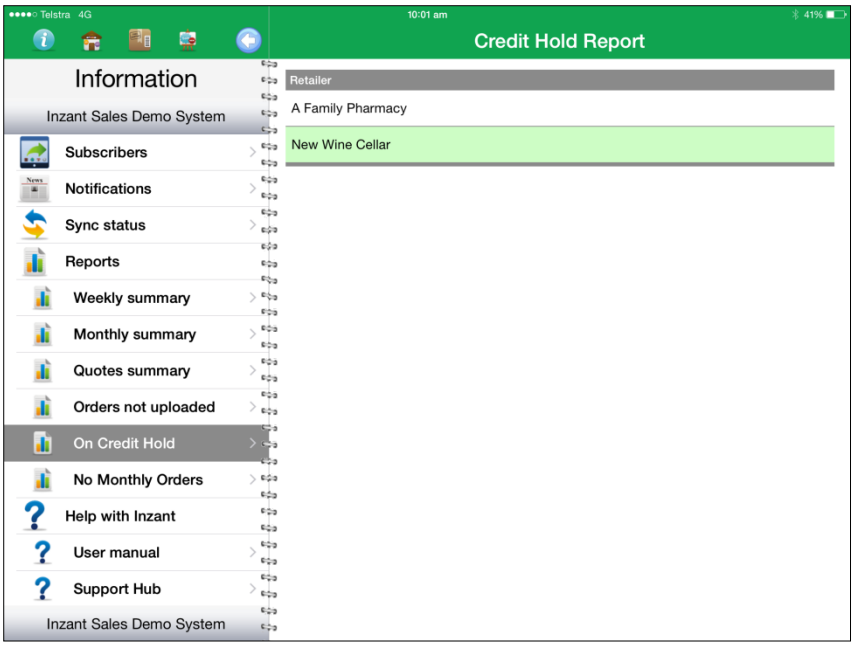
1 Touch the Information navigation icon.

2 Touch **"Orders not uploaded"** under the Reports list in the navigation in the Navigation Zone

3 The Orders Not Uploaded report will then be displayed in the Work Zone

4 Touching on a report in the list will cause the screen to change to the order review screen and display the selected order

3.7. On Credit Hold Report screen



Walkthrough – Viewing the On Credit Hold Report

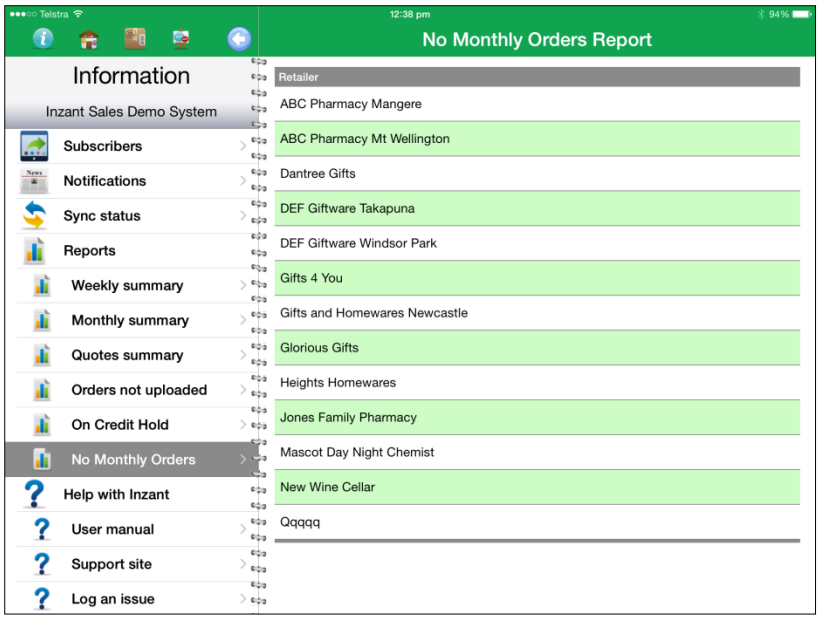
1 Touch the Information navigation icon. 

2 Touch **"On Credit Hold"** under the Reports list in the navigation in the Navigation Zone 

3 The Retailers who are on Credit hold will then be displayed in the Work Zone

4 Touching on a Retailer in the list will cause their details to be displayed

3.8. No Monthly Orders Report screen



Walkthrough – Viewing the No Monthly Orders Report

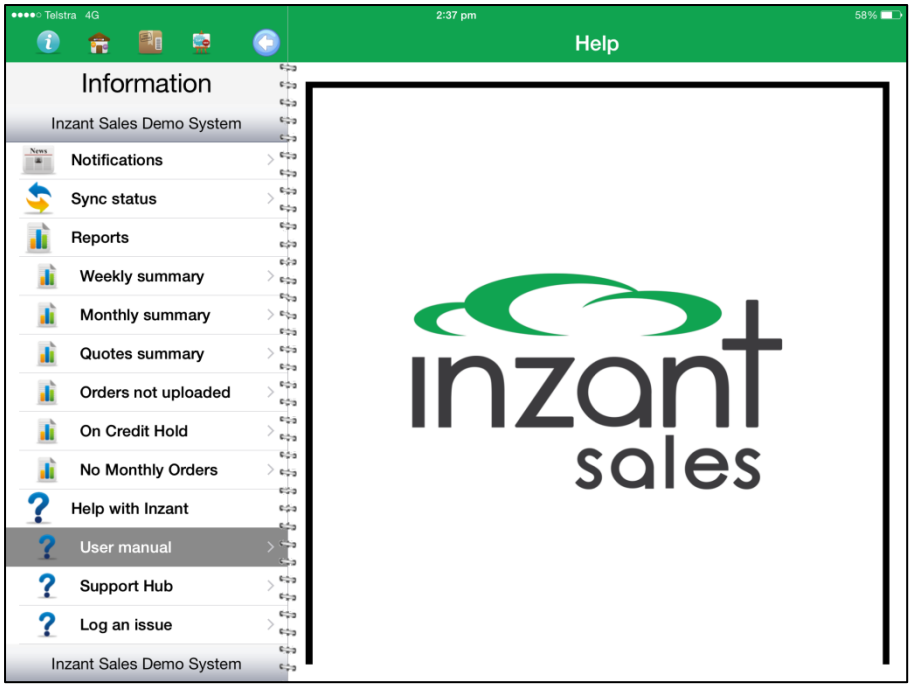
1 Touch the Information navigation icon. 

2 Touch **"No Monthly Orders"** under the Reports list in the navigation in the Navigation Zone 

3 The No Monthly Orders report will then be displayed in the Work Zone

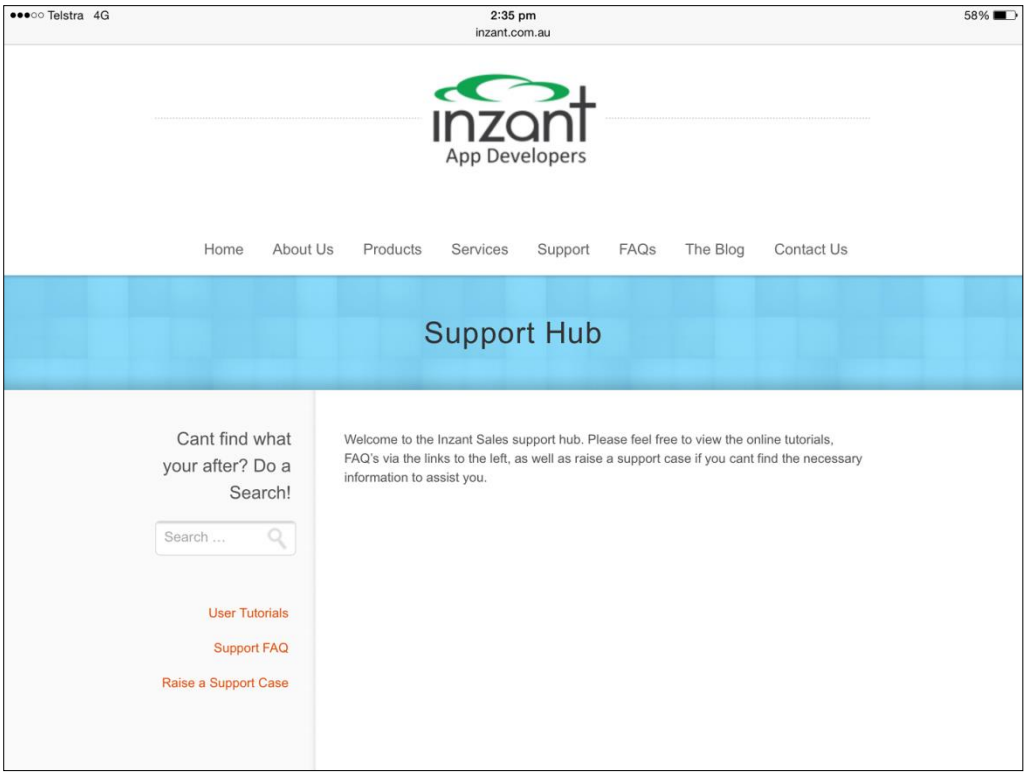
4 Touching on a report in the list will cause the screen to change to the Retailer Details

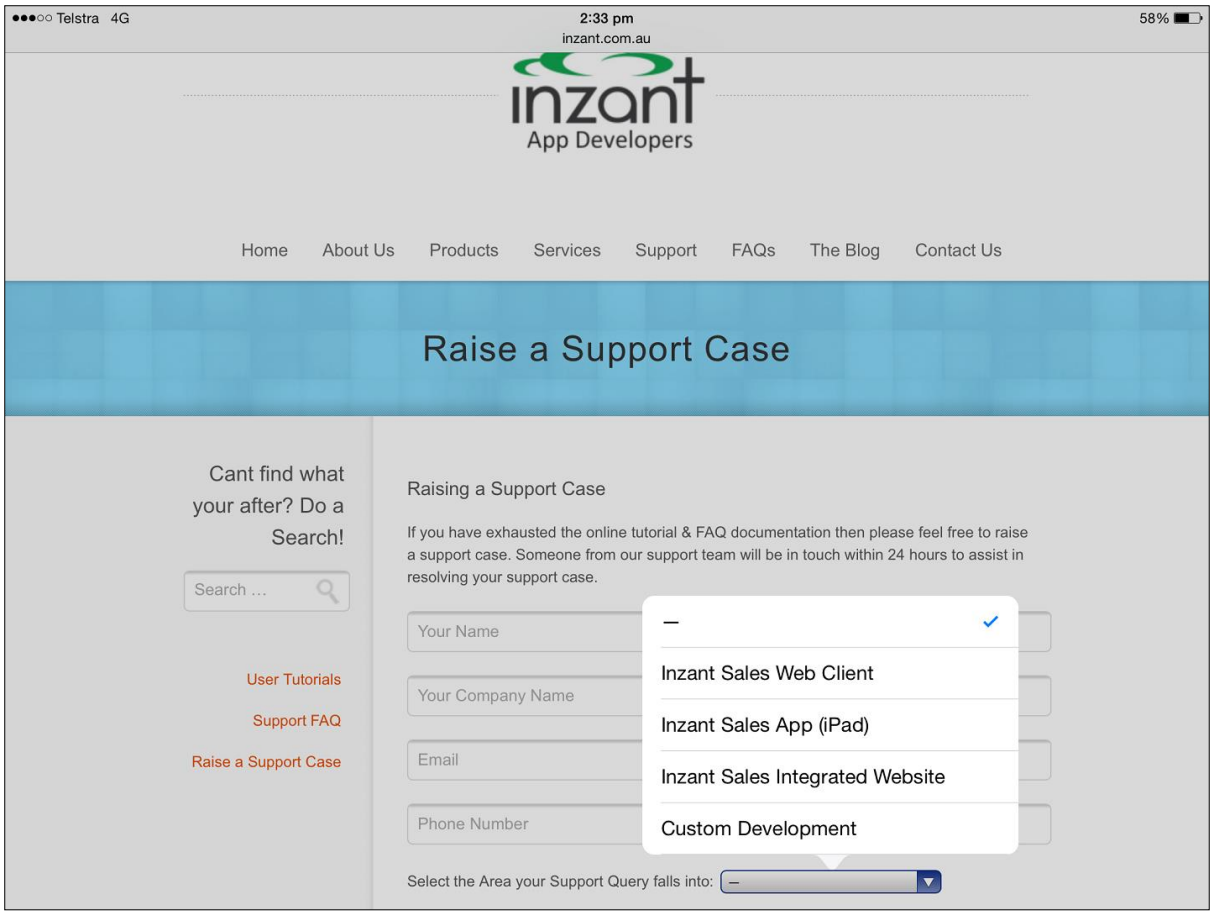
3.9. Help with Inzant



As shown above, there are 3 types of Help material:

