



iPad User Manual

Version 1.1

This page intentionally blank

Table of Contents

Table of Contents	3
1. General Information	5
1.1 Solution Overview	5
1.2 Revision Control	5
1.3 Helpdesk and Support	5
1.4 Icon Listing	6
1.5 General Tips & Information about using the Inzant Sales Plus App	8
2. Screen Layout.....	9
2.1 Navigation Zone	9
2.2 Work Zone	9
2.3 Navigating the App	10
3. Information Screens	11
3.1 Notifications Screen	11
3.2 Sync Status screen.....	11
3.3 Diagnostic Functions	11
4. Report Screens	15
4.1 Weekly Summary Report screen.....	15
4.2 Monthly Summary Report screen	16
4.3 Ad hoc Reporting screen	17
4.4 Quotes Summary Report screen	18
4.5 Orders Not Uploaded Report screen	19
4.6 On Credit Hold Report screen	20
4.7 No Monthly Orders Report screen.....	21
5. Help with Inzant	22
5.1 The iPad User Manual	22
5.2 The Inzant Support Hub	23
6. Retailers Screen.....	24
6.1 Selected Retailer	25
6.2 General Details.....	26
26	
6.3 Retailer Dashboards	26
6.4 Contacts.....	27
6.5 Supplier	27
6.6 Retailer Specific Discounts	28
6.7 Information Screen	28
6.8 Custom Fields	29
6.9 Financials Screen	29
6.10 Notes	30
6.11 Location.....	30

6.12	Journal.....	31
6.13	Tasks.....	31
6.14	Credit Hold Notifications.....	32
6.15	Edit Retailer.....	31
6.16	Add Retailer.....	33
6.17	Call cycle.....	35
7.	Products screen.....	36
7.1	Product Details screen	38
7.2	Custom	38
	39	
7.3	Product/Supplier Discounts	39
7.4	Media	39
7.5	Interactions	40
7.6	Journal Entry	41
7.7	Current Tasks.....	42
7.8	Current Orders	43
8.	Tasks.....	44
8.1	Surveys	45
8.2	Promotions.....	47
9.	Orders.....	49
9.1	Add Items to Order	50
9.2	Stock Count Order.....	52
9.3	Campaign Order	55
9.4	Individual Image Order.....	58
9.5	Barcode Scanning Order.....	59
9.6	Add Comments to Order	61
9.7	Order Review.....	62
9.8	Advanced Pricing Module	64
10.	Completing and Submitting Orders to Cloud.....	65
11.	Order History.....	67
12.	Goods Return Orders	68

1. General Information

1.1 Solution Overview

Inzant Sales is an intuitive product developed for Apple iPads 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 Stock counts, 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	Date	Issued	Checked
1.0	14 th Mar 2017	SLK	SK
1.1	22 nd Mar 2017	SLK	SK

1.3 Helpdesk and Support

For support enquiries please contact Inzant on:



































Telephone: +61 2 4957 0281
























Email: support@inzant.com.au

Web: <https://support.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
Add Icon		Add Items Order Mode	
Associated Orders		Back	
Barcode		Barcode Scan Order Mode	
BI Report (Top 50 Sold)		Boolean	
Calculator		Calendar	
Campaign Order Mode		Cancel	
Contact Information		Custom Fields	
Delete		Discounts	
Edit		Featured Products	
Feedback		Financials	
Full Screen		Goods Returns	
Help		Images	
Information		Interactions	
Journal		Location	
List View		Merchandising	
Loyalty Program		New Products	
Multiple Image View		Order History	

Function	Icon	Function	Icon
Notes		Order with Notes	
Order Review		Product	
Presentation		Product Category 2	
Product Category 1		Product Category Tree	
Product Category 3		Retailer	
Reports		Retailer Filter 1	
Retailer Filter 1		Save	
Retailer Filter 2		Statistics	
Low Stock		Supplier	
Stock Count Order Mode		Tasks	
Sync		Very Low Stock	
Upload to Cloud			

1.5 General Tips & Information about using the Inzant Sales Plus App

- I. 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.

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



- III. 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.



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

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



- VI. 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.

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

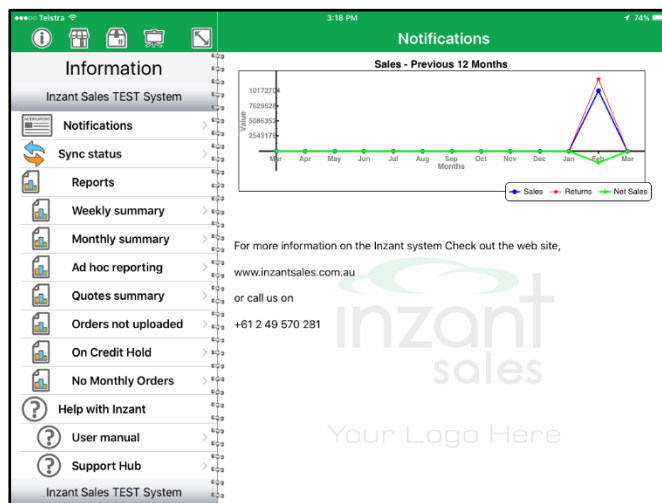


- VIII. If for any reason your iPad becomes unresponsive and unable to turn on, perform a hard reset by holding both the **'Power'** and **'Home'** buttons on the device for 10 seconds.

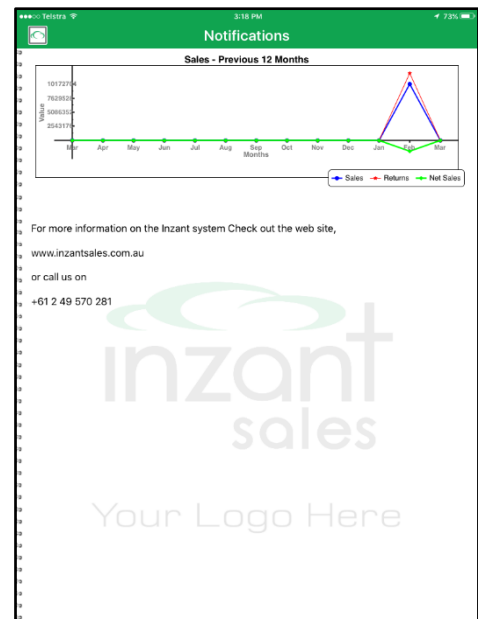
- IX. If for any reason a synchronisation fails, a popup will be displayed after 1 hour as a reminder to perform a full synchronisation.

- X. Always remember to recharge your iPad overnight.

2. Screen Layout



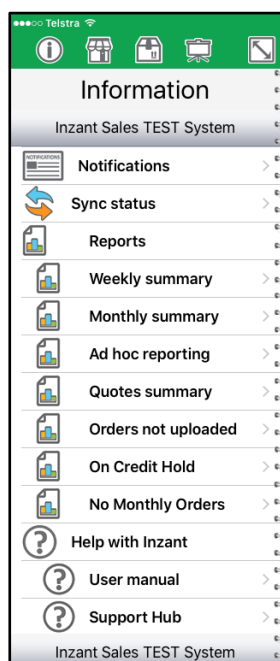
Inzant Sales - Landscape



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.

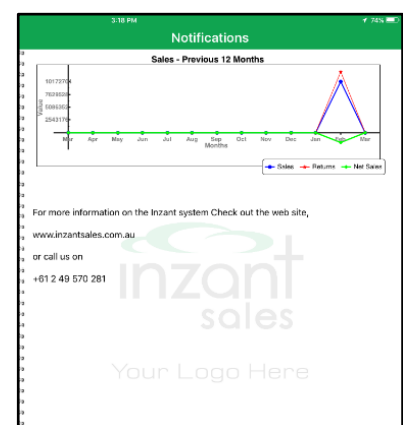
When using Inzant Sales in portrait mode the Navigation Zone is not shown. The Navigation Zone can be displayed by touching the **Menu** button.

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 by using simple Icons to provide the functions. Navigating using the Icons provides fast workflow.

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

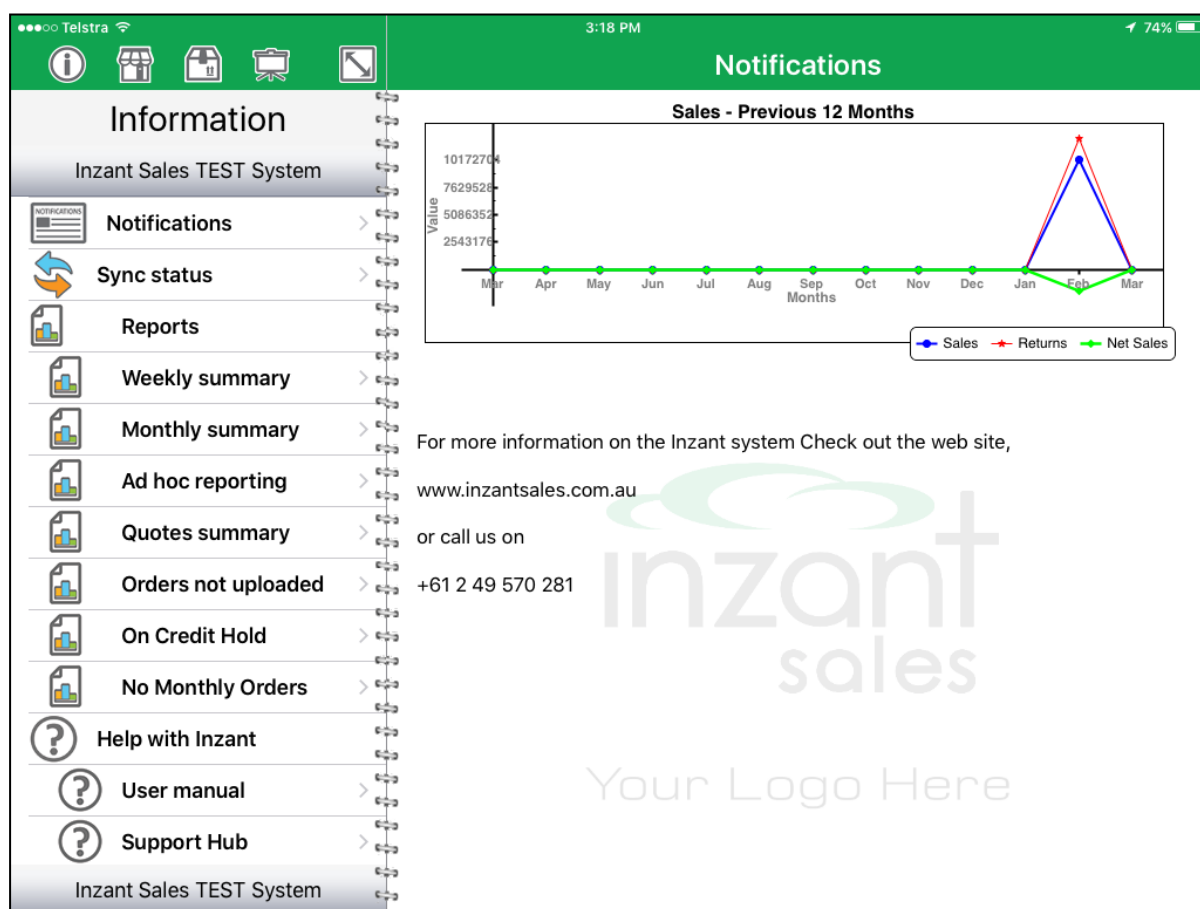


The information screens that can be viewed are listed in the Navigation Zone. To display a screen touch the screen name.

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.



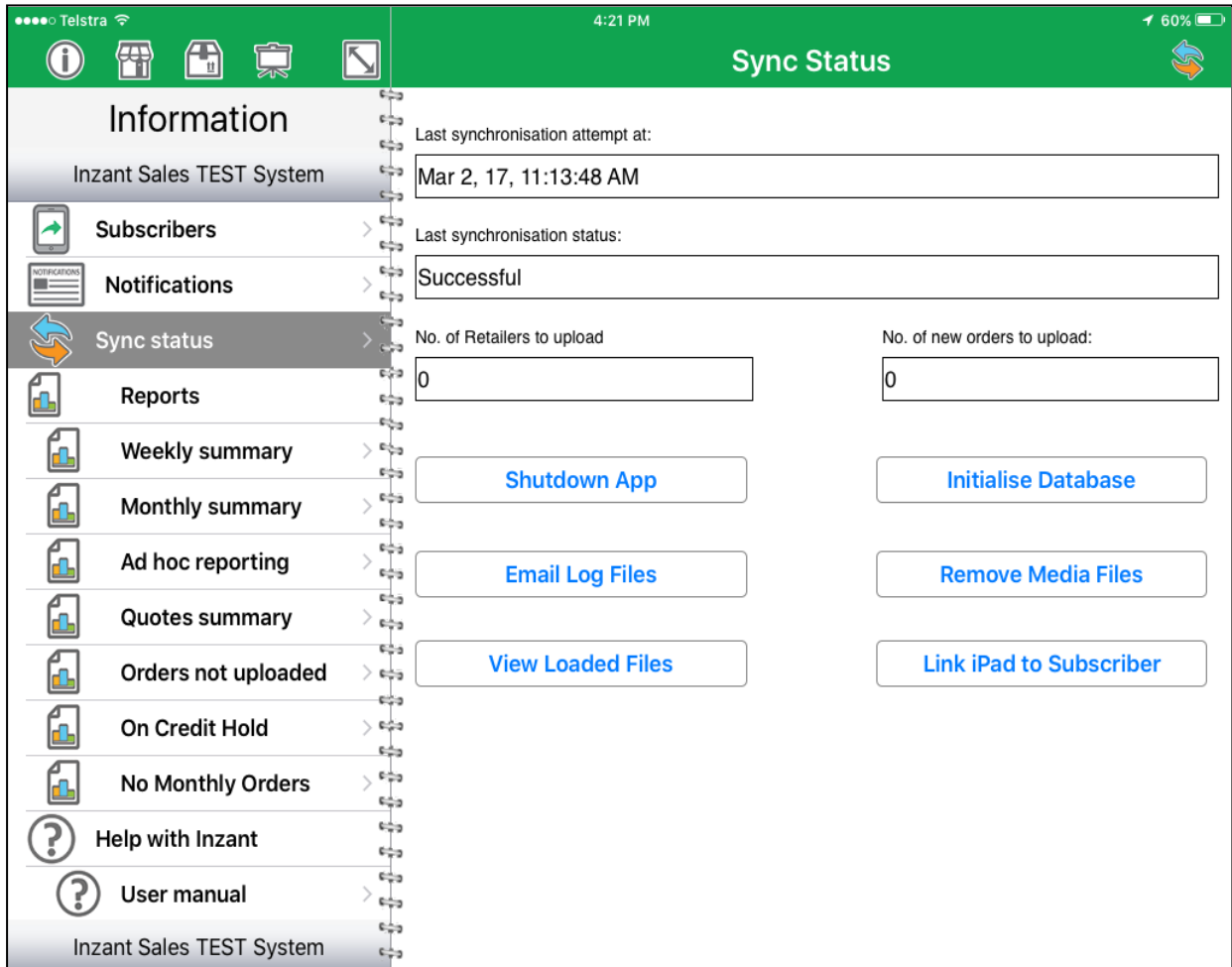
2 Touch the Notifications icon or **“Notifications”** in the Navigation Zone



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.



3.3 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.

