West ID Sales Force

User Guide V1.00

Contents

1. Sales Force Application   Generalities

« Sales Force Application » allows salespeople to create, modify or delete orders directly at the customer's site or on the stand of an exhibition with a touch screen handheld terminal. The user loads the necessary files into the terminal and creates orders autonomously.

The application can select a customer, define the price category (list price or distributor's price), create a new order, and scan or enter an item code. The application shows the information of the product and waits for the order quantity. The order amount is automatically calculated by the terminal.

The user can, whenever he wants, add or modify an item in his order. At the end of the order, the client has to sign on the touch screen to validate the order.

The user can, via different parameters, modify the application behavior. All the parameters and their use are presented in Appendix A of this document.

Sales Force Application files can easily be integrated into an ERP or a sales management software. It avoids order retyping and risk of errors and increases productivity.

Icons used in the application.

This icon is used to save an action. It answers positively to a question.

This icon is used to cancel an action, to go back or to answer negatively to a question. In the main screen, it is used to exit the application.

The red asterisk indicates that the given parameter can modify the application

behavior.

5 basic functions are accessible from the Main Screen by the Sales Representative (Sales rep).

New: Order Creation

Edit : Order Modification

Comm : File Sending / Receiving

Sales Rep : User Selection

Exit : Application Exit

A grey window displays some general data : amount of products in the catalog file, the number of orders in the terminal and the active sales rep.

4.1   How to receive files

Click on the Comm [icon] icon on the Main Screen. [icon] Click on Receive files to access the file reception menu. Following your parameter choices, the Sales rep file and Customer file may, or may not, be necessary.

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References File.

Sales rep File[*]

Customers File. [*]

Start the download of all available files

The figures at the right of your screen give you the number of records in each file.

[*] Non obligatory File (depending on parameter settings).

4.2   How to send files

Click on the Comm icon on the Main Screen. Click on Send File to start the process of sending the order files to the host.

5.1 How to select a sales rep

Click on the Sales rep[*] icon on the Main Screen. If the Sales rep file is in the terminal, a window pops up and gives you the list of available sales representatives. To select a Sales rep, use the arrows of your Keyboard or the icons on the screen to scroll through the list. The red X button cancels the selection; the check mark button saves it.

The chosen sales representative will appear on the Main Screen. The selection of a sales representative is not mandatory to place an order.

6.1   How to select a customer

Click on the New [icon] icon on the Main Screen; the application prompts the user to select the customer * from the file. After having selected the customer, the complete customer's data form appears on screen. It is always possible to select another customer using the navigation arrows. Use the [icon] button to go to the previous screen. Save the selection using the [icon] button.
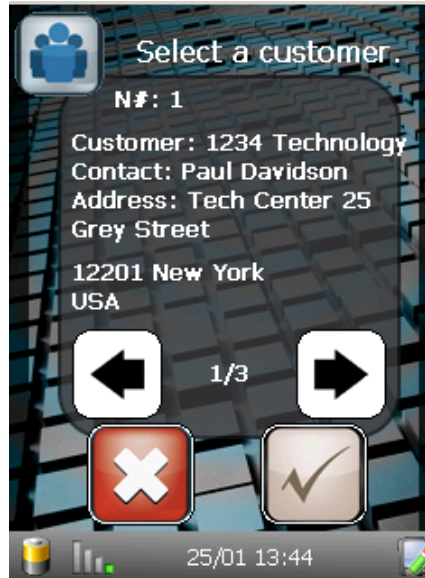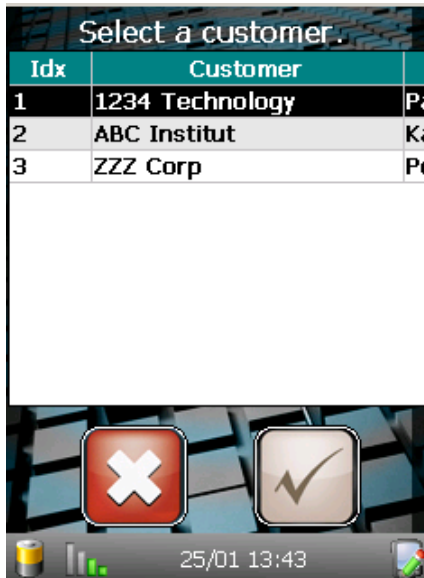
6.2   How to select a price list