- User Manual – online document giving general user instructions
- Support Hub – FAQ's and tutorials
- Log an Issue – Allows the user to raise a Support Case





Walkthrough – Accessing Help Documentation

1. Touch the Information navigation icon. 

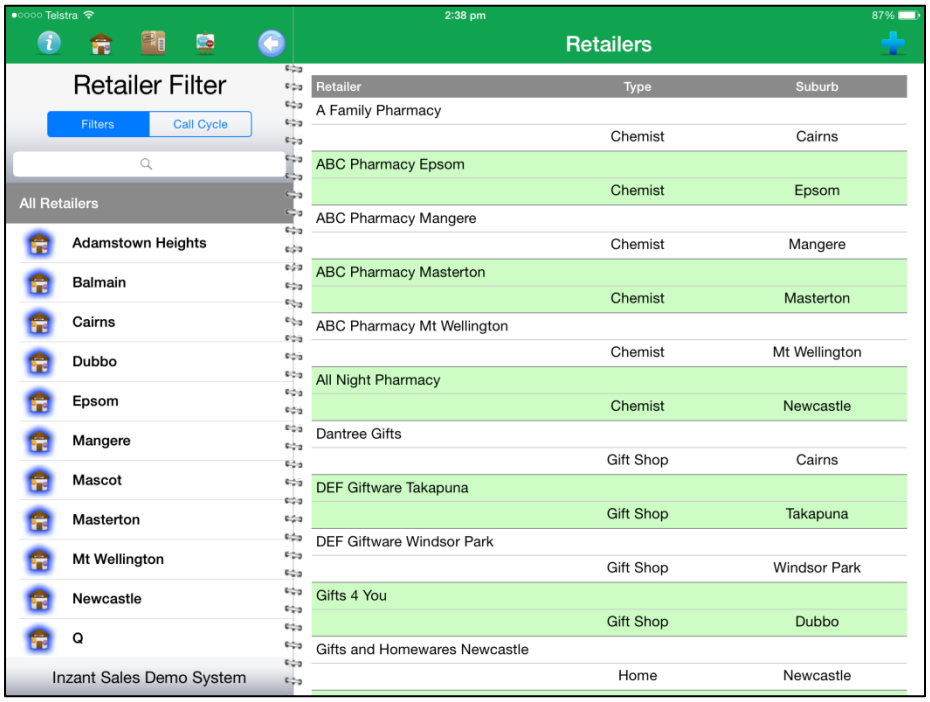
2. Select required page under **"Help with Inzant"** in the Navigation Zone

3. All Help material will then be displayed in the Work Zone or launch a web browser if required.

4. Retailers Screen 

The Retailers screen contains all information regarding the retailers and is the main work area of Inzant Sales. From these screens retailer information can be viewed and modified, order history viewed and new orders and credits created.

New retailers may also be created from this screen.



Navigation Zone

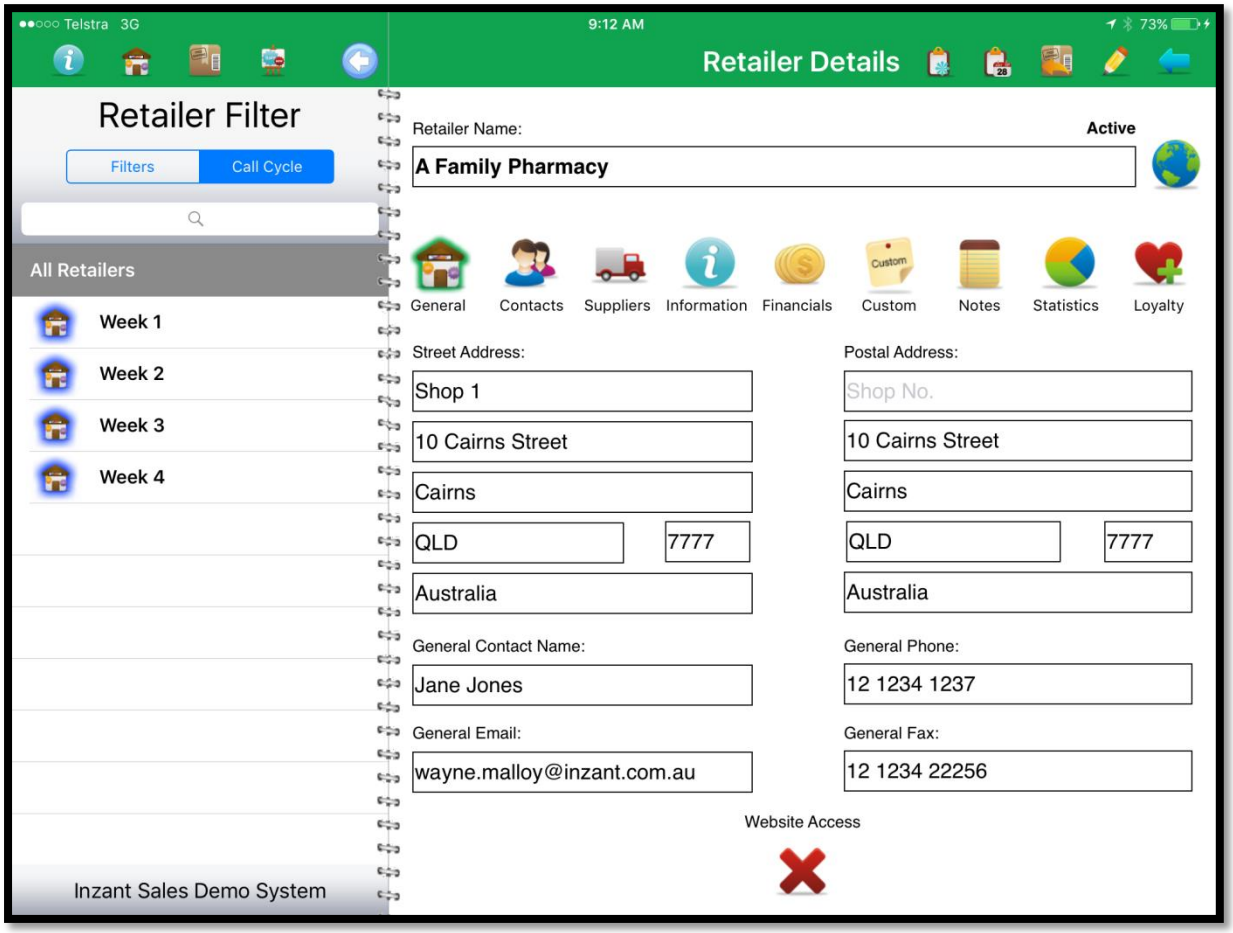
i. The Navigation Zone provides two methods of filtering the list of retailers.
ii. There is a drop down filter that allows filtering of the retailer list based on the configured filter settings. When a category is chosen, if there are further sub-categories then they are displayed. This allows the retailer list to be filtered in a “drill down” manner.
iii. A search zone is also provided that allows for the retailer name or suburb to be entered for searching. The search will match on partial words found anywhere in the retailer name or suburb.

Work Zone

As mentioned above the Work Zone displays the filtered list of retailers. Initially the retailer listing will be showing all retailers, this may then be filtered further using the Navigation Zone. Touching a retailer from the listing will show the Retailer Contact Details screen.

4.1. Selected Retailer

After selecting a retailer a screen will be displayed showing the details specific to a retailer. The first screen displays all the contact details for the selected retailer as shown in the following figure. Additional information can be viewed by touching the section icons.



A number of functions are available from the retailer screen:

1. To return to the retailer listing touch the back icon in the top right of the screen 

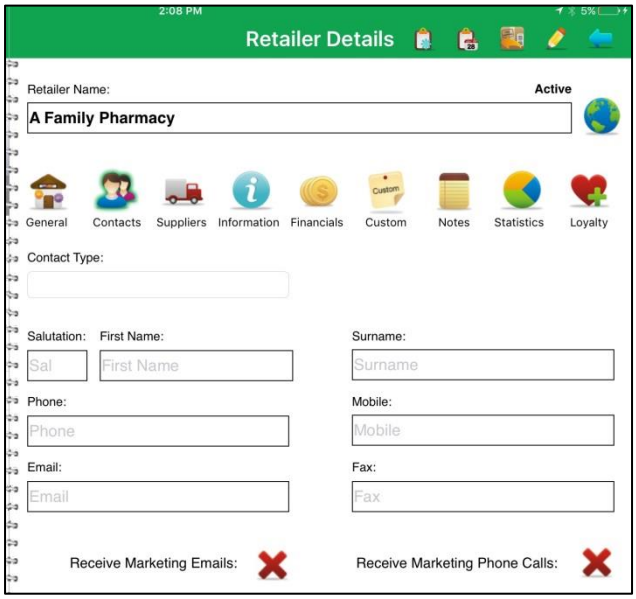
2. To enter edit mode touch the edit icon in the top right of the screen 

3. To review previous orders touch the Order History icon in the top right of the screen 

4. To create a new order touch the New Order icon in the top right of the screen 

5. To create a new return order touch the Return Order icon in the top right of the screen 

Contacts Information



Touch the Contacts Information icon to access this information.

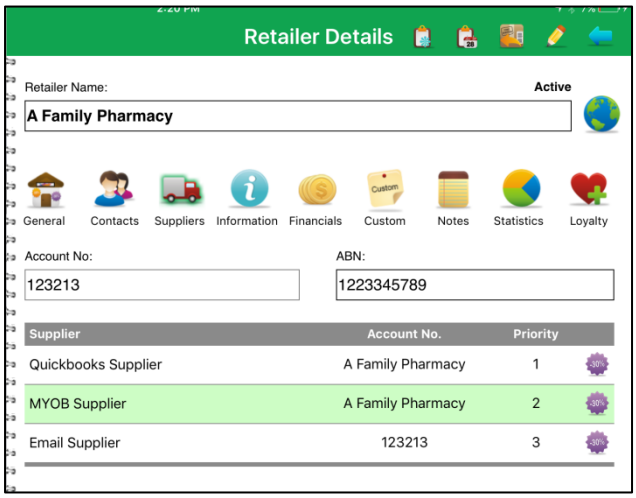
This section allows access to all contacts stored against a single retailer. Each contact is stored against a "Contact Type" and can be searched using a selector wheel.

