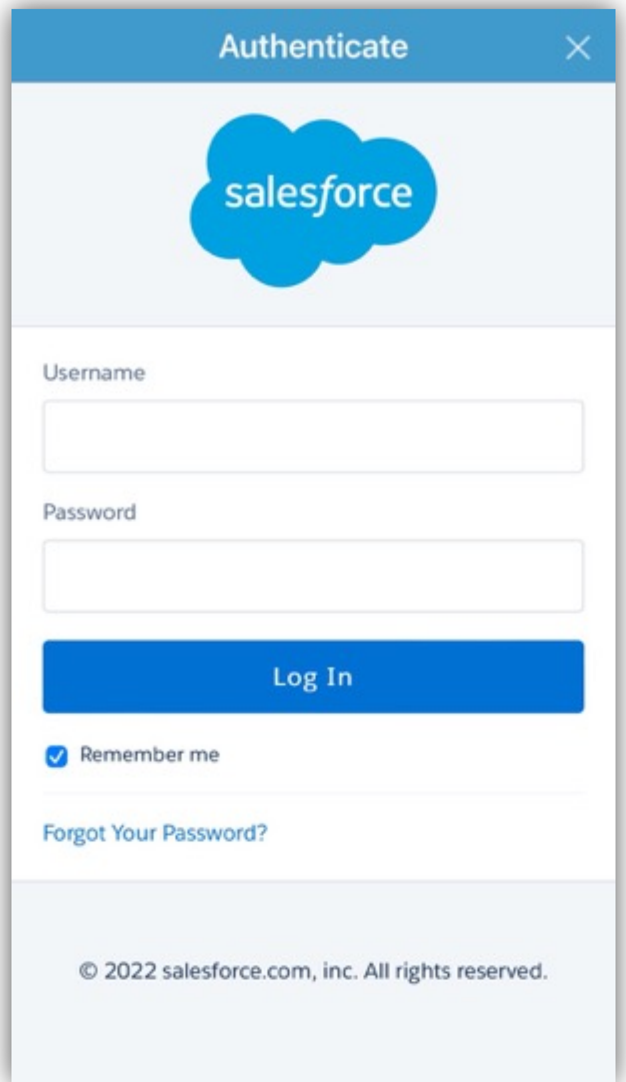
pappsales

User Manual | Version 2.4.4



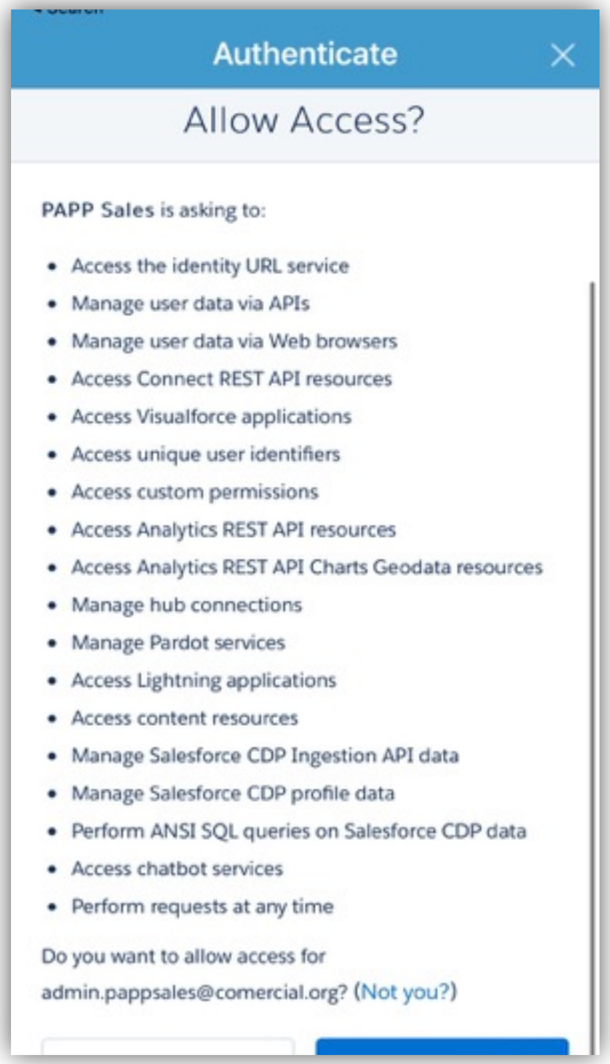
Accessing the App:

On app initial screen, type the username and password to login on Salesforce and authenticate the user on device. This process occurs on the first access to the application or when the session expires.

For that the user can perform the access, the Org admin must mark 'Enable New Device ID' field on Salesforce portal, in user settings.

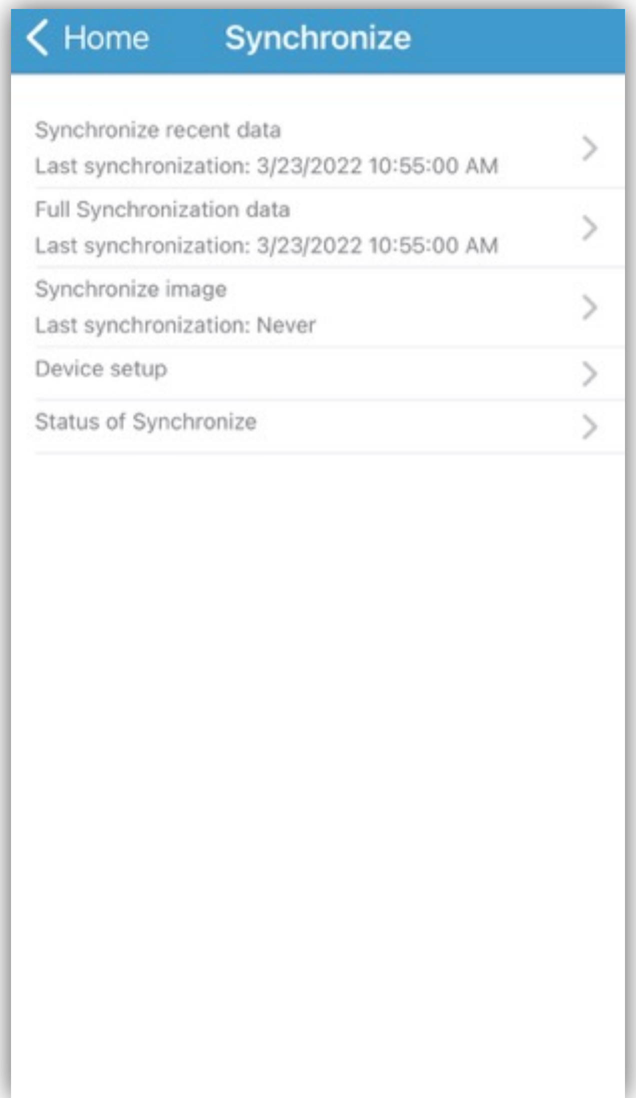
Check 'Remember me' field so that the username can be suggested on the next login.

Click 'log In' button to access the app using informed credentials.



At the time of authentication, the application ask permission to access the data of the user's Org.

Click 'Allow' button to allow and proceed with the app use or click 'Deny' button to deny the access.



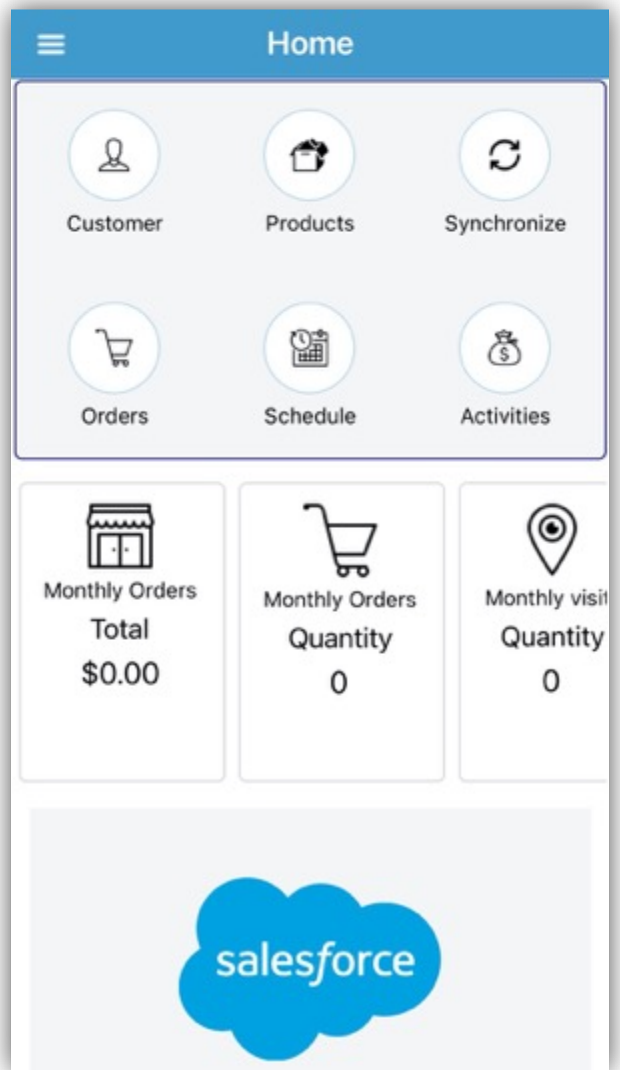
After allowing authentication, the synchronization screen is displayed, in which are performed data and images synchronizations to your device to get the same data as the Org in Salesforce.

The ‘Synchronize data’ option is used to update the Org’s data. Data are sent from device to Salesforce and from Salesforce to device, considering update date and time.

The ‘Synchronize all data’ option is used to clear all data on device and download again from Org in Salesforce.

The ‘Synchronize image’ option is used to synchronize products, schedules and companies images.

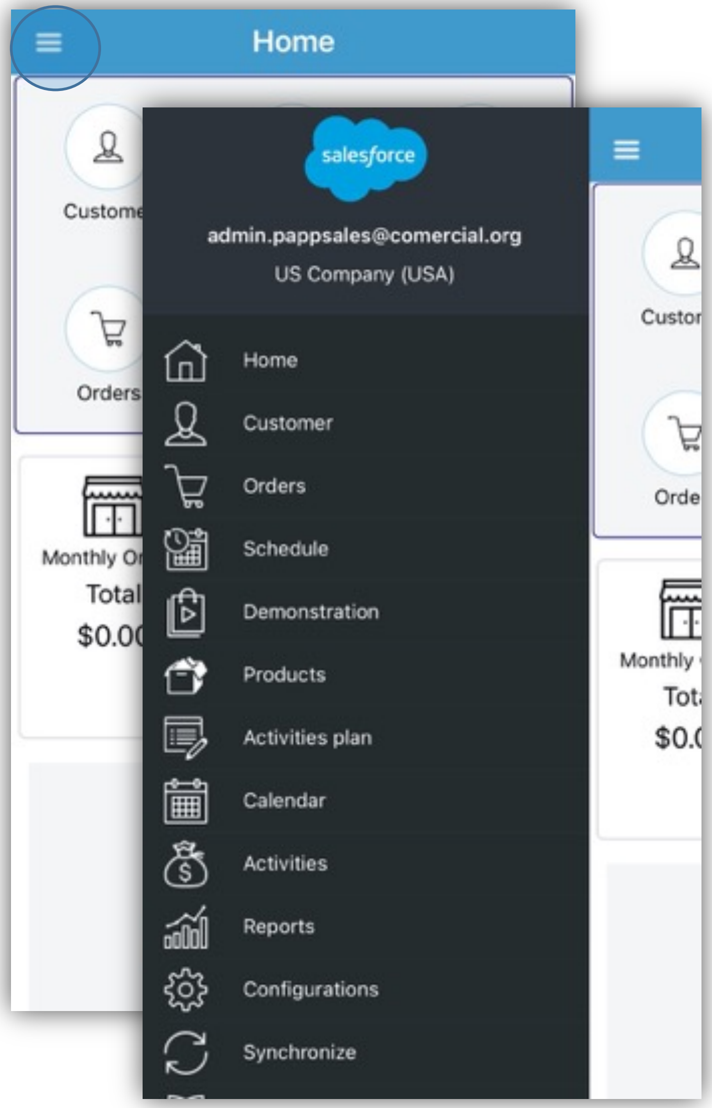
The ‘Synchronize device’ option is used to synchronize parameters, companies and users cadastre.



Home:

After login and synchronize the data, the Home screen displays some dashboards such as: Monthly Orders Amount and Quantity, Goals, Visits etc.

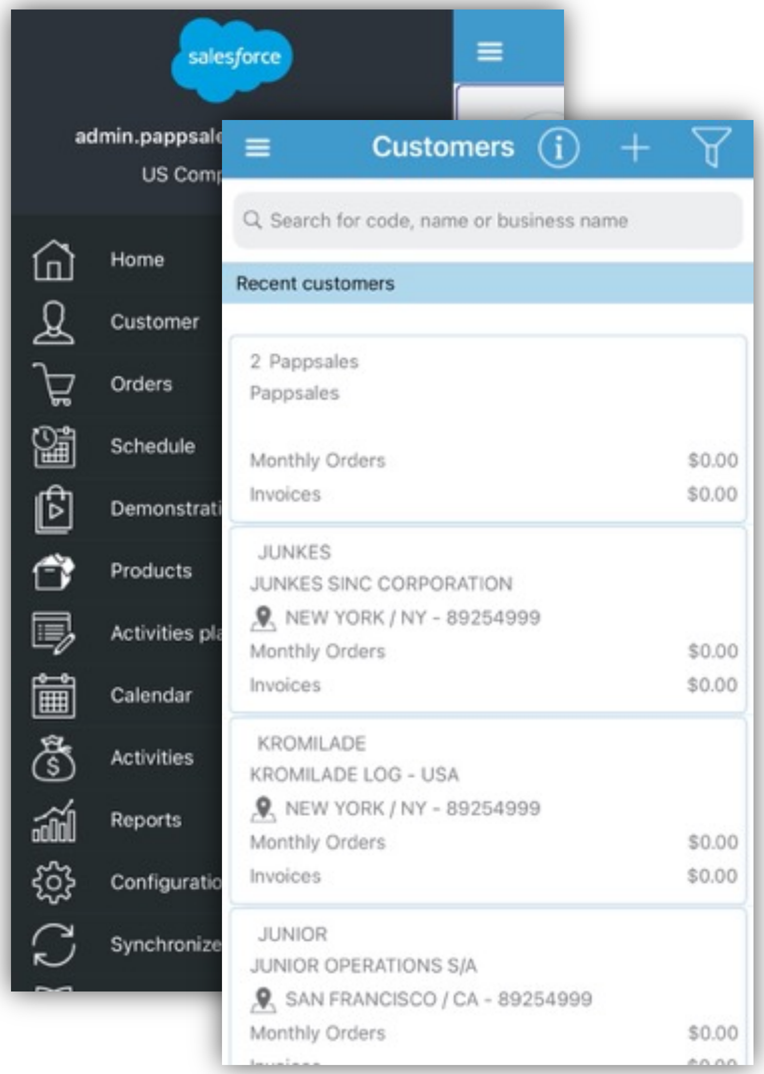
The goal dashboard consider the user overall goal.



Main menu:

When selecting the option to view the menu, all the features' tabs are displayed.

The options that make up this menu will be detailed below.

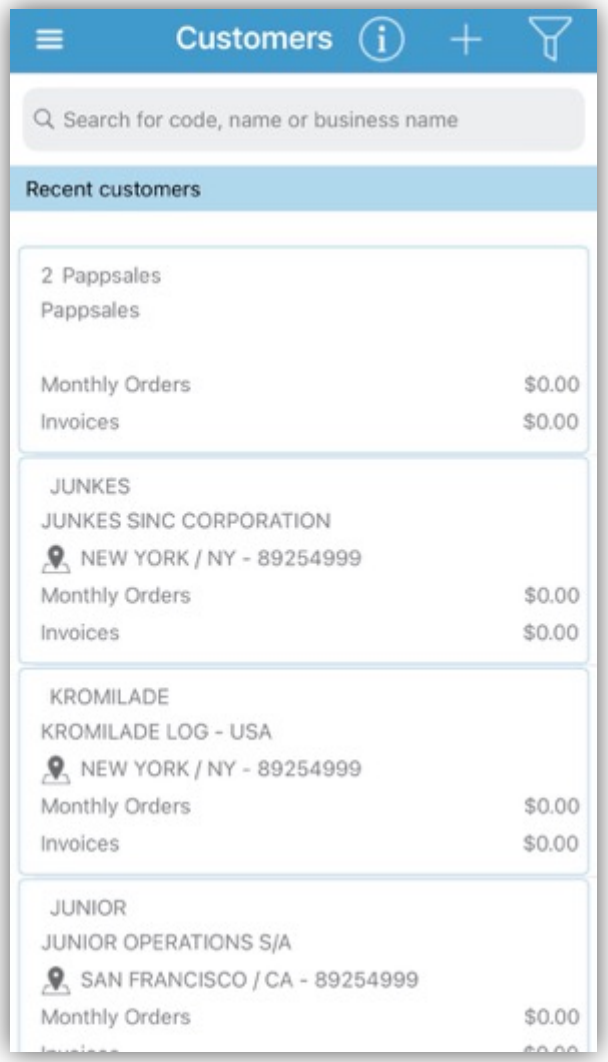


Customers:

When selecting ‘Customers’ option, all registered customers on logged user Org are displayed.

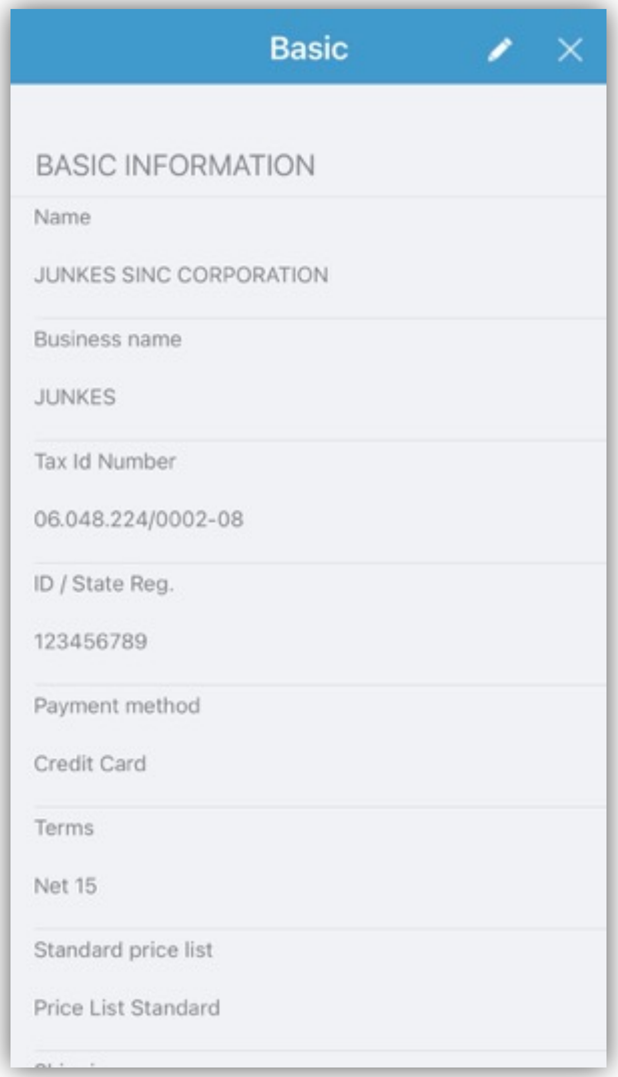
It is possible to register new customers through option ‘+’ or perform filters on customers query through filter option, located at the top right of the screen.

The process of registering new customers must be released to the user through parameter ‘Customer_Management’ in Salesforce.



On this screen, the app displays the identification of customers who have outstanding bills, overdue bills and financial alert bills, through colors blue, yellow and red respectively. The subtitle of this information can be consulted through 'information' icon located at the top of the screen.

When selecting a customer, it displays the screen that allows to consult or register his data.



Basic Tab:

This tab displays all basic information of the selected customer in the query.

It also displays the main contact and customer data, main address and the default information to perform sales order.

