

SALES AND STOCK CONTROL (SSC)

MOBILE USER GUIDE

MOBILE SSC



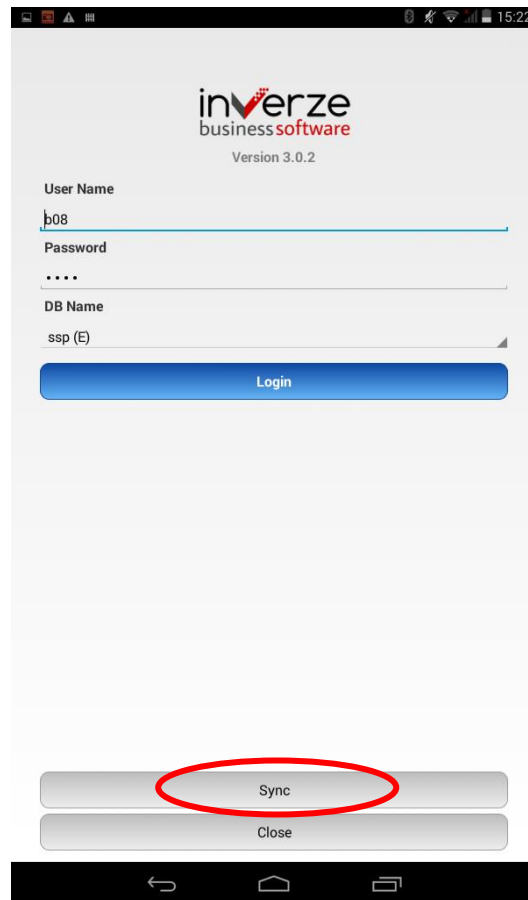
Inverze Sdn Bhd (942114-M)
B-16-02 Kompleks Rimbun Scott Garden,
Jalan Klang Lama,
58000 Kuala Lumpur.

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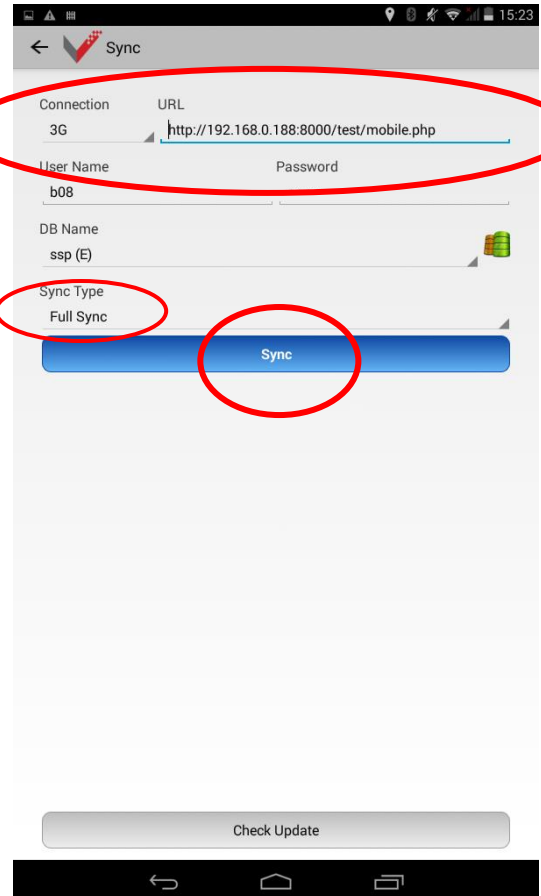
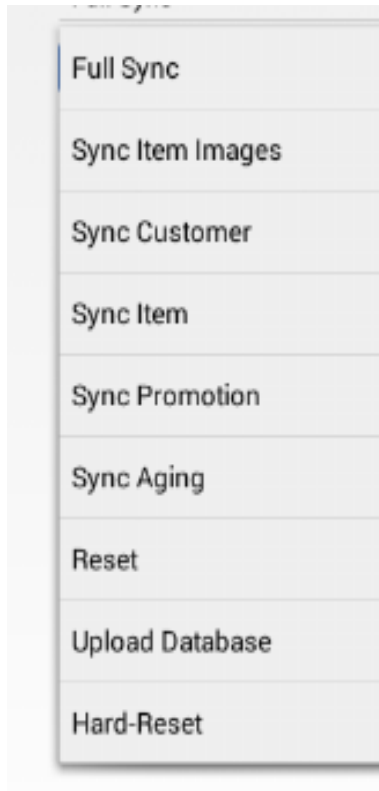
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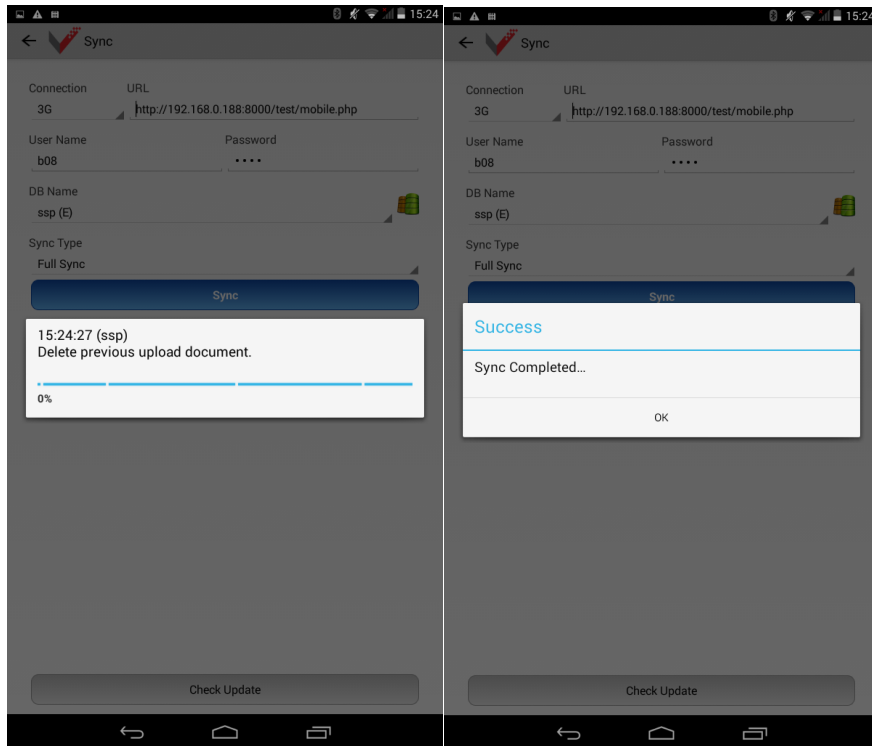
Sync Data