Each Inzant Sales system can have unlimited contact types.

This is where it can be selected if a contact receives marketing emails and/or marketing phone calls.

Supplier Information

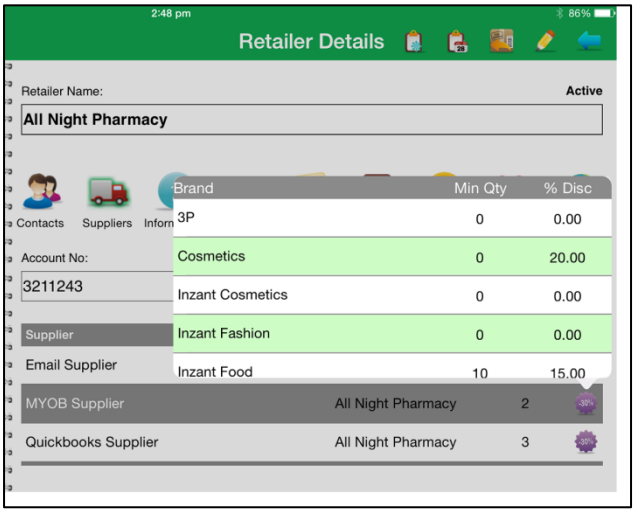
Touch the Supplier Information icon to access this information.



This section lists details such as internal account number, ABN and a list of all active suppliers with their associated account numbers and priority as an order supplier.

Supplier priorities determine which supplier will be chosen should a product be available from multiple suppliers when placing an order.

Retailer Specific Discounts

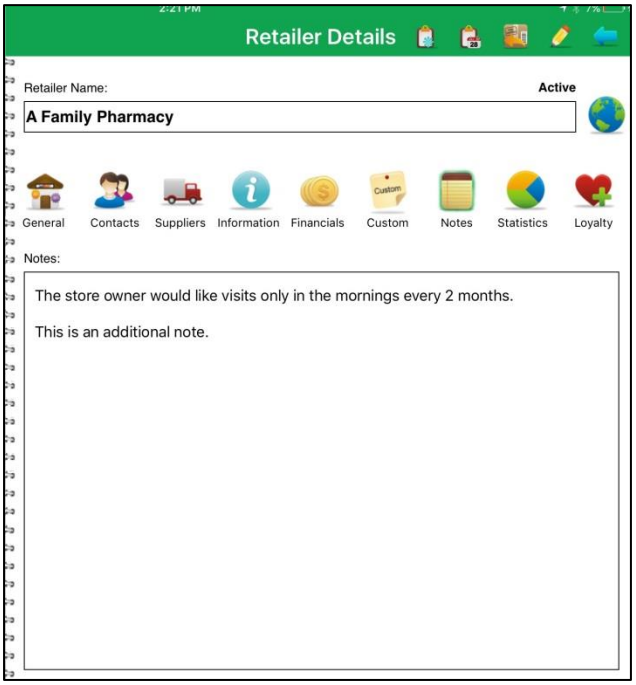


View the discounts by touching the Discount icon

From the financials page of a retailer it is possible to view discounts specific to the viewed retailer.

This will display the discount value that will be applied should the retailer order greater than the minimum quantity of items for a product in a specific Brand (or line).

Notes Information



Touch the Notes icon to access this information.

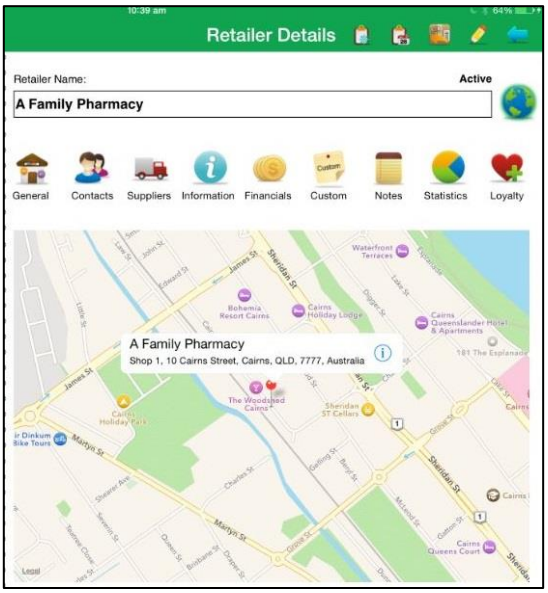
This section lists details such as the retailer type, retail chain, availability, retailer grade, visit cycle, territory and general notes.

Custom Information

Touch the Custom icon to access this information.

This section lists details associated with any custom fields that have been configured.

Location Information



Touch the Location icon to access this information.

This section displays an interactive map showing the physical location of the retailer.

Credit Hold Notifications

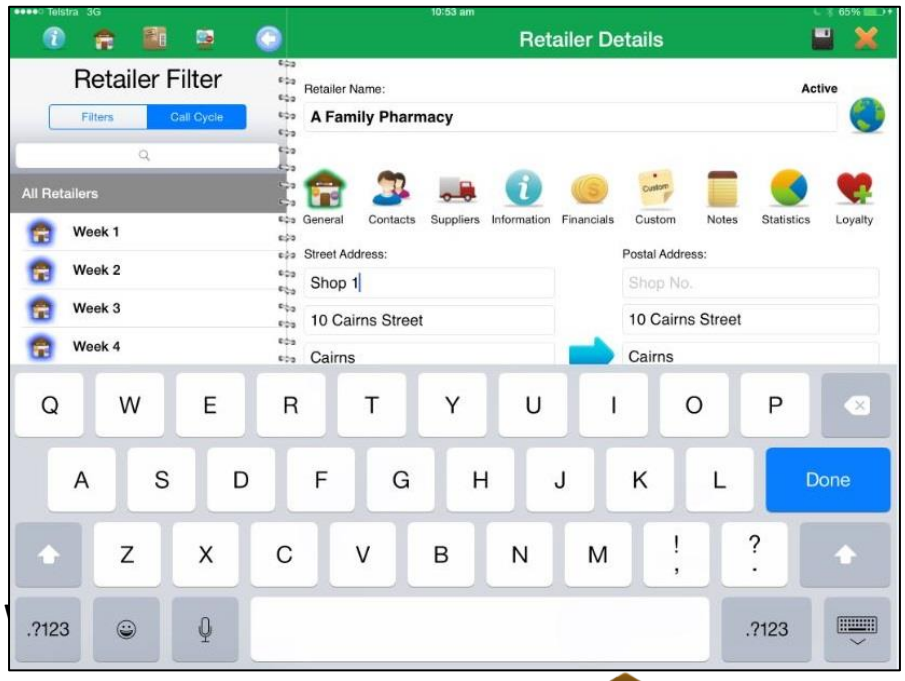
At times a retailer may be on **"Credit Hold"** meaning that new orders should not be processed for the retailer until the situation is resolved.

When a customer is placed on credit hold a notification will be displayed at the top of the retailer details screen highlighted in red stating **"On Credit Hold".**

New orders can still be taken and submitted to the cloud however these orders will not be processed once reaching the cloud. To process these orders once the credit hold status has been removed a user must log in to the Inzant Sales web interface and manually process the order.

4.2 Edit Retailer

From the selected retailer screen it is possible to update any details that may have changed whether it is information such as contact details, financial details, general details or the addition, removal or modification of suppliers and associated account numbers.



1 Touch the Retailer navigation icon. 

2 Filter the retailer list using the Navigation Zone search or filter and select the retailer from the list

3 Touch the **Edit** icon in the top right of the Work Zone 

4 Select the field to update, and enter the new information. Depending on the type of information either a keyboard, numerical keypad or selection wheel will be displayed

5 The adding of the retailer may be cancelled by touching the cancel icon. 

6 Save by touching the Submit to Cloud or Save icon in the top right of the Work Zone. The icon displayed will depend on how your system is configured.

 or 

Walkthrough - Add a Supplier for a Retailer

1. From the Supplier screen, touch the edit icon in the top right of the Work Zone 

2. Touch the '*Add*' icon

3. Select the supplier from the popup selector and touch '*Done*'

4. The supplier is then added to the supplier listing at the bottom of the details pane

5. Enter the account number and a priority for the supplier.

6. The adding of the retailer may be cancelled by touching the cancel icon.

7. Save by touching the Submit to Cloud icon in the top right of the Work Zone. or

Walkthrough - Edit a Supplier for a Retailer

1 From the Supplier screen, touch the edit icon in the top right of the Work Zone

2 Modify the supplier account number and priority.

3 The adding of the retailer may be cancelled by touching the cancel icon.

4 Save by touching the Submit to Cloud icon in the top right of the Work Zone.

Walkthrough - Delete a Supplier for a Retailer

1 From the Financials screen, touch the edit icon in the top right of the Work Zone

2 Touch the supplier to be deleted from the supplier listing at the bottom of the screen

3 A 'Delete' button will then become active, touch this button

4 A popup will be displayed requesting confirmation, to confirm touch '*Delete*' or touch '*Cancel*' to discontinue the operation

5 The adding of the retailer may be cancelled by touching the cancel icon.

6 Save by touching the Submit to Cloud icon in the top right of the Work Zone.  or 

4.3 Add Retailer

A new retailer may be added to the system from the Retailer screen. This allows for entry of all retailer information and will be uploaded to the cloud services.

Walkthrough - Adding a Retailer

1 Touch the Retailer navigation icon. 

2 Touch the Add icon in the top right of the Work Zone 

3 Enter all the retailer information, to select a field to enter information into, simply touch it. Depending on the information type a keyboard, numerical keypad or selection wheel will be displayed.

4 Retailer detail information is divided into 9 separate sections. Not all fields are editable by the user, some are System Configuration Settings.

a.  Contact Details information such as physical and postal addresses, primary contact name, phone numbers and email.

b.  Supplier Information such as internal account number, ABN and a list of all active suppliers and associated account numbers.

c.  Information Details such as the retailer type, retail chain, availability, retailer grade, visit cycle, territory and general notes.

d.  Financials. Includes terms, Credit Limit Account balance and custom fields.

e. 

Custom notes information about a retailer, the custom fields are defined by the Inzant team to your requirements.

f. Notes information about a retailer. General information in a free format.

g. Statistics. Contains Business Intelligence

h. Loyalty. Shows Loyalty program relevant to the Retailer.

i. Location information displaying an interactive map showing the physical location of the retailer.