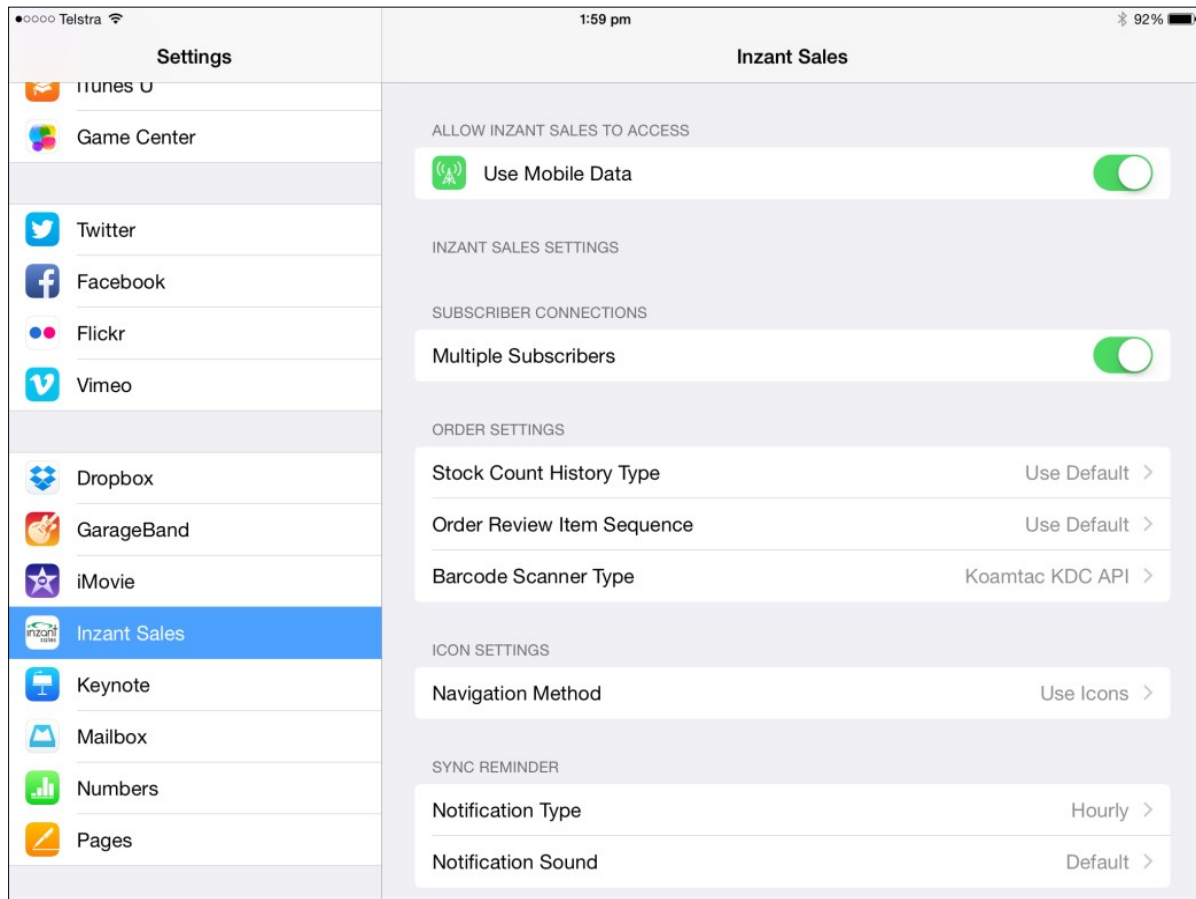
Remove Media Files


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

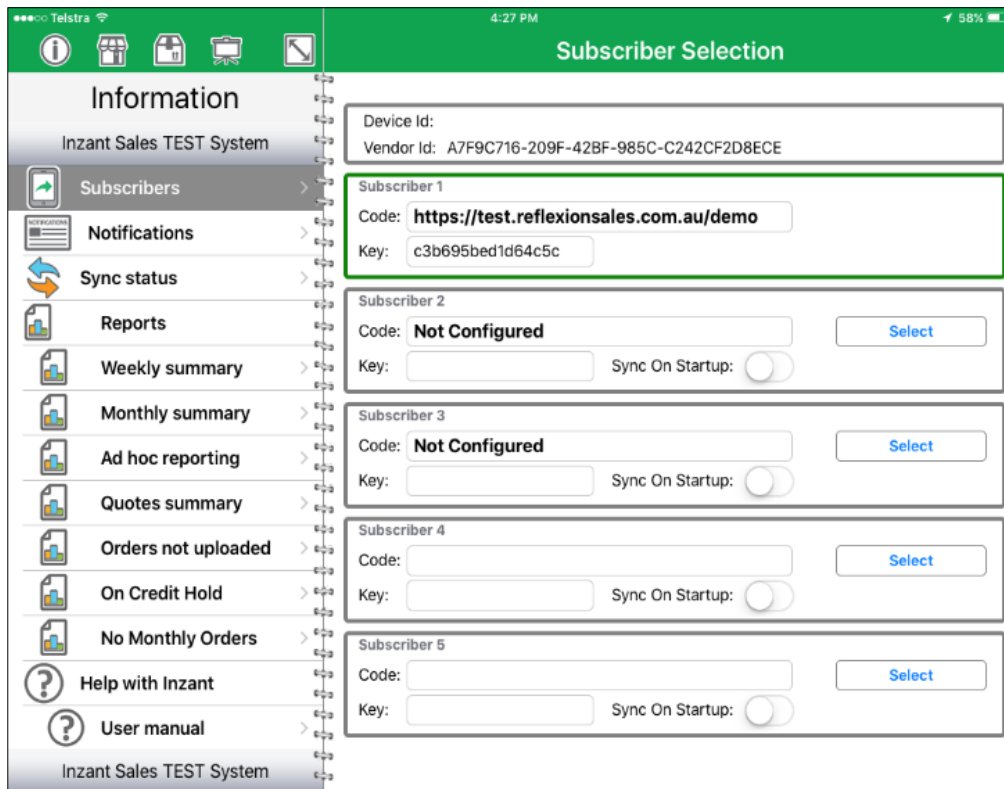
Note: The diagnostic functions should only be used if directed by Inzant support staff.

Link iPad to Subscriber

This is the button that will link 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 selected 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:



Subscriber Selection

Device Id:
Vendor Id: A7F9C716-209F-42BF-985C-C242CF2D8ECE

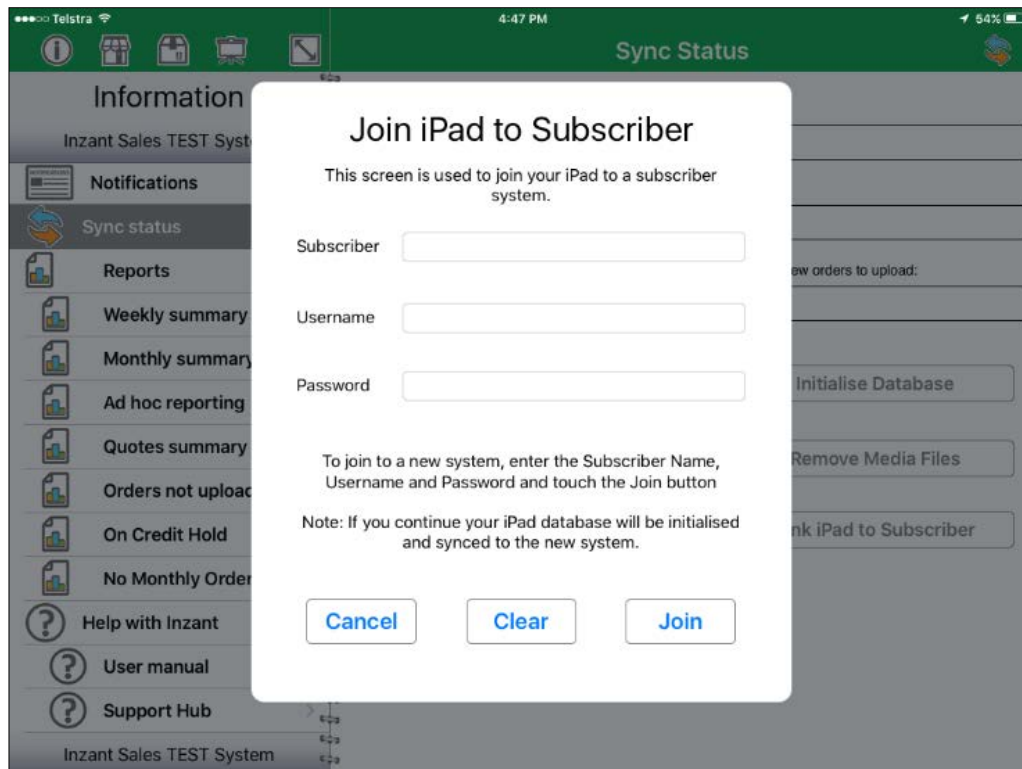
Subscriber 1
Code: <https://test.reflexionsales.com.au/demo>
Key: c3b695bed1d64c5c

Subscriber 2
Code: Not Configured
Key: Sync On Startup: ☐ [Select](#)

Subscriber 3
Code: Not Configured
Key: Sync On Startup: ☐ [Select](#)

Subscriber 4
Code: [Select](#)
Key: Sync On Startup: ☐

Subscriber 5
Code: [Select](#)
Key: Sync On Startup: ☐



Join iPad to Subscriber

This screen is used to join your iPad to a subscriber system.

Subscriber

Username



Password

To join to a new system, enter the Subscriber Name, Username and Password and touch the Join button

Note: If you continue your iPad database will be initialised and synced to the new system.




[Cancel](#) [Clear](#) [Join](#)

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 Subscriber Code, 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.

Walkthrough – Performing a Manual Synchronisation

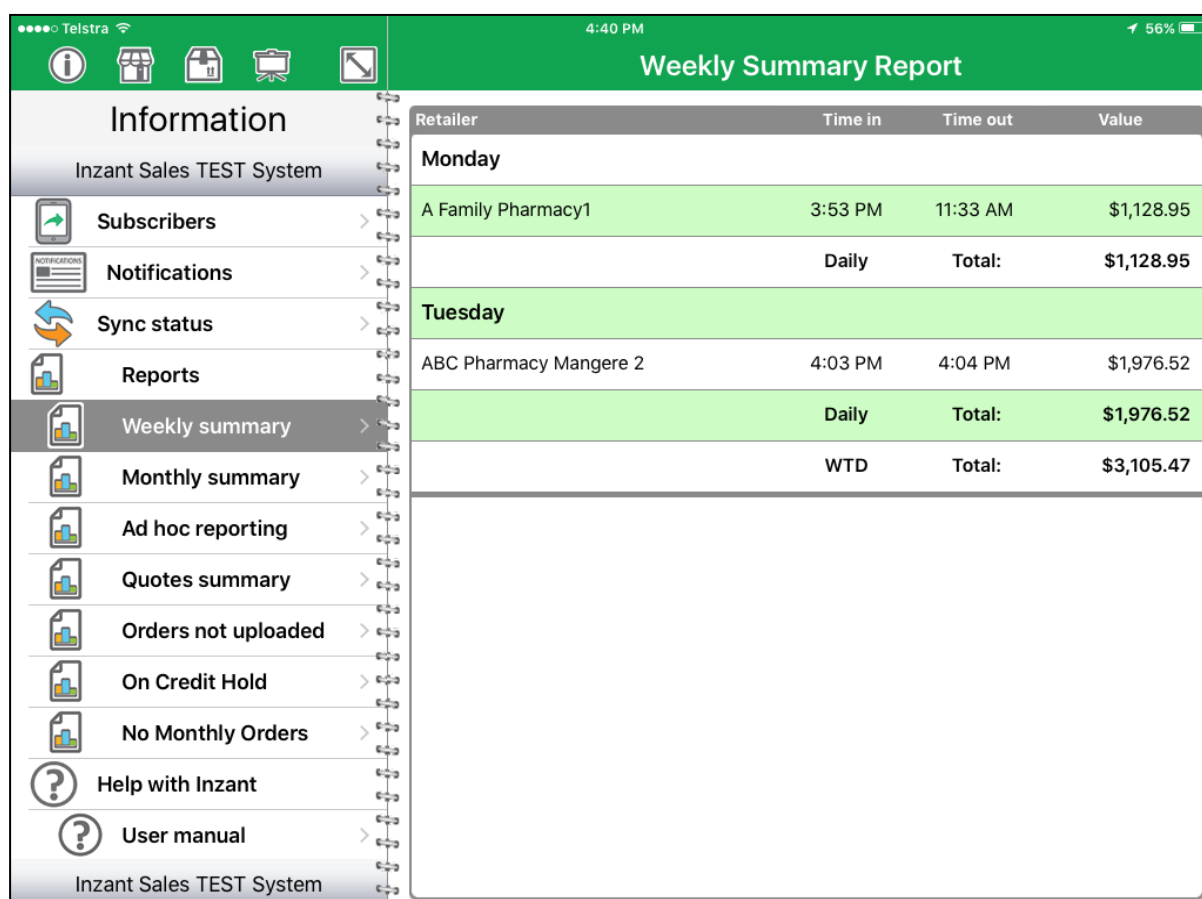
- Touch the Information navigation icon. 
- Touch the Sync Status icon or “Sync Status” in the Navigation Zone. 
- To start the manual Sync touch the Sync Icon in the **top right of the Workzone** 
A screen will then be displayed showing that a synchronisation is occurring.

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.

4. Report Screens


4.1 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.



Weekly Summary Report			
Retailer	Time in	Time out	Value
Monday			
A Family Pharmacy1	3:53 PM	11:33 AM	\$1,128.95
	Daily	Total:	\$1,128.95
Tuesday			
ABC Pharmacy Mangere 2	4:03 PM	4:04 PM	\$1,976.52
	Daily	Total:	\$1,976.52
	WTD	Total:	\$3,105.47

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 then launch a PDF containing a list of items ordered.

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

4.2 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.

Monthly Summary Report			
Retailer	Order No	Order Date	Value
Last Month			
A Family Pharmacy1	5662	Feb 1, 17	\$160.07
A Family Pharmacy1	5666	Feb 1, 17	\$117.95
Bobs Bookshop And Cafe	5675	Feb 9, 17	\$15,118.24
Bobs Bookshop And Cafe	5678	Feb 13, 17	\$25.00
Test Retailer	5680	Feb 13, 17	\$8,887,806.00
DEF Giftware Windsor Park	5679	Feb 13, 17	\$1,281,363.00
DEF Giftware Windsor Park	5681	Feb 13, 17	\$12,205,432.00
Bobs Bookshop And Cafe	5677	Feb 14, 17	\$25.00
A Family Pharmacy1	5682	Feb 14, 17	\$102.50
Dantree Gifts	5685	Feb 15, 17	\$0.20
A Family Pharmacy1	5687	Feb 27, 17	\$1,128.95
ABC Pharmacy Mangere 2	5689	Feb 28, 17	\$1,976.52
Last		Total:	-\$2,047,844.75

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 WorkZone.
- 4 Touching on a retailer in the list will then launch a PDF containing a list of items ordered.

4.3 Ad hoc Reporting screen



The Ad Hoc report screen allows the iPad user to view an on demand summary of Sales data by either Retailer or Products via a specific date range. These can be filtered by various Retailer fields; Chain, Grade, Type, Territory and State. Data can also be filtered via Product Category.

Retailer	Order No	Order Date	Value
A Family Pharmacy1	5687	Feb 27, 17	\$1,128.95
ABC Pharmacy Mangere 2	5689	Feb 28, 17	\$1,976.52
Total:			\$3,105.47

Walkthrough – Using the Ad Hoc Reporting Screen

- 1 Touch the Information navigation icon.
- 2 Touch **“Ad Hoc Reporting”** under the Reports list in the navigation in the Navigation Zone.
- 3 The Ad Hoc Report will then be displayed in the WorkZone.
- 4 From this screen the report can be generated by grouping the Data by Retailers or Products, then selecting the various Retailer fields; Chain, Grade, Type, Territory and State. Data can also be filtered via Product Category.



4.4 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.

Information		Quotes Summary Report		
Inzant Sales TEST System		Retailer	Date	Value
<ul style="list-style-type: none"> Subscribers Notifications Sync status Reports <ul style="list-style-type: none"> Weekly summary Monthly summary Ad hoc reporting Quotes summary Orders not uploaded On Credit Hold No Monthly Orders Help with Inzant User manual 		A Family Pharmacy1	Feb 27, 17	\$1,128.95
		A Family Pharmacy1	Feb 15, 17	\$117.95
		A Family Pharmacy1	Feb 15, 17	\$33.70
		Bobs Bookshop And Cafe	Feb 9, 17	\$0.00
		All Night Pharmacy	Feb 9, 17	\$95,280,368.00
		Dantree Gifts	Feb 9, 17	\$16,349.01
		Dantree Gifts	Feb 9, 17	\$228,809.78
		Bobs Bookshop And Cafe	Feb 9, 17	\$499,995.00
		Bobs Bookshop And Cafe	Feb 9, 17	\$448.19
		All Night Pharmacy	Feb 2, 17	\$387.03
		ABC Pharmacy Mangere 2	Feb 2, 17	\$101.20
		A Family Pharmacy1	Feb 1, 17	\$153.25
		A Family Pharmacy1	Feb 1, 17	\$125.00
		A Family Pharmacy1	Feb 1, 17	\$160.10
		A Family Pharmacy1	Feb 1, 17	\$117.95

Walkthrough – Viewing the Quotes Summary Report

- 1 Touch the Information navigation icon. 
- 2 Touch **“Quotes Report”** under the Reports list in the navigation in the Navigation Zone.
- 3 The Quotes Summery Report will then be displayed in the Work Zone.
- 4 Touching on a quote in the list will cause the screen to change to the **“Order Review Screen”** for the selected quote. 