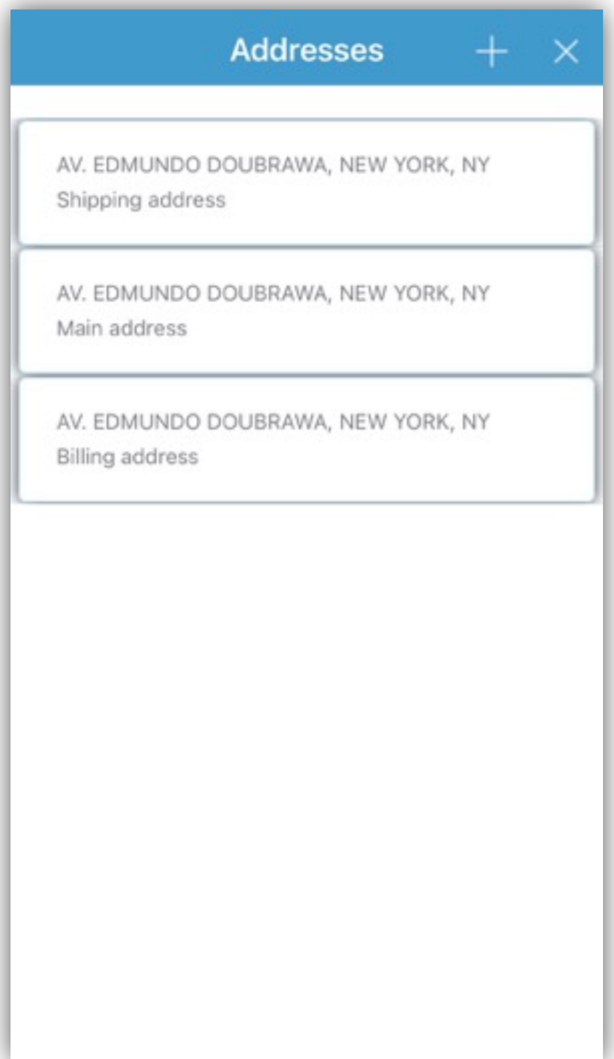
This default information is set on customer registration. Case this information is not registered to the customer, will be considered the default settings defined on Salesforce parameters.

Contacts Tab:

This tab displays the contacts of the selected customer. It is possible to add a new contact through button '+' located at the top of the screen.

The operation of registering new customers must be released to the user through the parameter 'Contact_Management' in Salesforce.

When selecting a contact, all his detailed information is shown, and you can edit this information and define if this is the main contact of the company.



Addresses Tab:

This tab displays the addresses of the selected customer. It is possible to add a new address through button '+' located at the top of the screen.

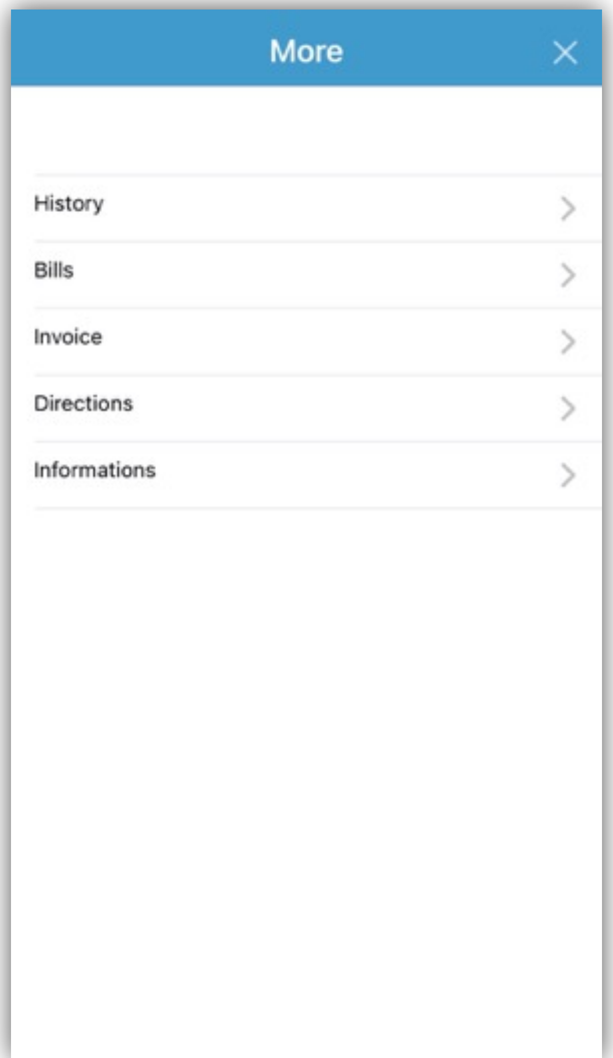
When selecting an address, all his detailed information is shown, and you can edit this information through 'edit' icon located at the top of the screen.

Characteristics Tab:

This tab displays the characteristics of the selected customer. It is possible to add a new characteristic through button '+' located at the top of the screen.

The characteristics that will be added on this screen must be registered on Salesforce and must have the field 'Origin Type' defined with 'CUS', that means this is a customer characteristic.

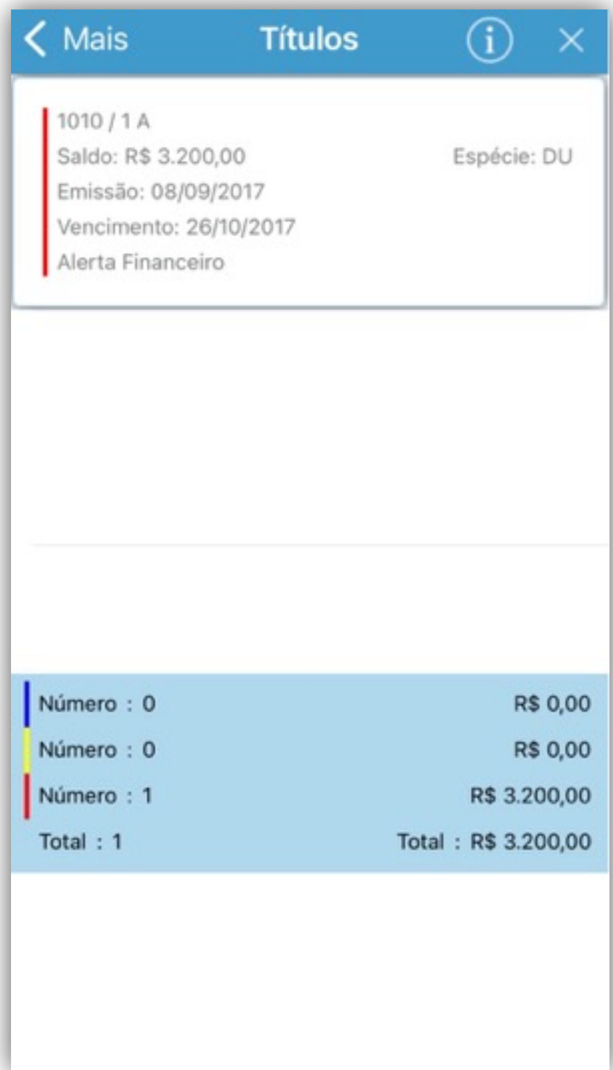
Select a characteristic to view detailed information.



Option ‘More’:

Selecting option ‘More’ will be displayed more data viewing options for the selected customer, as detailed below.

The option ‘More’ is only displayed when using the app on Smartphones. When using Tablets or iPad, all these options will be displayed at the bottom of the screen.



Open Bills Tab:

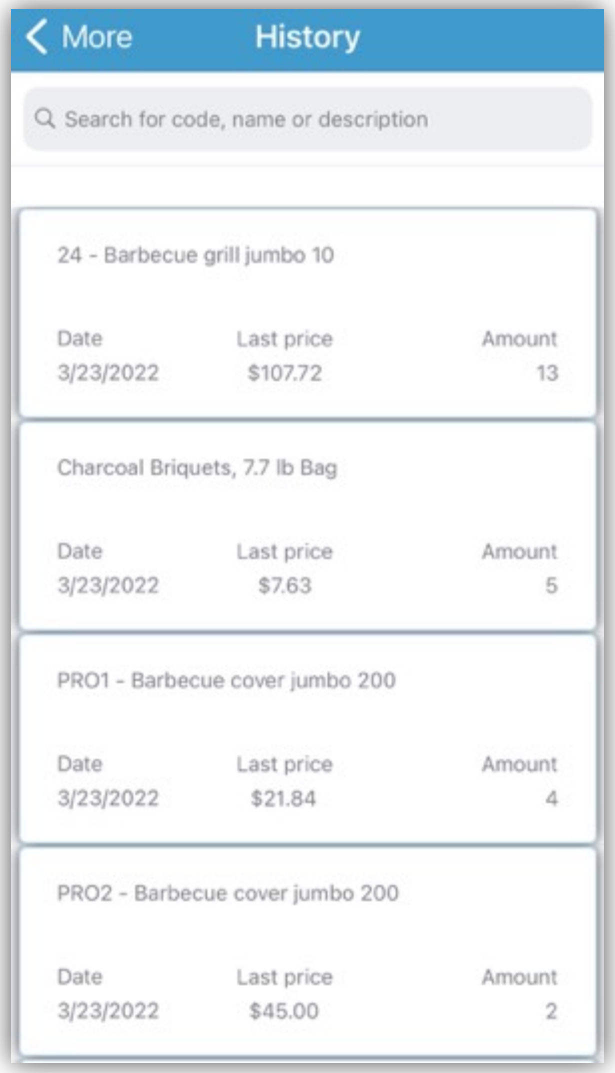
This tab displays all customer bills that are with 'Open' status.

The customer bills that are within the validity period are highlighted in blue.

Overdue bills are highlighted in yellow.

The bills that have financial alert are highlighted in red.

In the bottom of the screen are displayed the total values of sum of bills presented in the query.



Invoice Tab:

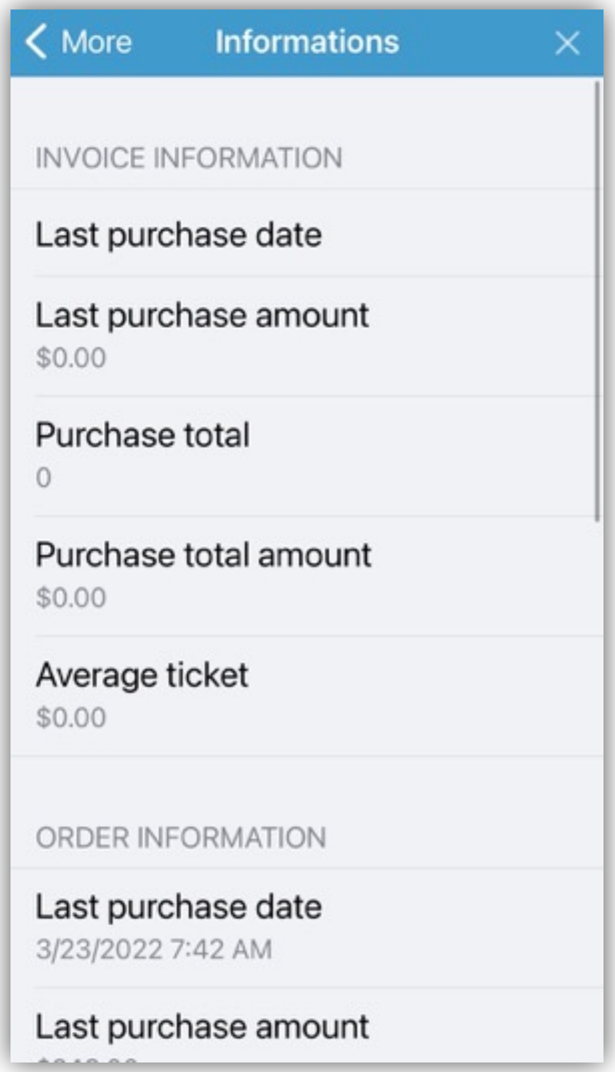
This tab displays all invoices issued to the customer on determinate period. To change query period, select filter option located at the top of the screen and type the new period.

When selecting an invoice, it displays basic information of the corresponding revenue, dates, values, among others. On this same screen you can see the items in the billing through the respective button.

Directions Tab:

On this tab, the app shows the map with the customer location and it displays a possible route between the current location and the customer location.

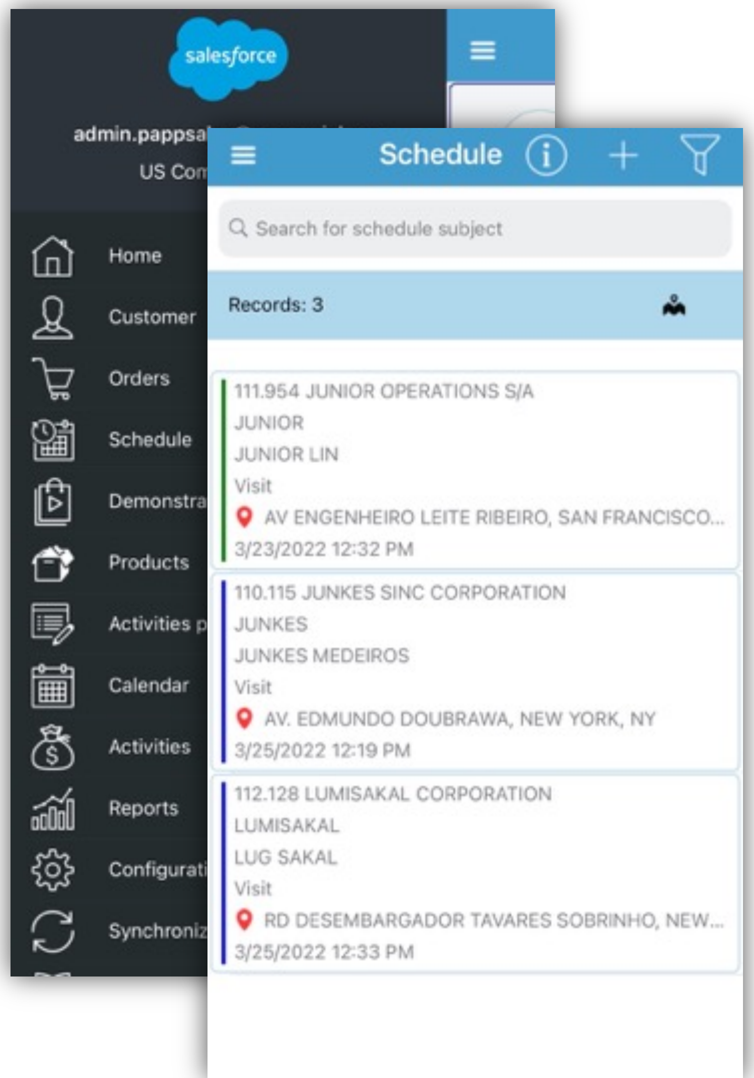
The Pin highlighted with the blue circle represents the user current location. The Pin without blue highlight represents the customer location.



Informations Tab:

This tab displays information related to billings and orders from the selected customer.

It displays values and dates of last purchases, number of purchases from this customer and the total value of purchases.



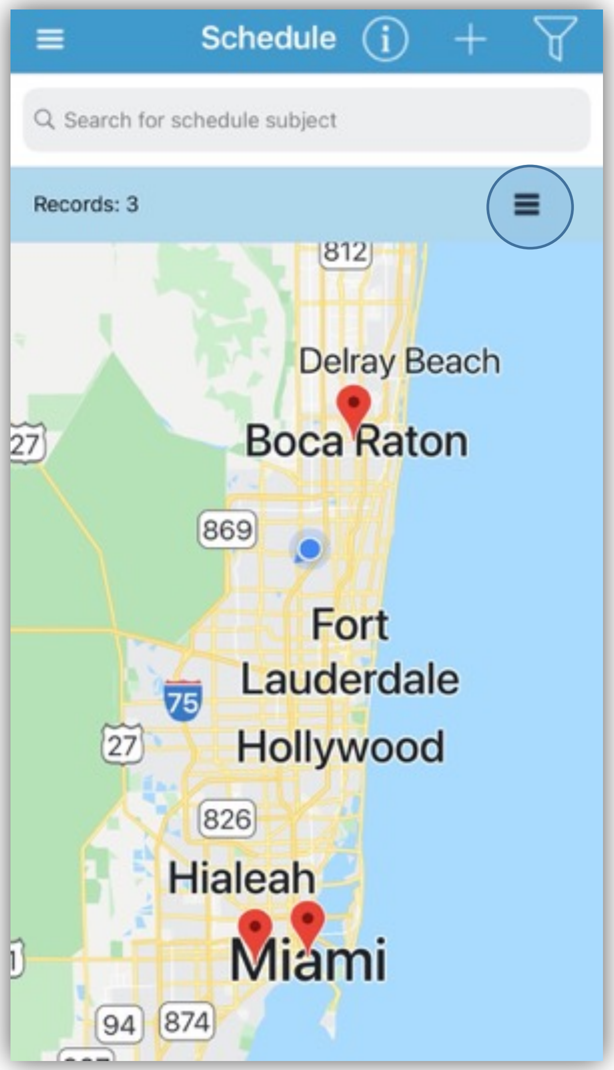
Schedule:

When accessing the ‘Schedule’ menu, it displays the registered schedules to the logged user.

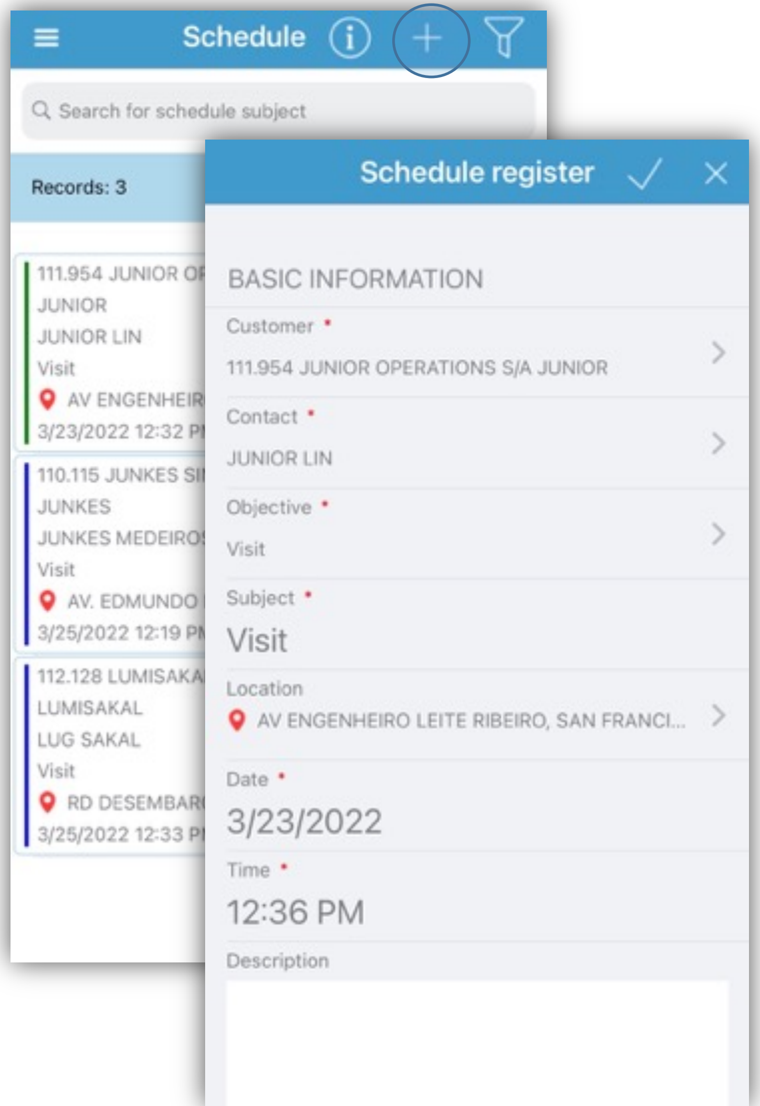
The Schedule status can be identified through colors ‘blue’, ‘green’ and ‘red’, that represents ‘open’, ‘finished’ and ‘canceled’ schedules, respectively.

When the schedule is geolocated, the app highlights the pin in red. This way, the respective schedule will have the location displayed when viewing the schedule’s location map.

On the top of the screen, it’s possible to filter the schedules period through filter icon, or register a new schedule through button “+”.



When selecting the highlighted icon in the image, the app switch between the list of schedules found in the period and the map with the 'Pins' identifying the schedules location.



Registering new Schedule:

When selecting the option "**+**" on the schedule query screen, it displays the Schedule Register screen.