5 The adding of the retailer may be cancelled by touching the cancel icon.

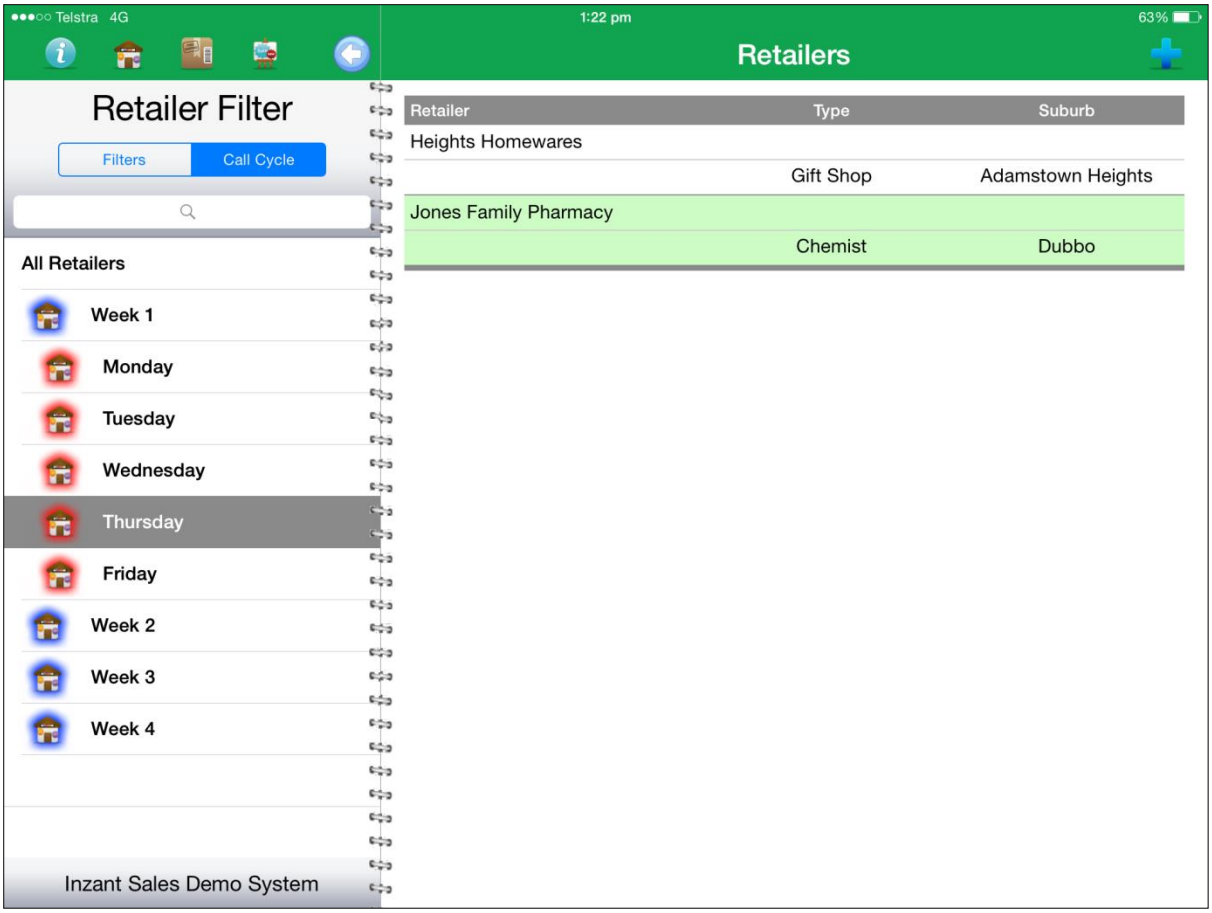
6 Save by touching the Submit to Cloud icon in the top right of the Work Zone. or

Walkthrough – Add a Contact

1. From the Supplier screen, touch the edit icon in the top right of the Work Zone
2. Select the Contact type from the selector wheel
3. Enter Contact Details information such as name, phone numbers and email.
4. Check if they are to receive marketing emails and /or phone calls.
5. Save by touching the Submit to Cloud icon in the top right of the Work Zone.

4.4 Call cycle

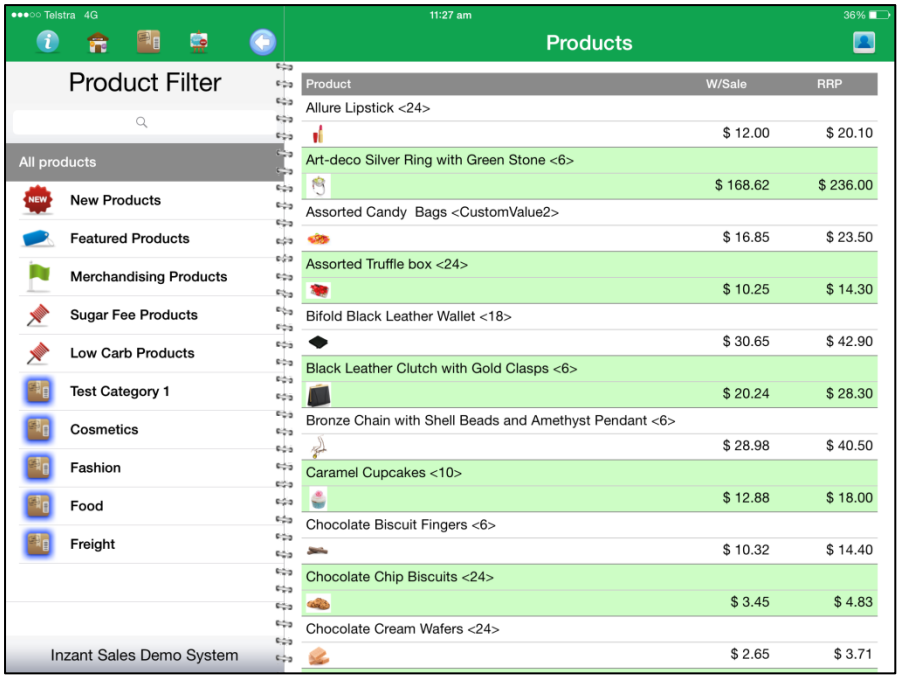
From the Retailers screen the planned Call Cycles to Retailers can be displayed as shown below.



This screen is for information only and cannot be edited by the user.

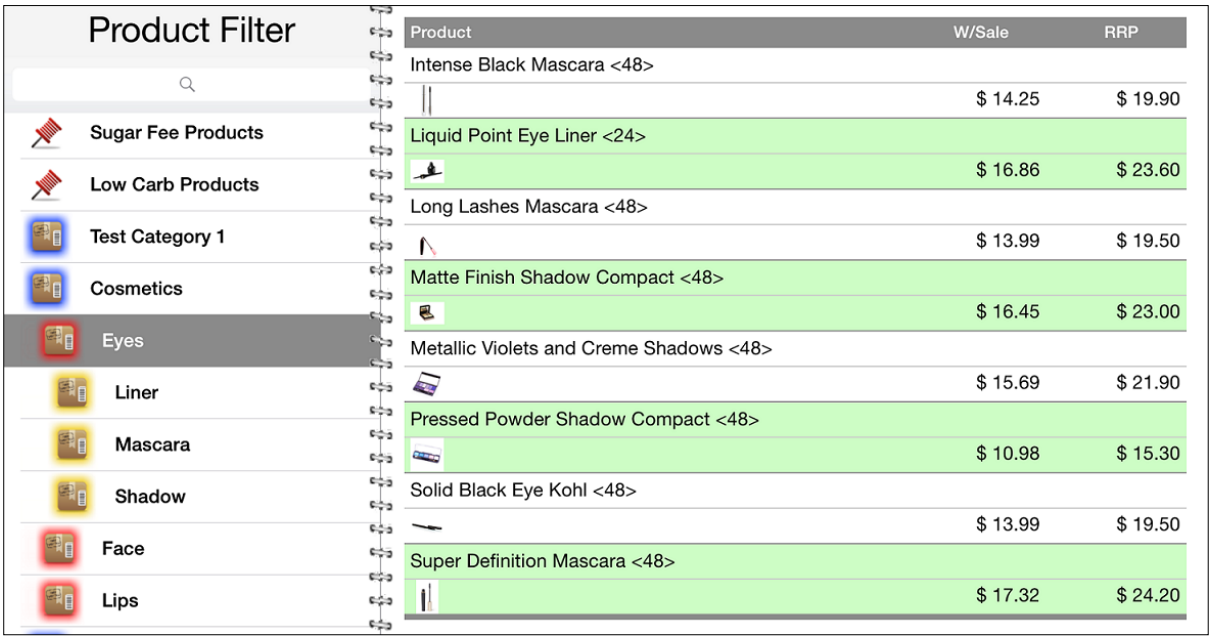
5 Products screen

The Product screen is an information screen that allows you to view all the products in the product. It displays basic product information as well as which suppliers carry the product and any discounts that are available for the products.



The Navigation Zone allows filtering and searching of products and the Work Zone displays the list of products that can be viewed. New, Featured and Merchandising have separate categories as shown in the summary above. Product categories associated with the icon are those which have specific characteristics or a part of a special group.

General products are associated with the icon but may have up to three levels as shown below:



Navigation Zone

The Navigation Zone provides two methods of filtering the list of products.

There is a drop down filter that allows filtering of the product list based on the product categories. When a category is chosen, if there are further sub-categories then they are displayed. This allows the product list to be filtered in a “drill down” manner.

There are also quick links to the New Products, Featured Products and Merchandising Products product listing.

A search zone is also provided that allows for the product name or code to be entered for searching. The search will match on partial words found anywhere in the product name or code.

Work Zone

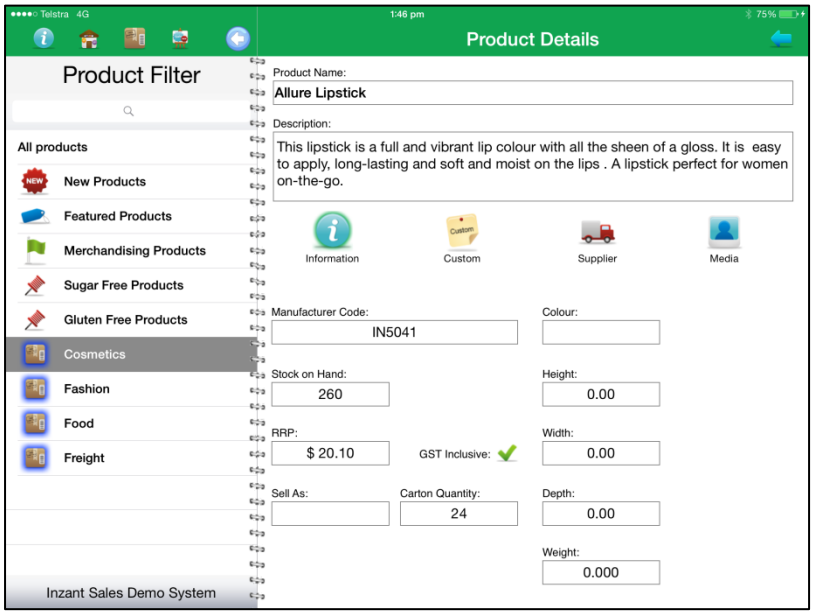
As mentioned above the Work Zone displays the filtered list of products. Initially the product listing will be empty until a selection is made by using the Navigation Zone. Touching a product from the listing will show the Product Details screen.

Image Display 

Touching the Image icon will load the currently filtered products in the Image presentation screen.

5.1 Product Details screen

The Product Details screen provides detailed information about the product including the supplier, stock, pricing and dimensions.



Product Image

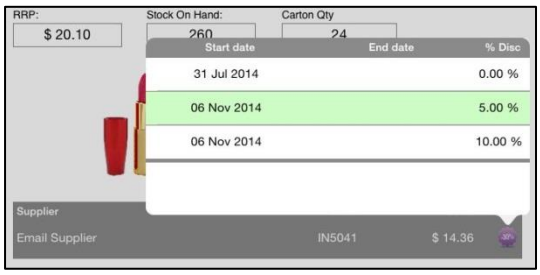
Touching the Media icon will display the product image if available.

Double tapping the product image will cause the image to be zoomed to a larger size. Double tapping again will return to the normal display.

To return to the product listing touch the back icon in the top right of the screen 

Product Discounts

It is possible to view the discounts that are available for the product from each Supplier. The Supplier must first be selected from the Product Details screen.