1. Press Sync in the Main Login screen.



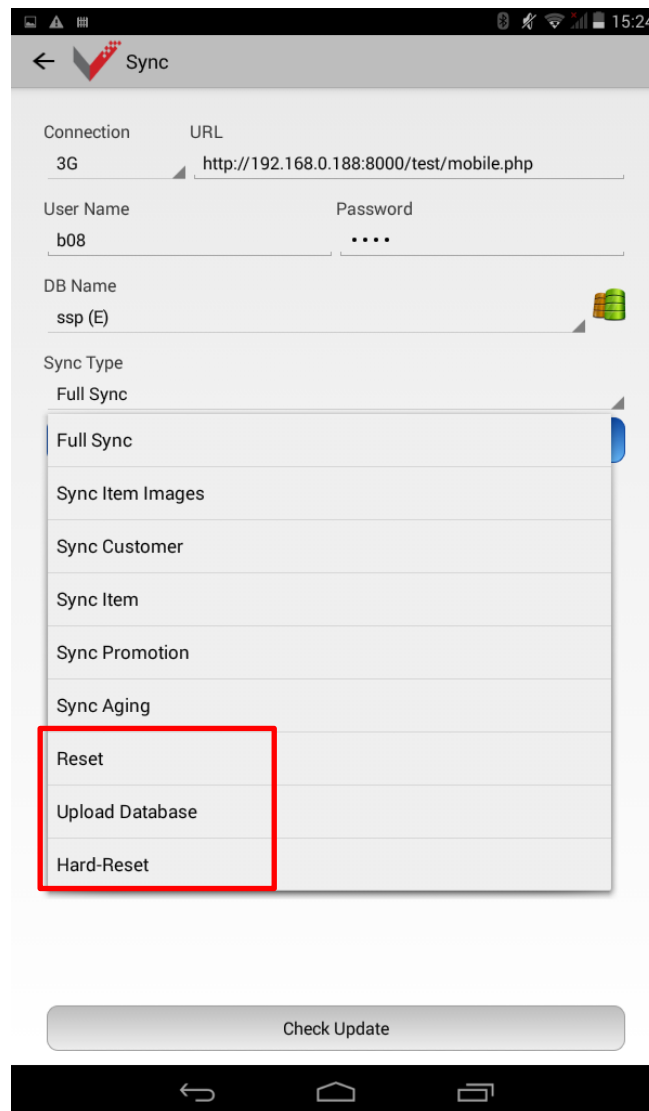
2. Enter the correct URL, User Name and Password.
3. Select the correct Sync Type:
 - Full Sync - Upload orders from tablet & Download all data from server (except product picture)
 - Sync Item Images – Download product pictures only
 - Sync Customers – Download customer details only
 - Sync Item – Download Item Details only
 - Sync Promotion – Download promotion details only
 - Reset – Technical Support (Choose when informed by Inverze)
 - Upload Database – Technical Support (Choose when informed by Inverze)
 - Hard Reset – Technical Support (Choose when informed by Inverze)
4. Press Sync.