4.5 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.



Retailer	Date	Status	Value
A Family Pharmacy1	Mar 2, 17	Created	\$0.00
Bobs Bookshop And Cafe	Mar 2, 17	Created	\$0.00
Bobs Bookshop And Cafe	Feb 27, 17	Created	\$0.00
Bobs Bookshop And Cafe	Feb 27, 17	Created	\$0.00
Gifts and Homewares Newcastle	Feb 13, 17	Created	\$0.00
Bobs Bookshop And Cafe	Feb 13, 17	Created	\$44,558,192.00
Bobs Bookshop And Cafe	Feb 13, 17	Created	Return
Jones Family Pharmacy	Feb 13, 17	Created	Return
DEF Giftware Takapuna	Feb 13, 17	Created	Return
Test Retailer	Feb 13, 17	Created	Return

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

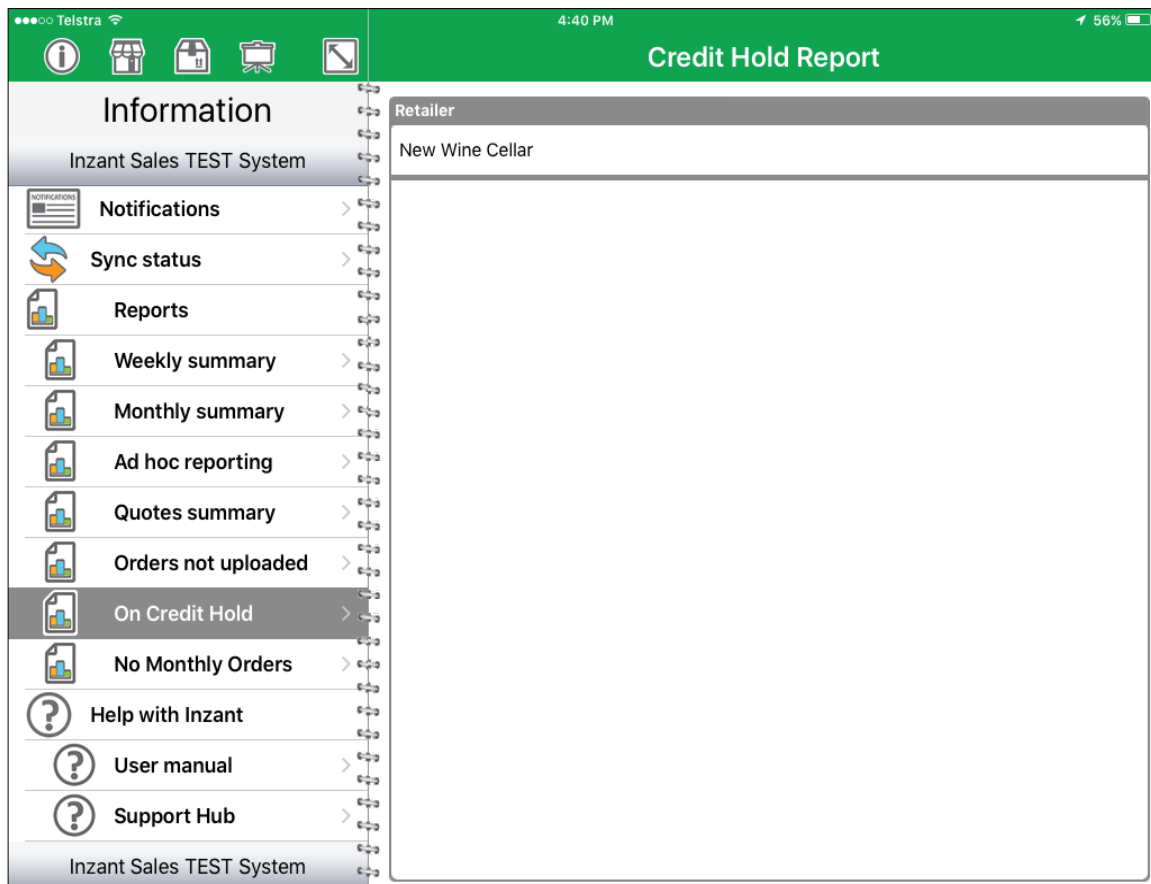
Created: An order has been started and not yet submitted to the cloud.

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 retailer in the list will open the unfinished order, landing on the **“Order Review Screen”** 

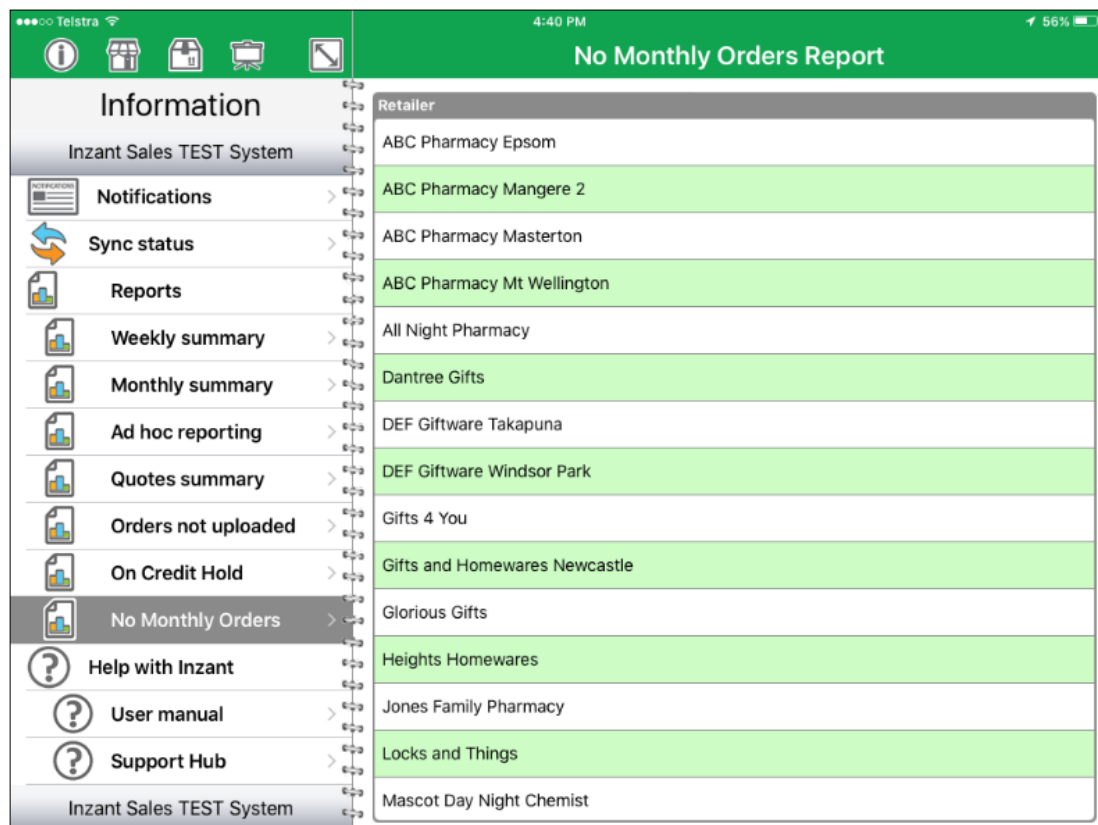
4.6 On Credit Hold Report screen




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 the **“Retailer Details Screen”** to be displayed.

4.7 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 Retailer in the list will cause the screen to change to the Retailer Details.

5. Help with Inzant



There are 2 types of Help material:

- I. User Manual – PDF document providing general user instructions and step by step walkthroughs.
- II. Support Hub – Access to FAQ's, tutorials and the ability to directly raise a support case with the Inzant Support team.

5.1 The iPad User Manual

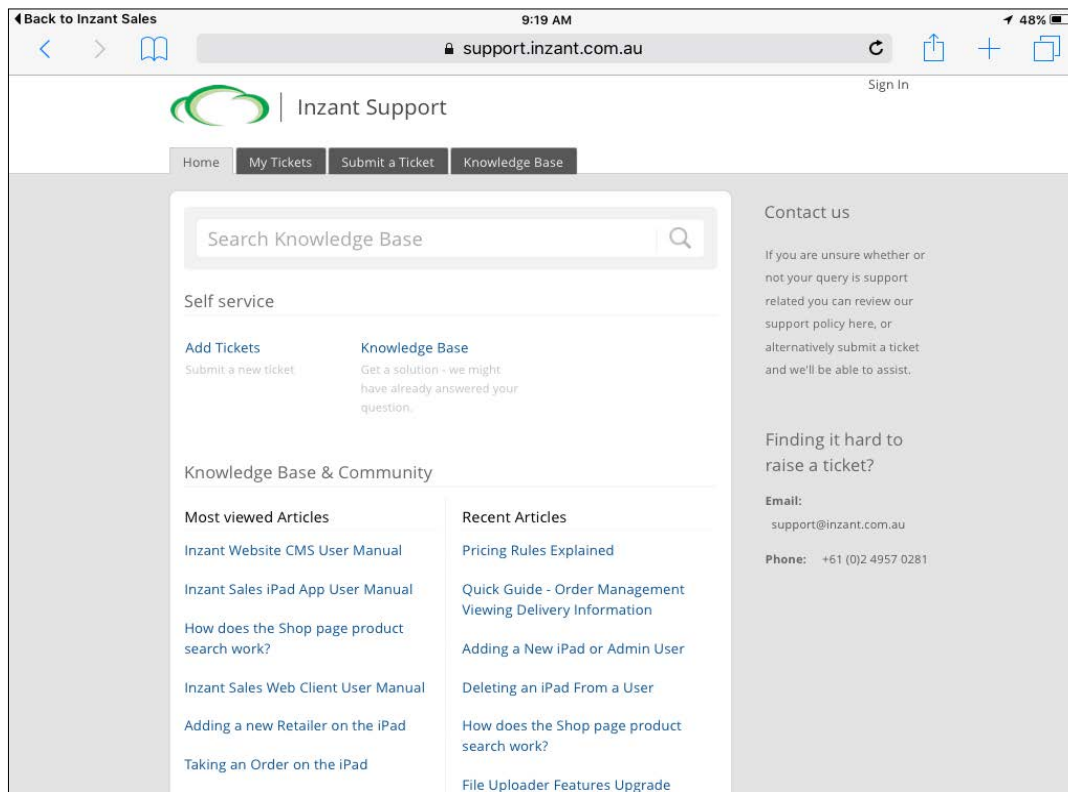


Walkthrough – Accessing the User Manual


- III. Touch the Information navigation icon. 
- IV. Select “**User Manual**” under “**Help with Inzant**” in the Navigation Zone
- V. This will then launch the Inzant PDF viewer, from here it is possible to email, print and bookmark pages.
- VI. Swiping to the left and right will move to the next or previous pages.
- VII. Return from the PDF view by tapping the close icon. 

5.2 The Inzant Support Hub

Using this feature will cause the iPad's web browser Safari to open and land on the Inzant Support Website, from here it is possible to view all Inzant's online support. The Home Page will display a zone where Inzant's contact information is easily accessed as well as tabs for the online knowledge base and the ability to view and directly raise a support ticket with Inzant.



Walkthrough – Accessing the Inzant Support Sub

- 1 Touch the Information navigation icon. 
- 2 Select **“Support Hub”** under **“Help with Inzant”** in the Navigation Zone
- 3 The iPads web browser Safari will then open to the Inzant Support Website.
- 4 From the **Home** page use the tabs to access the various features of the site.
- 5 Select the **“My Tickets”** tab to view any current or past support tickets raised with Inzant.
- 6 Select the **“Submit a Ticket”** tab to raise a new support task with the Inzant Support team.
- 7 To access FAQ's, tutorials and all help manuals select the **“Knowledge base”** tab.

6. 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.

The screenshot shows the 'Retailers' screen. On the left is a sidebar with a 'Retailer Filter' section containing 'Filters' and 'Call Cycle' buttons, a search bar, and a list of weeks from Week 1 to Week 11, each with a storefront icon. The main area displays a table of retailers with columns for Retailer, Type, and Suburb. The table lists 13 retailers, including Bobs Bookshop And Cafe, A Family Pharmacy1, ABC Pharmacy Epsom, ABC Pharmacy Mangere 2, ABC Pharmacy Masterton, ABC Pharmacy Mt Wellington, All Night Pharmacy, Dantree Gifts, DEF Giftware Takapuna, DEF Giftware Windsor Park, and Gifts 4 You. The table is filtered to show only Chemists and Gift Shops. The bottom of the screen shows 'Inzant Sales TEST System'.

Retailer	Type	Suburb
Bobs Bookshop And Cafe		
	Chemist	Cobrico
A Family Pharmacy1	Chemist	Cairns
ABC Pharmacy Epsom	Chemist	Epsom
ABC Pharmacy Mangere 2	Chemist	Mangere
ABC Pharmacy Masterton	Chemist	Masterton
ABC Pharmacy Mt Wellington	Chemist	Mt Wellington
All Night Pharmacy	Chemist	Newcastle
Dantree Gifts	Gift Shop	Cairns
DEF Giftware Takapuna	Gift Shop	Takapuna
DEF Giftware Windsor Park	Gift Shop	Windsor Park
Gifts 4 You	Gift Shop	Dubbo

Navigation Zone

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

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.

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, call Cycle Planning is also available.

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.

6.1 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:

- I. To return to the retailer listing touch the back icon in the top right of the screen.
- II. To enter edit mode touch the edit icon in the top right of the screen.
- III. To review previous orders touch the Order History icon in the top right of the screen.
- IV. To create a new Interaction touch the “Interaction” icon in the top right of the screen.
- V. To begin a New Order, select the “New Order Button” on the Interactions tab.



6.2 General Details



10:22 AM Retailer Details 35%

Retailer Name: **A Family Pharmacy1** Active

Journal Tasks Orders

Dashboard General Contacts Suppliers Information Custom Financials Notes Loyalty Location

Street Address: Shop 1
10 Cairns Street
Cairns
QLD 7777
Australia

Postal Address: Shop No.
10 Cairns Street
Cairns
QLD 7777
Australia

General Contact Name: Jane Jones
General Email: support@inzant.com.au
Website Username: testusername

General Phone: 12 1234 1237
General Fax: 12 1234 22256

Web Enabled

Touch General Detail's icon

This section lists details such as Street and Postal Address, General contact name, phone, fax and email. As well as the ability to give the Retailer an access to order on your Inzant Website and provide them with a username.

6.3 Retailer Dashboards



10:17 AM Retailer Details 80%

Retailer Name: **Bobs Bookshop And Cafe** Active

Journal Tasks Orders

Dashboard General Contacts Suppliers Information Custom Financials Notes Loyalty Location

Required Tasks

Fashion Promo	YTD Sales Target	
Food Promo	YTD Sales Actual	
Makeup Promo	MTD Sales Target	
Call Survey	YTD Sales Actual	
	Last Order Date	
	Last Order Value	
	Average Order	
	bla bla	
	bla bla bla	
	fiddlydo	

View the Dashboards by touching the Dashboards icon.

Here is possible to view a list of tasks that are set as "Required" for the Retailer as well as 10 additional customer fields.