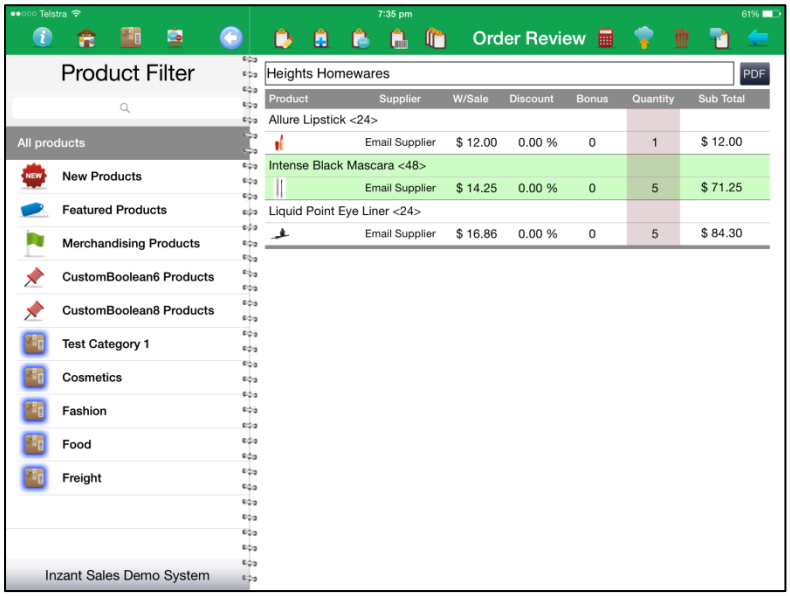


View the discounts as shown above by touching the discount icon 

6 Orders

The system enables orders to be created in a number of ways such as simply adding items, creating orders from stock counts, barcode scanning products and through the presentation mode.

An order is started from the retailer screen and can be continually added to or modified until submitted to the cloud for processing.



Walkthrough - Initiating an Order

1 Touch the **Retailer** navigation icon. 

2 Filter the retailer list using the Navigation Zone search or filter and select the retailer from the list

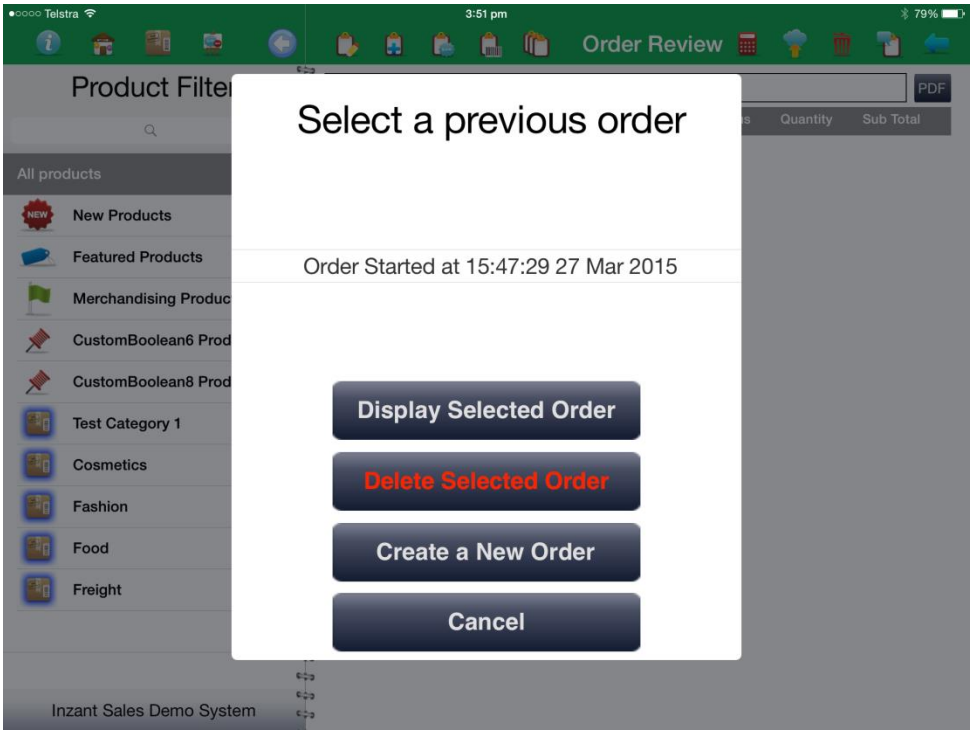
3 Touch the **'New Order'** button 

4 This will display the Order Review Screen that is initially empty until products are added to the order

The Order Review screen contains a number of new icons to select the different order entry modes and other features.

This section will deal in detail with these icons and their function.

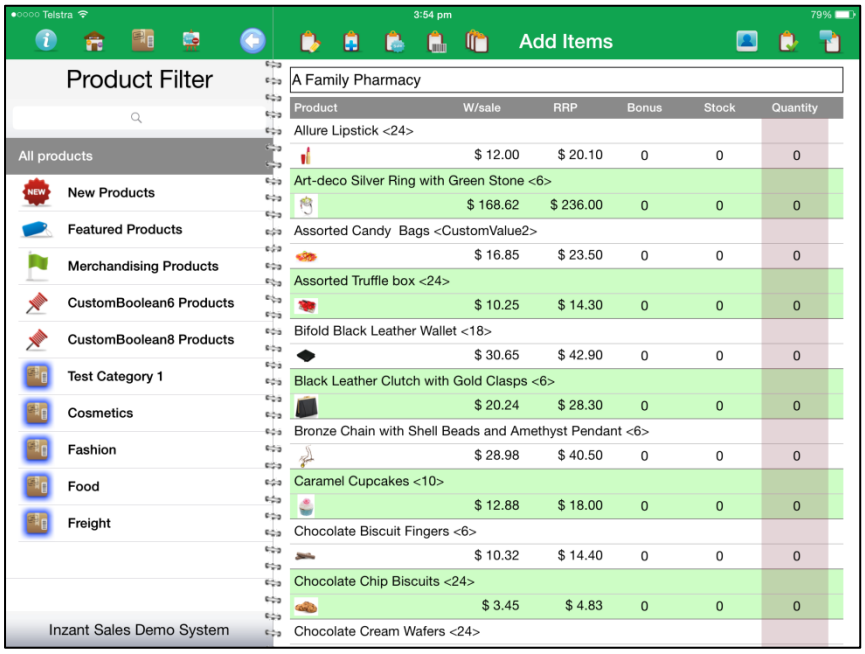
If an order has already been elected when you request a new order to be raised the following screen will be displayed:



You can choose to continue with order or raise a new one. This display can also be invoked by touching the icon  . The available orders will be identified by the start date and time.

6.1 Add Items to Order

Using the **'Add Items to Order'** screen is the simplest method of creating an order.



i. The **Work Zone** will display a listing of the products that may be ordered for the retailer. This listing is filtered using the Navigation Zone filter and search settings. The list is initially blank until a filter or search setting is chosen.

ii. The **Navigation Zone** contains the Product Category filter and Product Search to allow filtering the list of products displayed in the Work Zone. This is handy when looking at one line of products. There are also quick links to the New Products, Featured Products and Merchandising Products listings.

iii. The **Images** icon allows the page to be show in images mode. This will be discussed later in the document. 

iv. **Products** are added to the order by touching the Quantity or Bonus fields for each product and entering the amount on the keypad. For an initial order the stock level can also be entered in the Stock field.

v. If an image is available for the product it will be displayed as a thumbnail. Touching this image will show the Product Information pop over screen. If no image is available, when a product is selected the Product icon will be displayed in the selected line. Touching this icon will display the Product Lookup screen; this gives a cut down version of the product information suitable for client viewing. 

vi. When a product is selected the Comments icon will be displayed in the selected line. 

vii. Touching this icon will display the Order Line comment popup. Any comments for this order line may be entered into the text zone. If your system has custom fields enable for sales order lines you will be to edit these fields as well.

viii. If your system has integrated stock levels and low stock alarming enabled when stock levels are low an indicator will be present at the right side of the product listing. A yellow highlight indicates stock levels are low, a red highlight ! Indicates stock levels are very low.

Walkthrough - Adding Items to an Order

1 Select the retailer and touch the **'New Order'** icon 

2 Touch the **"Add Items to Order"** button 

3 The Product Category Filter and Product Search can be used to further filter the list of products shown in the Work Zone

4 The product filter pane can be used to further filter the list of products shown in the Work Zone

5 To add a product touch the **"Quantity "** amount, a numerical keypad will be displayed, enter the quantity required and then touch **"Done"**

6 If required Bonus and Stock amounts may also be entered by touching them and entering the amounts into the numeric keypad.

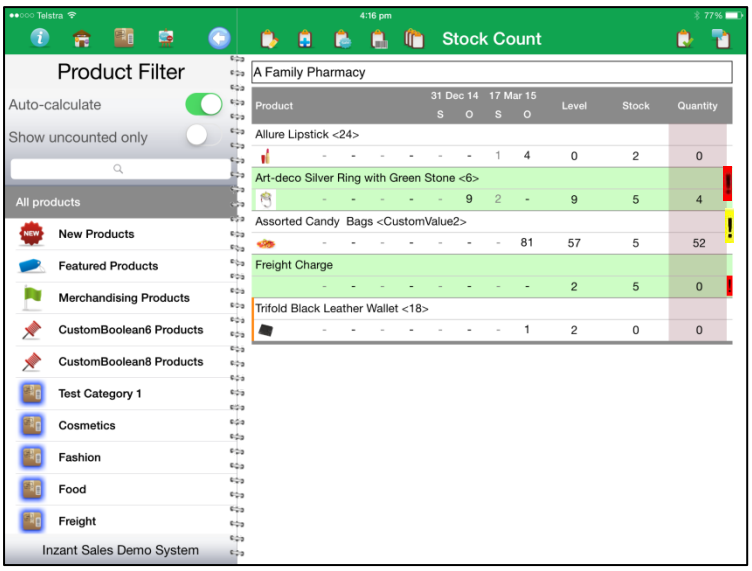
7 Comments about the order can be entered by touching the  icon.

8 When finished adding items touch the **"Order Review"** button 

9 The Order Review screen will now display any items that were added.

6.2 Stock Count Order

The Stock Count mode allows quick order generation when looking at reordering sold stock.



The Level field is the normal or desired stock amount. The Stock field is what is actually in stock. If the Auto –calculate option in the Navigation zone is on then the difference between the two is calculated and put into the Quantity field and this amount becomes the order quantity. If stock is uncounted, i.e. zero in the Stock field, an orange bar will be displayed to the left of the product description as shown above. It is possible to show only the uncounted items by selecting that option in the Navigation zone.

The Work Zone will display a listing of the products currently stocked by the retailer. The system is self-learning and adds products to this listing when new lines are ordered.

The Work Zone will display the stock level and order quantity for the last series of orders or periods. The default history type may be changed in "Inzant Settings" and is selectable by touching in the header above the history values. **The available history types are:**

- Last 3 Orders – includes order 12 months ago for seasonal information
- Last 4 Orders
- Last 4 Weeks
- Last 8 Orders
- Last 8 Weeks
- Last 8 Months

Touching a previous order value will transfer the value to the quantity column for this order.

The **Navigation Zone** contains the product Category filter and Product Search to allow filtering the list of products displayed in the Work Zone. This is handy when looking at one line of products.

If the **Auto-calculate** setting is turned on the ordered quantity will be automatically calculated once the stock quantity has been entered to bring the total quantity back to the level value.

The quantity can be overridden regardless of the level value if required.

Note: For a new retailer where an order has not previously been created the stock count mode cannot be used for the first order, the levels can be set from the Add Items Order screen and will be available for the next order.