5. Wait for the data sync to progress.
6. Press OK when sync is completed.

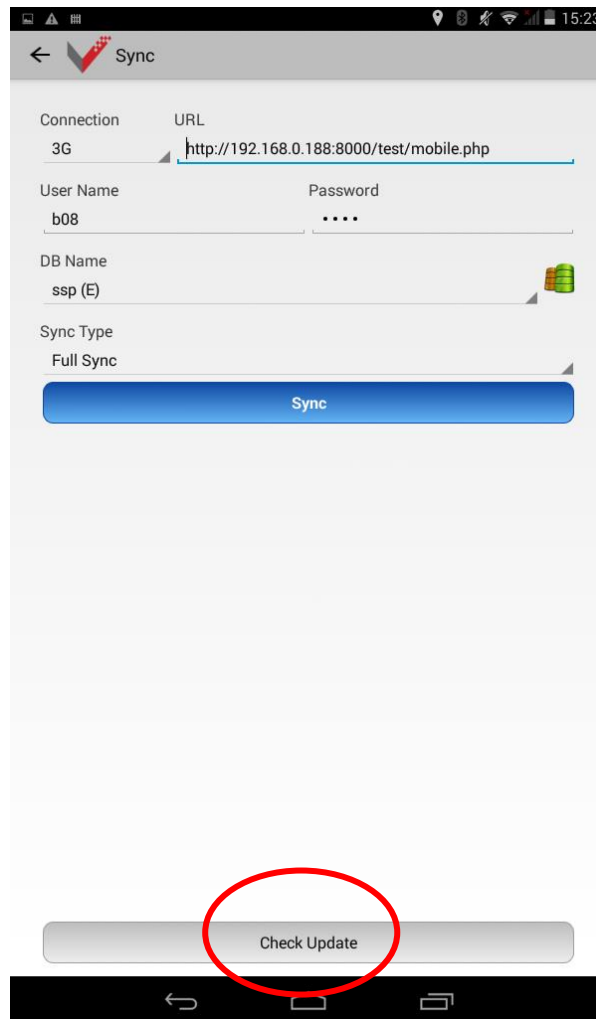
Reset/Hard Reset/Upload Database

1. Reset or Hard Reset is to clear existing database and re-sync all the data.

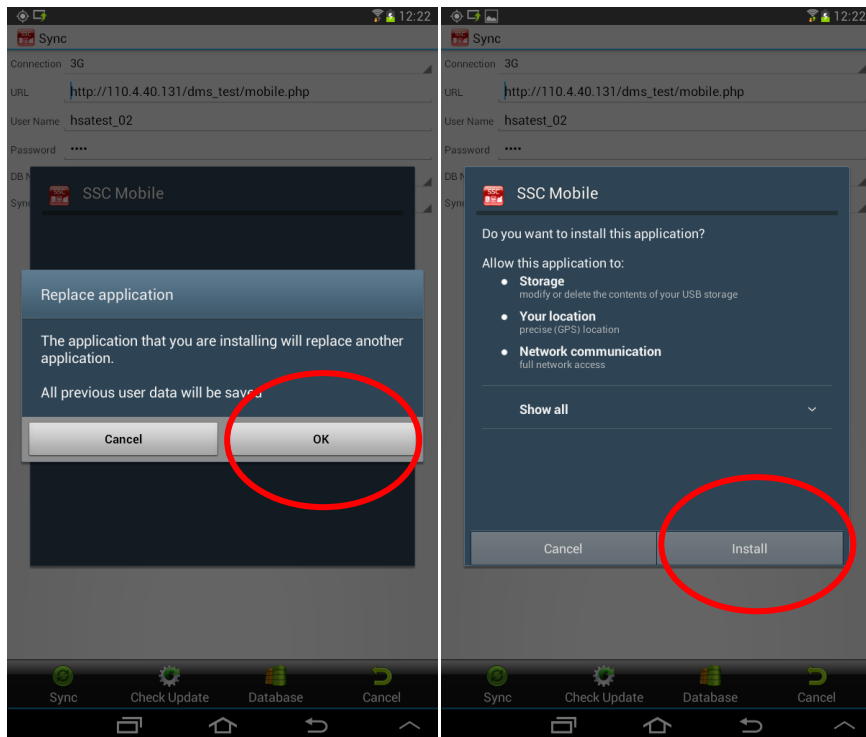