On this screen select the customer you want to register the schedule, the customer contact, the schedule objective, subject, date and time. The objectives must be registered in Salesforce, on 'Objectives' tab.

When searching the schedule address, the app sugest firstly the user current location address. Case the customer already has registered address, the respective field is automatically filled.

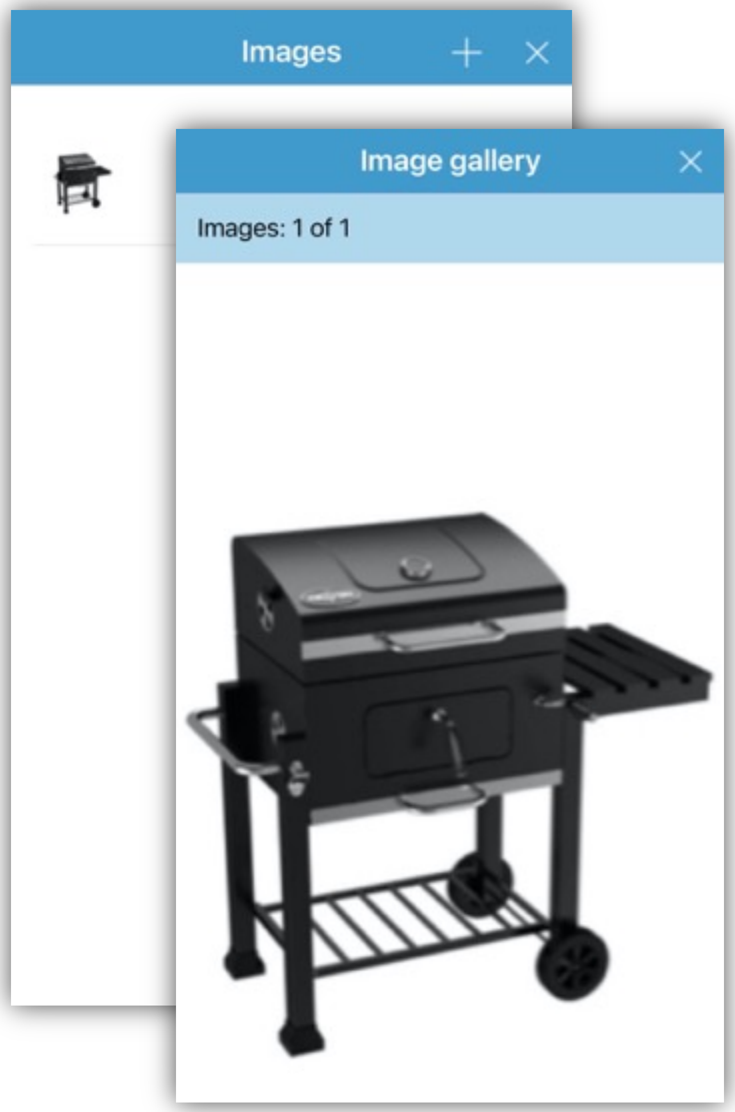
On the top of the screen, select the option '✔' to finalize the schedule register.

After finalizing, the app ask if you want to synchronize the changes. If you accept, the schedule data are sent to Salesforce.

Schedule Detail:

After registering a schedule or selecting a schedule on query screen, the details schedule screen in displayed.

On this screen are displayed registered data and on the bottom of the screen it's possible to access tabs to add images, characteristics and to finalize the schedule.

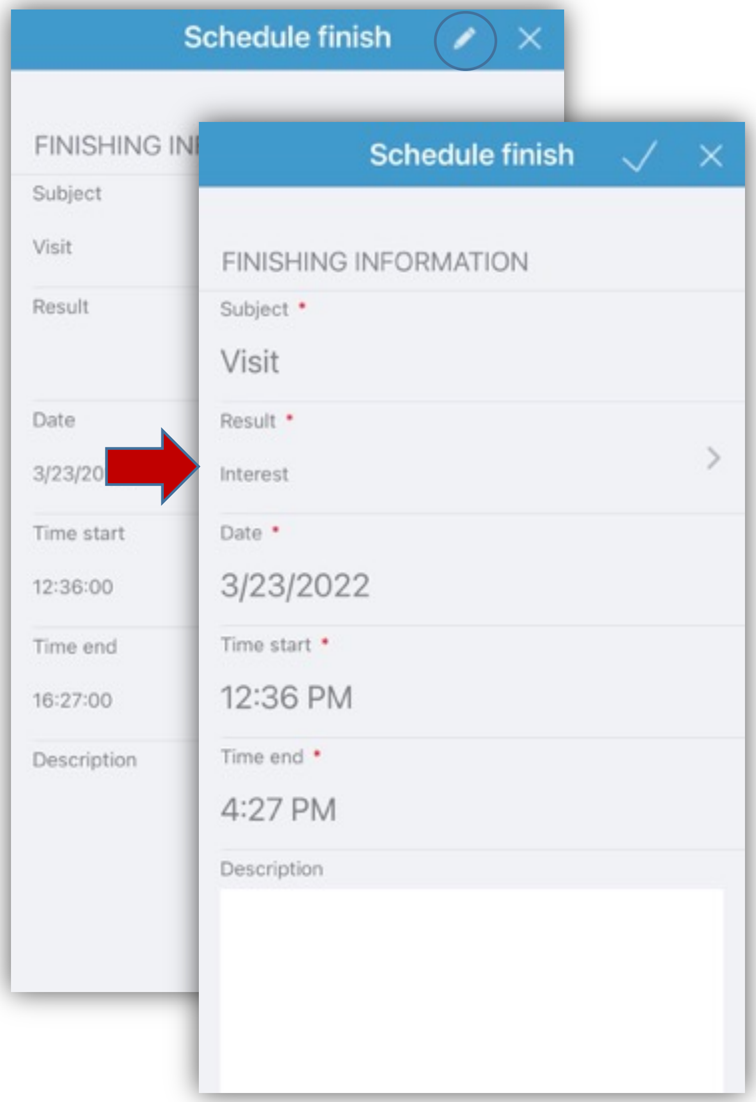


Images Tab:

On this tab it’s possible to add images relatives the schedule, through button “+”.

After inserting an image, the app asks if you want to synchronize the changes. If so, the new images are synchronized with Salesforce. If not, the images only will be synchronized on the next images synchronization.

Click any image to view full size.



Finish Tab:

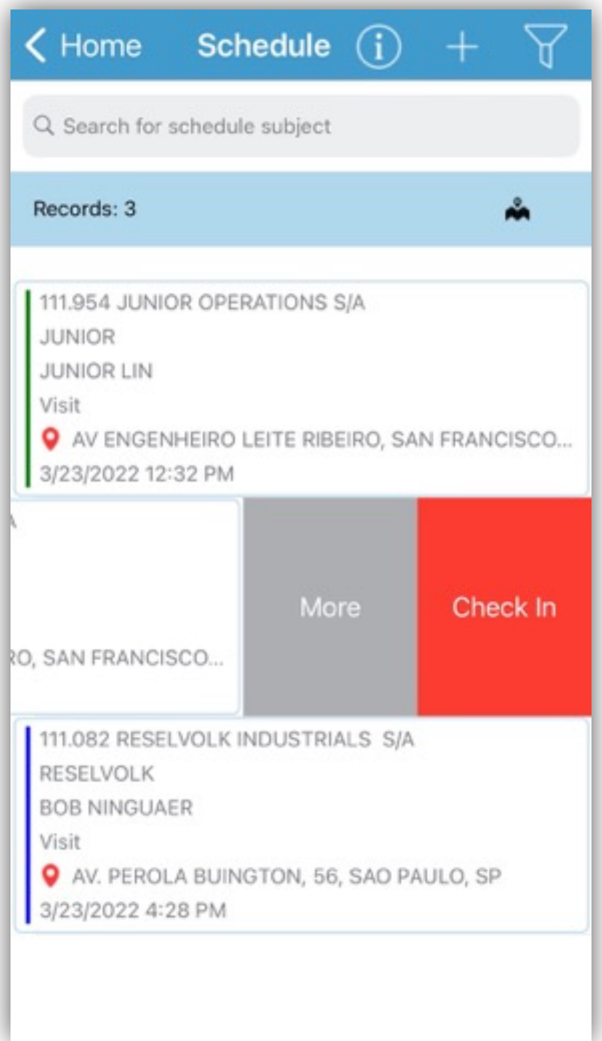
On this tab you can finish the registered schedules.

To finish a schedule, select the edit icon at the top of the screen. On the new screen, type the schedule result, that must be registered in Salesforce, on 'Results' tab.

The app allows you to change schedules data, and after these changes, click on button '✔' to finish the schedule.

If the customer does not have location data when finishing a schedule, the app asks if you want to update the customer location data as the same of the schedule.

When finished, the application lets you reschedule its schedule, copying the data from the newly finished schedule.

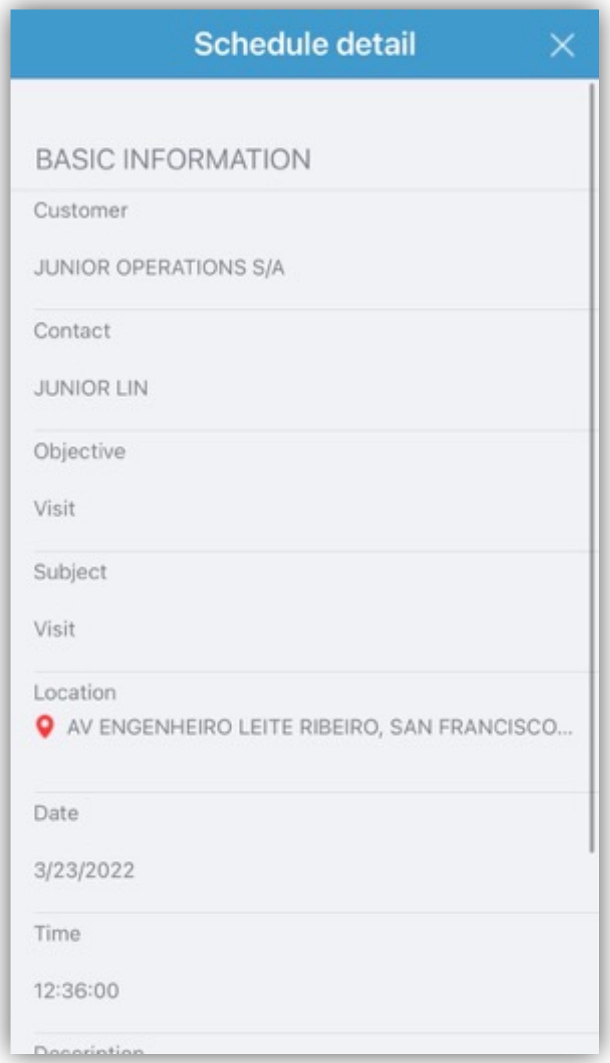


Canceling Schedule:

There are two ways to cancel schedules on app. The first one is through the schedules main query.

Select the schedule that you want to cancel, drag to the left side through 'swipe' function and select 'Cancel' option, or, press a schedule option for a while and select 'cancel' depending on your device operational system.

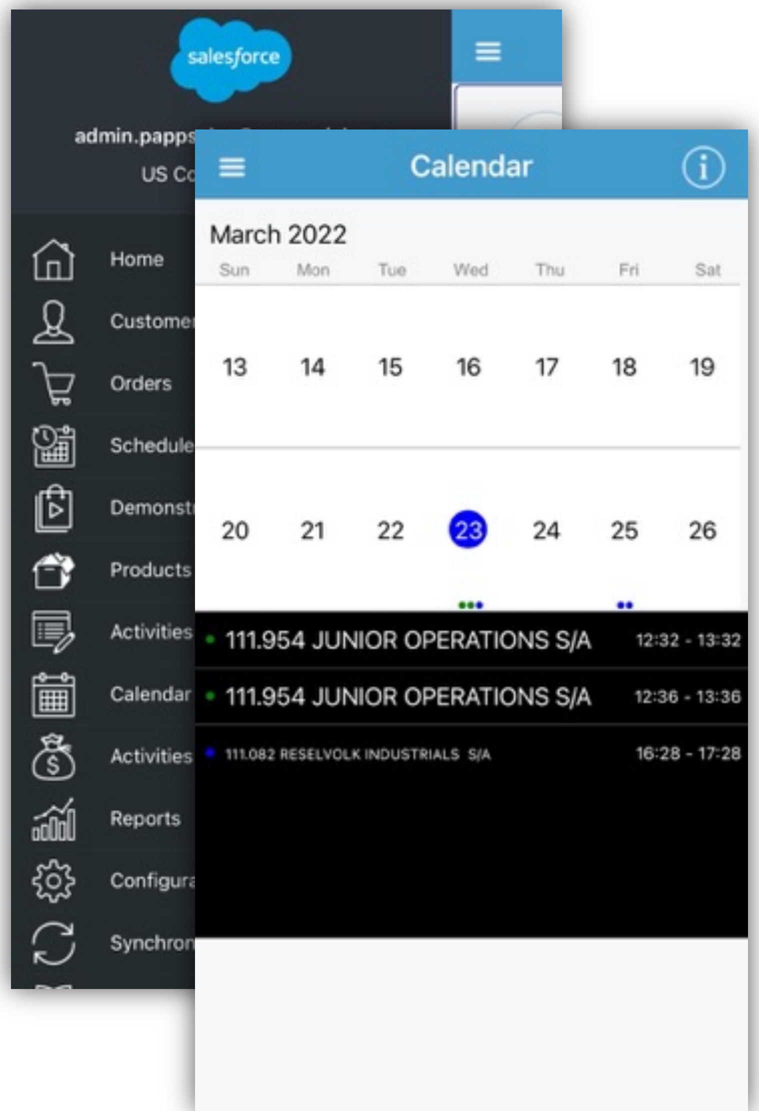
On this moment the schedule is displayed in the query with 'Canceled' status.



Another way to cancel a schedule is through 'Schedule Details' tab.

When selecting the schedule that will be canceled, click on 'edit' option on the top of the screen, and on edit screen, click 'Cancel' option, located on the bottom of the screen.

When confirmed cancellation, the schedule status become 'Canceled' on schedule query.



Calendar:

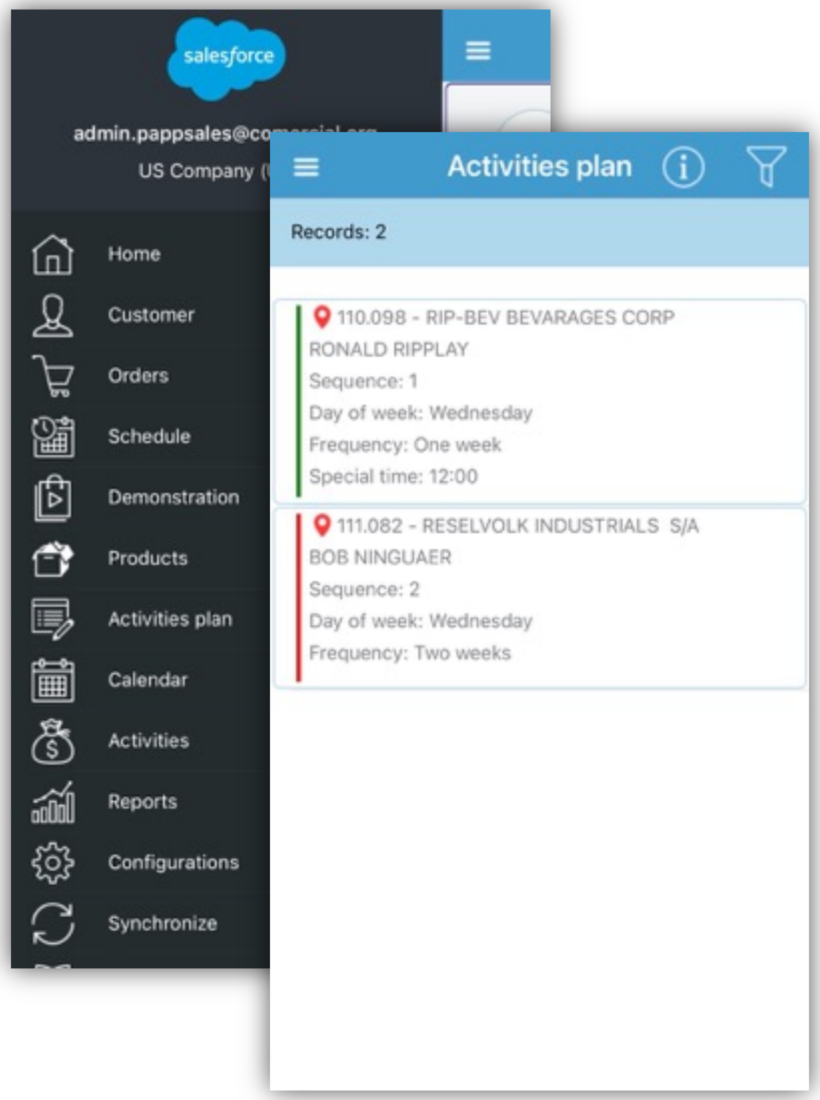
This screen displays the calendar and identify the days that there are registered schedules to the logged user on device.

Open schedules are represented with blue identifier.

Finished schedules are represented with green identifier.

Canceled schedules are represented with red identifier.

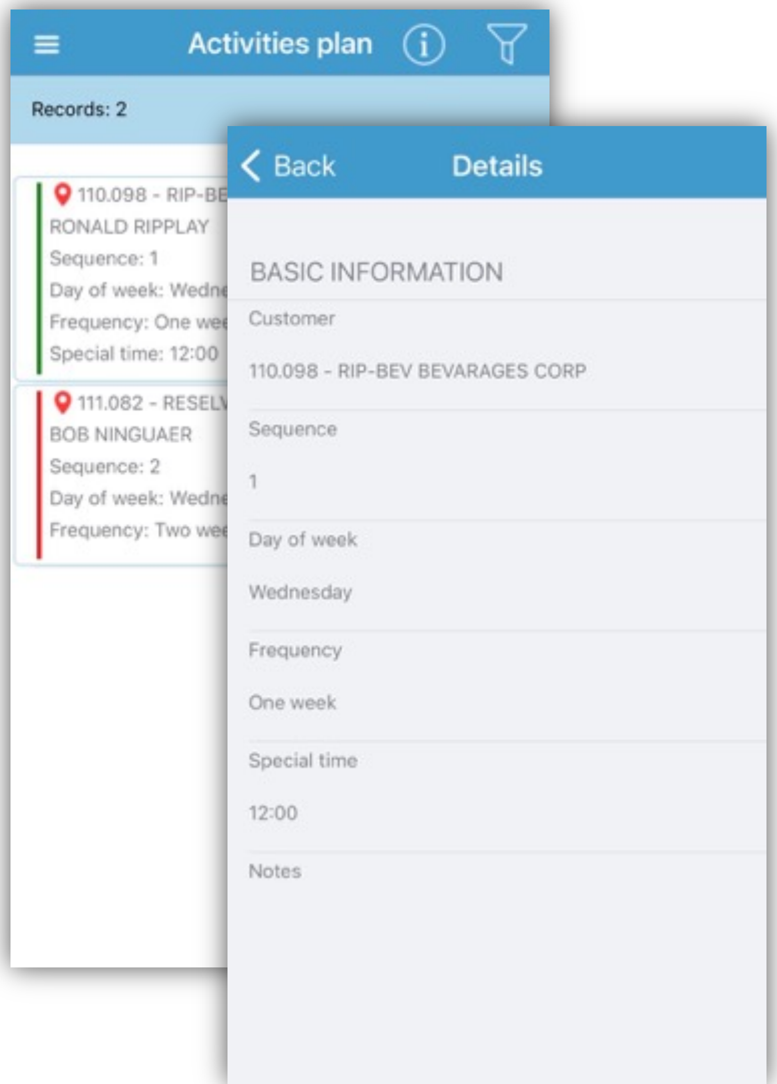
When selecting a date, will be displayed the schedules of the day with the respective status indicators.



Activitie Plan:

By accessing the activities plan option are displayed activities of the current day, registered to the seller in the activities plan in Salesforce. The activities are displayed sorted according to the sequence field, set up in Salesforce.

To change the view of the data displayed in the query, click on filter icon at the top of the screen. In the filter screen, you can select other days of the week you want to view the activities and also select a particular customer for viewing.