Order Mode Tips

- If an image is available for the product it will be displayed as a thumbnail. Touching this image will show the Product Information pop over screen.

- If no image is available, when a product is selected the Product icon will be displayed in the selected line. Touching this icon will display the Product Lookup screen; this gives a cut down version of the product information suitable for client viewing.

- When a product is selected the Comments icon will be displayed in the selected line. Touching this icon will display the Order Line comment popup. Any comments for this order line may be entered into the text zone. If your system has custom fields enable for sales order lines you will be to edit these fields as well.

- If your system has integrated stock levels and low stock alarming enabled when stock levels are low an indicator will be present at the right side of the product listing. A yellow highlight ! Indicates stock levels are low, a red highlight ! Indicates stock levels are very low.

- The required stock level will be automatically calculated for new products that are ordered by the retailer; however the required level may be changed by touching on the level value and entering a new value using the popup keypad.

- If using a barcode scanner, the barcode scanner may now be used on the stock count screen to identify items in the list. When an item is scanned it will be scrolled to the centre of the list and selected.

Walkthrough - Performing a Stock count

1 Select the retailer and touch the **'New Order'** icon

2 Touch the **Stockcount** button

3 The product filter and search can be used to further filter the list of products shown in the Work Zone

4 For each product touch the **'stock '** amount, a numerical keypad will be displayed, enter the currently stocked quantity and then touch '*done*'

5 After entering the stock level the **'Quantity'** will be automatically populated.

6 If necessary the **'Quantity'** field can be changed by touching it. A numerical keypad will be displayed, enter the currently stocked quantity and then touch '*done*'

7 Touching a previous order quantity will copy that quantity to the **'Quantity'** field.

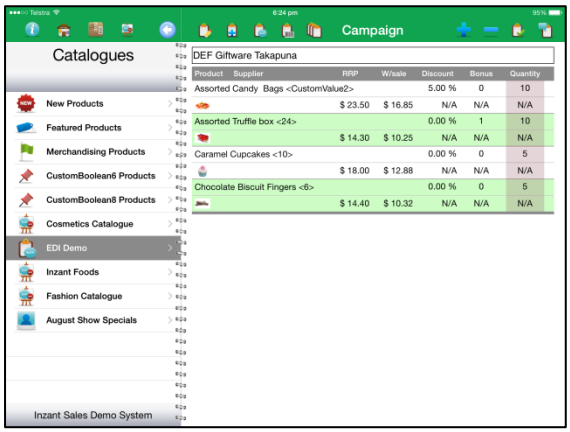
8 When stocktake is complete simply touch the **'Order Review'** button 

9 The Order Review screen will now display any items where the Stock or Quantity was set to above zero.

6.3 Campaign Order

A campaign order is a special order type whereby a specific listing of Products with quantities, bonuses and discount percentages can be built.

There are 3 specific types of campaigns available.

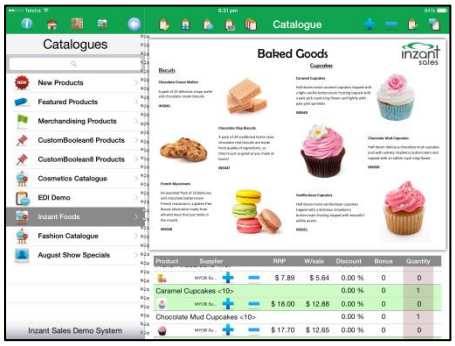


Campaign

The first is a standard campaign that contains a specific list of products and associated quantities, bonuses and discounts.

This is useful for prepack offers or situations where an image is not required.

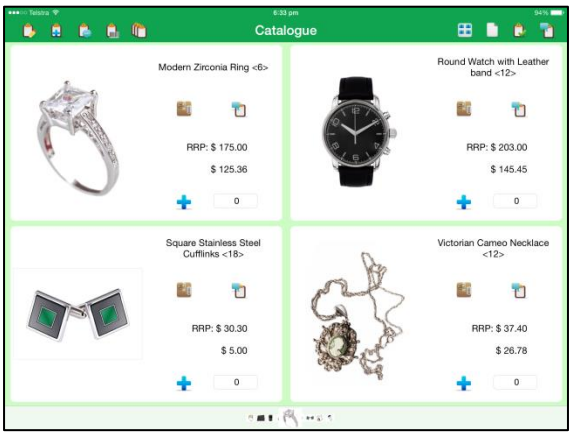
Presentation



The second type of campaign is a presentation which provides images with the product listing for that page.

The presentation can be multi-page and allows you to step through each page while ordering products along the way.

Deals and offers may be specified for each product or page



Individual Images

The third type of campaign is a presentation that is built using individual images that are stored for each product.

The presentation can be multi-page and allows you to step through each page while ordering products along the way.

Campaign / Presentation Information

The product line in the Campaign and Presentation Mode is used to add items to the order.

Caramel Cupcakes <10>				0.00 %	0	1
MYOB Su...		$ 18.00	$ 12.88	0.00 %	0	0

I. The top line of each product displays the Discount, Bonus and Quantity that will be applied if the "Plus" or "Minus" icons are touched. This allows for offers to be setup in the system that can be ordered quickly.

II. In the bottom line the Discount, Bonus and Quantity values show what is actually in the order. If required you can touch these values and change them using the pop-up numeric keypad.

Note: The "Plus" and "Minus" icons at the top of the Work Zone will apply to ALL products on the page, just as if you touched all the individual "Plus" or Minus" icons. This enables you to order everything on the page at once.

If an image is available for the product it will be displayed as a thumbnail. Touching this image will show the Product Information pop over screen. Touching this image will display the Product Lookup screen; this gives a cut down version of the product information suitable for client viewing.

When a product is selected the Comments icon will be displayed in the selected line.

Touching this icon will display the Order Line comment popup. Any comments for this order line may be entered into the text zone. If your system has custom fields enable for sales order lines you will be to edit these fields as well.

If your system has integrated stock levels and low stock alarming enabled; when stock levels are low an indicator will be present at the right side of the product listing. A yellow highlight ! Indicates stock levels are low, a red highlight ! Indicates stock levels are very low.

When viewing products in individual image mode the links to the Product Lookup screen and Line Comments are available.

Products may be ordered using the add button

Quantities may also be added by touching in the quantity zone and using the keypad.

Presentation Display Modes

I. When the iPad is in Portrait orientation, the presentation format can be set to display the image in half screen view or near full screen view. In both these modes the bottom section of the display shows the product ordering details. This mode is changed by tapping the resize icon. The presentation image can also be changed to full screen mode and back by double tapping the image.

II. The image can also be rotated when working across a counter so the client and the sales rep can both view the relevant information right way up. This is achieved by tapping the rotate icon.

III. Swiping to the left and right will move to the next or previous pages.

IV. Regardless of the image size of display direction images may be zoomed and panned by pinching and swiping the image to give a better view of the image.

V. If your system has integrated stock levels and low stock alarming enabled when stock levels are low an indicator will be present at the right side of the product listing. A yellow highlight ! Indicates stock levels are low, a red highlight ! indicates stock levels are very low.

Walkthrough - Running a Campaign

1 Select the retailer and touch the **'New Order'** icon 

2 Touch the **'Campaign'** button 

3 The **Navigation Zone** will contain a list of the campaigns and presentations that are setup on your system. Campaigns can be identified as they have the Campaign icon in front of the name. Touch the Campaign name to load a Campaign.

4 To add or remove products from the order you have the following options

a. Touch the bottom row of the **'Discount', 'Bonus'** or **'Quantity'** fields, enter the required value on the numerical keypad and select 'Done'

b. Touch the **"Plus"** icon on the Product line to add the recommended quantity, bonus and discount on the top row.

c. To remove the recommended quantity, bonus and discount touch the "**Minus"** icon on the Product line.

d. The recommended quantities etc. may be added to all products on the page by touching the **"Plus"** and **"Minus"** icons at the top of the Work Zone.

5 When campaign is complete simply touch the '*Order Review*' button

6 The Order Review screen will now display any items that were added to the order.

Walkthrough - Running a Presentation

1 Select the retailer and touch the **'New Order'** icon 

2 Touch the **'Campaign'** button 

3 The Navigation Zone will contain a list of the campaigns and presentations that are setup on your system. Presentations can be identified as they have the Presentation icon in front of the name. Touch the Presentation name to load a Presentation. 

4 The upper part of the Work Zone displays product images in a multiple page format. These pages can be changed by swiping to the left or right.

5 The lower part of the Work Zone will contain a table listing all the products presented in the images.

6 To add or remove products from the order you have the following options

a. Touch the bottom row of the **'Discount', 'Bonus'** or **'Quantity'** fields, enter the required value on the numerical keypad and select 'Done'

b. Touch the **"Plus"** icon on the Product line to add the recommended quantity, bonus and discount on the top row. 

c. To remove the recommended quantity, bonus and discount touch the **'Minus'** icon on the Product line. 

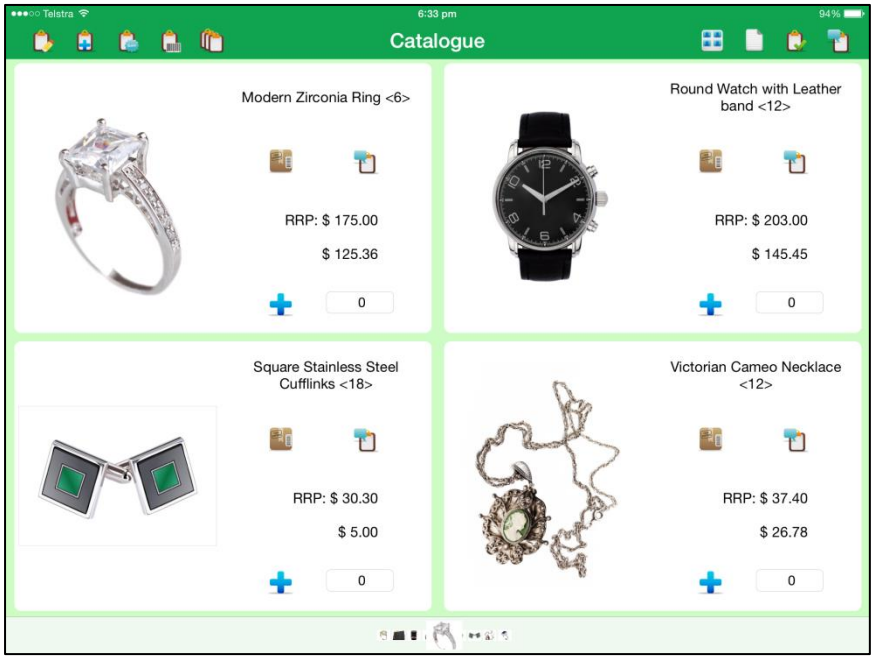
d. The recommended quantities etc. may be added to all products on the page by touching the "Plus" and "Minus" icons at the top of the Work Zone.

7 When presentation is complete simply touch the **'Order Review'** button 

8 The Order Review screen will now display any items that were added to the order.

6.4 Individual Image Order

The Individual Image Order mode can be used from both the Add Items to Order and Campaign screens.



I. The image display mode allows the selection of 1, 2, 4 or 8 images per screen. If on 2, 4 or 8 per screen, double tapping the image will change the display to 1 image per screen. Double tapping again will return the screen to the multi-image mode. To change the number of images per screen, touch the selector icon. 

II. It is possible to move between pages by swiping the display in the direction you wish to move. It is also possible to scroll through the pages using the thumbnail images at the bottom of the screen.