2. Upload Database is to upload a copy of mobile database to server for troubleshooting.

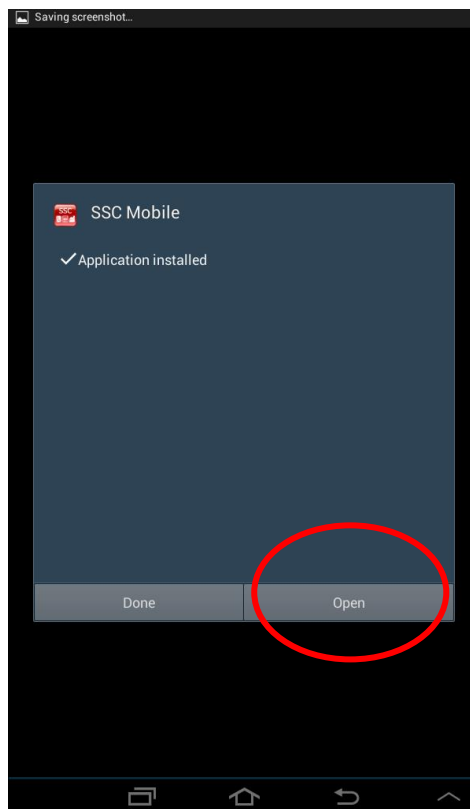
Check Update



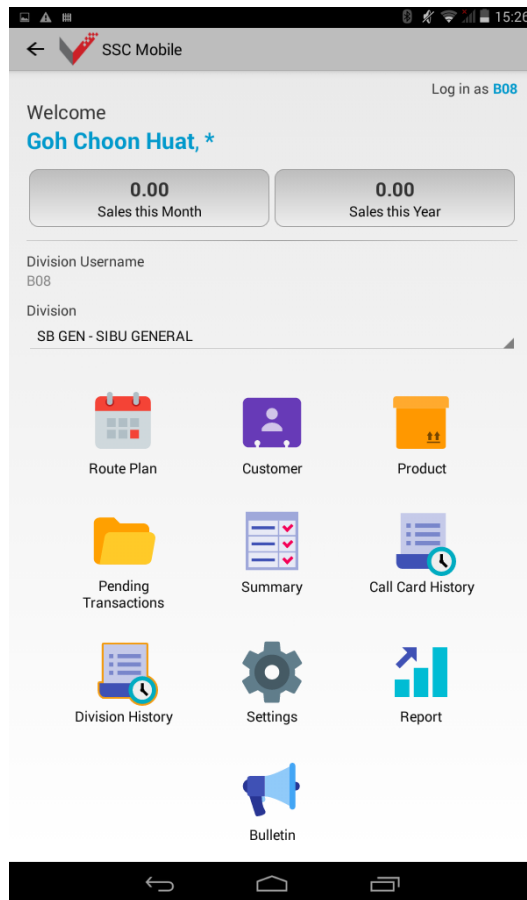
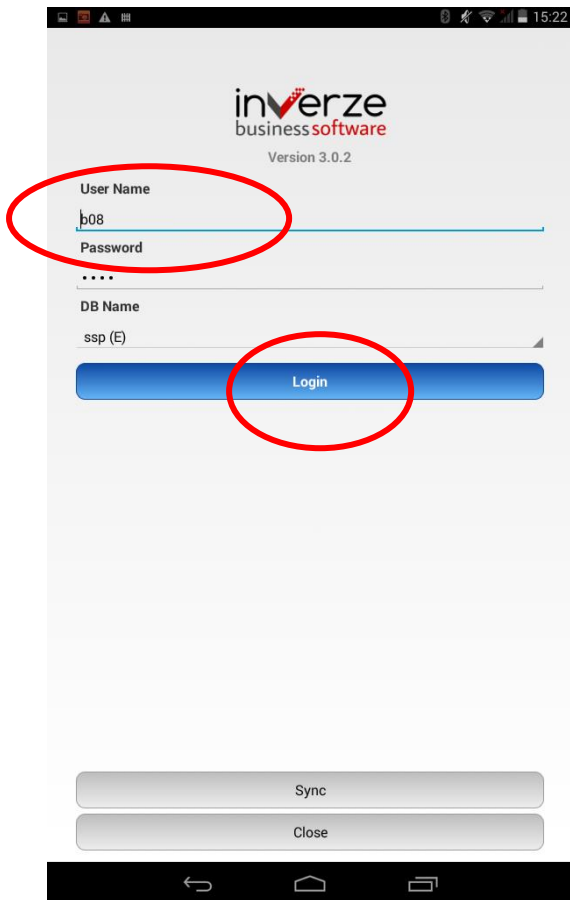
1. Press Check Update button to install new version of application.