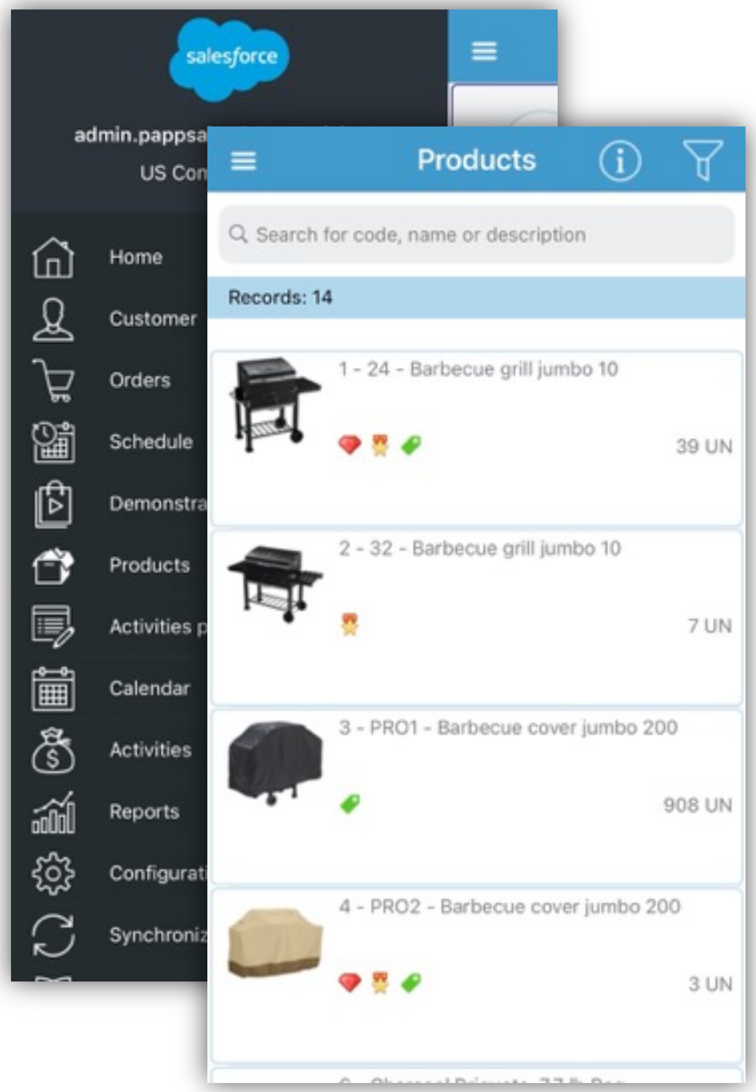


Activities Plan:

When selecting an option from the activities plan in the query, it is displayed the details screen, on which you can view the basic customer information and the information of the selected activity.

On this screen you can also see the last action performed by the customer and the date of such action.

In the bottom of the screen, the contact data and their customer address are displayed.



Products:

When accessing the products query, will be displayed all available products on the company default price list, which is active on the app.

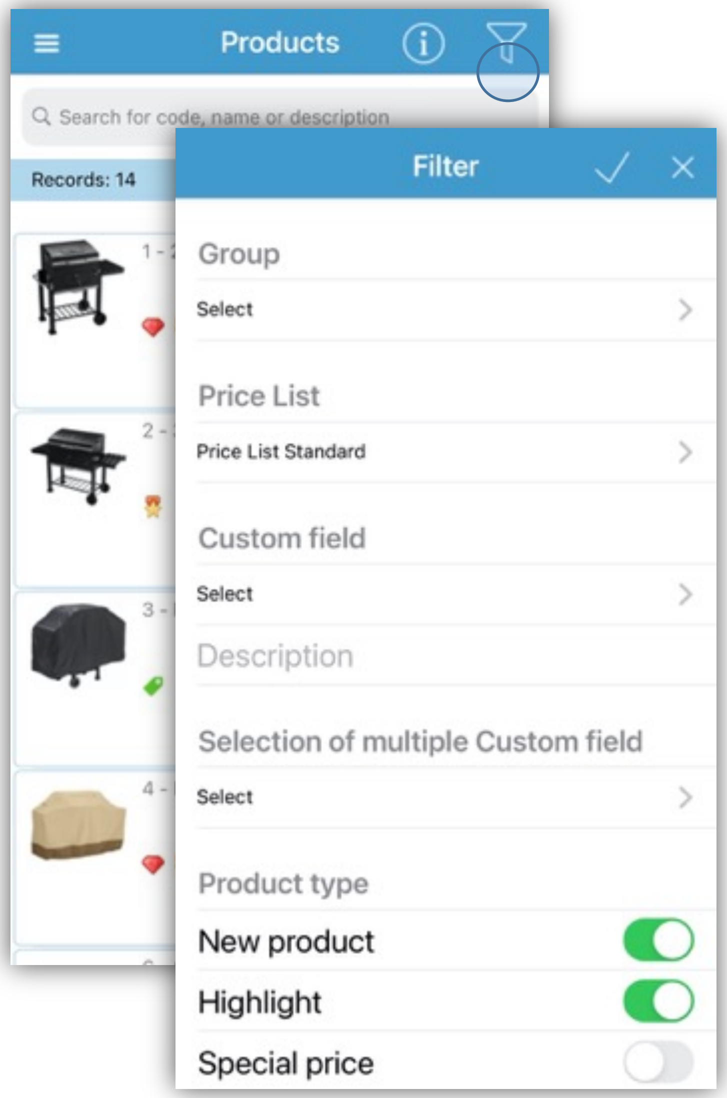
To change the products view, select the icon located at the top of the query.

On the query, products have identifiers that are represented through icons below:

- news produtos on Org

- highlighted products

- products with promotional prices



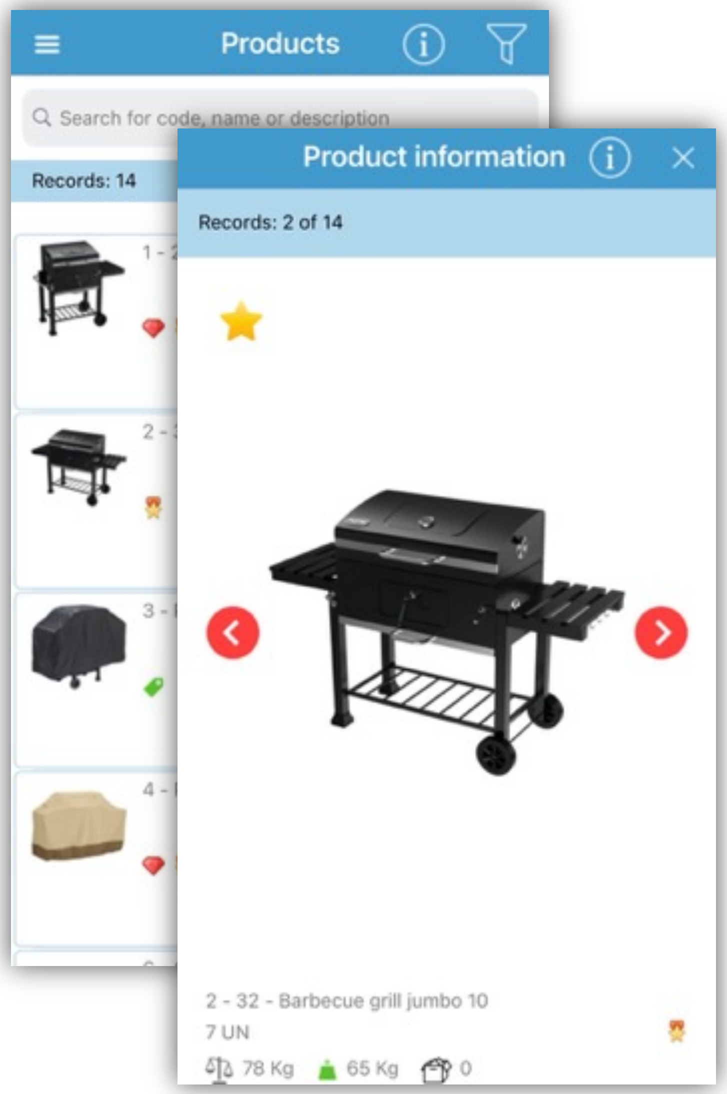
When selecting the filter icon on query screen it's possible to select the options that you want to see more specifically, like Product Groups, Price Lists and Characteristics.

On Product type grid it's possible to determine if the query will show new products, highlighted products and special price products. This information are registered on Product Registration screen, in Salesforce.

Below, it's possible to select the warehouse you want to view and define if you want to see products that has items on warehouse, independently if was selected a warehouse.

To apply the filters, select the option ✔.

To remove applied filters, click 'Clear filters' and select the option ✔.



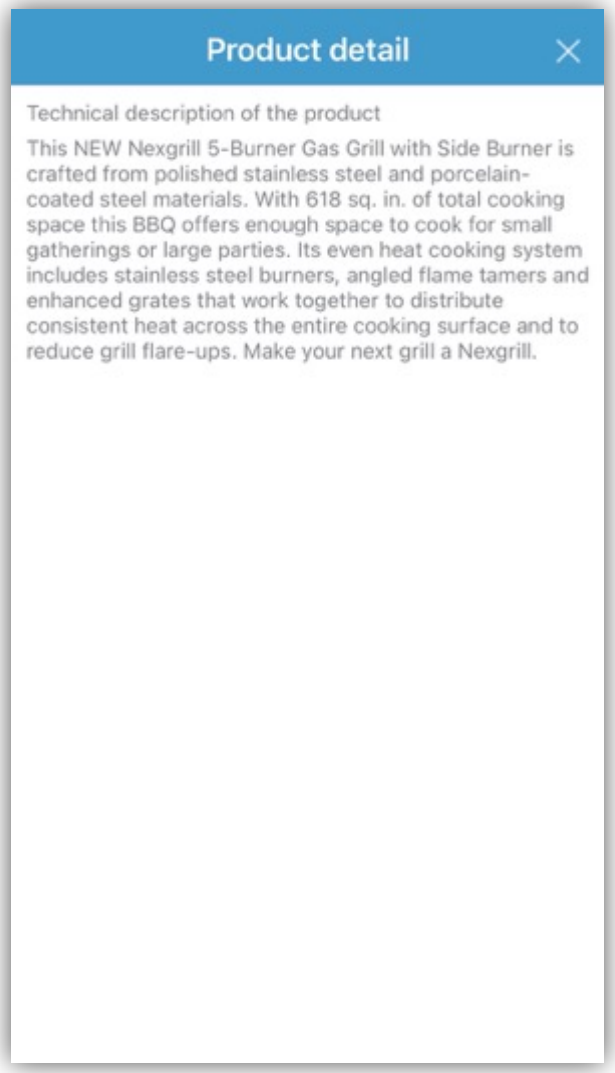
Still on query, when selecting a product, it is displayed in larger size with the respective detailed information, and it's possible to navigate between another products of the query, through the side arrows.

Below image, product code and description, quantity in stock and the measure unit are displayed.

On the bottom of the screen, it's possible to navigate between the options to view the product detailed information.

The 'star' icon says that the product has complementary or equivalent items. When selecting this icon it's displayed a new screen with those products, allowing to view the products detailed information.

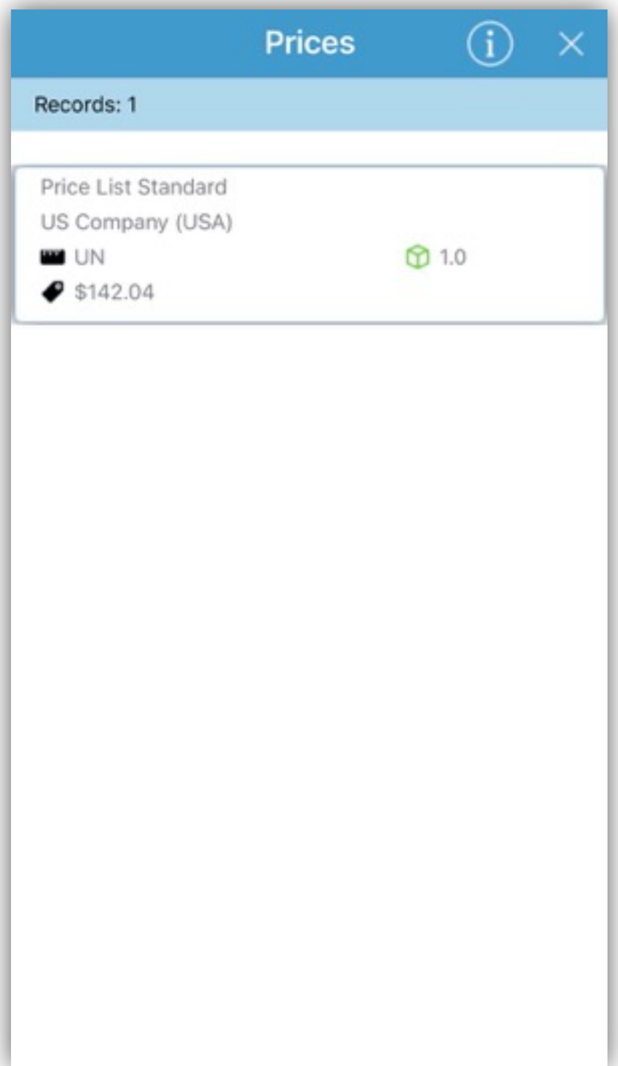
To view icons subtitles, click information icon at the top of the screen.



Details Tab:

This tab displays product technical description, that is registered in own product registration screen.

This description normally comes from ERP, case the integrator is correctly configured to send this information to Salesforce.



Prices Tab:

This tab displays the product prices for each price list which is in. The icons displayed on the screen identify several situations in values of products as follow:

- Package discount
- Regular price
- Regular price with discount
- Special price
- Special price with discount

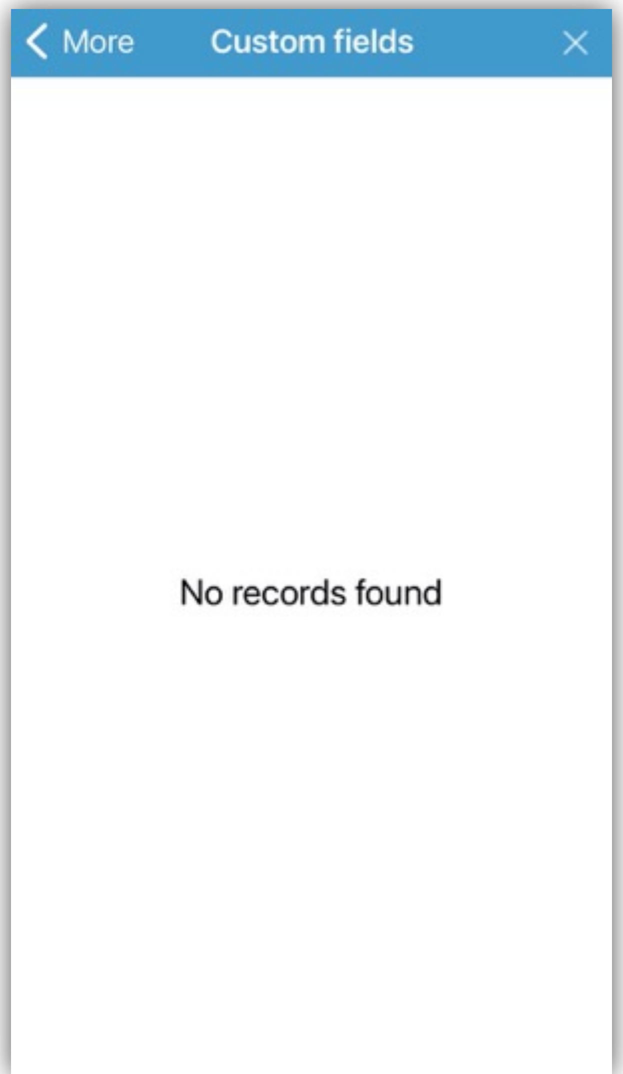
Only will be displayed the price lists that are registered to the company logged on App.

Inventory Tab:

This tab displays the deposits of the company that have this product, with their respective amounts.

On Salesforce it is possible to set inventories per deposits, that is, on this example we determinate that ‘Miami’ deposit has 150 units and two ‘Boston’ deposits has 232 and 300 units of this product.

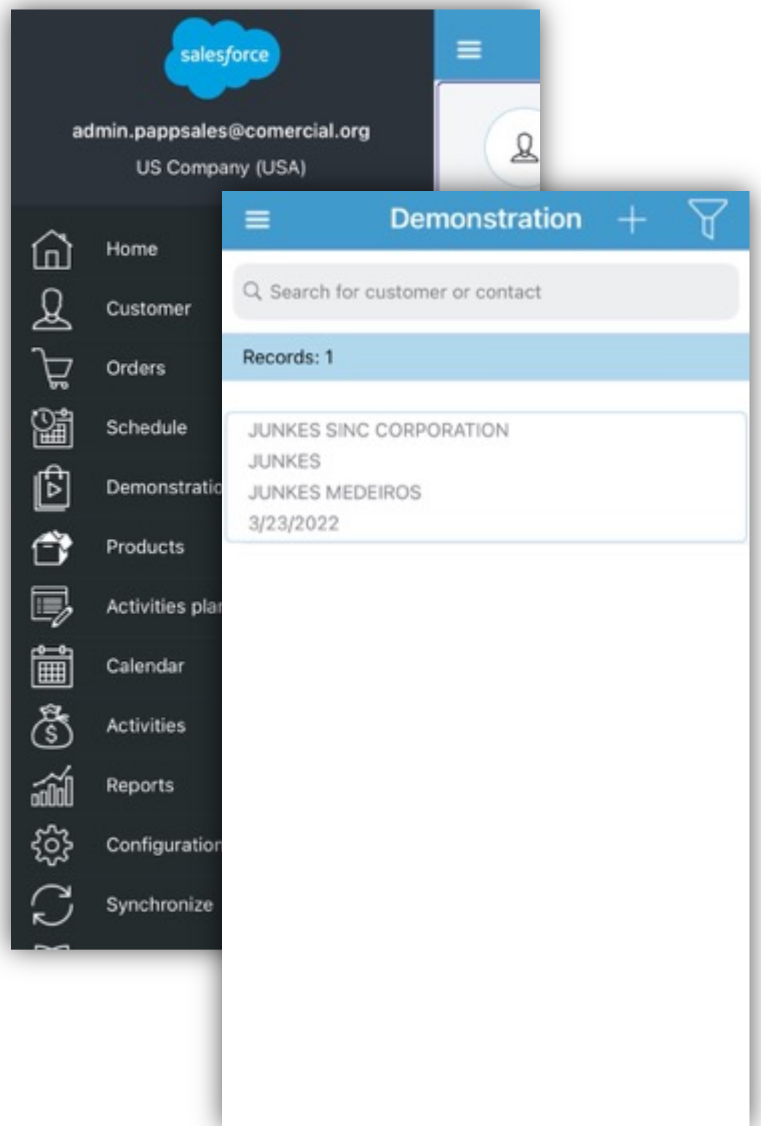
This concept is used so that when the customer is in another country or state, the company can view preferable the products that are in a warehouse in this same location, facilitating logistics sales. To perform this setting, it is necessary to inform the customer warehouse on Customer Registration screen, in Salesforce.



Custom Fields Tab:

This tab displays the product characteristics.