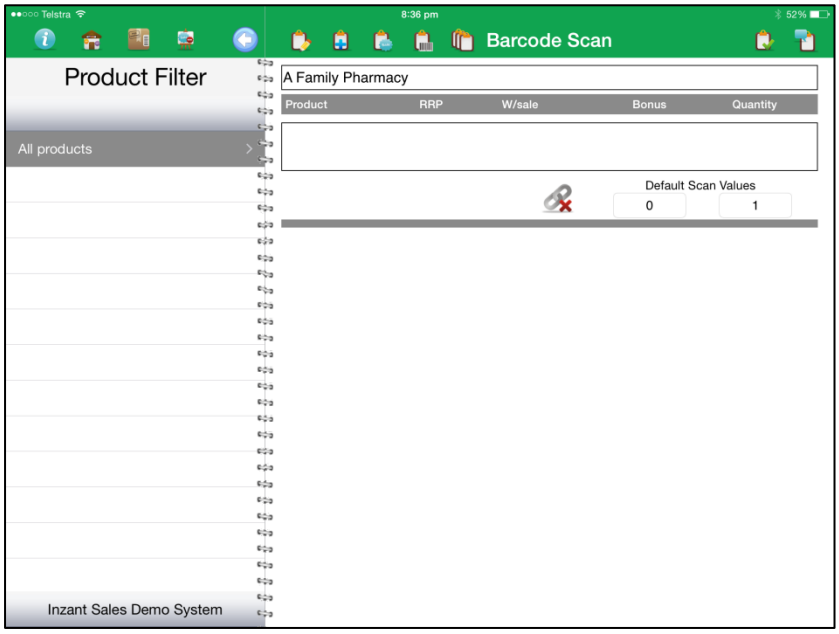
III. Product Lookup and comments icons work the same as in other presentation modes.

IV. Products may be ordered using the add button 

V. Quantities may also be added by touching in the quantity zone and using the keypad. 

6.5 Barcode Scanning Order

Inzant Sales supports the use of a barcode scanner for entering order information. The barcode scanner connects to the iPad using Bluetooth. Before the scanner can be used it must be paired to the iPad using the iPad Setting configuration.



I. The scanner sends barcode information to the iPad where the product is retrieved from the database. The scanned product information is displayed at the top of the display along with pricing information and the updated quantity of the item ordered.

II. When a product is scanned if the iPad is a different order screen it will automatically change to the barcode screen and process the order.

III. The default quantity that will be added with each scan is 1, if a different quantity is required it can be changed by touching the default scan values field under the product information and changing the value using the popup keypad.

IV. Once a product is scanned you can also change the quantity using the quantity entry fields in the product information area.

V. A record of the products scanned and the total quantities of these products is also entered in a list. If an item in the list is touched it is loaded into the product information area at the top of the screen and the values may be edited.

VI. If an image is available for the product it will be displayed as a thumbnail. Touching this image will show the Product Information pop over screen. If no image is available, when a product is selected the Product icon will be displayed in the selected line. Touching this icon will display the Product Lookup screen; this gives a cut down version of the product information suitable for client viewing.

VII. When a product is selected the Comments icon will be displayed in the selected line.

VIII. Touching this icon will display the Order Line comment popup. Any comments for this order line may be entered into the text zone. If your system has custom fields enable for sales order lines you will be to edit these fields as well.

IX. If you wish to add more of the same item, touching the Add to Order button will add the default quantity to the order.

X. Products may be removed from the order by touching the delete icon.

XI. If the barcode cannot be found it will be reported with a red "Product Not Found" message and a warning sound produced. If two or more products are found with the same barcode a selector will be displayed allowing the correct product to be selected.

Note: If you would like further information regarding the barcode scanning option, please contact us.

Walkthrough – Barcode Scanning

1 Select the retailer and touch the **'New Order'** icon

2 Touch the **'Barcode'** button to be taken to the barcode interface.

3 If the barcode scanner is not connected the **"Bad Link"** indicator will be present. Press the side button closest to the front of the scanner to connect the device.

4 Change the default quantity if desired.

5 Scan the product; this is achieved by pointing the scanner at the barcode and pressing the button just below the display on the scanner.

6 The product information will appear at the top of the iPad display. If the product is not found **"Product Not Found"** will be displayed in red.

7 If desired the quantity may be changed using the fields in the product information section at the top of the screen.

8 The item can also be added to the order by touching **"Add to Order"**.

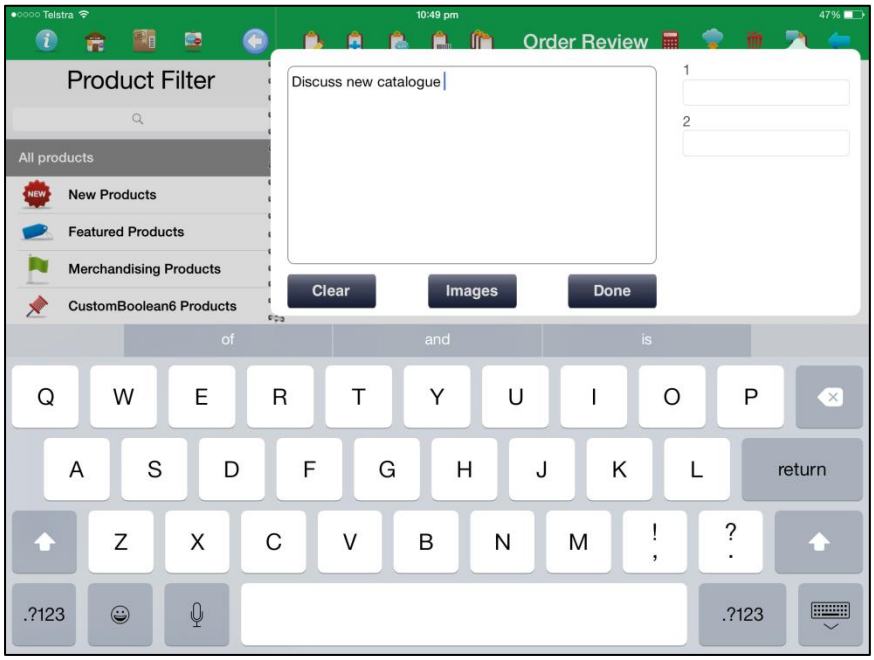
9 The items that have been added can be reviewed in the table.

10 When presentation is complete simply touch the **'Order Review'** button

11 The Order Review screen will now display any items that were added to the order.

6.6 Add Comments to Order

Comments may be added to an order or updated from any of the order screens.



While these comments will be submitted to the cloud, they are not supplier specific and therefore will be sent as part of a purchase order to ALL suppliers.

Walkthrough - Adding Comments to an Order

1 From any order screen touch the **'Order Comments'** icon 

2 A pop up will be displayed allowing the entry of free form text comments, when the comment is complete touch the **'Done'** button

3 The comments will then be associated with the current order and uploaded during order submission

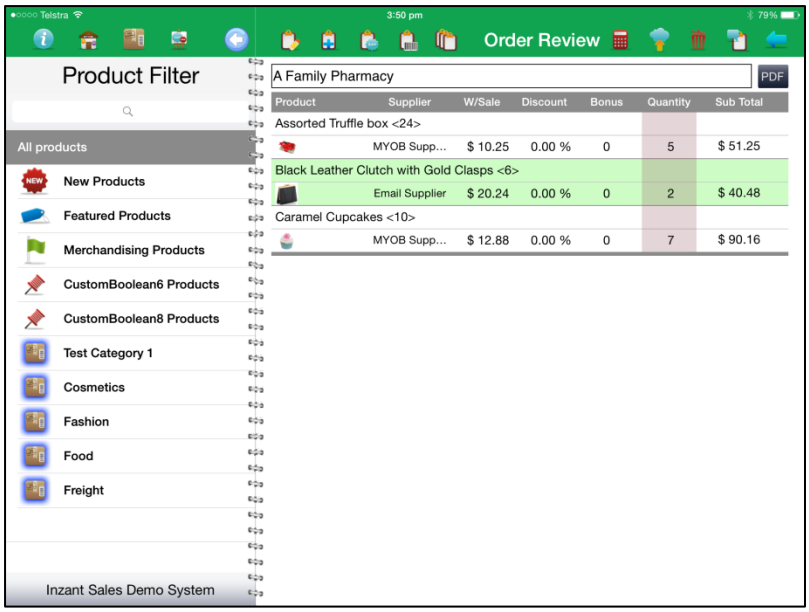
Line comments may be added to individual order lines by touching the order comments icon on an order line.

If custom fields are enabled they will be displayed on the order comments popup and may be edited.

Note: If a barcode is scanned while the order comment popup is showing the barcode information will be inserted into the notes field.

6.7 Order Review

The sales order review screen contains all information relating to the current order being created for a retailer and allows the selection of quantities, discounts, bonuses and suppliers.



I. The **Work Zone** contains a listing of all products in the order, the quantity values will be based on the quantity entered when adding the item either manually, through a campaign or when performing a stocktake, these values can be modified before submitting the order by touching them and changing them accordingly.

II. The **Navigation Zone** contains the product Category filter and Product Search to allow filtering the list of products displayed in the Work Zone. This is handy when looking at one line of products.

III. The supplier will have been selected based on the priority setting in the Retailer configuration. The supplier may be changed by touching it and selecting a new supplier should multiple be available for that product.

IV. **Discounts** may have been automatically set based on Retailer Brand settings or Campaign settings. The discount value can however be set to a different value by touching it and selecting from the available list of configured discounts.

V. **Quantity** and **Bonus** values may be changed by touching them and changing them accordingly.

VI. Individual items that have been added to an order can be removed by highlighting a row; a delete icon will appear to the left of the product row, selecting this icon will remove the product from the sales order

Note: The deleted icon at the top of the Work Area will remove ALL items from an order and cancel the order

VII. If an image is available for the product it will be displayed as a thumbnail. Touching this image will show the Product Information pop over screen. If no image is available, when a product is selected the Product icon will be displayed in the selected line. Touching this icon will display the Product Lookup screen; this gives a cut down version of the product information suitable for client viewing.

VIII. When a product is selected the Comments icon will be displayed in the selected line.

IX. Touching this icon will display the Order Line comment popup. Any comments for this order line may be entered into the text zone. If your system has custom fields enable for sales order lines you will be to edit these fields as well.

X. If your system has integrated stock levels and low stock alarming enabled when stock levels are low an indicator will be present at the right side of the product listing. A yellow highlight ! Indicates stock levels are low, a red highlight ! Indicates stock levels are very low.

XI. The order items are displayed may be changed by touching on the header at the "Product" heading. A selector appears allowing the selection of alphanumeric sorting or by the order items were added.

XII. Lastly on this screen the sub total will be displayed for each item, this is an adjusted value based on the wholesale price of the selected supplier and any discounts that have been applied.

XIII. The order total, including a breakdown of values and quantities by Supplier can be displayed using the calculator icon. This will raise a popup displaying the values.

XIV. A PDF of the order can be generated for printing or emailing by touching the PDF icon in the top right hand side of the Work Zone. After displaying and processing the PDF you can return to the Order Review screen by a double tap.