2. Press OK and Install to install.
3. Press Open when installation is completed.



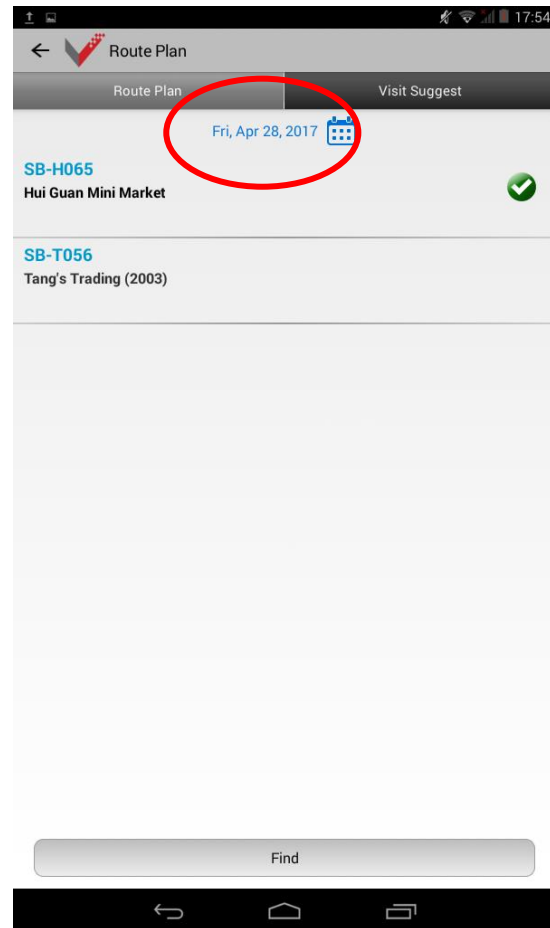
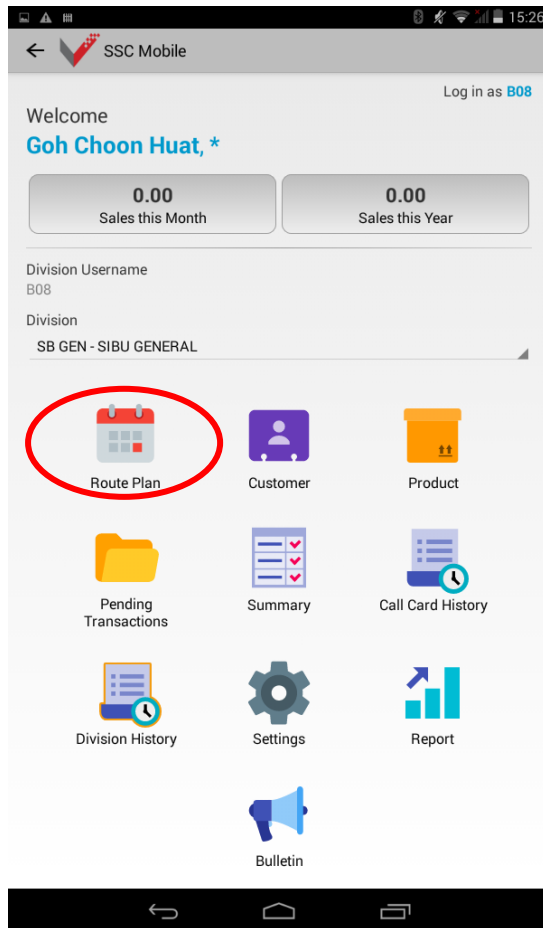
Login and Main Screen