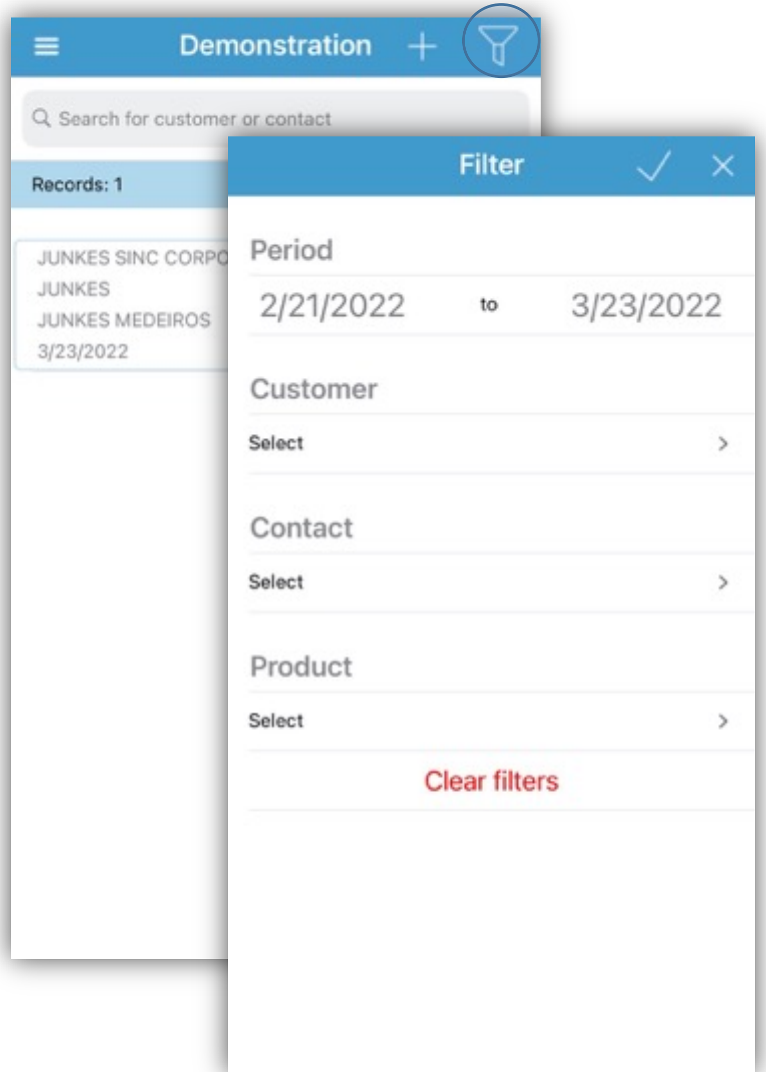
The custom field must come directly from ERP, so, it is necessary that the integrator is set correctly.



Demonstration:

On Demonstrations screen are displayed all products demonstration made on filtered period, being possible to create new demonstrations, add new products on demonstrations already made or cancel the demonstrations displayed in the query.

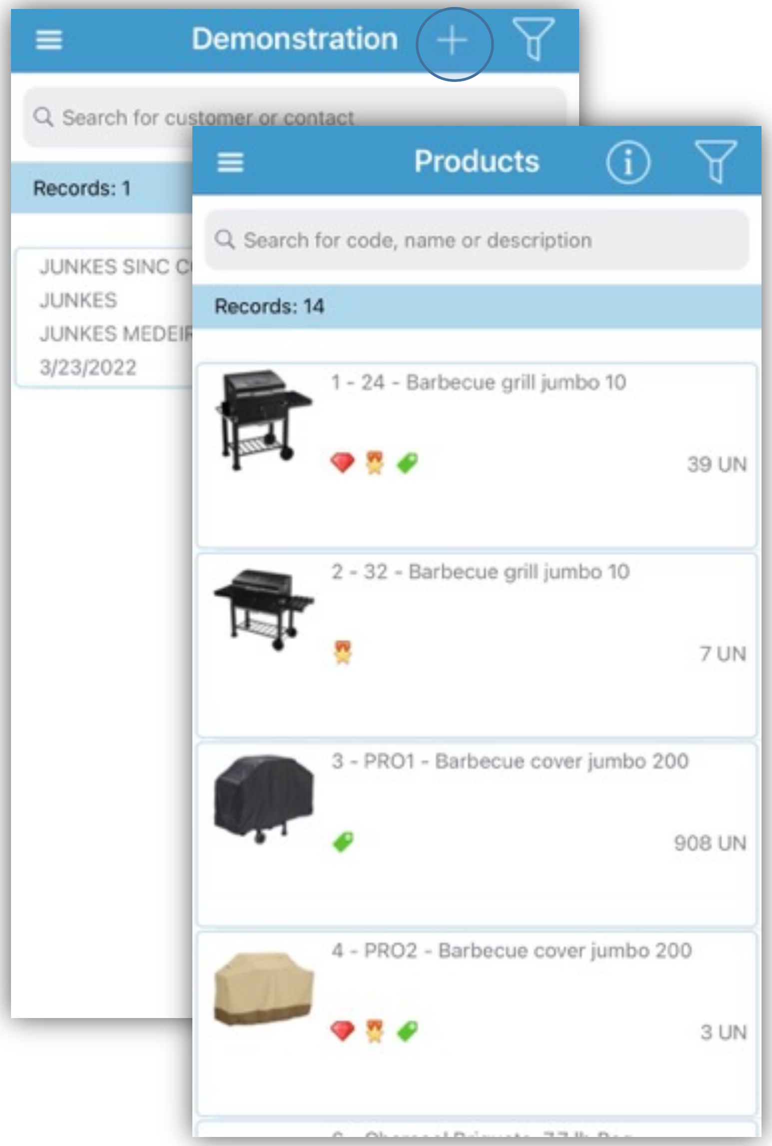
Canceled or Inactive demonstration will not be displayed. These are only displayed in Salesforce, on Product Demonstration tab.



When selecting the highlighted icon on image, it's displayed the filter screen to select more specifically the demonstrations that you want to see in the query.

To apply the filters, select the option '✔'.

To remove the applied filters, click 'Clear filters' and select '✔'.



Creating new Demonstrations:

When you select the option "+" to create a demonstration, is displayed the screen to select a customer and a contact for the demonstration, and so, the products selection screen is shown.

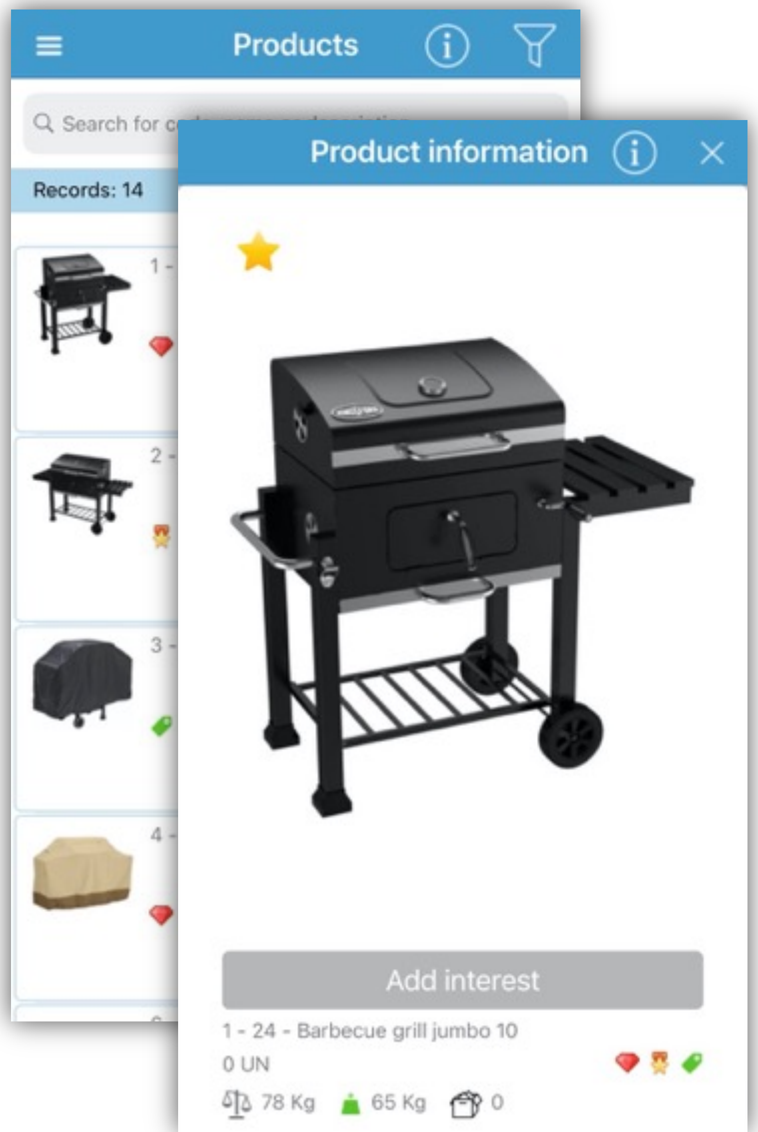
On this screen, the products have identifiers that are represented through icons below:

- new products on Org

- highlighted products

- promotional price products

- demonstrated products

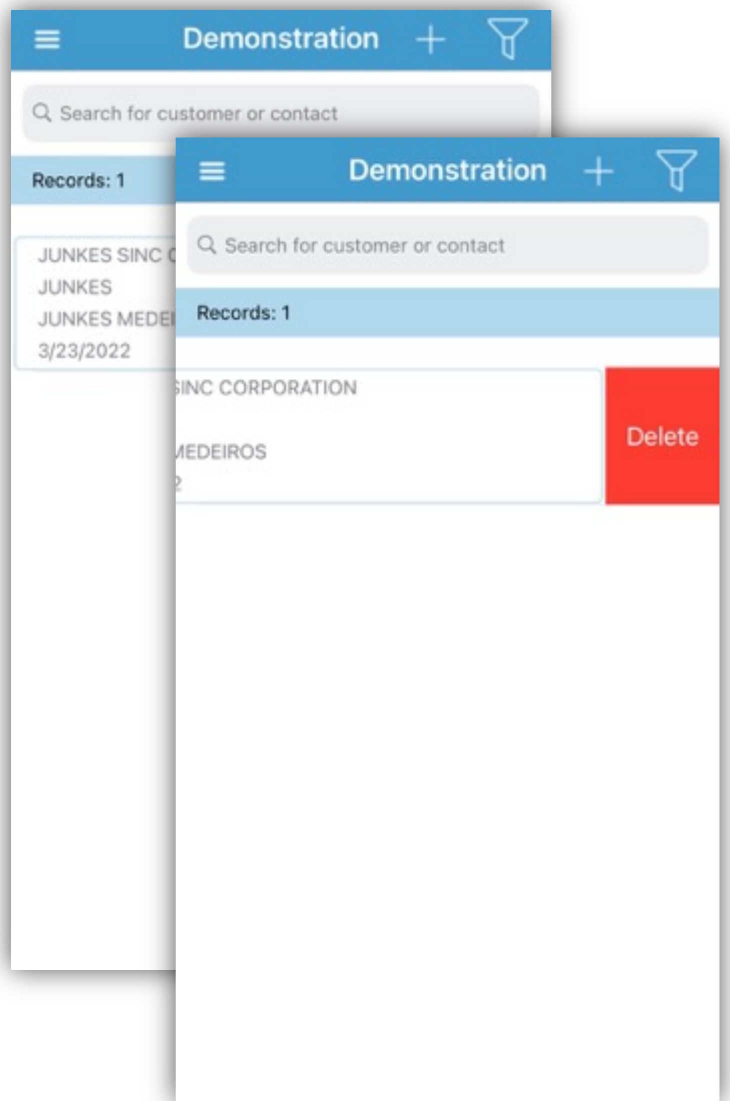


When you select a product, it's displayed the 'Product information' screen, being possible to navigate between another products through the side arrows.

To add a product on demonstration, click on 'Add on demonstration' button. After adding on demonstration, this button will be red with the option to remove the product from demonstration.

The 'star' icon displays the similar and equivalents products screen and on the bottom of this screen are displayed the product details tabs, in the same way they are shown on products query.

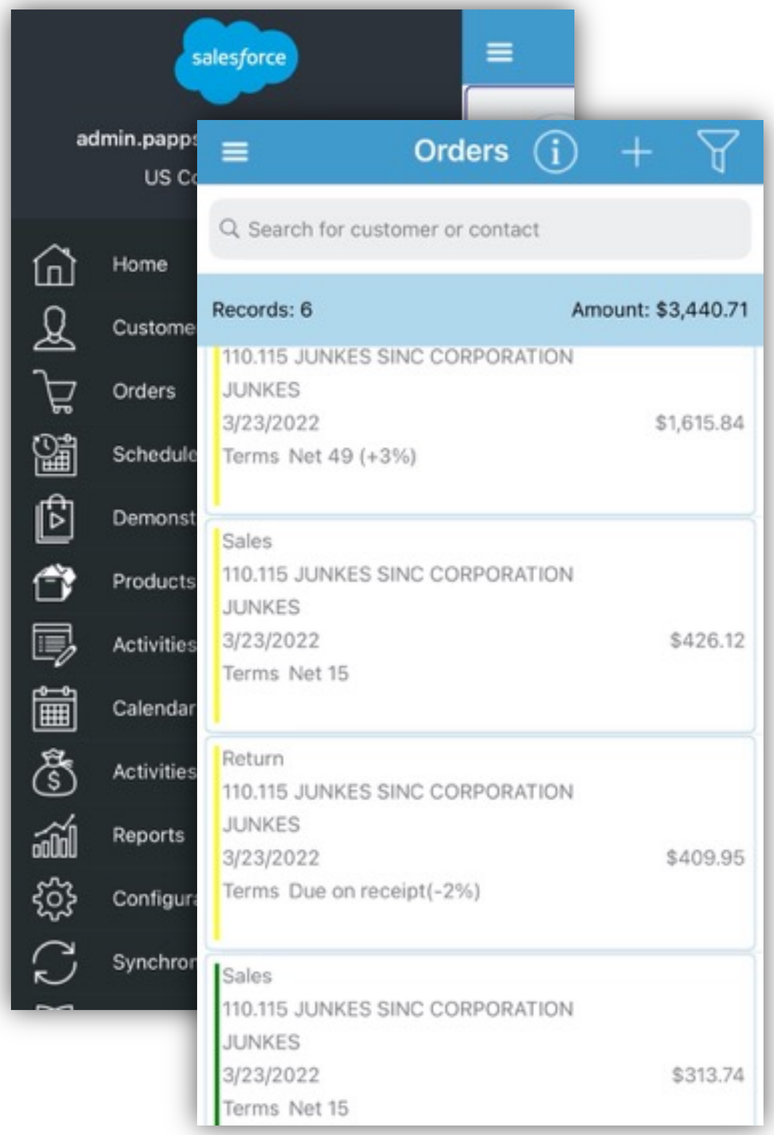
If the customer has an open schedule for the day of the demonstration, when finishing the demonstration, the application asks if you want to finalize the schedule.



Canceling Demonstrations:

To cancel a demonstration, on demonstration query screen, select an option, drag to the left side through 'swipe' function and select 'Delete', or, press a demonstration option for a while and select 'Delete', according to your device operational system.

Only unsynchronized records can be deleted. Synchronized records will be inactivated.



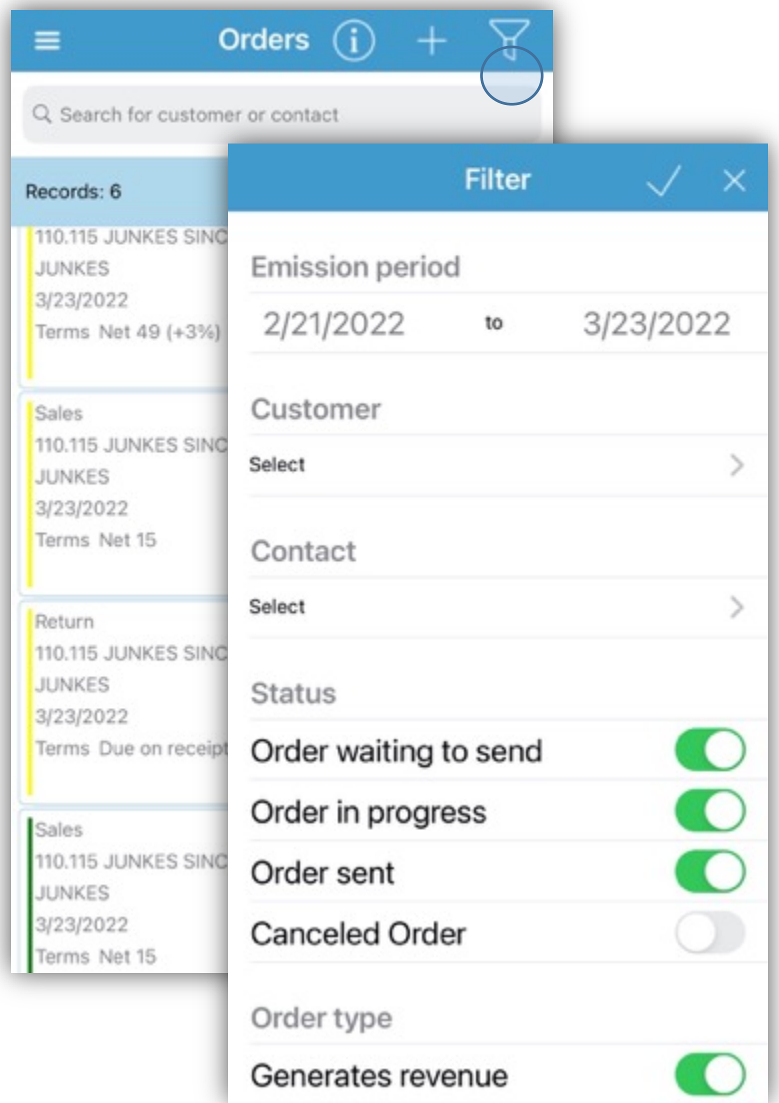
Orders:

Accessing 'Orders' menu, will be displayed all sales orders made on query filtered period.

Sales Orders identified in blue are orders that are waiting synchronization. Orders with this status still can be edited and deleted.

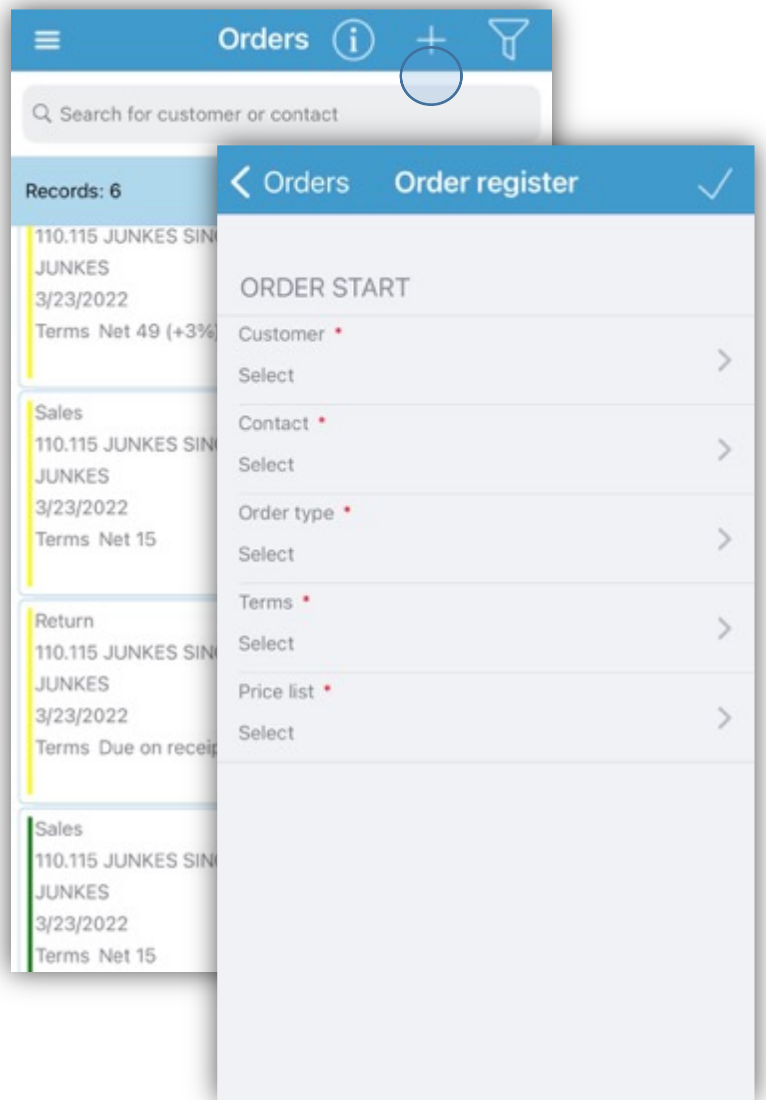
Sales Order in yellow are orders that are not ready to synchronize. These only will be ready after editing the register and selecting the option 'Ready to synchronize'. Orders with this status still can be edited and deleted.

Orders identified in green are orders already synchronized. Orders with this status cannot be edited or deleted.



On the top of the orders query are displayed totalizer of orders quantity and the total found orders value, according to the filters.