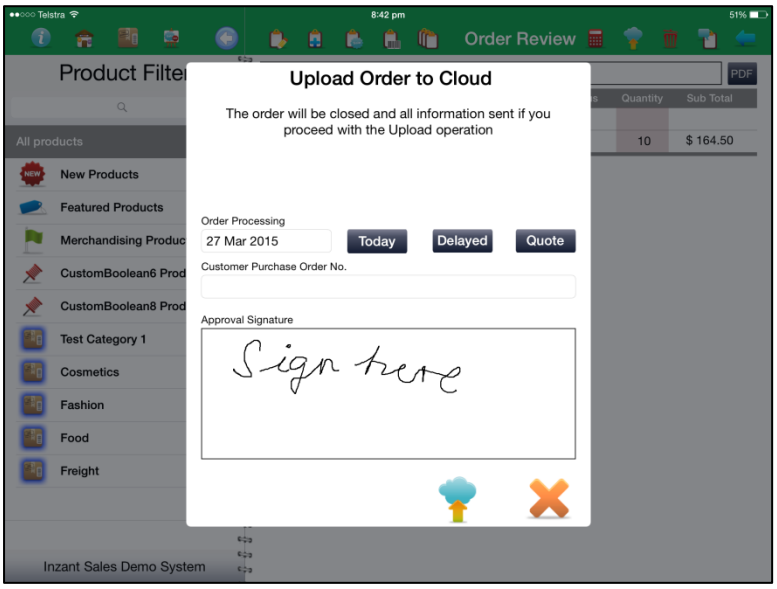
Advanced Pricing Module

If the Advanced Pricing Module is enabled for your system you have the option of performing a Price Check from the Calculator icon to select correct pricing for the entire order. This will send the entire order to the Inzant cloud services where the entire order will be processed and returned with all pricing rules applied.

Upload Order to Cloud

The final stage of an order is to submit the order to the cloud for processing. This is achieved by touching the "Upload to Cloud" icon

On touching the "Upload to Cloud" icon a screen is displayed that allows the user to provide additional information.



I. On touching the **"Upload to Cloud"** icon a screen is displayed that allows the user to provide additional information.

II. The order date may be set in the future by touching **"Delayed"** and selecting a date using the popup keypad.

III. The order date may be reset to today by touching **"Today"**.

IV. If the order is to be a Quote this is selected by touching **"Quote"**, this will cause the order to be uploaded as a draft or quote, but not processed into an order.

V. This screen also allows the entry of a client purchase order number.

VI. An approval signature may also be captured by drawing a signature in the zone with a finger or stylus.

VII. To complete the order upload touch the upload icon.

VIII. Touching the Cancel icon will return to the Order Review screen.

Walkthrough - Reviewing an Order

1 From any order screen touch the '*Order Review*' icon 

2 All products included on the order will be displayed in the Work Zone

3 Ensure the nominated supplier for each product is correct and change if required

4 Select discounts if required

5 Discounts can be applied to a whole group of products by using the Navigation Zone filter and search to display products with common discounts and suppliers. To do this touches the word "Discount (%)" in the table header.

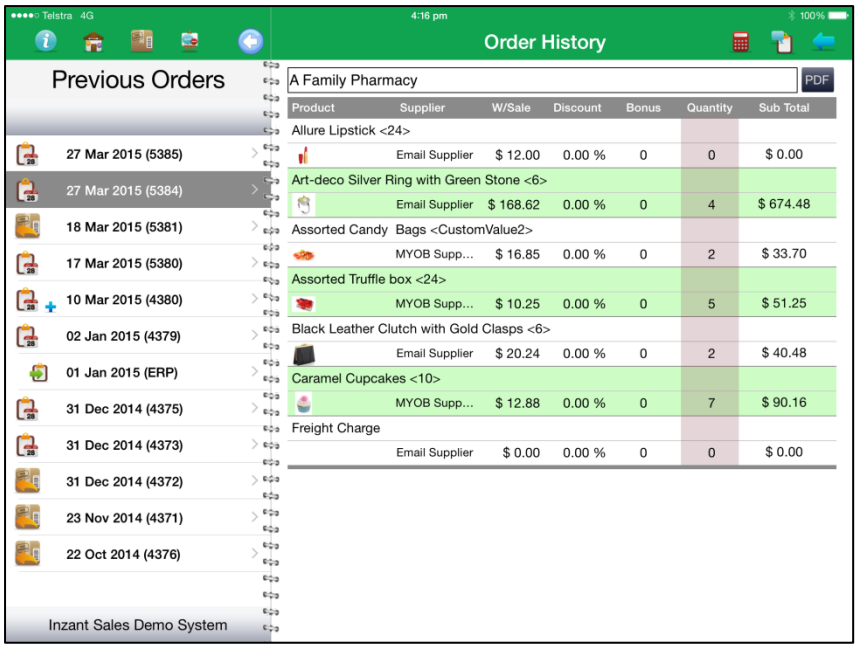
6 Change the quantity and bonus vales if required.

7 When all information is correct submitted the order to the cloud. 

8 Enter any further information and submit the order to the cloud. 

6.8 Order History

From a selected retailer it is possible to view all orders that have historically been created.



i. The Navigation Zone displays a list of all orders and return orders for the Retailer. The list displays the date and sales order number (in brackets).

ii. Selecting a historical order in the Navigation Zone will load the order details into the Work Zone.

iii. The order total, including a breakdown of values by Supplier can be displayed using the calculator icon. This will raise a popup displaying the values. 

iv. Order comments associated with the order may be viewed by touching the comment icon. 

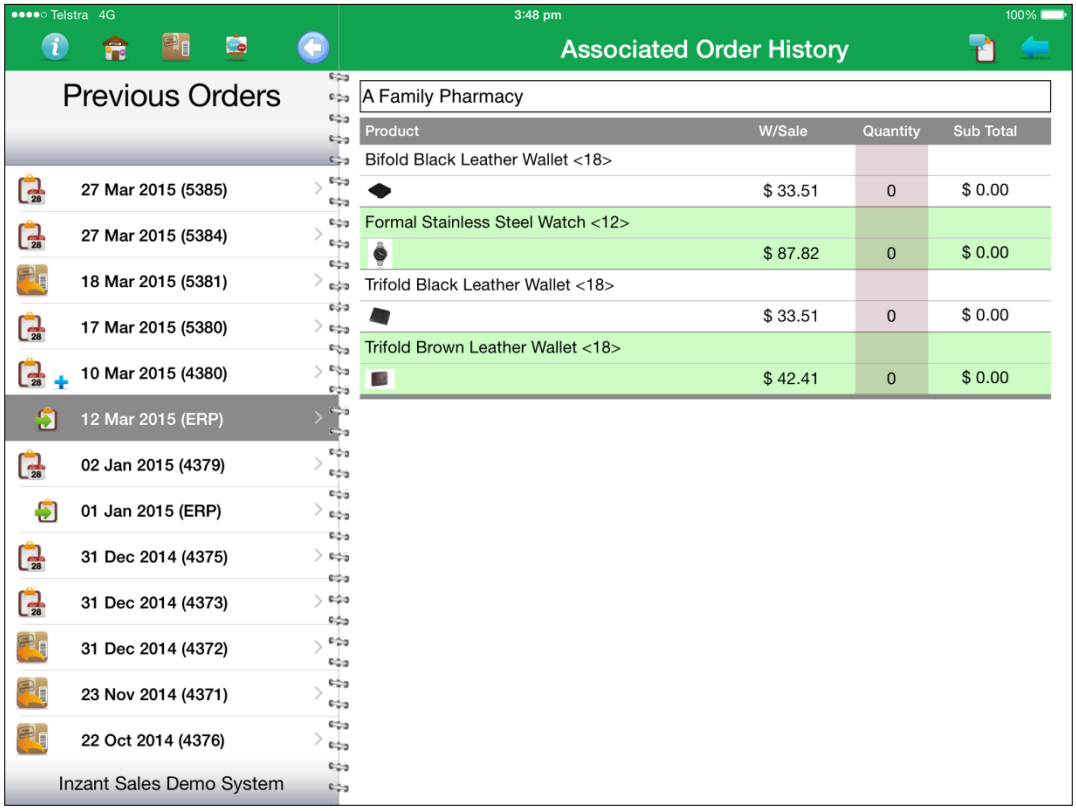
v. If an image is available for the product it will be displayed as a thumbnail. Touching this image will show the Product Information pop over screen. If no image is available, when a product is selected the Product icon will be displayed in the selected line. Touching this icon will display the Product Lookup screen, this gives a cut down version of the product information suitable for client viewing. 

vi. When a product is selected the Comments icon will be displayed in the selected line. 

vii. Touching this icon will display the Order Line comment popup. Any comments for this order line may be entered into the text zone. If your system has custom fields enable for sales order lines you will be to edit these fields as well.

viii. When viewing previously created Quotes or Forward Dated Orders, the edit icon will be visible. Clicking on the Edit icon will change the order to Edit mode and allow items and the order state to be changed and re-uploaded for processing.

ix. If there are associated orders with an historical order a plus symbol will appear to the left of the date. If this order is selected then the associated orders appear as shown below:



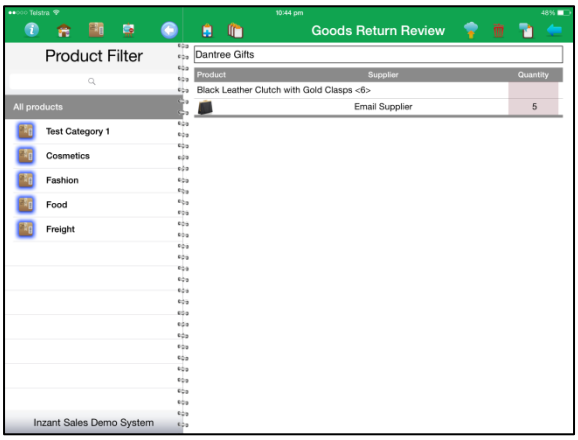
Walkthrough - Viewing Historical Orders

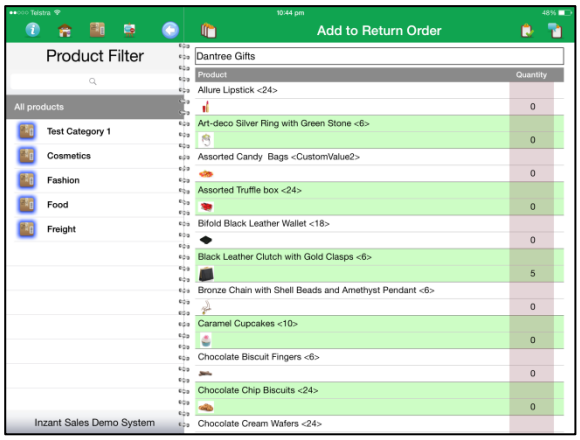
1 Select the retailer and touch the **'New Order'** icon

2 Touch the order required in the Navigation Zone list, the details will be displayed in the Work Zone

7 Goods Return Order

It may be necessary at times when stock is reported as faulty or not as originally ordered, to submit a goods return. A goods return order is generated in a similar manner to a normal order however only the Add to Order mode is available.





Walkthrough - Performing Goods Return

1 Select the retailer and touch the **'Goods Return'** icon. This will display the Goods Return Review screen

2 Touch the **"Add Items to Order"** button

3 The Product Category Filter and Product Search can be used to further filter the list of products shown in the Work Zone

4 The product filter pane can be used to further filter the list of products shown in the Work Zone

5 To add a product touch the **'Quantity '** amount, a numerical keypad will be displayed, enter the quantity required and then touch **'Done'**

6 If required Bonus and Stock amounts may also be entered by touching them and entering the amounts into the numeric keypad.

7 When finished adding items touch the **'Order Review'** button

8 The Goods Order Review screen will now display any items that were added.

9 When all information is correct submitted the order to the cloud