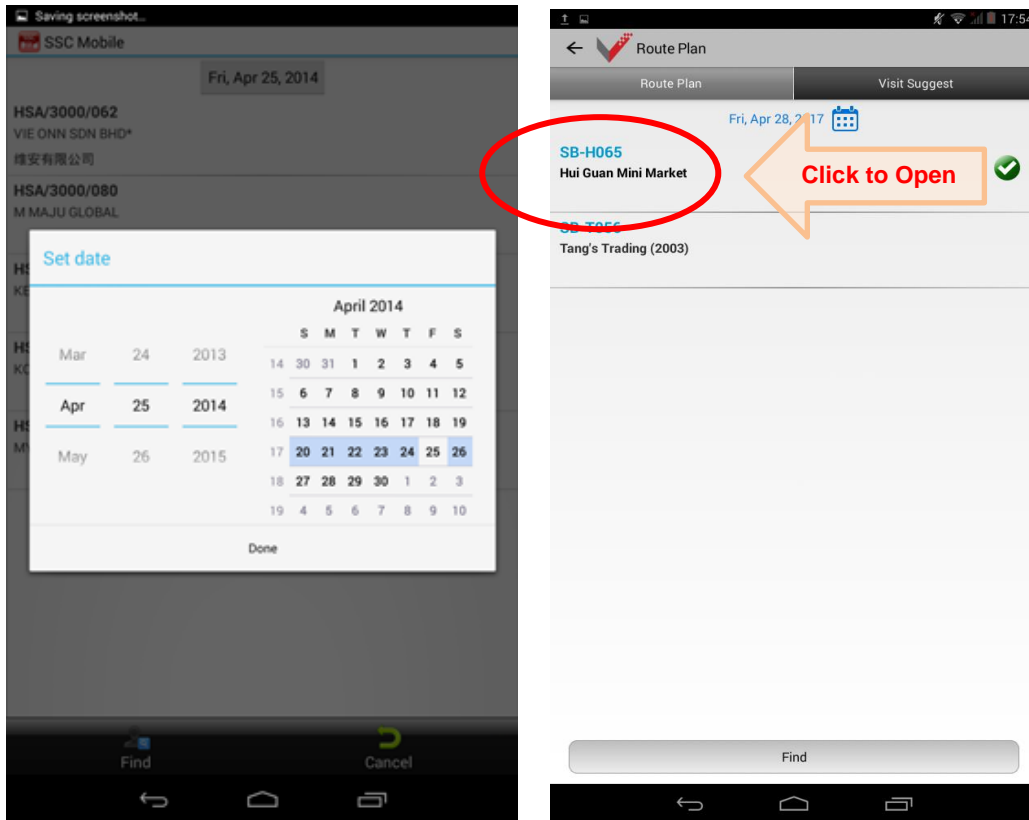


1. Enter the correct User Name and Password.
2. Press Login.
3. You will see the Main Screen.

Route Plan

1. Press Route Plan.
2. Route Plan screen will show the customer list for the day.
3. You can change the date.

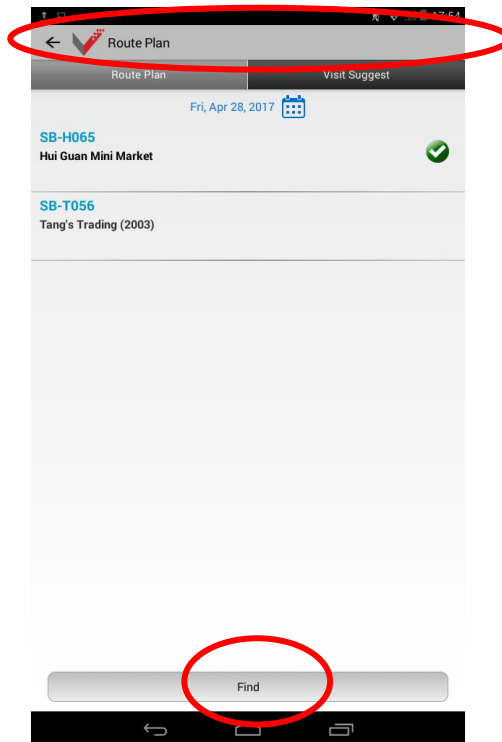




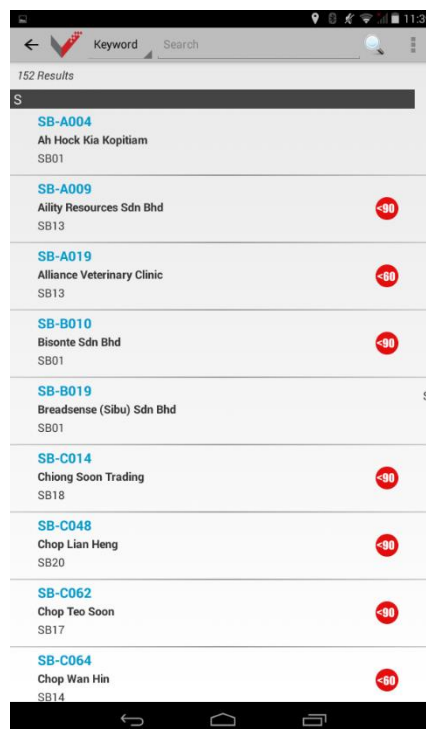