6.4 Contacts



10:22 AM 35%

Retailer Details

Retailer Name: **A Family Pharmacy1** Active

Journal Tasks Orders

Dashboard General **Contacts** Suppliers Information Custom Financials Notes Loyalty Location

Contact Type: Buyer

Salutation: Mr First Name: Alf Surname: Kripp

Phone: 1234 5432 Mobile: 9876 2345

Email: test@inzant.com.au Fax: 8765 4532

Receive Marketing Emails: ☒ Receive Marketing Phone Calls: ☒

Touch the Contacts icon to access this information.

This section contains the contact details for multiple contacts for this particular retailer. It can also store unlimited different contact types.

These contact types can be configured from the Inzant Sales Management Website. Each contact can also be ticked to receive Marketing Emails and Calls.

6.5 Supplier



12:16 PM 98%

Retailer Details

Retailer Name: **A Family Pharmacy1** Active

Journal Tasks Orders

Dashboard General Contacts **Suppliers** Information Custom Financials Notes Loyalty Location

Account No: 123213 ABN: 1223345789

Supplier	Account No.	Priority
Email Supplier	123213	1
MYOB Supplier	ABC Pharmacy Cairns	2
Quickbooks Supplier	A Family Pharmacy1	3
Xero	123213	4

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.

6.6 Retailer Specific Discounts



2:35 PM 16%

Retailer Details

Retailer Name: Active

Statistics General Contacts **Suppliers** Information Custom Financials Notes Loyalty Location

Account No: ABN:

Supplier	Brand	Min Qty	% Disc
MYOB Supplier	3P	0	0.00
Email Supplier	Cosmetics	0	0.00
Quickbooks Sup	Inzant Cosmetics	0	0.00
Xero	Inzant Fashion	0	0.00
	Inzant Food	0	0.00

View the discounts by touching the Discount icon on the Supplier Page

From here 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)

6.7 Information Screen



2:35 PM 16%

Retailer Details

Retailer Name: Active

Dashboard General Contacts Suppliers **Information** Custom Financials Notes Loyalty Location

Retailer Type: Retailer Custom 1

Retailer Chain: Retailer Custom 2

Grade: Retailer Custom 3

Territory: Retailer Custom 4

Availability: Retailer Custom 5

Visit Cycle Period:

This Screen Contains a number of information fields such as retailer type, chain, grade, territory, availability and Visit cycle period.

There are also 5 additional custom fields in this information zone.

6.8 Custom Fields



2:35 PM 16%

Retailer Details

Retailer Name: **A Family Pharmacy1** Active

Journal Tasks Orders

Dashboard General Contacts Suppliers Information **Custom** Financials Notes Loyalty Location

Retailer Custom 6	ExtCustom1
<input type="text"/>	<input type="text" value="3000"/>
Retailer Custom 7	ExtCustom2
<input type="text"/>	<input type="text" value="2999"/>
Retailer Custom 8	ExtCustom3
<input type="text"/>	<input type="text"/>
Retailer Custom 9	ExtCustom4
<input type="text"/>	<input type="text"/>
Retailer Custom 10	ExtCustom5
<input type="text"/>	<input type="text"/>

The Custom fields' page contains up to 10 entirely customizable fields.

This is where any fields' specific to Individual system set up will be located.

6.9 Financials Screen



2:59 PM 28%

Retailer Details

Retailer Name: **A Family Pharmacy1** Active

Journal Tasks Orders

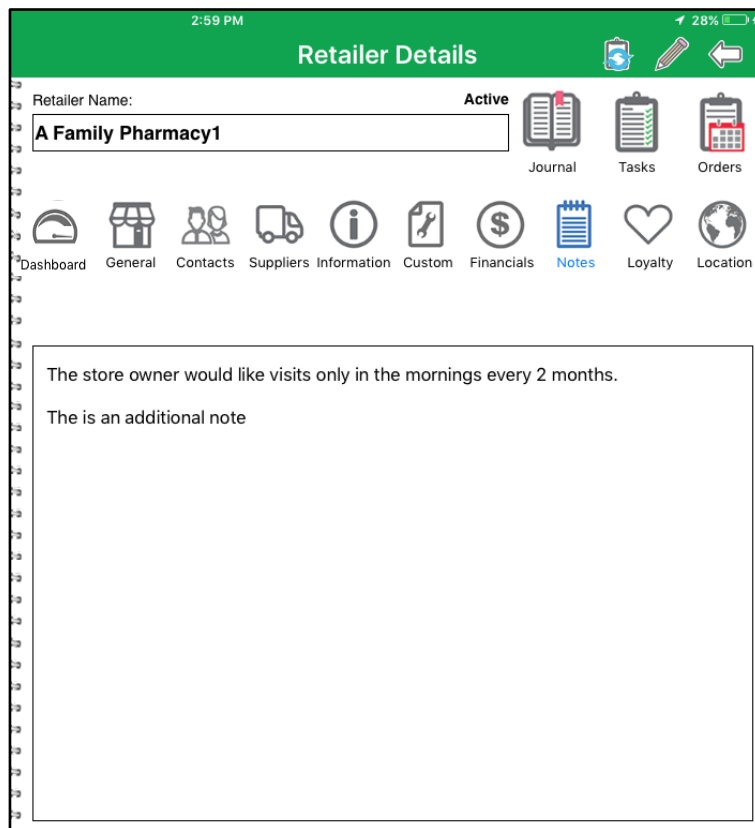
Dashboard General Contacts Suppliers Information Custom **Financials** Notes Loyalty Location

Terms:	Credit Limit:
<input type="text"/>	<input type="text" value="\$ 0.00"/>
Financial Custom1	Account Balance:
<input type="text"/>	<input type="text" value="\$ 0.00"/>
Financial Custom2	Financial Custom6
<input type="text"/>	<input type="text"/>
Financial Custom3	Financial Custom7
<input type="text"/>	<input type="text"/>
Financial Custom4	Financial Custom8
<input type="text"/>	<input type="text"/>
Financial Custom5	Financial Custom9
<input type="text"/>	<input type="text"/>
	Financial Custom10
	<input type="text"/>

This Screen Contains a number of financial information fields such as retailer terms, Credit Limit and Account Balance.

There are also 5 additional custom fields the financial information zone.

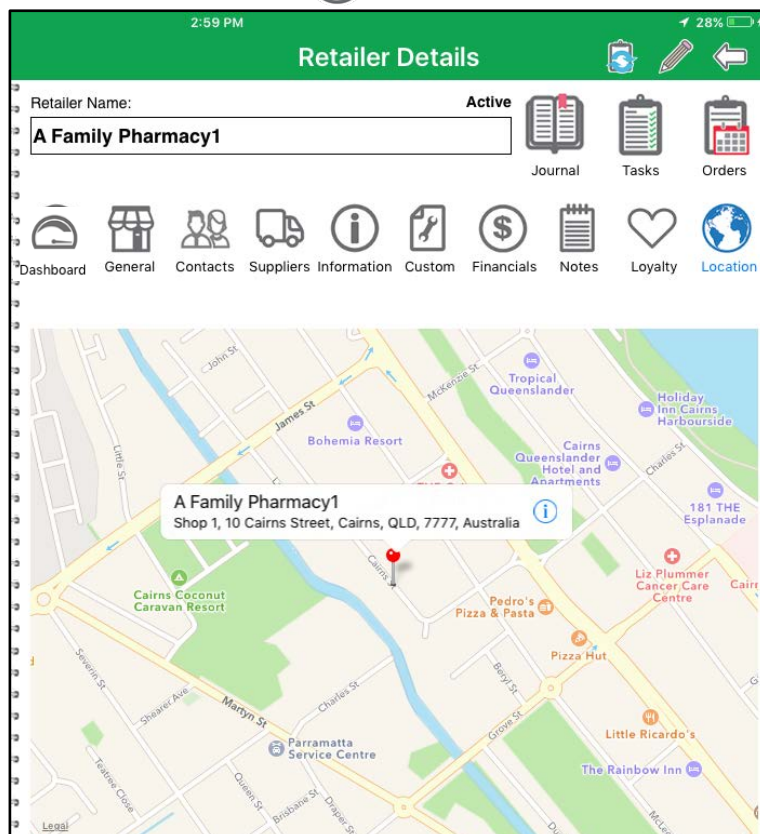
6.10 Notes



Touch the Notes icon to access this information.

This section is a text editable zone where reps can store any relevant private notes pertaining to the selected Retailer.

6.11 Location




Touch the Location icon to access this information.

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

Tapping on the Retailer name in the whiter zone will launch the Apple Maps App and provide turn by turn navigation to the Retailer's street address.

6.12 Journal



2:59 PM 28%   

Retailer Details

Retailer Name: **A Family Pharmacy1** Active

[Journal](#) [Tasks](#) [Orders](#)

[Dashboard](#) [General](#) [Contacts](#) [Suppliers](#) [Information](#) [Custom](#) [Financials](#) [Notes](#) [Loyalty](#) [Location](#)

Filters: [Call Notes](#) [Order Notes](#)

Feb 28, 17	In Store Visit	Neville Kripp
Feb 28, 17	In Store Visit	Neville Kripp
Feb 27, 17	EDI	Neville Kripp
Order Imported via EDI, SO #005688 of interaction type 'EDI'		
SalesOrder: 5688		
Feb 27, 17	In Store Visit	Sue Kripp
SalesOrder: 5687		
Feb 27, 17	In Store Visit	Sue Kripp

[Get All History](#)




Touch the Journal icon to access this information.

This section zone where any note recorded against the Retailer Interactions are viewable. You have the option of filtering the notes by **Order** or **Call** type.

From the Order note screen you can also view whole order notes as well as any notes that were taken against individual line items.

6.13 Tasks



10:17 AM 80%   

Retailer Details

Retailer Name: **Bobs Bookshop And Cafe** Active

[Journal](#) [Tasks](#) [Orders](#)

[Dashboard](#) [General](#) [Contacts](#) [Suppliers](#) [Information](#) [Custom](#) [Financials](#) [Notes](#) [Loyalty](#) [Location](#)

Filters: [Surveys](#) [Promotions](#) [Current](#)

Task Date	Name	State
	Call Survey	Created Edit
	Food Promo	Submitted View
Mar 16, 17	Makeup Promo	Previous View
Mar 16, 17	Food Promo	Previous View
Mar 16, 17	Fashion Promo	Previous View
Mar 14, 17	Makeup Promo	Previous View
Mar 14, 17	Food Promo	Previous View
Mar 14, 17	Fashion Promo	Previous View
Mar 14, 17	Makeup Promo	Previous View

[Get All History](#)

Touch the Tasks icon to access this information.

This section displays an interactive list of tasks that have been completed against this retailer from here it is possible to **View** the previously completed tasks. The tasks can be filtered by **Surveys**, **Promotions** and **Current**.

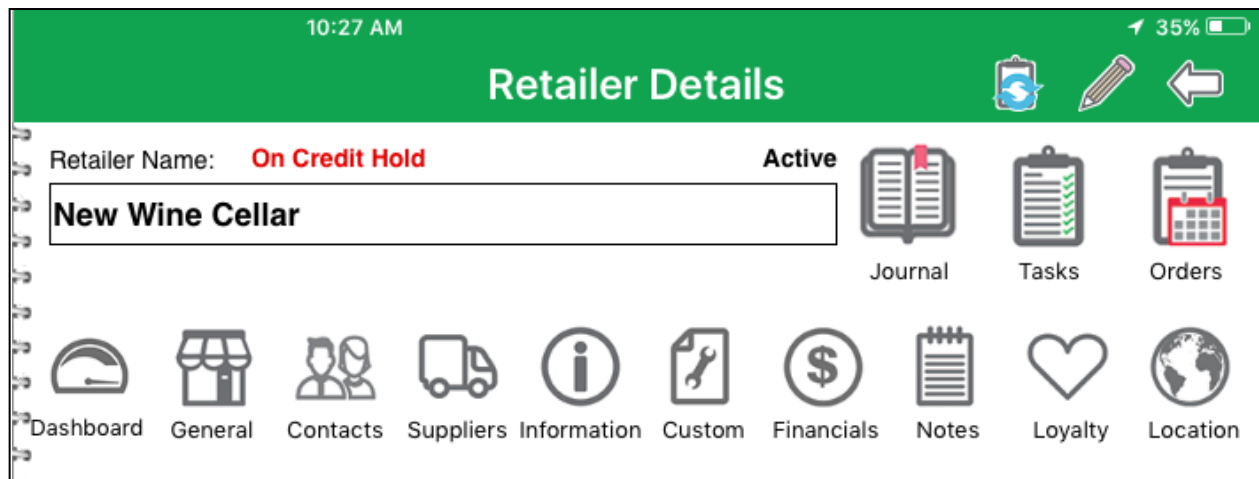
It is also possible to **Edit** tasks that are currently open for this retailer.

Is also possible to view additional task history by selecting **"Get All History"**.

6.14 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**”.



Orders for Retailers on Credit hold can be processes as normal, however this is a setting where if required new orders can still be taken and submitted to the cloud however these orders will not be processed once reaching the cloud. Once the credit hold status has been removed a user must log in to the Inzant Sales web interface and manually process the orders raised against the Retailer.

6.15 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.






Walkthrough - Editing Retailer Information

- 1 Tap the Retailer 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.








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 Adding a Retailer Supplier 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 editing of a Retailer Supplier 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 Deleting Retailer Supplier 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 

6.16 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.





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


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



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

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

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

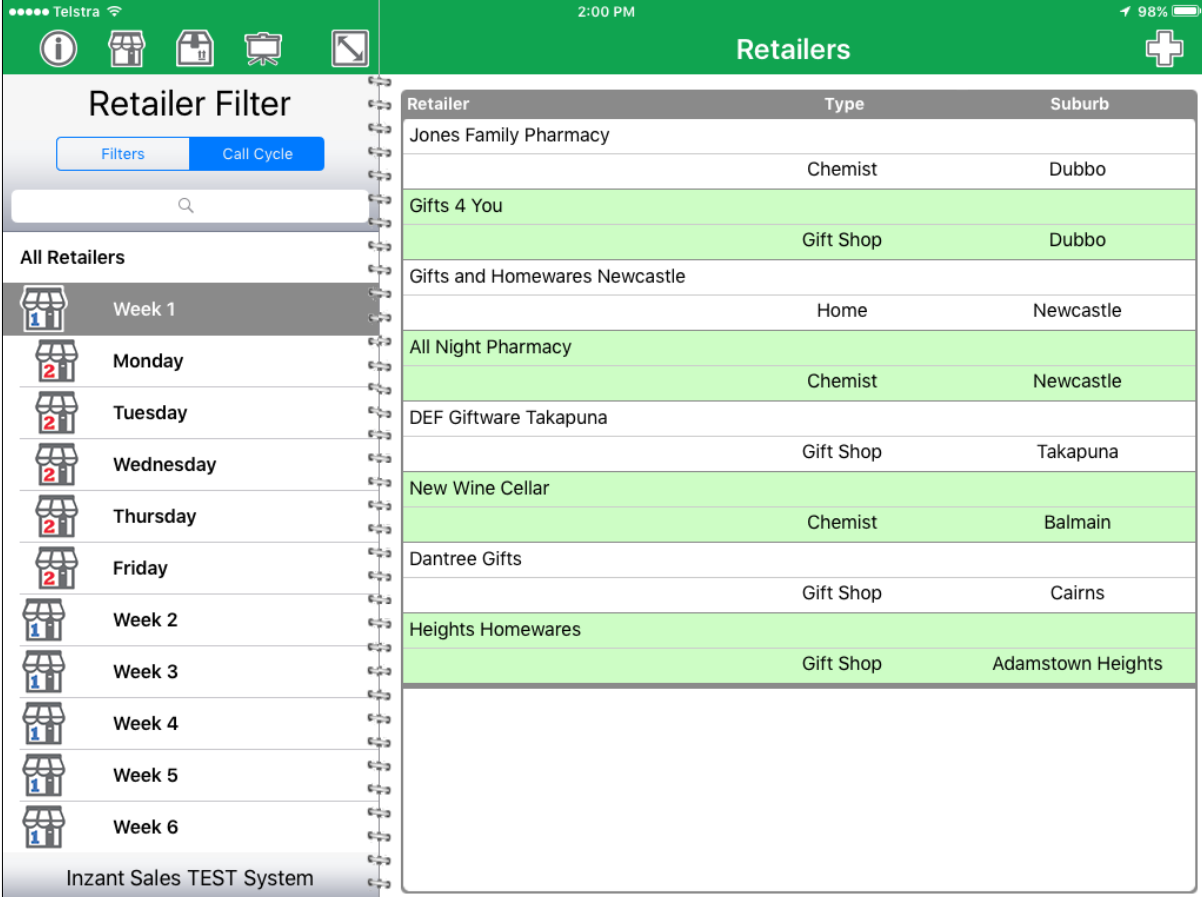
- 10  Notes information about a retailer. General information in a free format.
- 11  Statistics. Contains Business Intelligence
- 12  Loyalty. Shows Loyalty program relevant to the Retailer.
- 13  Location information displaying an interactive map showing the physical location of the retailer.