To determine the query filters, click on filter icon and select or check the options you want to view on query.

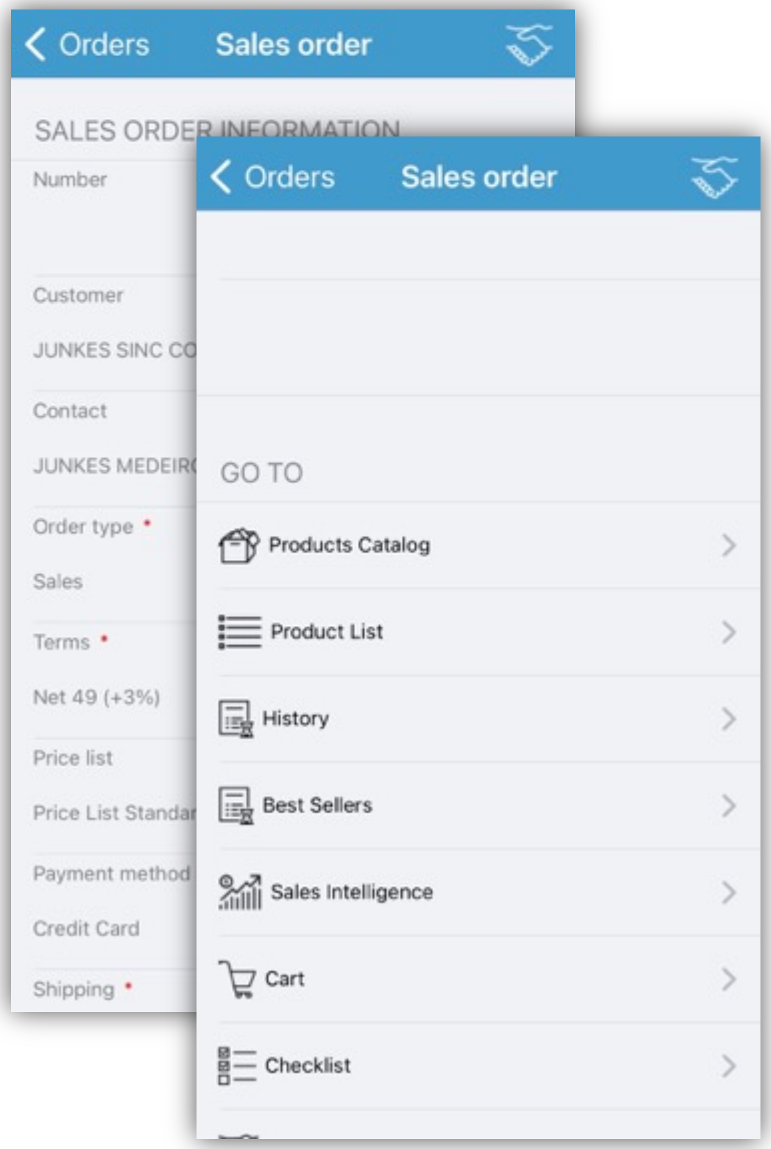


Registering a Sales Order:

To start a new order, select the option '+' at the top right of the screen. On the Register screen, select the customer you want to perform the order.

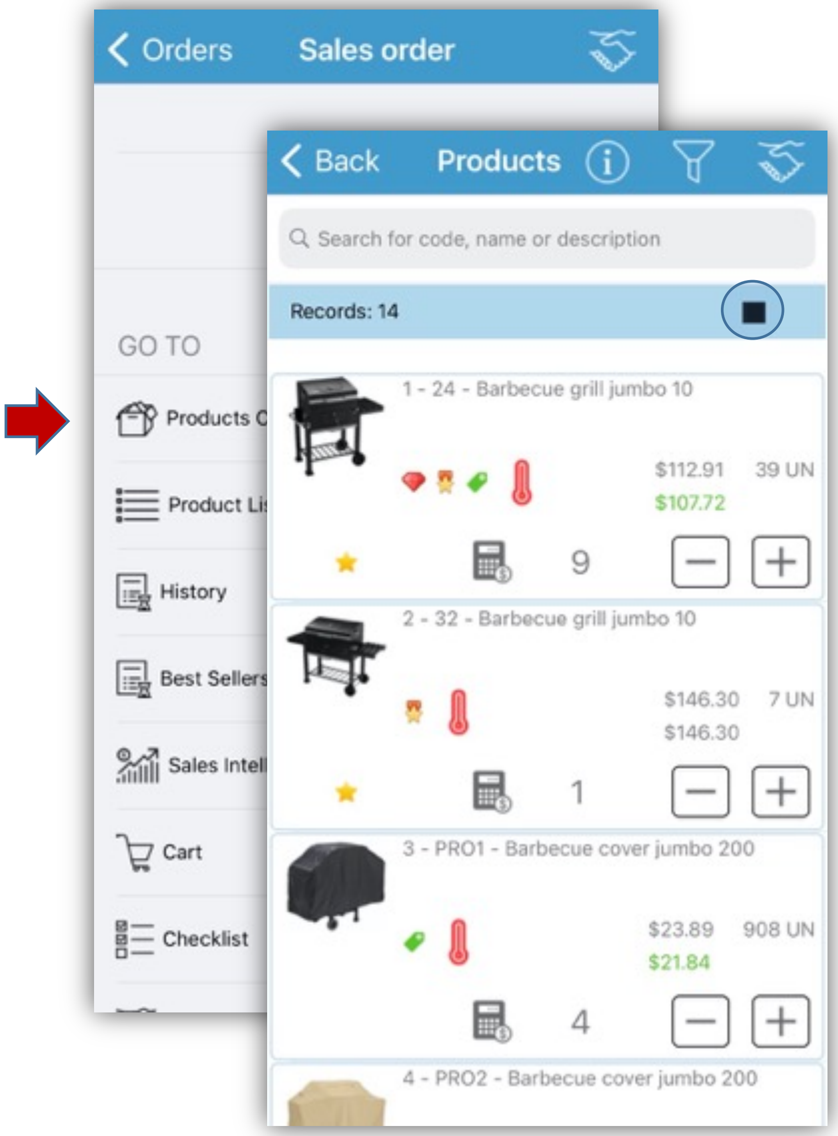
If the selected customer has default information registered in Salesforce, is not necessary to fill terms and price list, because app will fill automatically.

Fill the Order type and select ✔ to continue on sales order register.



On the next sales order register step, is displayed the screen with the selected information and on the bottom of the screen it's possible:

- ✓ Include products to order through 'Products' option;
- ✓ Consult the history of sales;
- ✓ Consult a list of products that may be relevant for sales to this customer, through 'Sell more' option;
- ✓ Products cart;
- ✓ Checklist, and;
- ✓ Perform the negotiation and finalization of the sales order, through 'Negotiation' option.



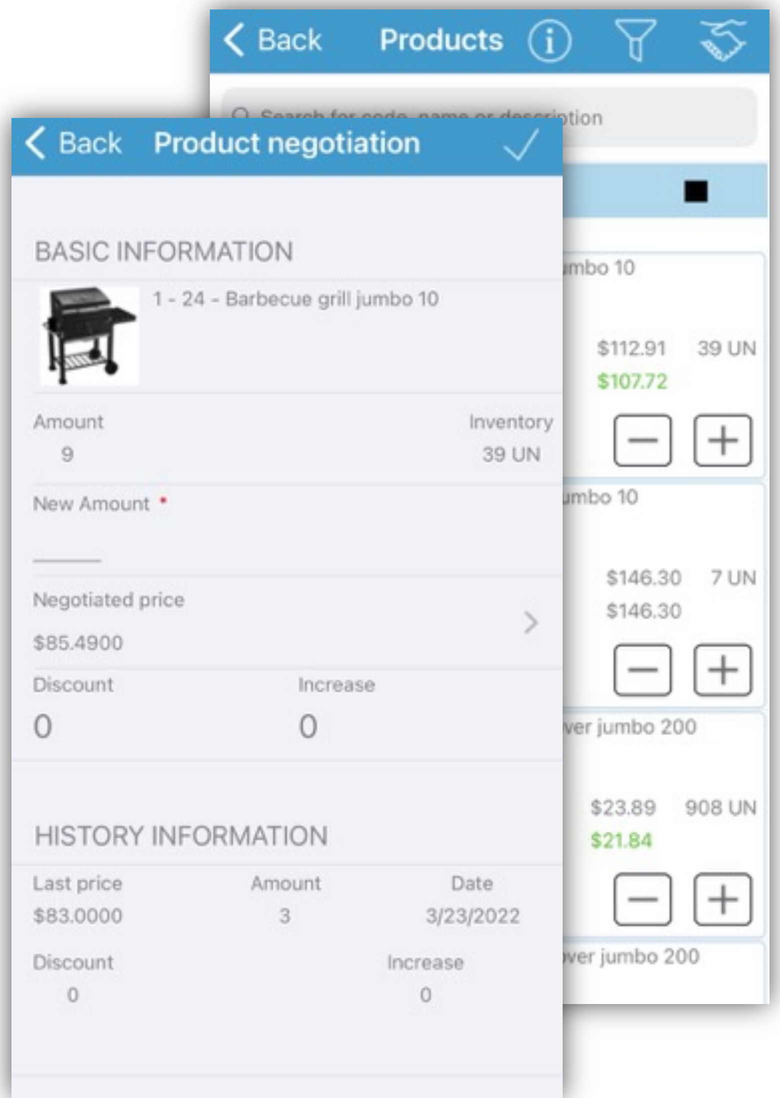
Adding Products to the Sales Order:

On the Sales Order main screen, select ‘Products’ option.

On the new screen are displayed all products available on the customer price list, according to the settings on Salesforce Org.

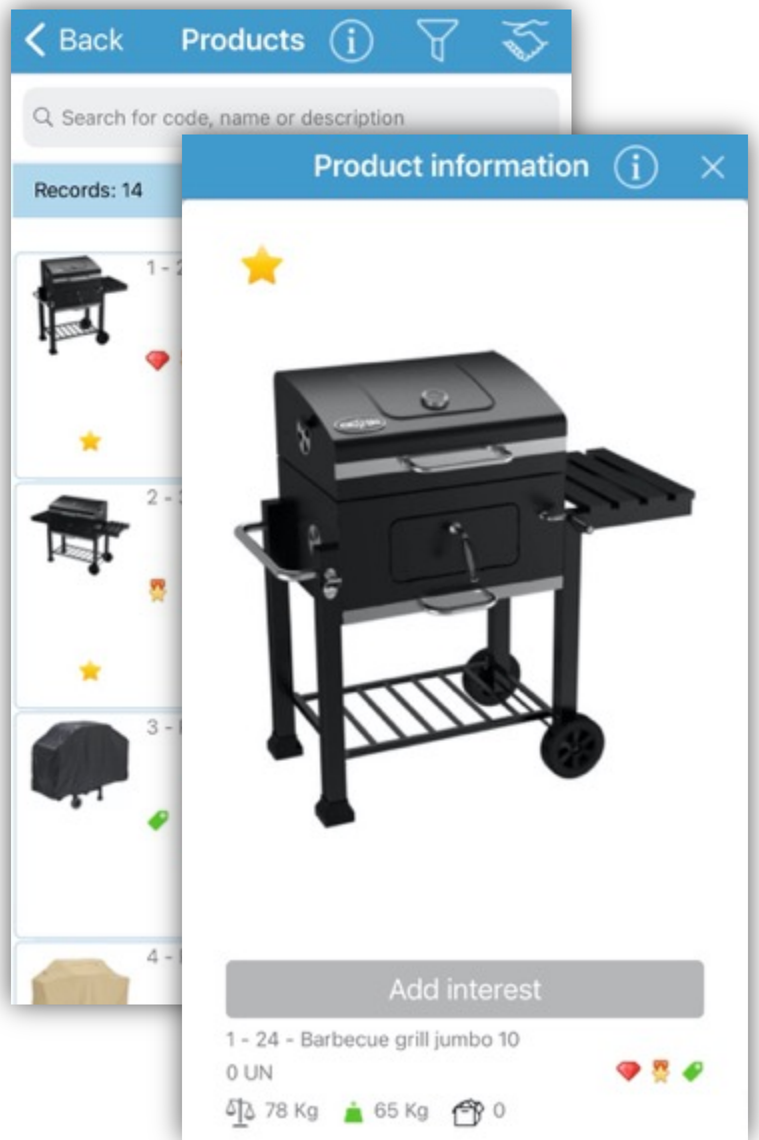
The products view can be changed through highlighted option on image, being possible to alternate to list or grid.

To add the products on Sales Order, select the option “+”, being added the amount of the standard package set in price list item register, in Salesforce.



Still in order addition products screen it's possible to do a individual negotiation for each item, through highlighted icon on image.

When selecting this icon, it's displayed a new screen, in which you can change product discount and increases values, also being possible to fill the quantity of the product that will be added on order and view another product value information.



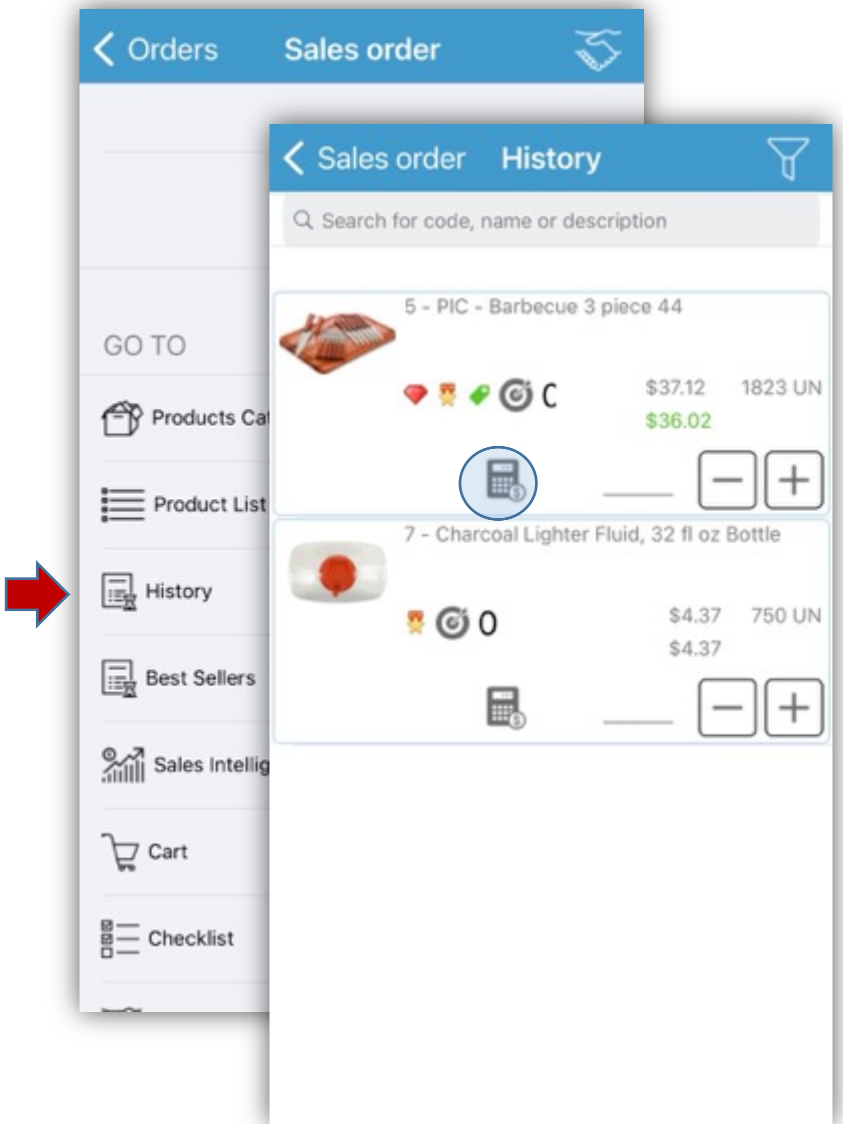
By clicking on product image, it's displayed a screen that allows to add the product to the customer interest list, this way, this product will be considered on product suggestion rule when selecting 'Sell more' option on Sales Order.

On this screen it's also possible to navigate between product information tabs like this is displayed on product query screen.

On sales orders products query are displayed the icons that identify several product situations, according to the respective cadastre on Salesforce.

The icons description can be viewed through ‘information’ button, at the top of the screen.

Case the selected item has complementary or similar item, the ‘star’ icon will be displayed, and by clicking on this icon it’s displayed a new screen with those products, being possible to add this products on sales order.



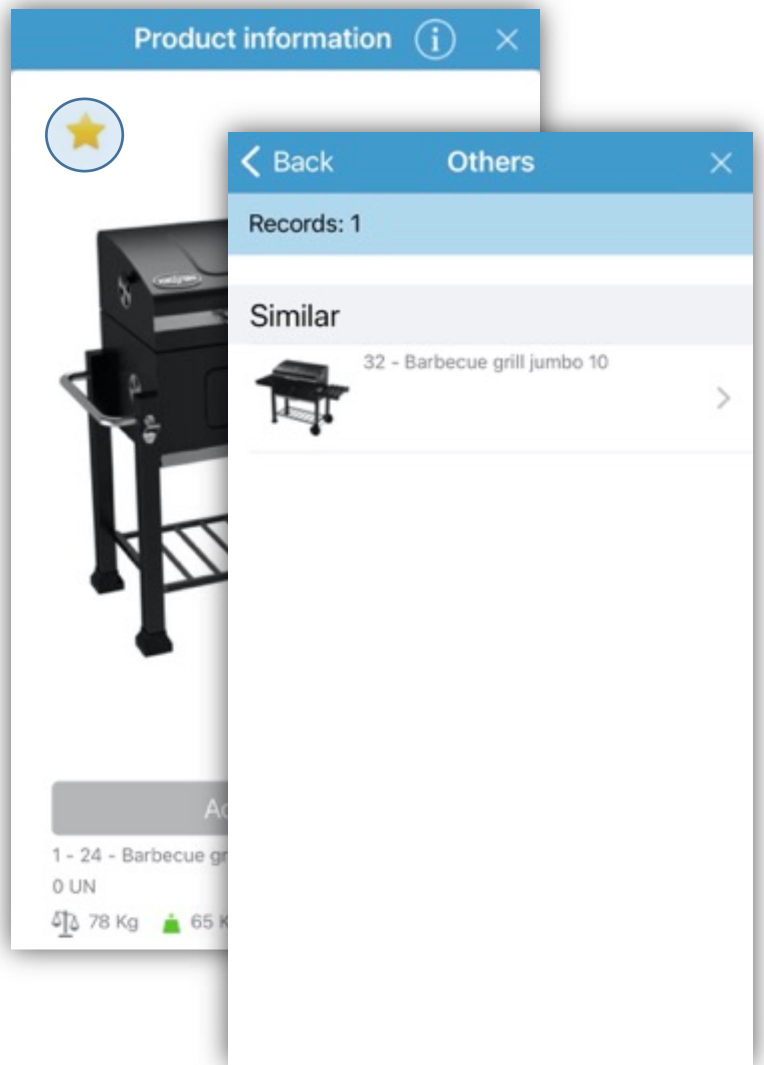
Consulting Sales History:

On the Orders main screen, select ‘History’ option.

On the new screen will be displayed all sold products on last 90 days to the selected customer.