It is possible to define the price category* to be applied to the given customer. Price category can be, for example, distributor or end-user pricing. Note that it is not possible to change the price category during order taking. If a parameter is used to disable the price selection, only the price of the price list n°1 will be available.
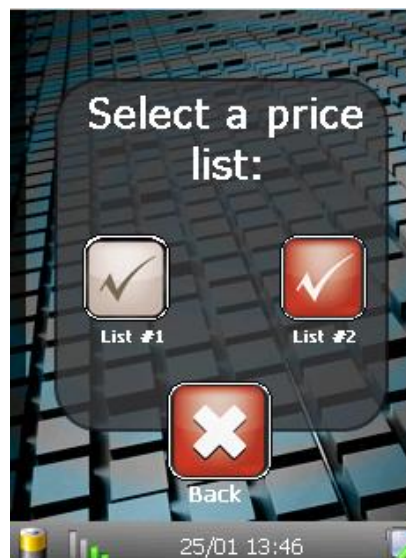
6.3 How to scan an item

The screen displays a summary of the order. The customer name, the number of references, the total quantity of items and the total amount of the order is visible on screen.

Scan the item's barcode or keyboard enter the item code of the item to be added to the order.

 This button is the equivalent of the Enter key of the Keyboard.

Show more information about the order

Exit the order.

The data about the item is displayed on the screen: scanned item, item description and unit price (taking into account the price list selection).

Enter the order quantity for the given item; the extended price is calculated automatically. The quantity may be entered via the numeric keypad or via the terminal's physical keyboard.

 Save the order line.

Exit or cancels the entered quantity.

Modifies the sales price depending on parameters *

Delete the last digit of quantity field

The order screen will then be updated reflecting the recently entered item.

6.4   How to modify a sales price

Use the « Price modification » button

Using the keyboard, enter the new price and then save.

6.5   Item already scanned

The application informs the user with 3 beeps if an item has already been scanned for the current order.

 Go back to the previous screen.

 Modify the quantity. By typing 0 in the quantity field, the item will be cancelled from the order.

6.6   List of the ordered items

Click the More button on the "How to scan an item" screen.

The ordered items are presented as a form. Review the ordered items by using the left and right arrows.
The following will be displayed for each item: the item code, a complete description of the item, the unit price, the ordered quantity and the total amount of the line.

6.7   How to save the order

Click the Exit [X] button on the "How to scan an item" screen. You have 3 possibilities when exiting the order module.

[X] Returns to the order without saving or quitting the order.

[Delete icon] Cancels the order. Note that the order will be permanently deleted.

[Valid icon] Saves the order.

6.1   Date and sign the order using the touch screen

Get the customer's signature to confirm the order.
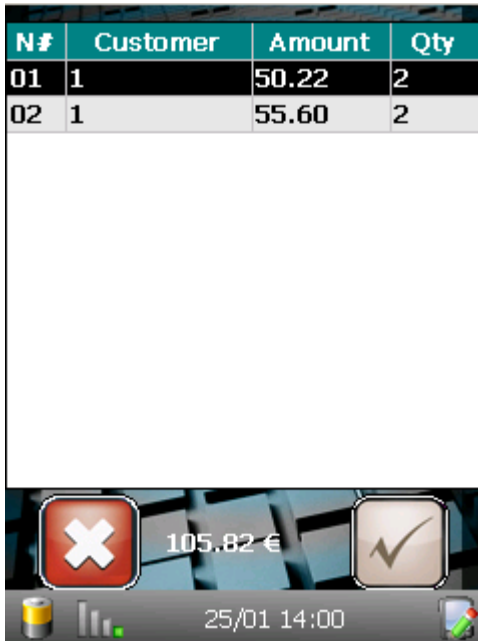
7.1   How to edit or delete an order