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

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

6.17 Call cycle

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



The screenshot shows a mobile application interface for 'Retailers'. The top status bar indicates 'Telstra', '2:00 PM', and '98%' battery. The app header is green with the title 'Retailers' and a plus icon. Below the header is a 'Retailer Filter' section with 'Filters' and 'Call Cycle' tabs, and a search bar. The left sidebar lists 'All Retailers' and a weekly calendar from 'Week 1' to 'Week 6'. The main area displays a table of retailers with their types and suburbs. Some rows are highlighted in green.

Retailer	Type	Suburb
Jones Family Pharmacy	Chemist	Dubbo
Gifts 4 You	Gift Shop	Dubbo
Gifts and Homewares Newcastle	Home	Newcastle
All Night Pharmacy	Chemist	Newcastle
DEF Giftware Takapuna	Gift Shop	Takapuna
New Wine Cellar	Chemist	Balmain
Dantree Gifts	Gift Shop	Cairns
Heights Homewares	Gift Shop	Adamstown Heights

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

7. 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.

Product	W/Sale	RRP
Allure Lipstick <24>	\$0.10	\$20.10
Art-deco Silver Ring with Green Stone <6>	\$168.62	\$236.00
Assorted Candy Bags <2>	\$16.85	\$23.50
Assorted Truffle box <24>	\$10.25	\$14.30
Bifold Black Leather Wallet <18>	\$30.65	\$42.90
Black Leather Clutch with Gold Clasps <6>	\$20.24	\$28.30
Bronze Chain with Shell Beads and Amethyst Pendant <6>	\$28.98	\$40.50
Caramel Cupcakes <10>	\$12.88	\$18.00
Chocolate Biscuit Fingers <6>	\$10.32	\$14.40
Chocolate Chip Biscuits <24>	\$3.45	\$4.83
Chocolate Cream Wafers <24>	\$50.00	\$3.71

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:

Product	W/Sale	RRP
Coke Cola 375 mL	\$8.00	\$12.00
Coke Cola 375 mL - 24 Pack	\$45.00	\$500.00
Coke Cola 375 mL - 6 Pack	\$95.00	\$0.00
Coke Cola 600 mL	\$19.50	\$15.50
Coke Cola Cups - 48 Pack	\$46.00	\$0.00
Sprite 375 mL Can	\$10.00	\$15.00
Sprite 375 mL Cans - 24 Pack	\$263.00	\$26.32
Sprite 375 mL Cans - 6 Pack	\$3.21	\$16.25
Sprite 600 mL Bottle	\$16.05	\$162.00
Sprite Paper Cups - 148 Pack	\$156.23	\$0.00
Testing product	\$750.00	\$0.00

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.

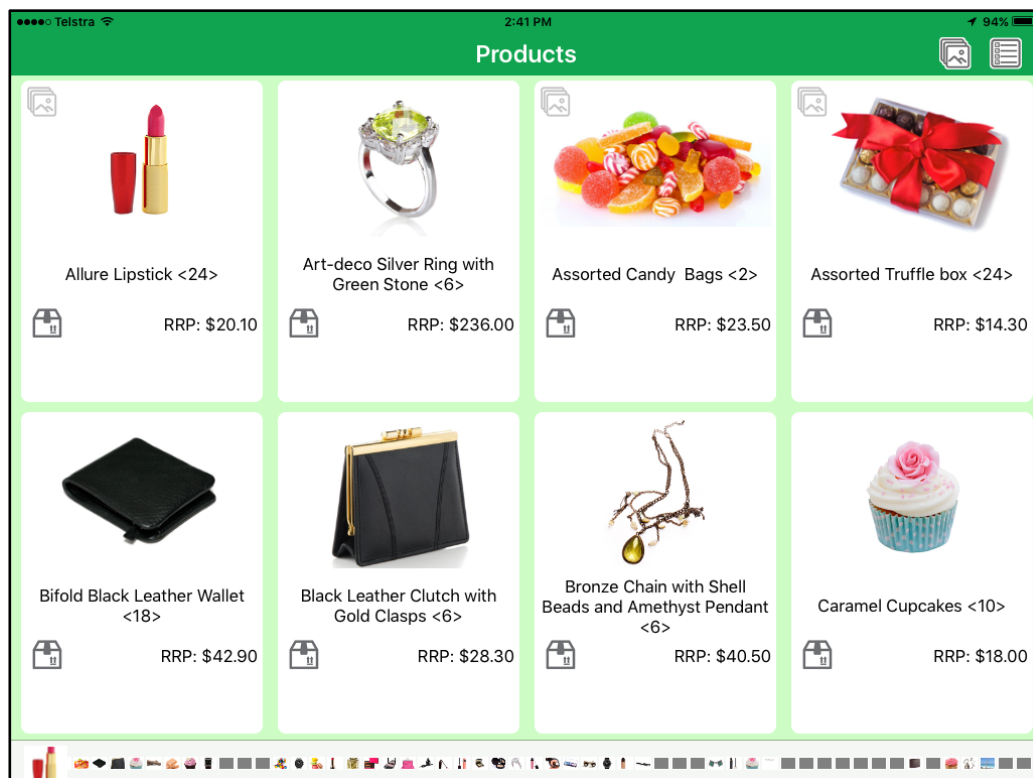
Image Display



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

The number of images can be adjusted by tapping the multiple image icon.

Tap the List View icon to return to the main display.



7.1 Product Details screen



2:02 PM 97%

Product Details

Product Name: **Allure Lipstick**

Description: This lipstick is a full and vibrant lip colour with all the sheen of a gloss. It is easy to apply, long-lasting and soft and moist on the lips. A lipstick perfect for women on-the-go.

Information Custom Supplier Media

Manufacturer Code: **IN5041** Colour: Custom1 **Red**

Stock on Hand: **260** Height: **0.00** Custom2 **24**

RRP: **\$ 20.10** GST Inclusive: ☒ Width: **0.00** Custom3 **5**

Sell As: Carton Quantity: **6** Depth: **0.00** Custom4

Weight: **0.000** Custom5

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

7.2 Custom



2:02 PM 97%

Product Details

Product Name: **Allure Lipstick**

Description: This lipstick is a full and vibrant lip colour with all the sheen of a gloss. It is easy to apply, long-lasting and soft and moist on the lips. A lipstick perfect for women on-the-go.

Information Custom Supplier Media

Custom6 CustomExt1 CustomBoolean1 ☒ Sugar Fee ☒

Custom7 CustomExt2 CustomBoolean2 ☒ CustomBoolean7 ☒

Custom8 CustomExt3 CustomBoolean3 ☒ Low Carb ☒

Custom9 CustomExt4 CustomBoolean4 ☒ CustomBoolean9 ☒

Custom10 CustomExt5 CustomBoolean5 ☒ CustomBoolean10 ☒

Test Supplier

The Custom fields' page contains up to 10 entirely customizable fields. In addition to 10 Custom Booleans

7.3 Product/Supplier 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



	Start date	End date	% Disc
Information	31 Jul 2014		0.00 %
Supplier	06 Nov 2014		5.00 %
Email Supplier	06 Nov 2014		10.00 %

2:02 PM

97%

Product Details

Product Name:

Allure Lipstick

Description:

This lipstick is a full and vibrant lip colour with all the sheen of a gloss. It is easy to apply, long-lasting and soft and moist on the lips . A lipstick perfect for women on-the-go.

Information

Custom

Supplier

Media

Supplier

Code

W/Sale

Email Supplier

IN5041

\$0.10

7.4 Media

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.

2:02 PM

97%

Product Details

Product Name:

Allure Lipstick

Description:


This lipstick is a full and vibrant lip colour with all the sheen of a gloss. It is easy to apply, long-lasting and soft and moist on the lips . A lipstick perfect for women on-the-go.






Information

Custom

Supplier

Media

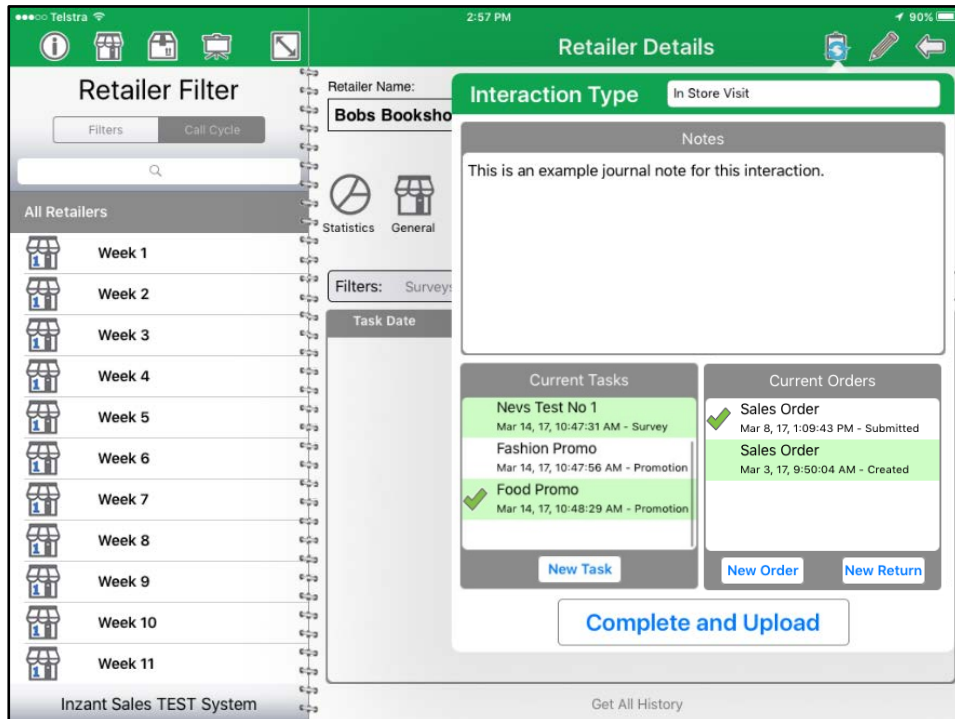


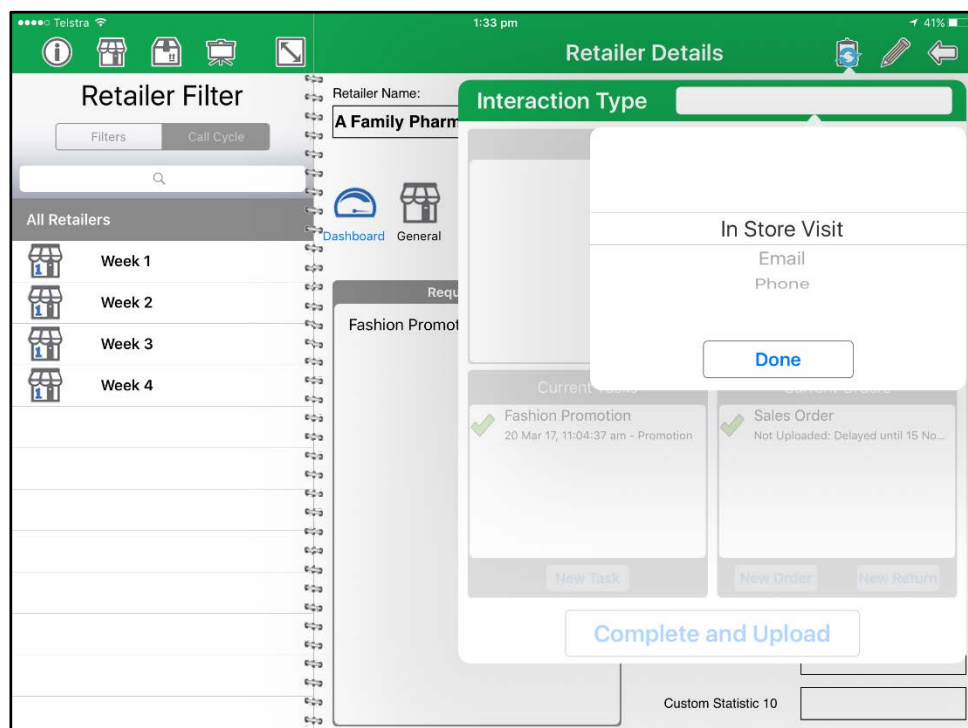
7.5 Interactions



The Interactions popup is accessed by selecting a retailer and tapping the **Interactions** Button. The Interaction button opens a screen popover that will allow users to record all components of an interaction with a customer including the Interaction Type, any journal notes, applicable & required tasks and order management.

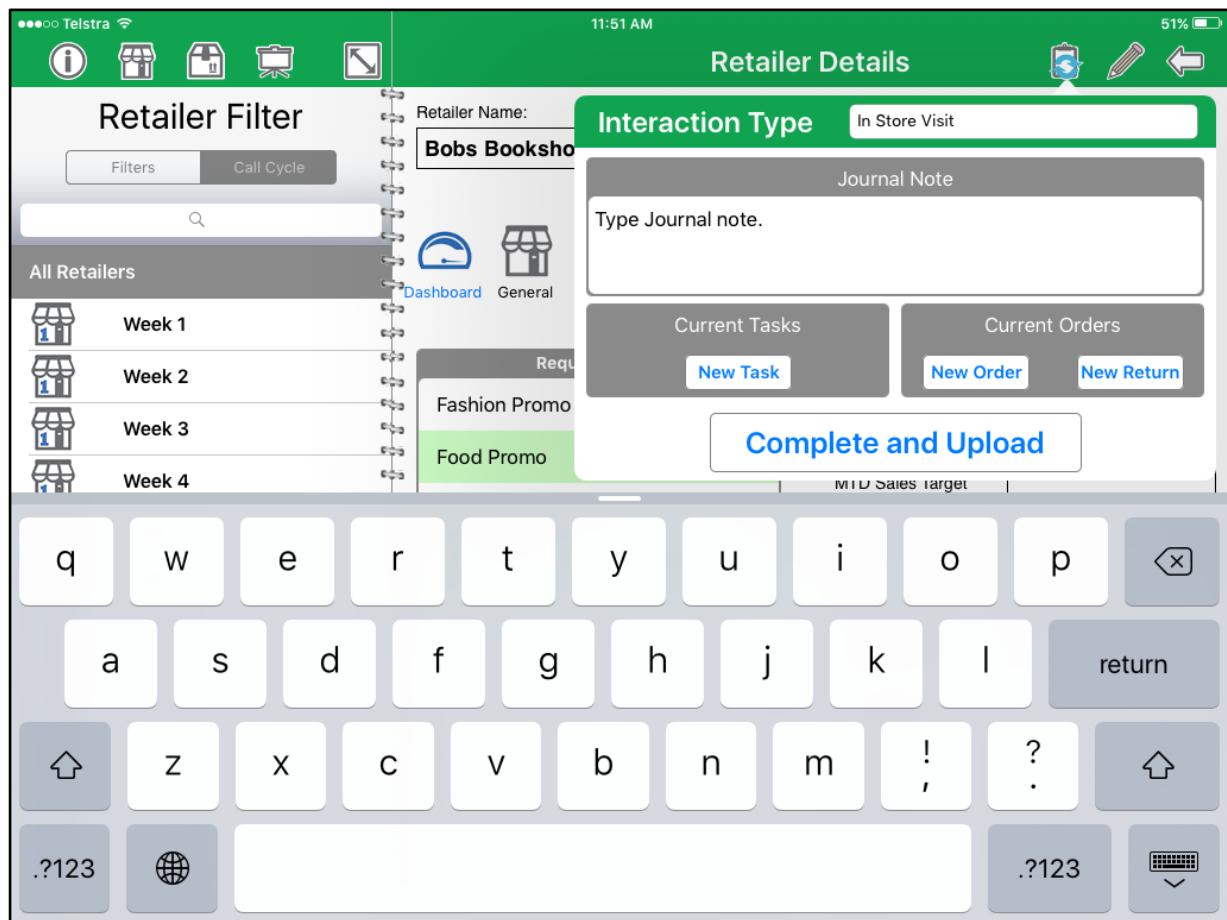


When the Interactions Popup is first opened it will prompt the user to select an interaction type in the scroll wheel. The rest of the popup area will appear greyed out until an interaction type is selected.