4. Select a Customer to begin transaction.

Customer not in Route Plan

1. If customer not in route plan, click FIND.

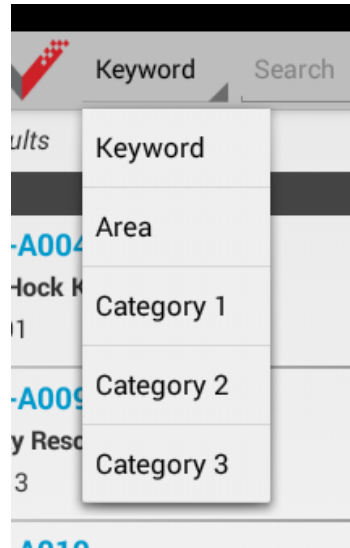


2. Full list of customers will be listed, search the desire customer and choose to begin transactions.

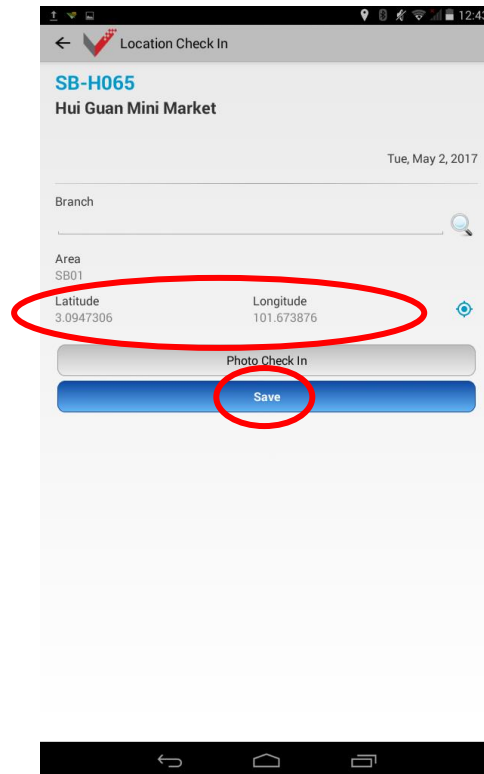
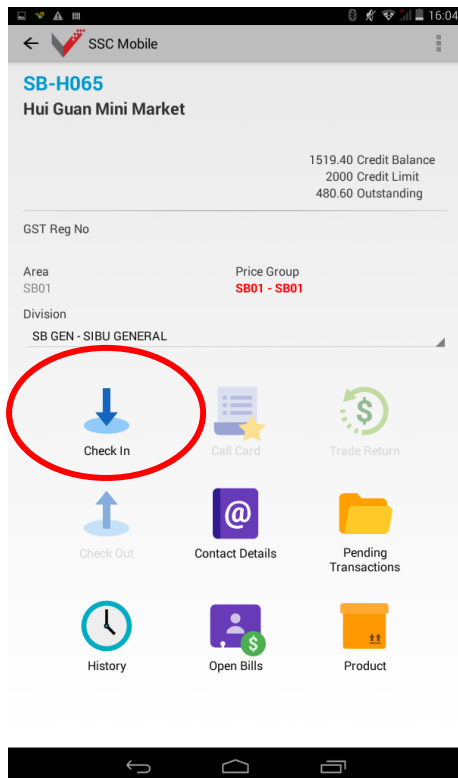