On the Main Screen, click the Edit icon [icon] . This function allows the user to see the list of available orders and to select an order to obtain more details or to modify it.
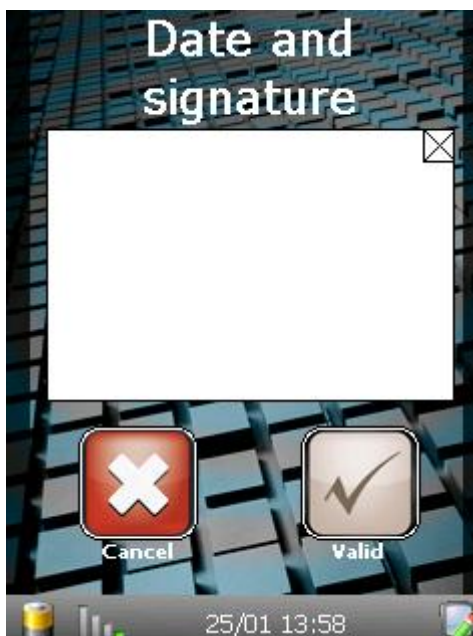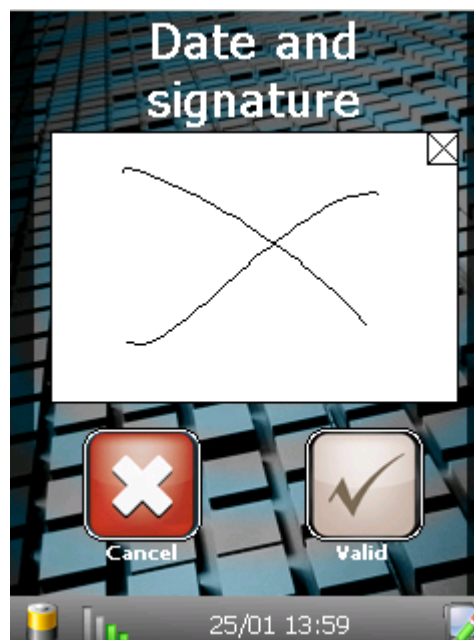
N#	Customer	Amount	Qty
01	1	50.22	2
02	1	55.60	2

105.82 €

25/01 14:00

The table summarizes the orders, the customer number, the order value and the extended ordered quantity.
At the bottom of the screen it is possible to see the total amount of the orders.
Use the up / down arrows or tap a line to select it.

[X icon] Exit the order Edit function.

[check icon] Get more details for the highlighted order.

Order number: 01

Date: 25/01/2011

Customer: 1234
Technology
Group price: A

Nb of Ref: 1 Qty: 2

Total price: 50.22

25/01 14:07

After selecting the order to be managed, the screen displays an order summary.

[X icon] Go back to previous screen.

[check icon] Edit the selected order. It is possible to modify all the lines of items, quantity and price. Modifications require the customer's signature again to confirm the new information.

[icon] Delete the selected order.

The selected order is displayed. All order taking functions are possible during order Edit.

When the order Delete button is pressed, the user must confirm the deletion.

Click:

 to cancel the deletion of the order.

 to confirm the deletion of the order.

This action is permanent and cannot be undone.

8.1   Description of parameter settings

The parameter settings are used to modify the environment and the behavior of the application with regard to the final user requirements and processes.

8.2   Available configuration parameters

Sales price list selection

It is a parameter of Boolean type (YES/NO) having the default value set to YES.

If the value of the parameter is YES, the application is going to propose, before every order, to choose the price list to apply. Two price lists are supported, one, for example, with the public prices and the other with reseller prices.

It is not possible to change the selected price list during an order.

If the value of the parameter is NO, the application does not propose the choice of price lists and imposes the first one. The field of the file corresponding to the second price list must be present even if its value can be empty.

Control purchase price

It is a parameter of Boolean type (YES/NO) having the default value set to YES.

If the value of the parameter is YES, the application will check that a given sales price (if this one was modified by the operator) is always greater than the purchase price.

If the value of the parameter is No, no control will be made on the sales price present in the file.

Customer selection

It is a parameter of Boolean type (YES/NO) having the default value set to YES.

If the value of the parameter is YES, the application will propose the screen to select the customer. The selection of the customer will thus be mandatory.

If the value of the parameter is NO, the application will use the customer index 1. It will not be possible to select a customer.

Order confirmation by signature

It is a parameter of Boolean type (YES/NO) having the default value set to YES.