7.6 Journal Entry

To Create a Journal Entry, tap the area. A keyboard will then appear on the iPad so the user can begin adding their journal entry.




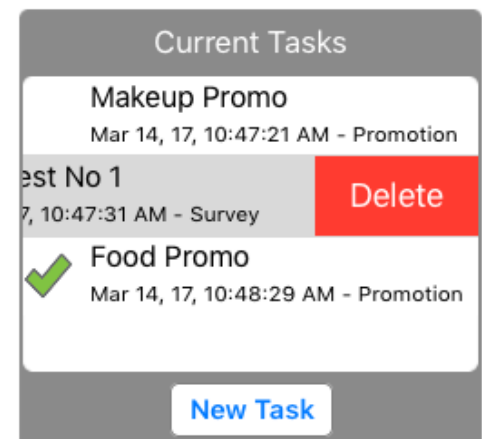
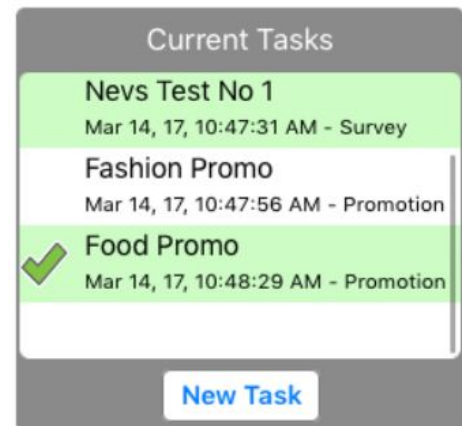
Journal entries can be added on their own without any tasks or orders associated with them, by selectin the “Complete and Upload” button on the Interactions popover.

7.7 Current Tasks

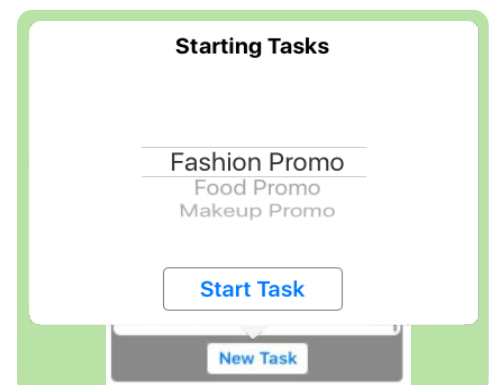
This tab displays a list of tasks that are currently active for this customer and displays various information for the tasks e.g. Time and date created, type of task i.e. Survey or Presentation.

To access a task already in progress, tap the task in the list under **Current Tasks**. This will take the user to the **Task Pop Up**.

- I.  Tasks with the ticked icon complete and cannot be edited.
- II. Tasks without the Ticked icon are still in progress and can be modified.
- III. To **Delete** a Task in progress the user must press on the order and slide a finger to the left, a delete button will then appear. Tap that Delete button to delete the task.
- IV. To begin a new task select the **"New Task"** button and use the scroll wheel to select the required task from the list




Note: If tasks are mandatory this pop up will appear automatically when the interactions tab is opened.

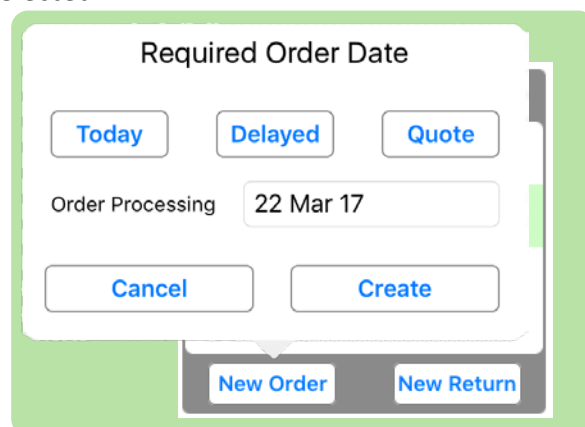
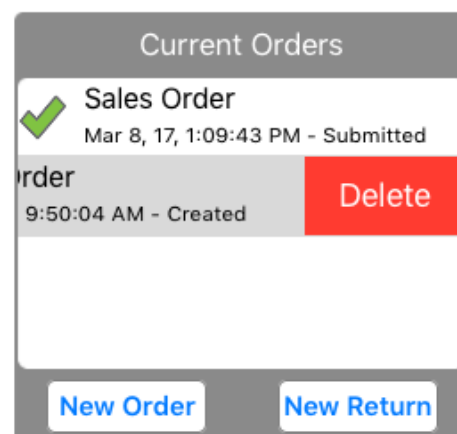
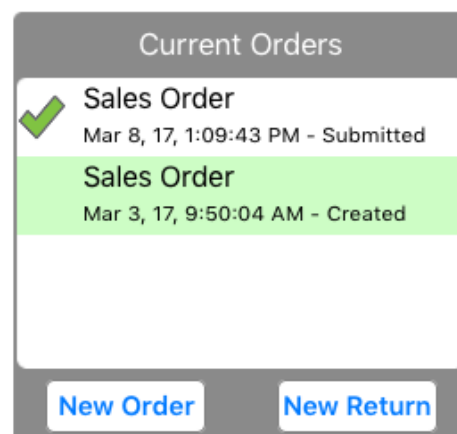


7.8 Current Orders

This tab displays a list of Orders that have been created for this customer during this interaction. Displaying various information for the Order e.g. Time and date created, order status i.e. Created, Pending, Submitted.

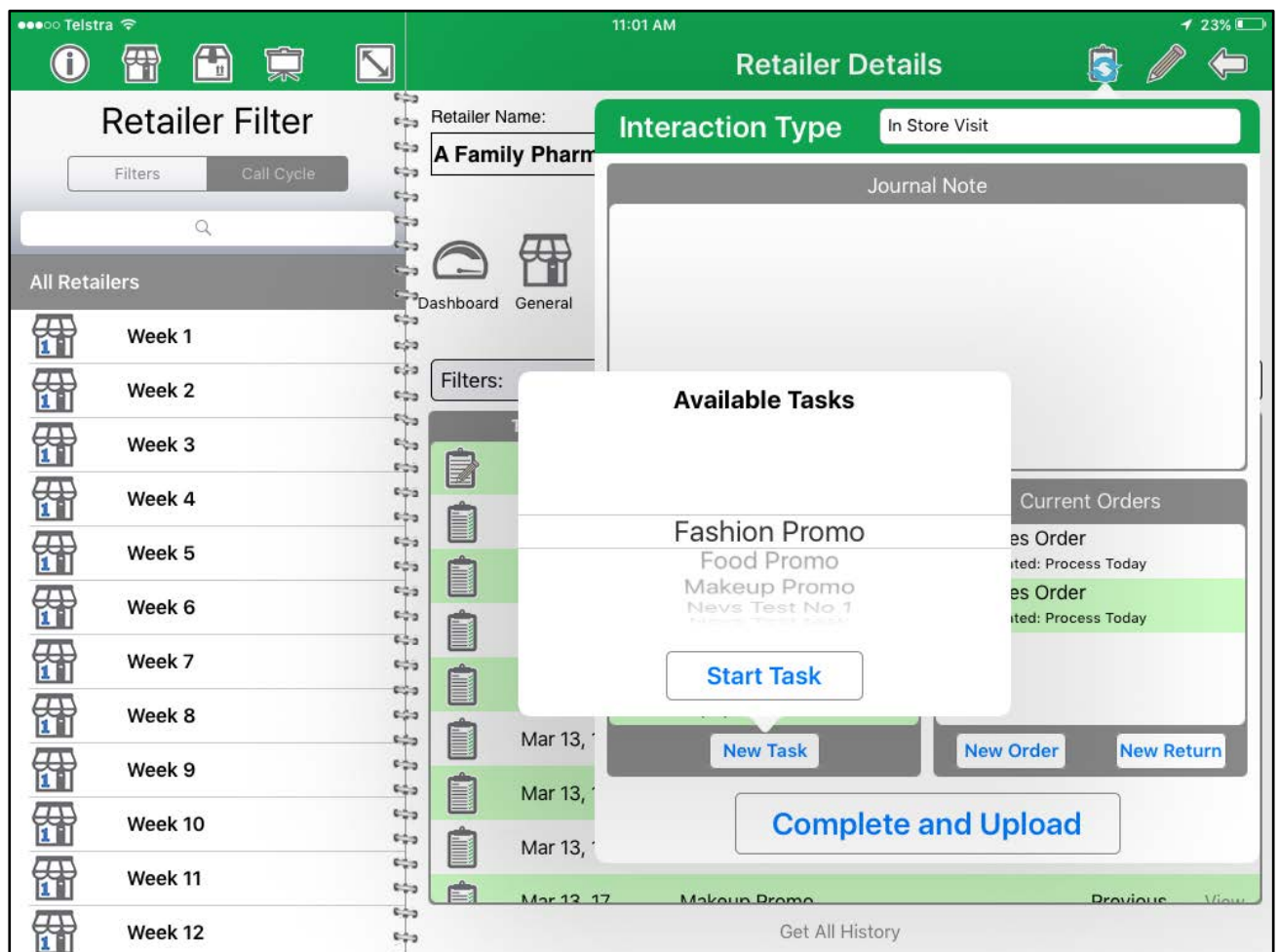
To access an order already in progress, tap the order in the list under **Current Orders**. This will take the user to the **Order Review** screen for that order.

- I.  Orders with the ticked icon and the status of **"Submitted"** are complete and cannot be edited.
- II. Orders with the status of **"Created"** are still in progress and can be modified.
- III. To **create** a new **Order** select the **"New Order"** Button.
- IV. To **create** a new **Return Order** select the **"New Order"** Button.
- V. To **Delete** an order in progress the user must press on the order and slide a finger to the left, a delete button will then appear. Tap that Delete button to delete the order.
- VI. A Setting can be configured to display a **"Required Order Date"** Popover when a New Order is selected. From here an order can be set as **"Delayed"** or Submitted as a **"Quote"**



8. Tasks

New Tasks are access by selecting the **New Task** button on the Interactions tab. A scroll wheel then appears displaying the list of available tasks. Using the scroll wheel find the required task then Select “**Start Task**”.



In Inzant Sales Plus there are 2 types of Tasks available:

- Surveys – Ask questions to gain further insight into customers.
- Promotions – Ensure that all customers are being shown relevant Campaigns.

8.1 Surveys

Surveys are a method of gathering information from customers. This information is collected through use of standardised features per survey so that every participants is captured in the same way. There are a variety of ways information is captured in Surveys in Inzant. It is also possible to view any PDF document associated with a question in the survey by selecting the “Campaign” button in the Survey Window.

Call Survey [Submit] [Close]

This is an example survey for Reps to complete

Are competitors products stocked [Campaign]

Response : ☒ Yes ☐ No

Comment : Various brands

Are our products prominent

Response : ☒ YES ☐ NO

Comment :


How many competitors products are stocked

Response : 5

Comment :

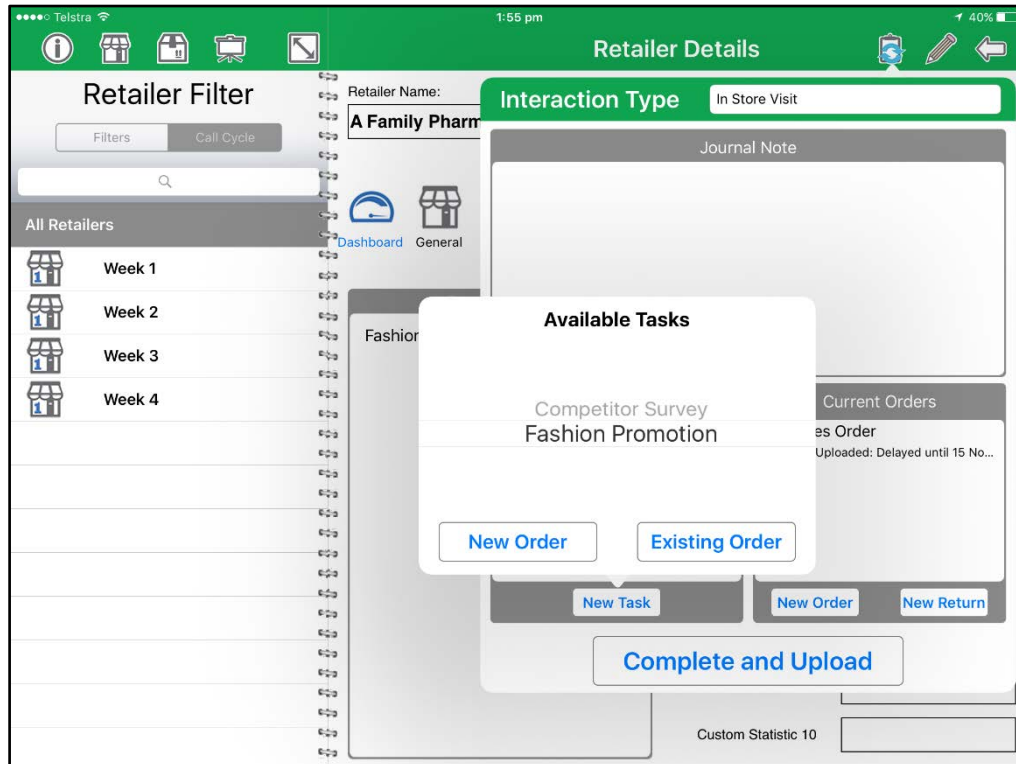
- I. **Dropdown Selection** – A list that allows the user to choose one value from the list to answer the questioned asked.
- II. **Free Text Response** – This option allows the user to use the keyboard on the iPad to manually type in any response they choose.
- III. **Image Capture** – Requires the user to access the Camera on their iPad to take a picture in response to the prompt in the Survey.
- IV. **Numeric** – This option displays a numeric keypad to ensure the user enters a numerical figure in response to the survey question.
- V. **Promotion** – Requires the user to present a PDF document loaded into Inzant to the Customer and displays as “Viewed” or “Unviewed”.
- VI. **Radio Button** – The radio button supports up to three 3 responses for the question using a simple checkbox method.

Walkthrough – Completing a Survey

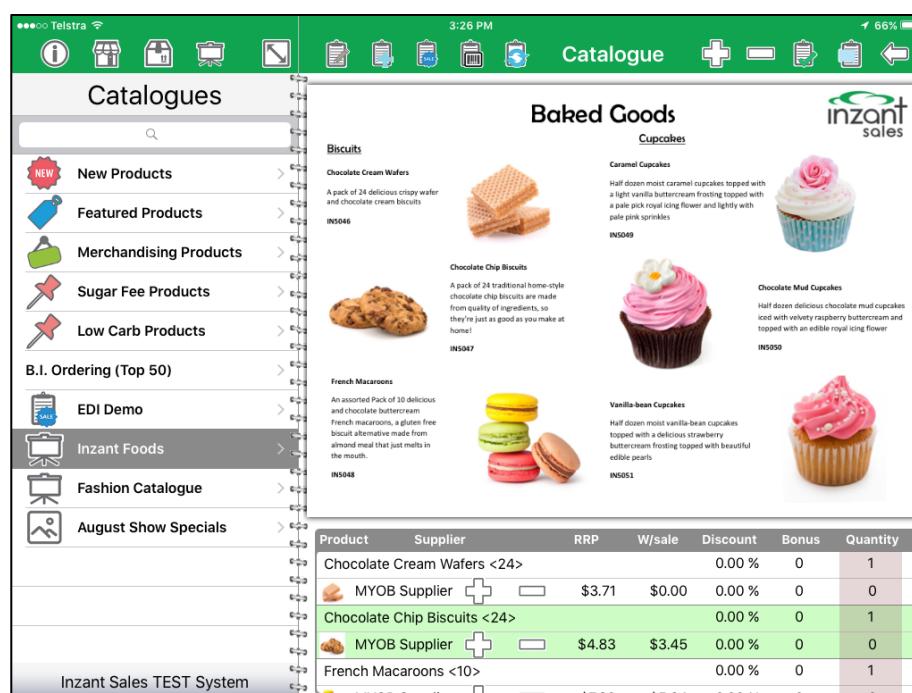
- 1 Touch the **Interactions** icon. 
- 2 In the “**Current Tasks**” zone select the “**New Task**” button.
- 3 Use the scroll wheel to select the required survey then tap “**Start Task**”.
- 4 The Survey Window will then appear on the screen, answer all questions associated with the survey.
- 5 Once completed select the “**Submit**” button in the top right corner of the survey window.
- 6 Tap the Interaction icon to return to the interactions pop up, Once all orders and tasks are complete, select the “**Complete and Upload button**” to close the interaction for the customer.