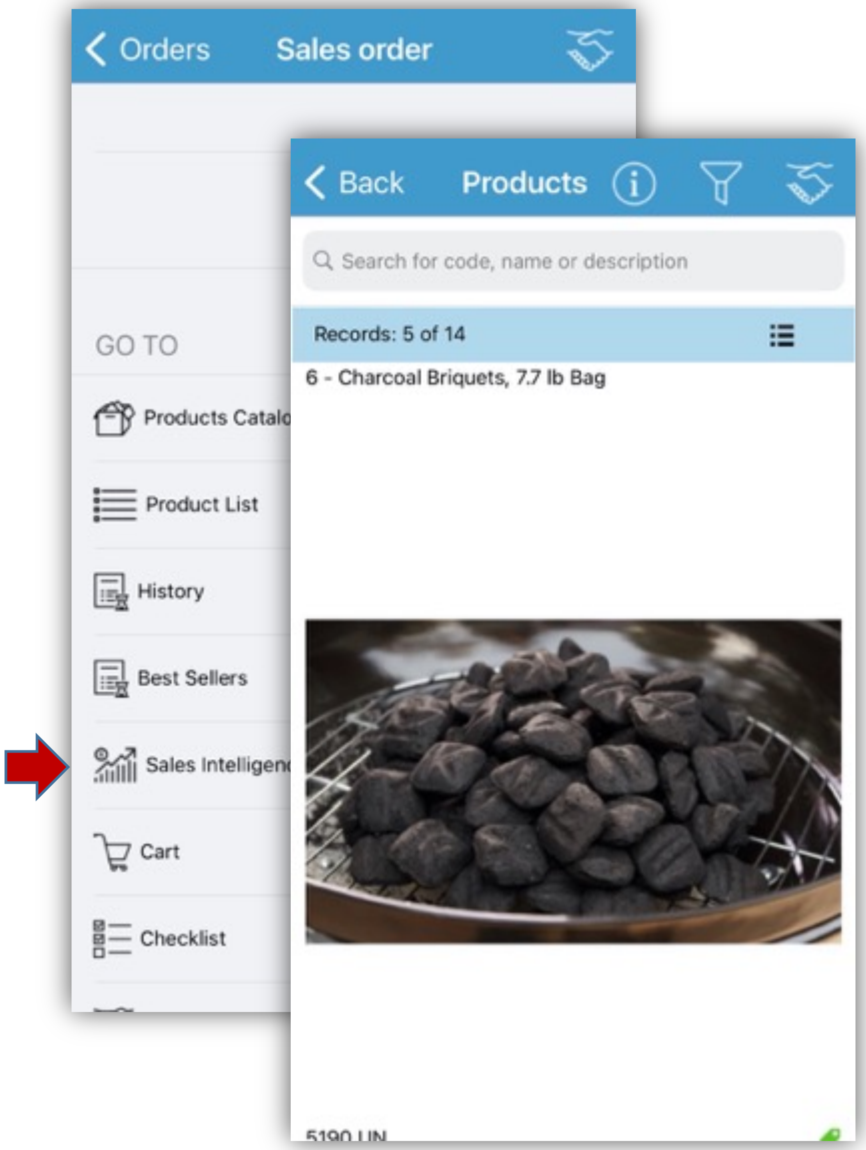
On the highlighted icon, it is possible to view the details of the product sale History.

Through this screen it’s possible to add this product to the new Sales Order, or, by clicking on product image it is possible to add to the customer ‘Interest list’. In this way, this product will be included on product suggestion rule when clicking ‘Sell More’ button, on Order main screen.



On this new screen it's also possible to navigate between product information tabs like this is displayed on product query screen.

Case the selected item has complementary or similar item, the 'star' icon will be displayed at the top left of the screen, and by clicking on icon it's displayed a new screen with those products, which is possible to add on customer interest list.

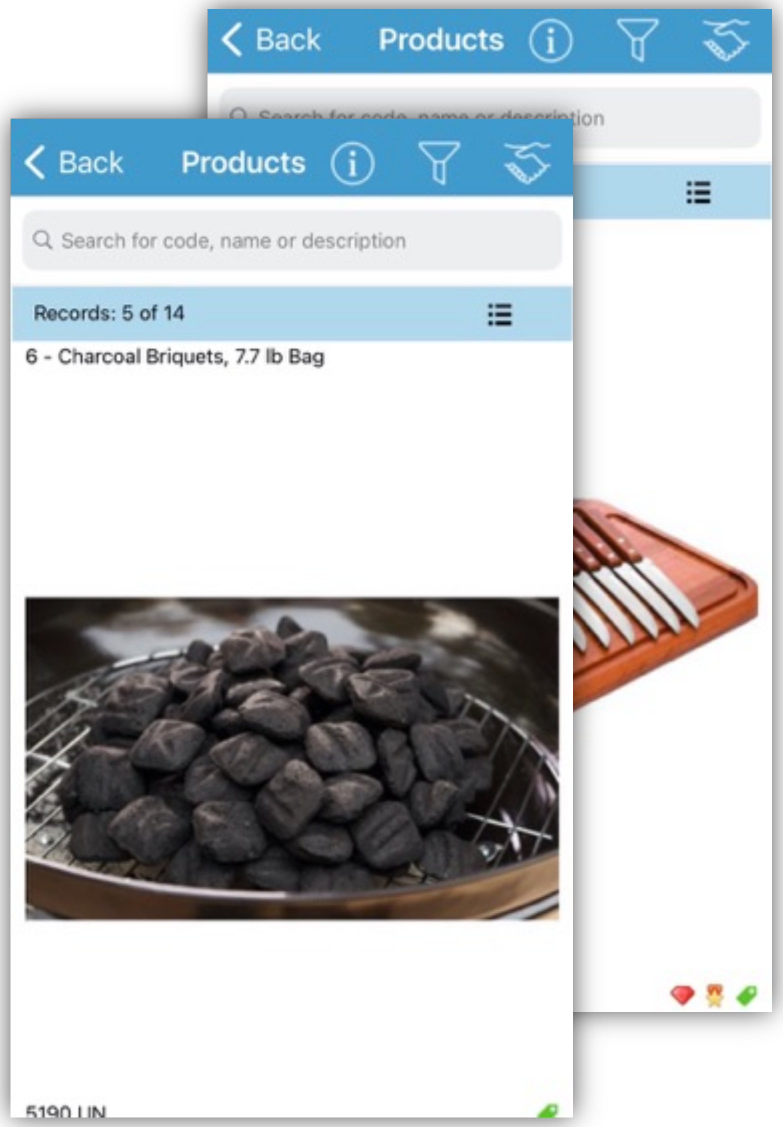


Sell More:

On the Sales Order main screen, select 'Sell More' option.

On the new screen will be displayed the products that have a greater purchase potential by the customer according to the 'Score' punctuation, defined on Sales Intelligence parameters configuration.

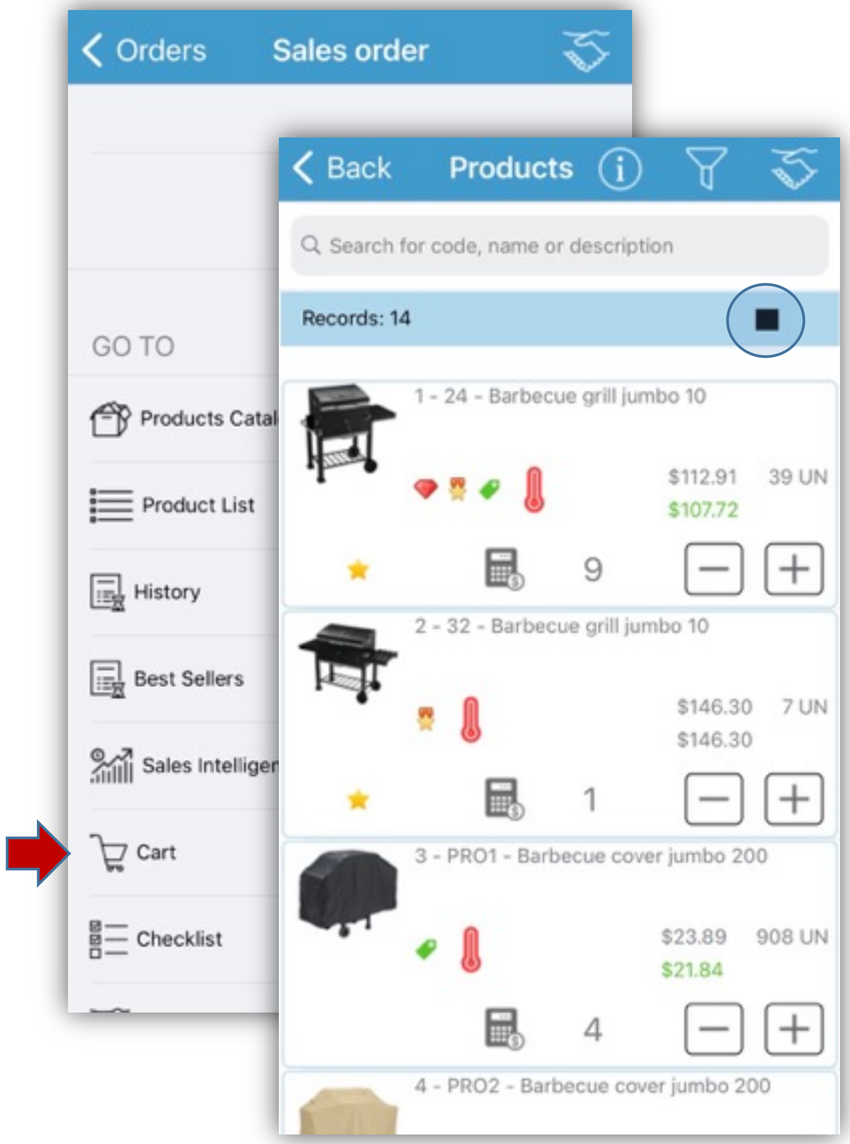
The products will be displayed sequentially following the thermometer color, which is red the greater purchase potential color and blue the lower purchasing potential color.



For the products to be scored and displayed on this screen, must be performed the settings of Salesforce parameters, that define the respective punctuation of each product situations.

This way, the app suggests on this screen, the products that are included on the performed settings.

Sales Intelligence detailed rules are described on ‘Parameters’ tab, on Salesforce Portal manual.

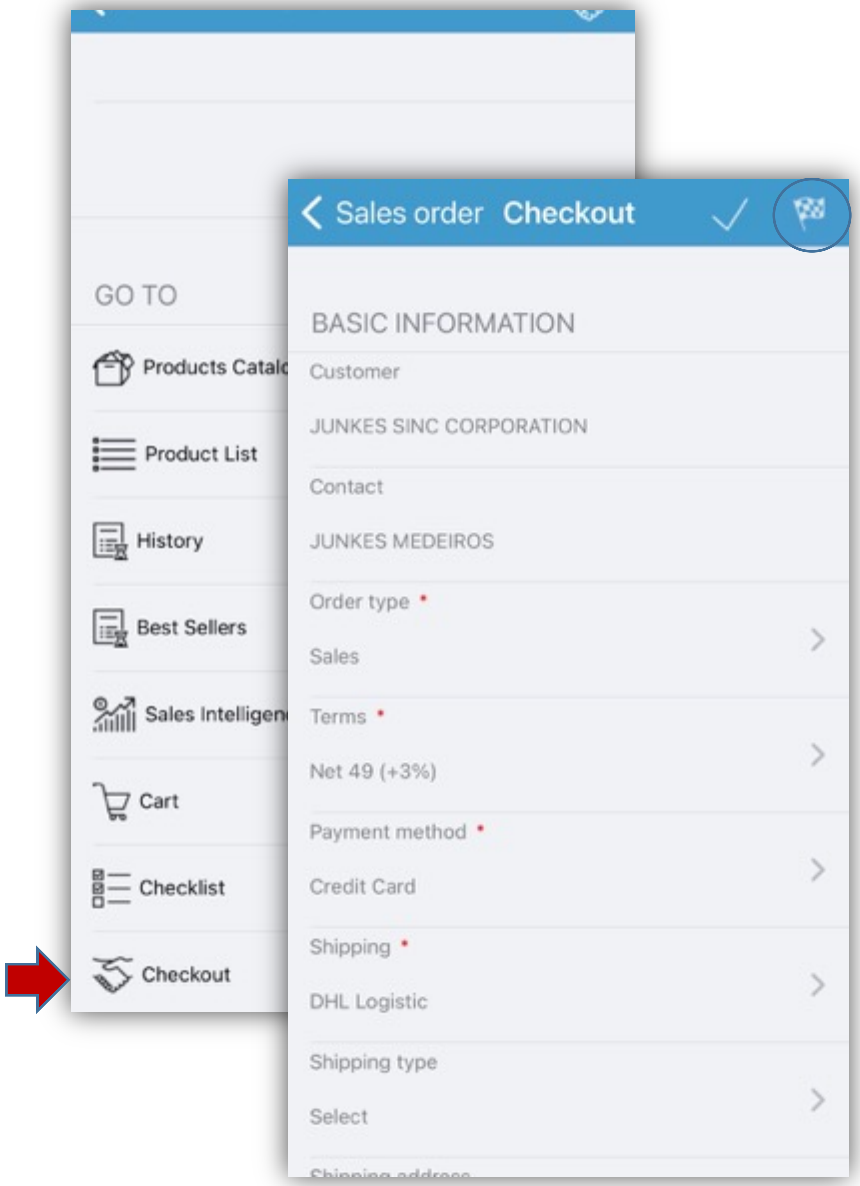


Viewing the products cart:

On the order main screen, select 'Cart' option.

In the new screen will be presented all products included in sales order, which can increase or decrease the amount of previously selected products.

On this screen you can also perform individual product trading, by clicking on 'negotiation' button highlighted on image.



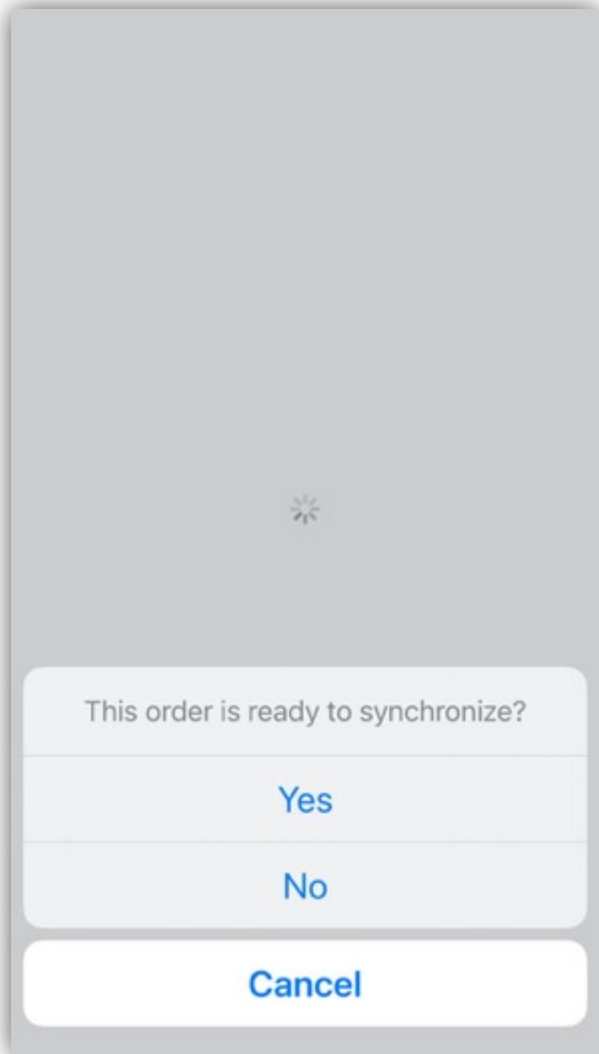
Finishing Sales Order:

On the Sales Order main screen, select ‘Negotiation’ option.

On the new screen will be presented all information previously set, which is possible to edit order type, terms, payment method and shipping.

In the bottom of the screen, it’s possible to add an observation relative the sales order and enter the signature.

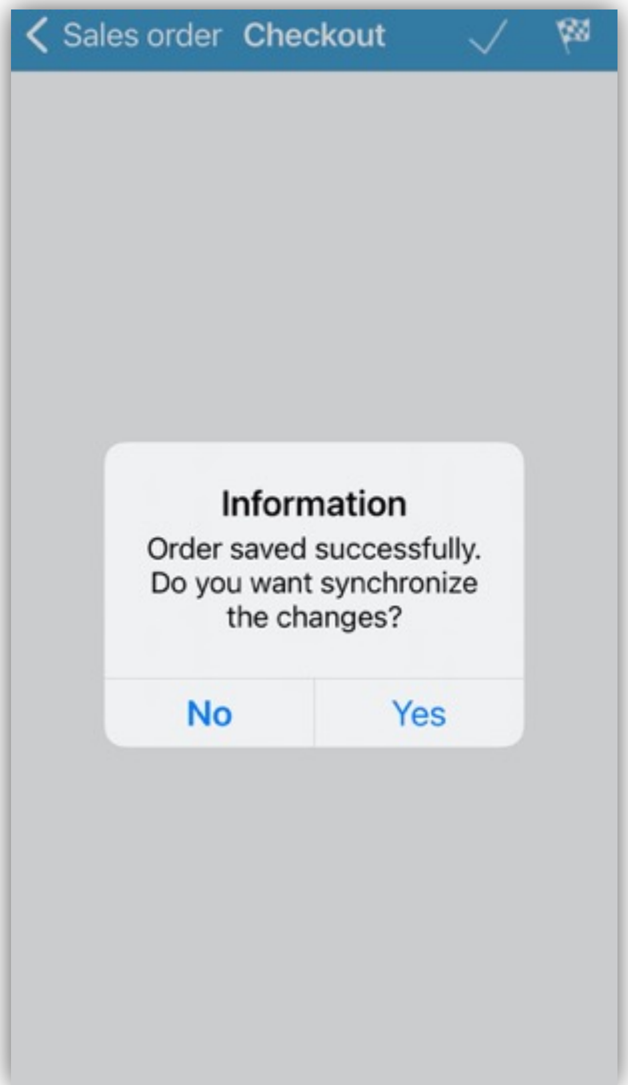
To finish the sales order, select the Icon, at the top of the screen.



When finishing an sales order, the app asks if the order is ready to synchronize.

Case 'Yes', the order status is changed to 'Order waiting to send' and will be synchronized with Salesforce on the next data synchronization.

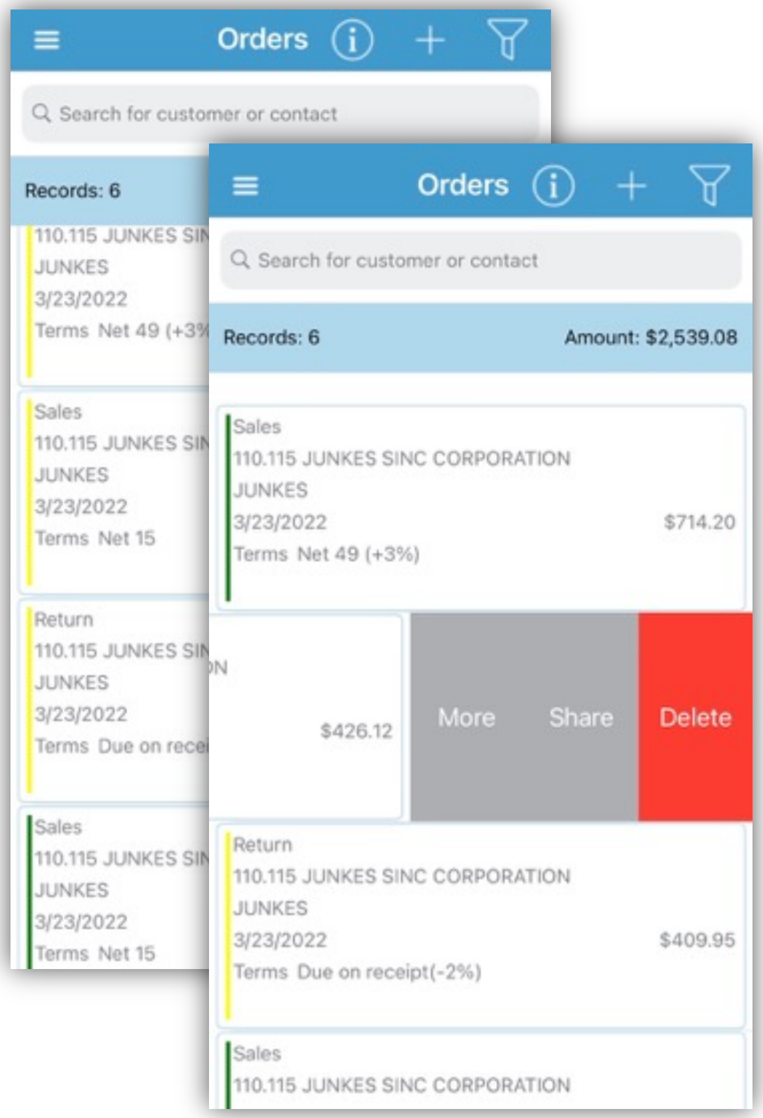
Case selected option 'No', the order status is changed to 'Order in progress', so you can edit this order until it is ready to synchronize.



When selected 'Yes' on previous screen, informing that the order is ready to synchronize, the app save the order and ask if you want to synchronize the changes.

Case selected 'Yes', the order status is changed to 'Order sent' and will be available for consultation in Salesforce.