If the value of the parameter is YES, the order has to be confirmed by the signature of the customer; in case of modification of the order the signature will again be requested. When the operator

transfers the file of orders, all the signature files will also be sent to the host. The order number is included in the name of the signature file.

If the value of the parameter is NO, the application will not ask for signatures.

Currency to display

It is parameter of alphanumeric type, having the default value set to €.

This parameter accepts all the characters to represent a currency, €, $, £, RUD (Russian Ruble), etc. Three characters are reserved on screens to display the currency.

Reseller Name

It is alphanumeric type, having the default value set to empty.

This parameter allows the name of the application's reseller to be stored. This name will be displayed on the first screen of the application.

9.1 Input files

',' is used to separate fields, '.' Is used as decimal separator.

9.1.1 Item File

The item file contains all the items available for sale by the application. On each line, you should find the item barcode (this code should be unique). The item lookup is done using this code. The value can be alphanumeric: Letters can have an accent and special characters are authorized. The description field of the item should represent the characteristics of the item.

The field "Price of list 1" is the price of the item by default. Its format is 999.00 without the currency symbol. The field "Price of list 2" is a second price that the sales representative can offer to the customer. For example, it is possible to use the Price of list 1 for Wholesale and the Price of list 2 for Retail. It is not possible to mix prices from both lists in the same order.

The Price of list 2 field should be empty if only one price is used. Note that even if the "Sales price selection" parameter is set to 'NO', the Price of list 2 field must be present in the file and empty. The format of this field is 999.00, the same as that of the Price of list 1.

The field "Purchase price" allows price control if a sales representative decides to change a sales price. This control requires the sales price to always be greater than the purchase price.

Default name : Catalogue.csv   **Separator :** ,   **Number of fields :** 5

Barcode	Description	Price of list 1	Price of list 2	Purchase price

Example :

1013101,PAUM. PTE A CLAMER MECANICA 1L,25.11,0,8.37
1013102,PAUM. PTE A CLAMER MECANICA 2L,30.49,0,10.17
1013103,PAUM. PTE A CLAMER MECANICA 3L,30.89,0,10.30

9.1.2 Sales Rep File

This file gathers the sales representatives that can create an order in the application. Each order will be assign to a sales representative. The use of this file is optional.

Default name : ListSalesman.csv   **Separator :** ,   **Number of fields :** 3

Index or salesman number	Salesman last name	Salesman first name

Example :

1,Daly,Paul
2,Janet,Adriel
3,Kenny,Dylan
4,Smith,John

9.1.3 Customer file

This file gathers all the data relating customer. It allows the assignation of a customer to an order. It is possible to create an order without customer (depending on a parameter).

Default name : ListCustomers.csv **Separator :** ,   **Number of fields :** 8

Customer number	Company name	Contact name	Address line 1	Address line 2	Zip code	City	Country

Example :

1,1234 Technology,Paul Davidson,Tech Center,25 Grey Street,12201,New York,USA
2,ABC Institut,Katy Thompson,2411 Bening road,,13675,Penfield,Brazil
3,ZZZ Corp,Peter Sullivan,16 avennue of Paris,BP254,75010,London,UK

9.2   Output files

9.2.1 Order file

The order file gathers all the orders created on the terminal. Each line corresponds to an item of an order. All the products of each order are stored in one and only one file. The second field of the file is the order number, which is unique.

The last two fields allow the assignation of salesman name and the customer name to the order. These fields match the salesman name and the name of the customer name coming from the ListCustomers.csv and ListSalesman.csv files.

Default name : CMDXXX-YYYYMMDDHHMMSS.csv **Separator : ,   Number of fields :** 10

Index	Order nb	Barcode	Unit price	Qty	Total price	Date	Time
Salesman number	Customer number						

Example :

01,00120110125124123,1013101,15.00,3,45.00,25/01/2011,12:43:52,2,1
01,00120110125124123,1013102,30.49,2,60.98,25/01/2011,12:44:11,2,1
01,00120110125124123,1013103,30.89,3,92.67,25/01/2011,12:45:13,2,1

9.2.2 Signature file

The signature file is an image containing the signature that was used to confirm the order. The name of this file includes the order number to which the signature belongs.

Default name : Signature_NNNNN.bmp   **Separator :** N/A   **Number of fields :** N/A