8.2 Promotions




A Promotions task is a way to ensure that all customers are aware of current promotions and specials. When a promotion task is selected in the Tasks scroll wheel there is the option of creating a new order for while viewing the promotion or adding it to an existing order.



The promotion 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.



Walkthrough – Completing a Promotion

- 1 Touch the **Interactions** icon. 
- 2 In the “**Current Tasks**” zone select the “**New Task**” button.
- 3 Use the scroll wheel to select the required Promotion then select “**New Order**” or “**Existing Order**”.
- 4 The Campaign Order Mode view will then appear on the screen, display to the customer and order any required items, if the customer does not wish to order at this stage proceed to step 8.
- 5 Once completed the customer can then add other items to the order using any of the other order methods.
- 6 Tap the Order review screen to see a summary of all items ordered. 
- 7 Once it is complete select the “Submit” icon. 
- 8 Tap the Interaction icon to return to the interactions pop up, Once all orders and tasks are complete, select the “**Complete and Upload button**” to close the interaction for the customer.

9. Orders

New Orders are created by selecting the “**New Order**” button on the Interactions tab. 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 for processing.

Telstra1:29 PM75%

Add Items

Product Filter

Q

All products

NEW

New Products

Featured Products

Merchandising Products

Sugar Free Products

Low Carb Products

B.I. Ordering (Top 50)

Food

Fashion

Cosmetics

A Family Pharmacy1

Product	W/sale	RRP	Bonus	Stock	Quantity	
Assorted Candy Bags <2>		\$5.00	\$23.50	0	0	6
Assorted Truffle box <24>		\$10.25	\$14.30	0	0	9
Bifold Black Leather Wallet <18>		\$30.65	\$42.90	0	0	0
Black Leather Clutch with Gold Clasps <6>		\$20.24	\$28.30	0	0	0
Bronze Chain with Shell Beads and Amethyst Pendant <6>		\$28.98	\$40.50	0	0	0
Chocolate Mud Cupcakes <10>		\$12.65	\$17.70	0	0	5
Smooth Liquid Foundation <24>		\$16.88	\$23.60	0	0	0
Solid Black Eye Kohl <48>		\$13.99	\$19.50	0	0	0

Inzant Sales TEST System

9.1 Add Items to Order



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

Product	W/sale	RRP	Bonus	Stock	Quantity
Assorted Candy Bags <2>	\$5.00	\$23.50	0	0	6
Assorted Truffle box <24>					
Bifold Black Leather Wallet <18>	\$10.25	\$14.30	0	0	9
Black Leather Clutch with Gold Clasps <6>	\$30.65	\$42.90	0	0	0
Bronze Chain with Shell Beads and Amethyst Pendant <6>	\$20.24	\$28.30	0	0	0
Chocolate Mud Cupcakes <10>	\$28.98	\$40.50	0	0	0
Smooth Liquid Foundation <24>	\$12.65	\$17.70	0	0	5
Solid Black Eye Kohl <48>	\$16.88	\$23.60	0	0	0
	\$13.99	\$19.50	0	0	0

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.

Navigation Zone

This 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.

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




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.

If an image is available for the product it will be displayed as a thumbnail. Sliding a finger to the left and pressing the "Details" button will open 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.




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.

Walkthrough - Adding Items to an Order

- 1 Select the retailer and touch the **“Interactions”** icon. 
- 2 Select the **New Order** button on the **“Interactions”** Tab.
- 3 Touch the **“Add Items to Order”** button.
- 4 The Product Category Filter and Product Search can be used to further filter the list of products shown in the Work Zone.
- 5 The product filter pane can be used to further filter the list of products shown in the Work Zone.
- 6 To add a product touch the **“Quantity”** amount, a numerical keypad will be displayed, enter the quantity required and then touch **“Done”**.
- 7 If required Bonus and Stock amounts may also be entered by touching them and entering the amounts into the numeric keypad.
- 8 Comments about the order can be entered by touching the  icon.
- 9 When finished adding items touch the **“Order Review”** button. 
- 10 The Order Review screen will now display any items that were added.

9.2 Stock Count Order



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

Product	Jan 16, 17	Jan 18, 17	Feb 27, 17	Level	Stock	Quantity
Assorted Candy Bags <2>	-	2	67	5	0	6
Bifold Black Leather Wallet <18>	-	8	-	5	0	0
Bronze Chain with Shell Beads and Amethyst Pendant <6>	-	-	-	6	0	0
Chocolate Mud Cupcakes <10>	-	-	-	5	0	5
Smooth Liquid Foundation <24>	-	-	-	5	0	0
Solid Black Eye Kohl <48>	-	-	-	8	0	0

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 uncoun ted, 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 uncoun ted 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:

- I. Last 3 Orders – includes order 12 months ago for seasonal information
- II. Last 4 Orders
- III. Last 4 Weeks
- IV. Last 8 Orders
- V. Last 8 Weeks
- VI. 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.


Adding a zero in the level column will remove a product from the stock count screen.


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

- I. 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.
- II. 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.
- III. When a product is selected the Comments icon will be displayed in the selected  line.
- IV. 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.
- V. 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.
- VI. 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 center of the list and selected.

Walkthrough - Performing a Stock count

- 1 Select the retailer and touch the **'New Order'** button on the **"Interactions"** tab.
- 2 Touch the **Stock count** 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.

9.3 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.

Product	Supplier	RRP	Wholesale	Discount	Bonus	Quantity
Assorted Candy Bags <2>	MYOB Supplier	\$23.50	\$18.85	0.00 %	0	10
Assorted Truffle Box <24>	MYOB Supplier	\$14.30	\$10.28	0.00 %	1	10
Caramel Cupcakes <10>	MYOB Supplier	\$18.00	\$12.88	0.00 %	0	5
Chocolate Biscuit Fingers <6>	MYOB Supplier	\$14.40	\$10.32	0.00 %	0	0

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.

Product	Supplier	RRP	Wholesale	Discount	Bonus	Quantity
Chocolate Cream Wafers <24>	MYOB Supplier	\$3.71	\$0.00	0.00 %	0	1
Assorted Truffle Box <24>	MYOB Supplier	\$4.83	\$3.45	0.00 %	0	0
Assorted Cupcakes <10>	MYOB Supplier			0.00 %	0	1

Product	Supplier	RRP	Wholesale	Discount	Bonus	Quantity
Art-deco Silver Ring with Green Stone <8>	MYOB Supplier	\$236.00	\$168.62	0.00 %	0	1
Black Leather Clutch with Gold Clasp <6>	MYOB Supplier	\$29.30	\$20.24	0.00 %	0	1
Classic Square Watch <12>	MYOB Supplier	\$213.00	\$152.36	0.00 %	0	1
Gold Clutch Purse <6>	MYOB Supplier	\$38.90	\$27.85	0.00 %	0	1
Modern Zirconia Ring <6>	MYOB Supplier	\$175.00	\$125.36	0.00 %	0	1
Round Watch with Leather band <12>	MYOB Supplier	\$203.00	\$145.45	0.00 %	0	1
Square Stainless Steel Cufflinks <18>	MYOB Supplier	\$30.30	\$21.65	0.00 %	0	1
Victorian Cameo Necklace <12>	MYOB Supplier	\$37.40	\$26.78	0.00 %	0	1

Image Campaign



The third type of campaign is an image campaign 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.

Product	Supplier	RRP	W/sale	Discount	Bonus	Quantity
Chocolate Cream Wafers <24>				0.00 %	0	1
 MYOB Supplier  		\$3.71	\$0.00	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.

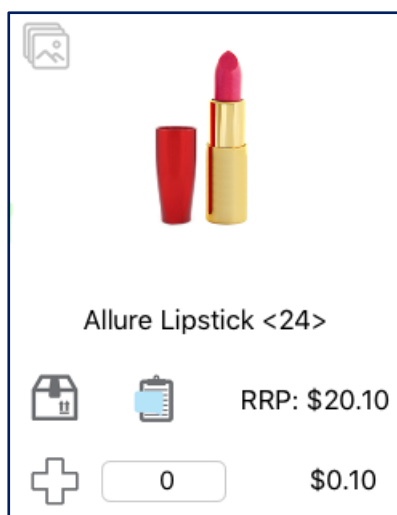
Note: The “Plus” and “Minus” icons at the top of the Work Zone will apply to ALL products on the page, just as if you touched all the individual “Plus” or “Minus” icons. This enables you to order everything on the page at once.

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. The presentation image can also be changed to full screen mode and back by double tapping the presentation.
- 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.

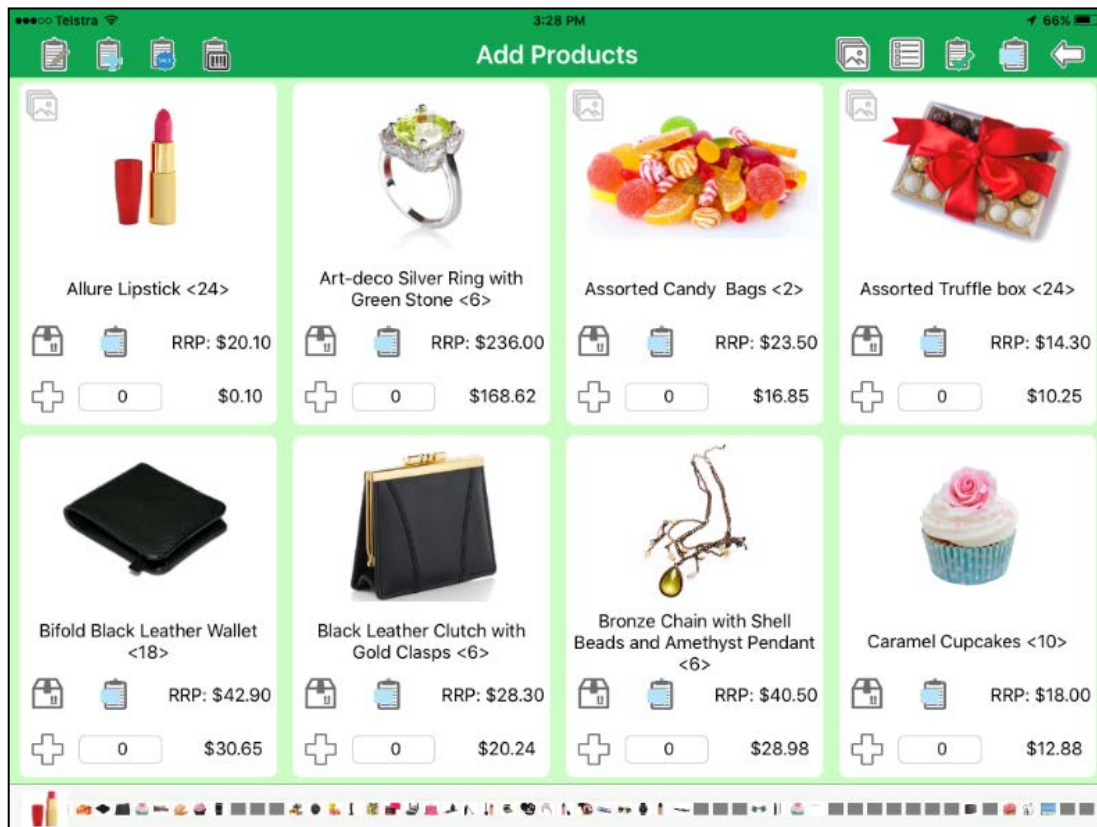
Walkthrough - Running a Campaign



- 1 Select the retailer and touch the **'Interactions'** icon 
- 2 Touch the New Order Button then select the **'Campaign Order Mode'** 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.
 - Touch the bottom row of the **'Discount', 'Bonus' or 'Quantity'** fields, enter the required value on the numerical keypad and select 'Done'.
 - Touch the **"Plus"** icon on the Product line to add the recommended quantity, bonus and discount on the top row.  To remove the recommended quantity, bonus and discount touch the **"Minus"** icon  on the Product line.
 - 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.



9.4 Individual Image Order

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



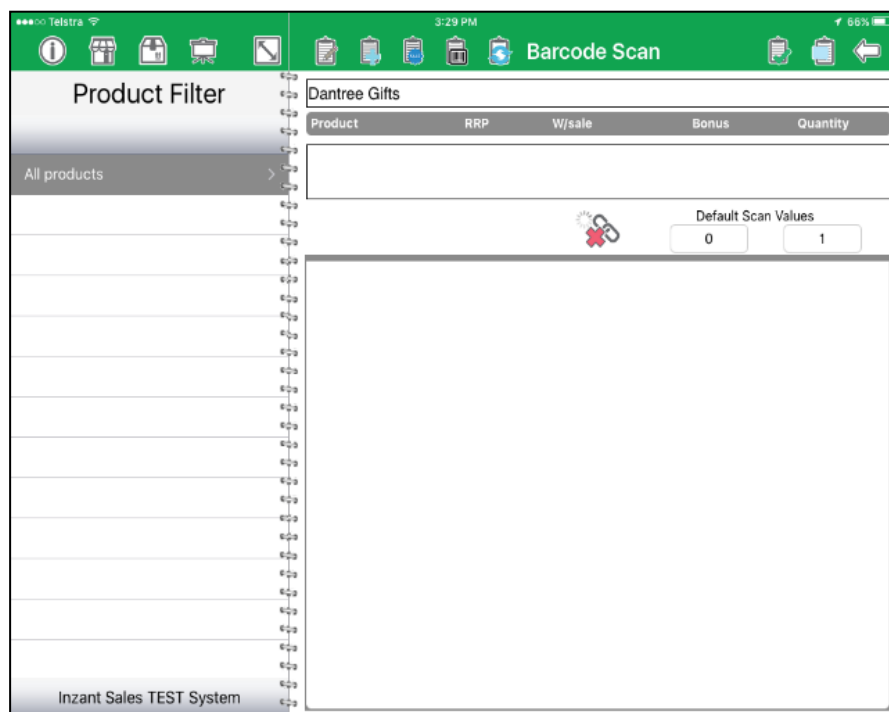
- I. The image display mode allows the selection of 1, 2, 4 or 8 images per screen. If on 2, 4 or 8 per screen, double tapping the image will change the display to 1 image per screen. Double tapping again will return the screen to the multi-image mode. To change the number of images per screen, touch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

0



9.5 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.

- VII. Individual items that have been added to an order can be removed by swiping a finger to the left on the products row; a delete button will appear to the right, tap the Delete Button to remove the product from the sales order.
- VIII. Swiping a finger to the left will also display the “Comments” button, when selected the Order Line comment popup will appear. 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. Swiping a finger to the left will also display the “Details” button, touching this will display the Product Information pop over screen.
- X. If you wish to add more of the same item, touching the Add to Order button will add the default quantity to the order. 
- XI. Products may be removed from the order by touching the delete icon. 
- XII. 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.