This question only occurs if the 'Automatic sync.' parameter is set as 'Partial', on Configuration screen.

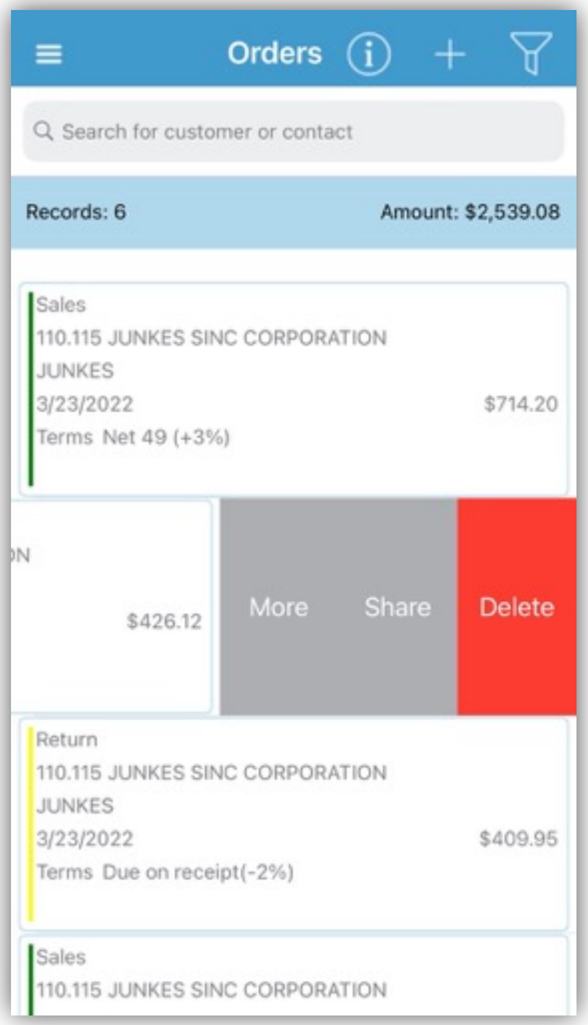


Canceling a Sales Order

On sales order query screen, select an order and drag to the left side through 'swipe' function or press for a while, depending on your device operational system.

On this moment, the options to delete, share and copy will be displayed.

To cancel an order, select 'Delete'. You cannot delete orders records already synchronized.

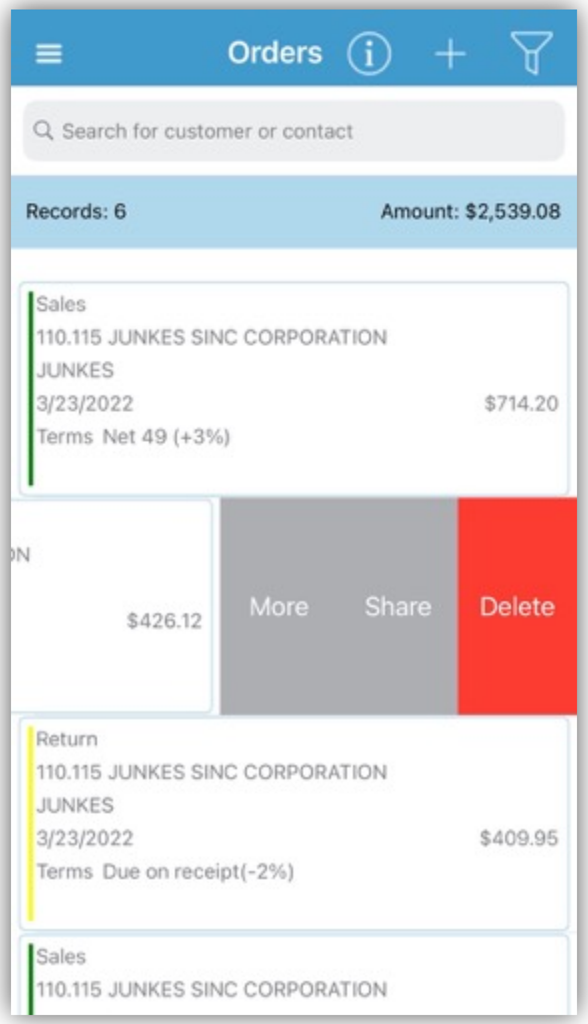


Copying a Sales Order

On sales order query screen, select an order and drag to the left side through ‘swipe’ function or press for a while, depending on your device operational system.

On this moment, the options to delete, share and copy will be displayed.

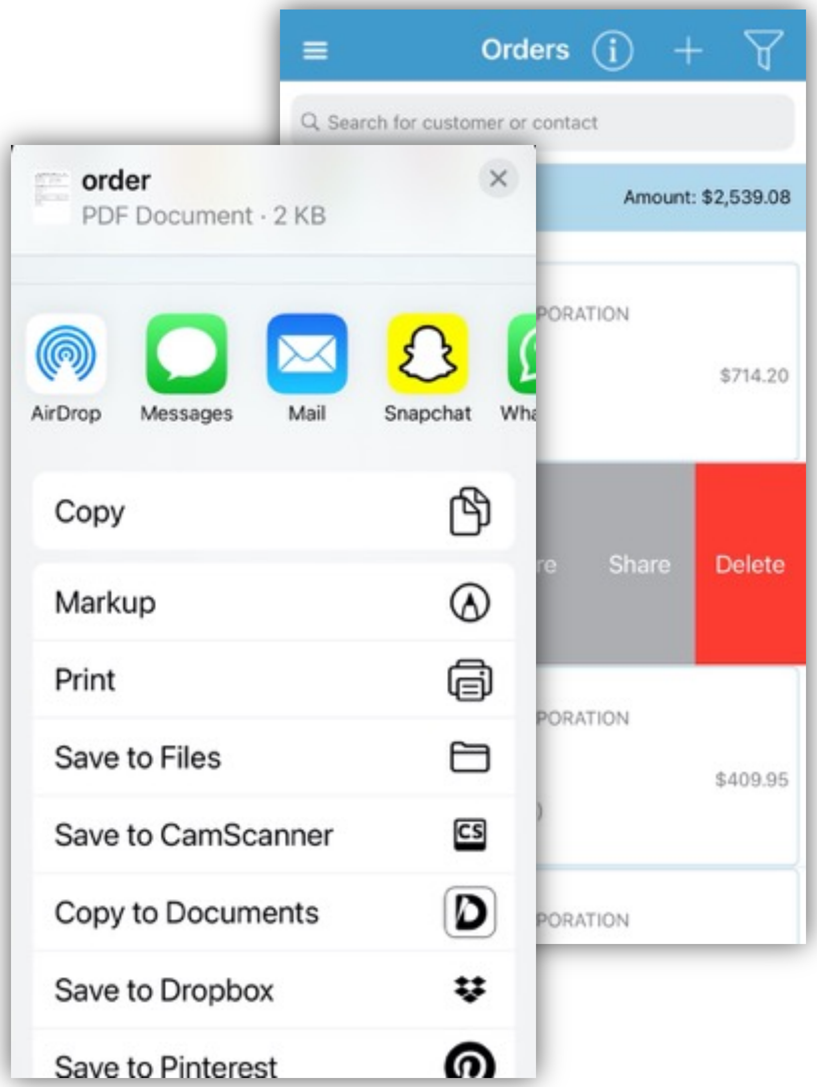
To copy an order, select ‘Copy’ option.



When making a copy of a sales order, the app:

- ✓ Search the products current prices;
- ✓ Reset the sales discount;
- ✓ Keep the sales increase;
- ✓ Apply the current package discount;
- ✓ Apply the current terms discount or increase value.

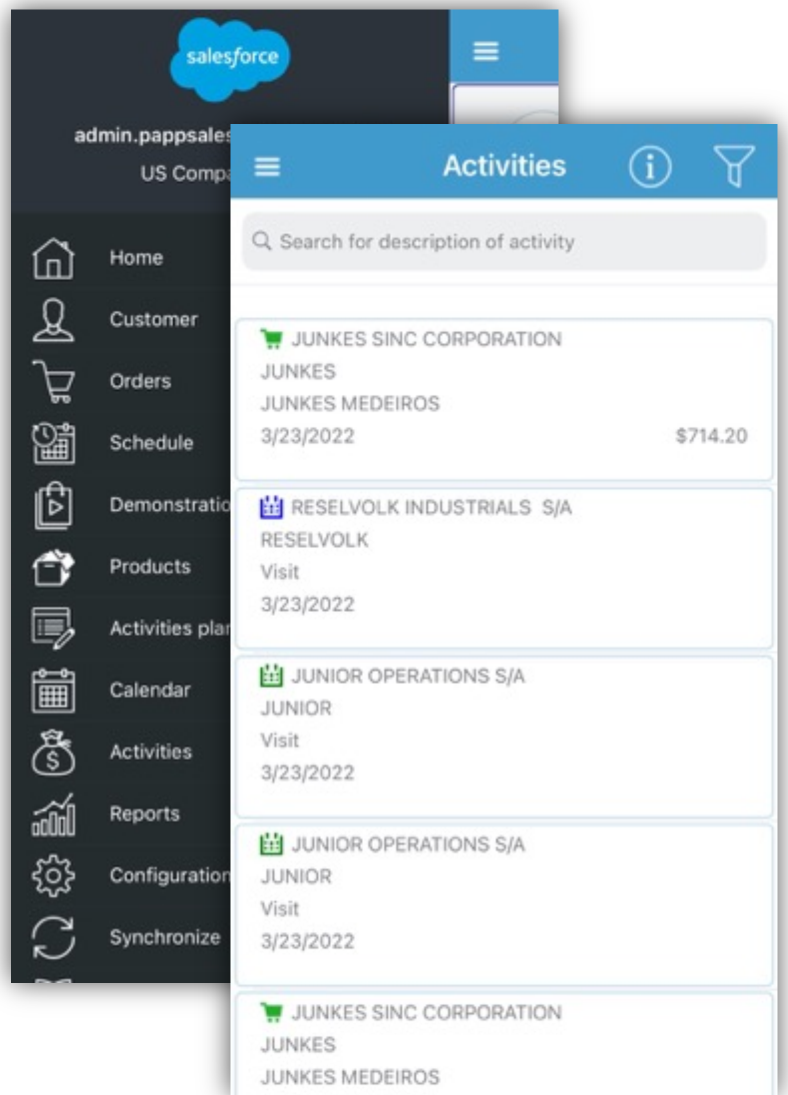
If there are fields that cannot be copied to the order, the app keep them empty.



Sharing a Sales Order

On the sales order query screen, select a order and drag to the left side through 'swipe' function or press a order option for a while and click 'share', depending on your device operational system.

After selecting share option, the app generates a file with 'pdf' extension and runs the default application from device operational system, allowing to share as you wish.



Activities:

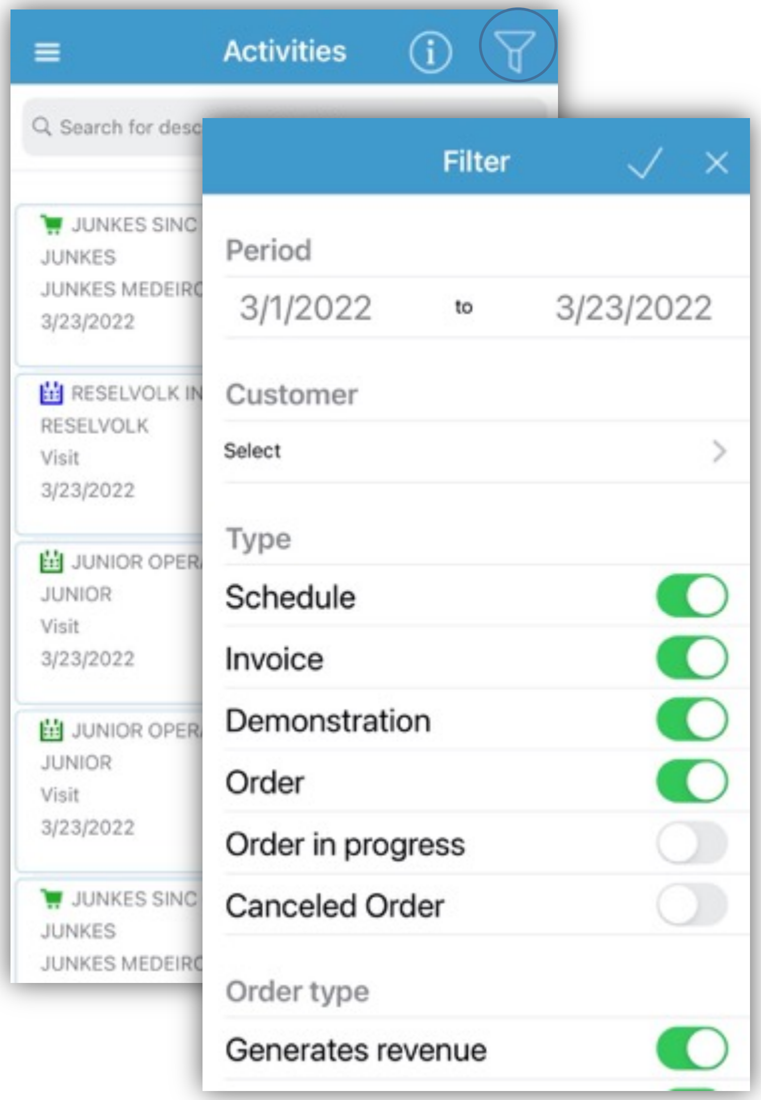
On this menu are displayed the activities included on the period and filtered specifications.

This query group Schedules, Sales Orders and Demonstrations. On the bottom of the screen, the app shows activities quantity and the total invoice value on period.

Each displayed activity has a identifier icon of the activity origin and each icon color represent those activities Status.

When selecting a demonstration, for example, the app is directed to the demonstration screen allowing to add or remove products from this demonstration.

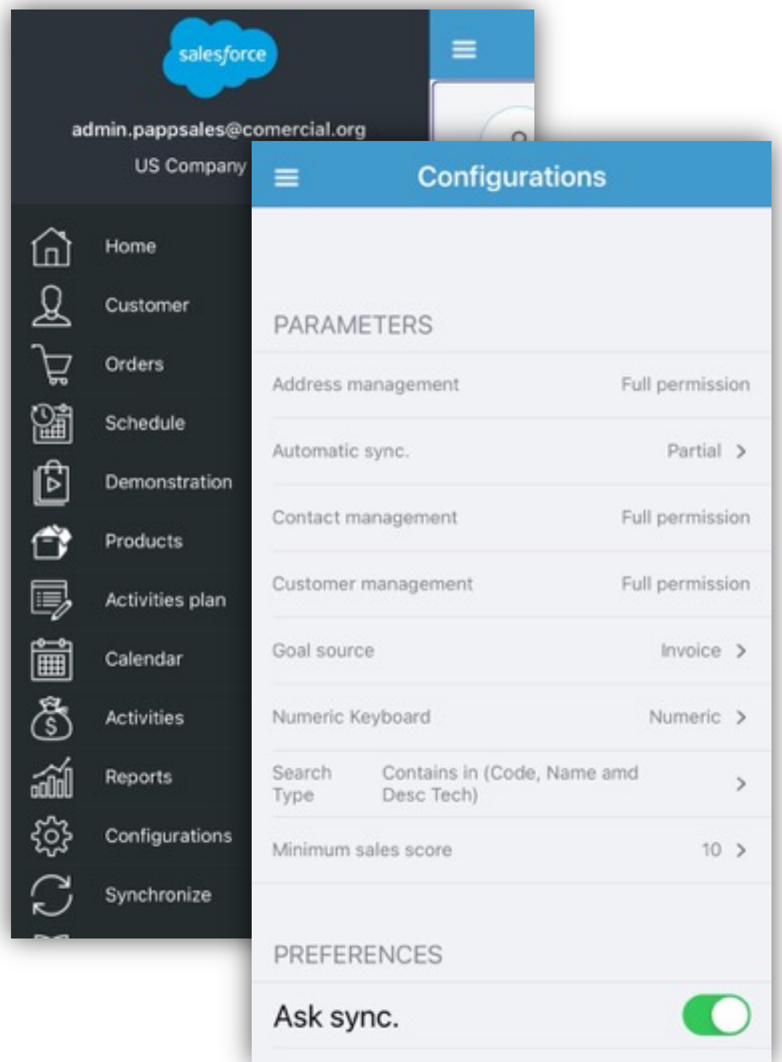
In the same way it happens with the schedules and the Orders, however, the orders only can be edited if they are not synchronized yet. The schedules can be edited even synchronized, but need to be open.



When clicking on highlighted icon on image, it is displayed the filter screen to select more specifically the activities that you want to view on query.

To apply the filters, select the option ✔.

To remove the applied filters, click 'Clear filters' and select the option ✔.



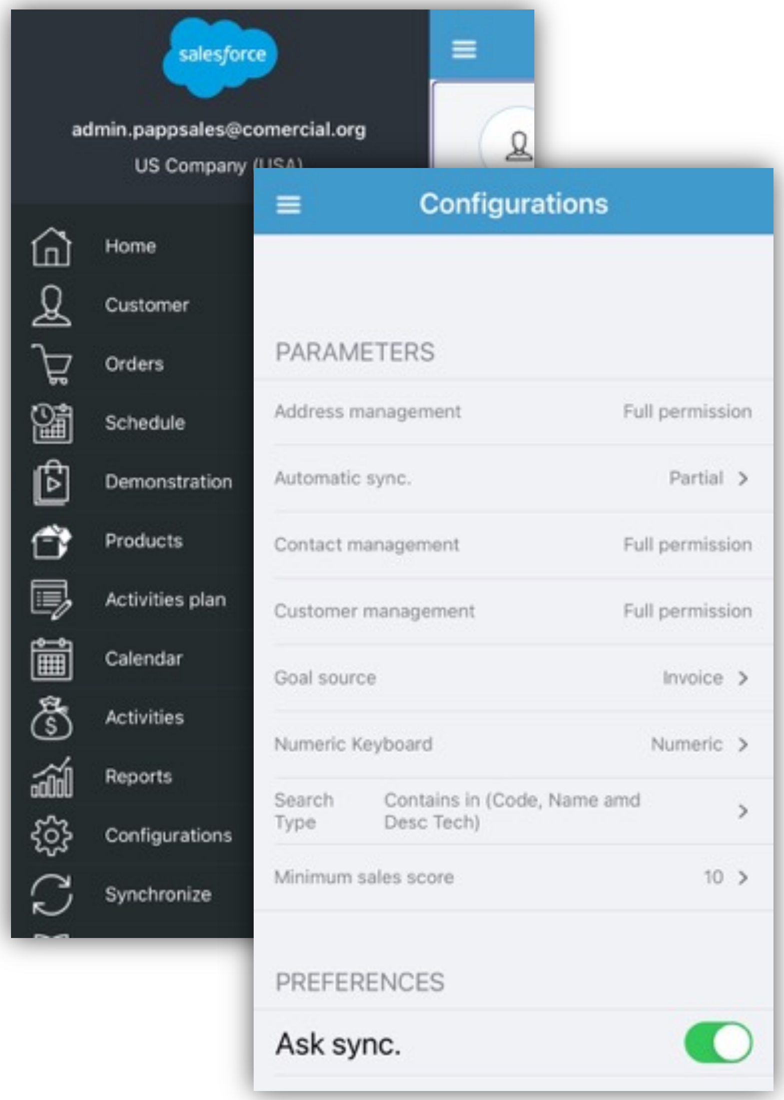
Configurations:

When accessing 'Configurations' menu, the options of app parameters and preferences are displayed.

On ‘Address’, ‘Contact’ and ‘Customer’ fields are displayed the configured options on Salesforce parameters, if the user can edit this information through device.

On ‘Automatic sync.’ field you must set up if the app must perform partial or complete synchronizations after performing some activities in the app.

On ‘Goal Source’ option is defined if the graphic on home screen will be displayed based on invoices or based on sales orders.



On 'Minimum sales score' field it's possible to define the minimum punctuation that a product needs to have on sales intelligence to be displayed on 'Sell More' option on Sales Order.

On 'Ask Sync.' option is defined if the app must ask the synchronization confirmation by finishing some activities on app that have this functionality. If it is unchecked, the information will be automatically synchronized.

On 'Default Price List' option is selected the default price list considered on products consultation.

The seller only will have access to his customer Price lists if this customer has price lists registered to the active company on app.