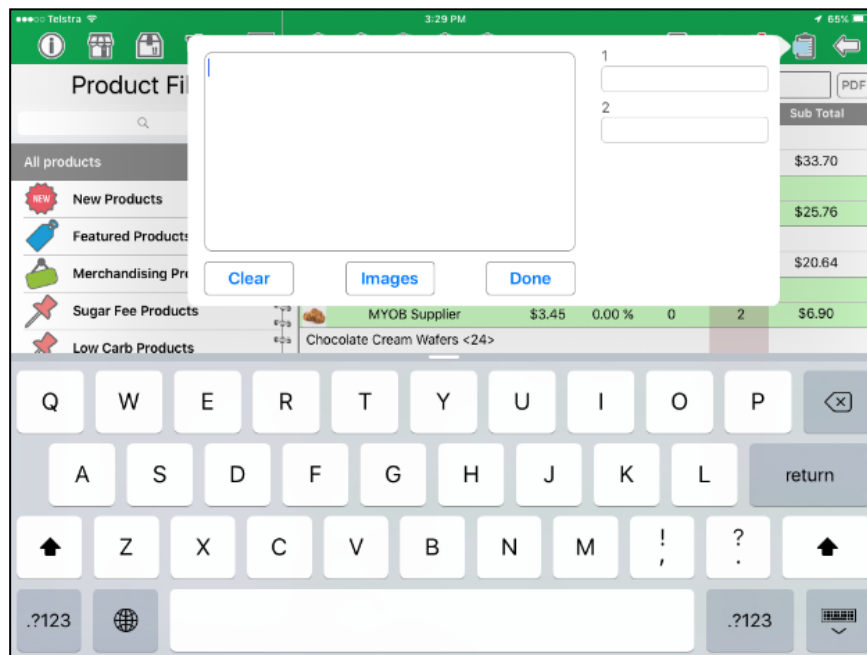
Walkthrough – Barcode Scanning

- 1 Select the retailer and touch the **‘Interactions’** icon. 
- 2 Select the **New Order** Button.
- 3 Touch the **‘Barcode’** button to be taken to the barcode interface. 
- 4 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.
- 5 Change the default quantity if desired.
- 6 Scan the product; this is achieved by pointing the scanner at the barcode and pressing the button just below the display on the scanner.
- 7 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.
- 8 If desired the quantity may be changed using the fields in the product information section at the top of the screen.
- 9 When the ordering is complete simply touch the **‘Order Review’** button. 
- 10 The Order Review screen will now display any items that were added to the order.

9.6 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.

9.7 Order Review






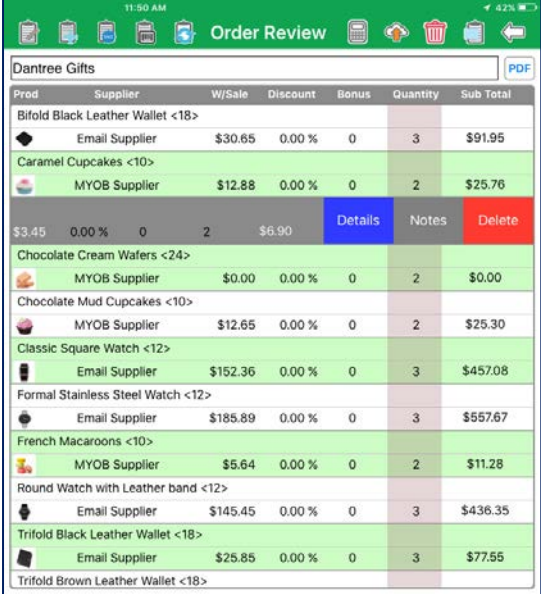
The sales order review screen contains all information relating to the current order being created for a retailer and allows the selection of quantities, discounts, bonuses and suppliers.

Testra

</


- 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 swiping a finger to the left on the products row; a delete button will appear to the right, tap the **Delete** Button to remove the product from the sales order.
- VII. Swiping a finger to the left will also display the **“Comments”** button, when selected the Order Line comment popup will appear. 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. Swiping a finger to the left will also display the **“Details”** button, touching this will display the **Product Information** pop over screen.
- IX. 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.
- X. 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.
- XI. 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.
- XII. 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. 
- XIII. 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.





Prod	Supplier	W/Sale	Discount	Bonus	Quantity	Sub Total
Dantree Gifts						
Bifold Black Leather Wallet <18>	Email Supplier	\$30.65	0.00 %	0	3	\$91.95
Caramel Cupcakes <10>	MYOB Supplier	\$12.88	0.00 %	0	2	\$25.76
		\$3.45	0.00 %	0	2	\$6.90
					Details	Notes
					Delete	
Chocolate Cream Wafers <24>	MYOB Supplier	\$0.00	0.00 %	0	2	\$0.00
Chocolate Mud Cupcakes <10>	MYOB Supplier	\$12.65	0.00 %	0	2	\$25.30
Classic Square Watch <12>	Email Supplier	\$152.36	0.00 %	0	3	\$457.08
Formal Stainless Steel Watch <12>	Email Supplier	\$185.89	0.00 %	0	3	\$557.67
French Macaroons <10>	MYOB Supplier	\$5.64	0.00 %	0	2	\$11.28
Round Watch with Leather band <12>	Email Supplier	\$145.45	0.00 %	0	3	\$436.35
Trifold Black Leather Wallet <18>	Email Supplier	\$25.85	0.00 %	0	3	\$77.55
Trifold Brown Leather Wallet <18>						

9.8 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.

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 submit the order this will mark it as complete in the interactions pop over. 

10. Completing and Submitting Orders to Cloud



The final stage of an order is to **Submit the Order** and **Complete the Interaction** for the Customer for processing. This is achieved by touching the “**Submit Order**”

On touching the “**Submit Order**” icon a screen is displayed that allows the user to provide additional information.

Submit Order For Upload

The order will be closed and all information sent if you proceed with the Upload operation

Order Processing
Mar 8, 17

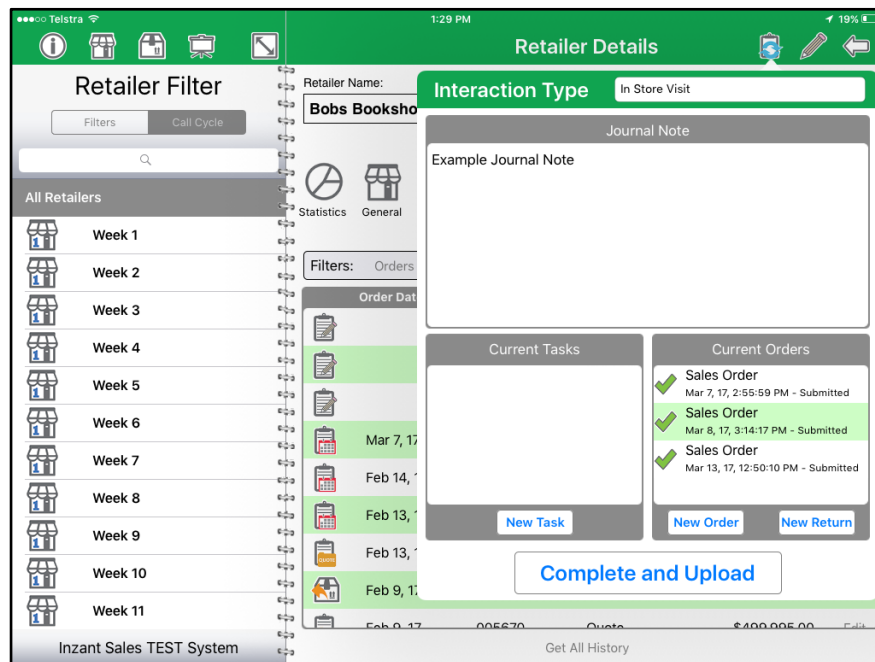
Customer Purchase Order No.

Approval Signature

Product	Quantity	Sub Total
Vanilla-bean Cupcakes <10>	2	\$33.70
	2	\$25.76
	2	\$20.64
	2	\$6.90
	2	\$0.00
	2	\$25.30
	2	\$25.30
	2	\$31.30
	2	\$11.28
MYOB Supplier	2	\$18.64

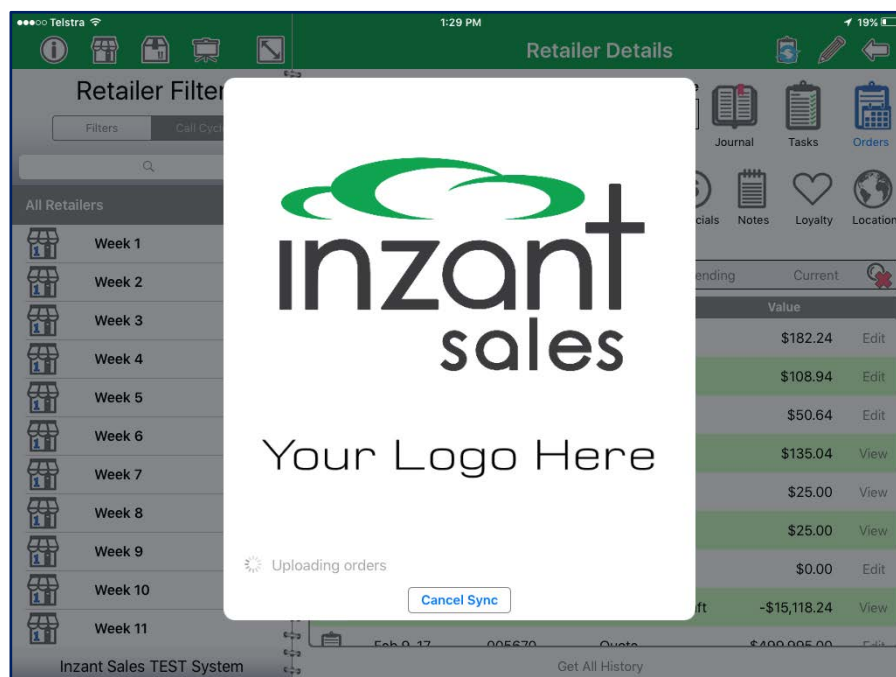
- I. The order date may be set in the future by touching “**Delayed**” and selecting a date using the popup keypad.
- II. The order date may be reset to today by touching “**Today**”.
- III. If the order is to be a Quote this is selected by touching “**Quote**”, this will cause the order to be uploaded as a draft or quote, but not processed into an order.
- IV. This screen also allows the entry of a client purchase order number.
- V. An approval signature may also be captured by drawing a signature in the zone with a finger or stylus.
- VI. To complete the order upload touch the “**Submit**” button.
- VII. Touching the **Cancel** button will return to the Order Review screen.

You will then be returned to the Interactions pop up where you can complete the Customer interaction and submit all information associated with it, e.g. Tasks, Notes Journals and Orders.



It is also possible to complete **Multiple Orders** per Interaction. To complete the interaction and upload orders tap the **“Complete and Upload”** button.

Note: Only Orders that have been Submitted will be uploaded to the cloud when the **“Complete and Upload”** is selected.

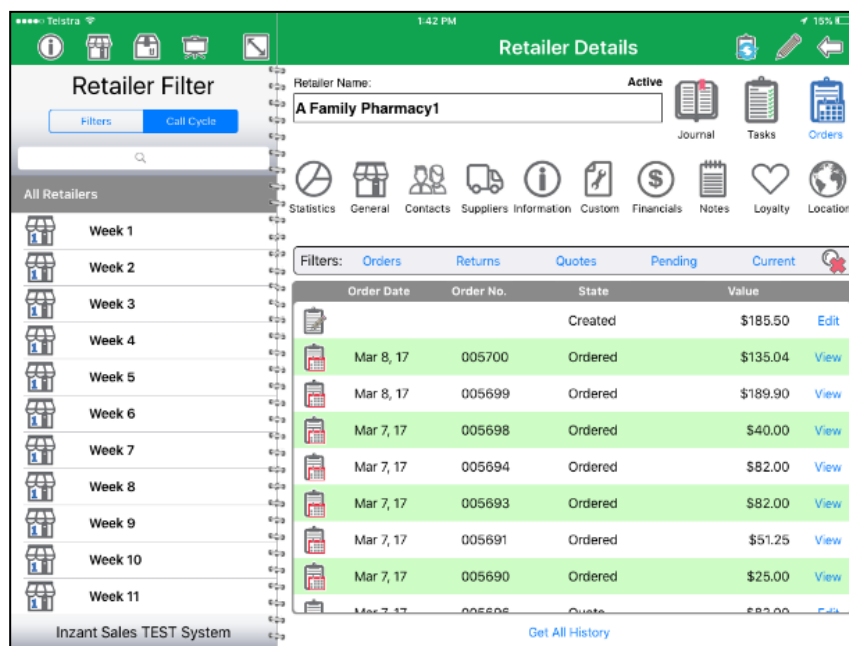


This screen will then appear to show that the Orders are Uploading.

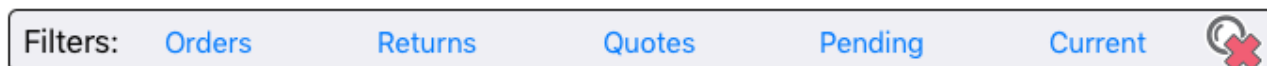
11. Order History



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



- I. Select the Orders History icon from the Retailer Details screen.
- II. The Orders will then be visible on the Work zone.
- III. They can be filtered by **Orders, Returns, Quotes, Pending and Created**



- IV. Order information that is displayed in the table list is **Order Date, Order No. State and Value**

- V. **Created Orders** can be Edited and Submitted Orders, Returns and Quotes can be viewed.

- VI. The **Get All History** Button will load entire Order History

- VII. Selecting the **“View”** button will launch a PDF document giving an itemised view of products for that order.

Filters: Orders Returns Quotes Pending Current				
Order Date	Order No.	State	Value	
		Created	\$185.50	Edit
Mar 8, 17	005700	Ordered	\$135.04	View
Mar 8, 17	005699	Ordered	\$189.90	View
Mar 7, 17	005698	Ordered	\$40.00	View
Mar 7, 17	005694	Ordered	\$82.00	View
Mar 7, 17	005693	Ordered	\$82.00	View
Mar 7, 17	005691	Ordered	\$51.25	View
Mar 7, 17	005690	Ordered	\$25.00	View
Mar 7, 17	005696	Quote	\$82.00	Edit

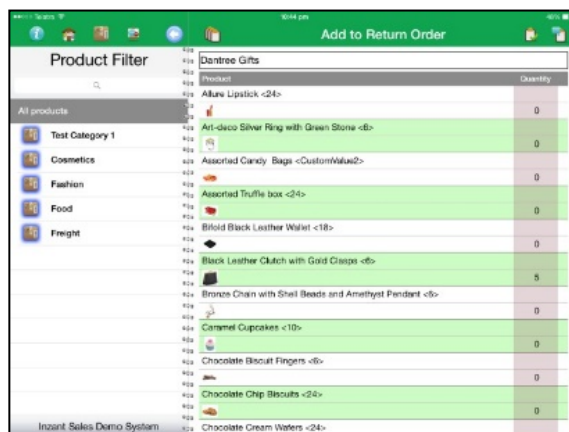
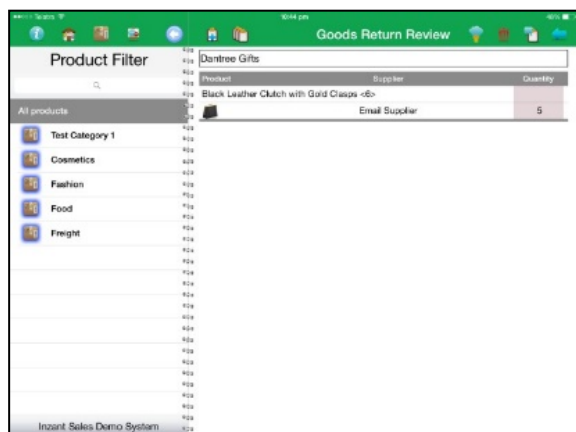
Get All History

- VIII. If there are associated orders with an historical order this icon will appear to the left of the date.






12. Goods Return Orders

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 by selecting **“New Return”** on the Interactions tab. However only the Add to Order mode is available.



Walkthrough - Performing Goods Return

- 1 On the Interactions tab, select the **“New 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 When finished adding items touch the **‘Order Review’** button. 
- 7 The Goods Order Review screen will now display any items that were added.
- 8 When all information is correct submit the order. 
- 9 Once returned to the Interactions tab, select the **“Complete and Upload”** button.