3. You can filter your search by

- a) Keyword – Search by customer keywords (name, customer code)
- b) Area – Search by customer area
- c) Category 1
- d) Category 2
- e) Category 3

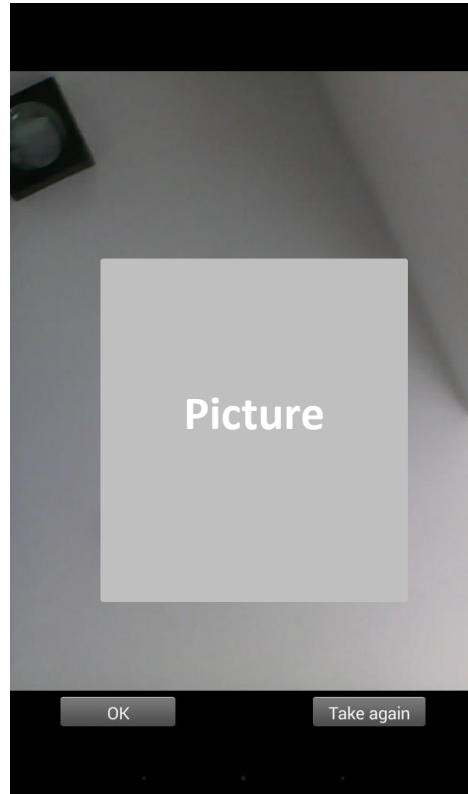
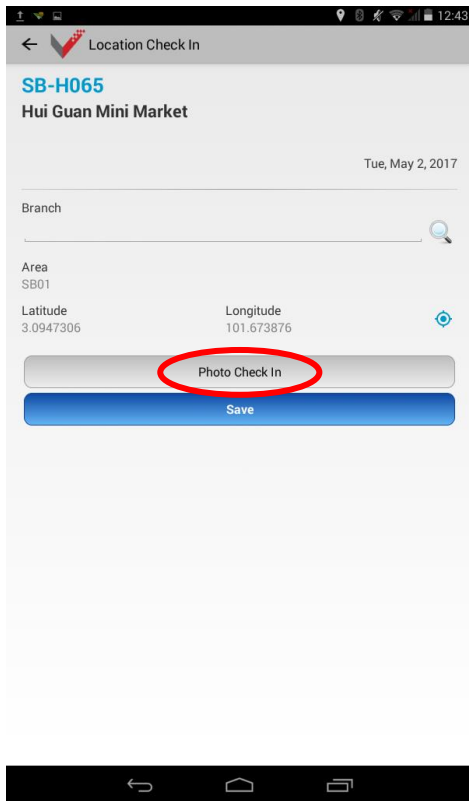


Location Check In

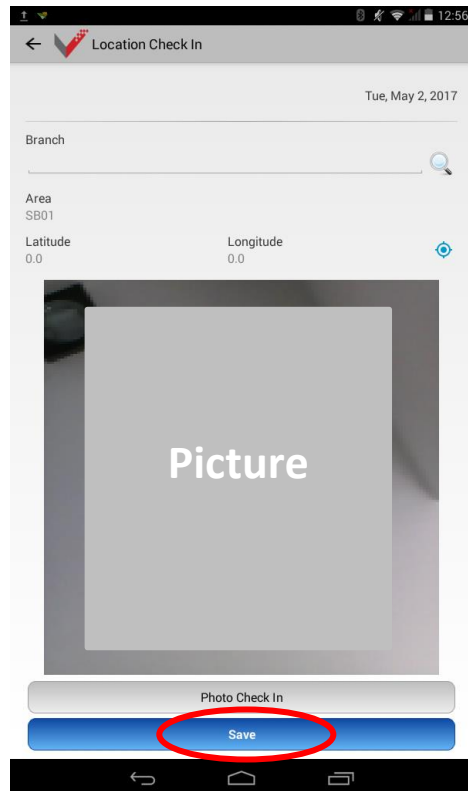


1. Click the check in button and it will redirect you to a page where it will auto detect the GPS location.
2. Latitude & Longitude shows GPS location in number.
3. Click Save once done.

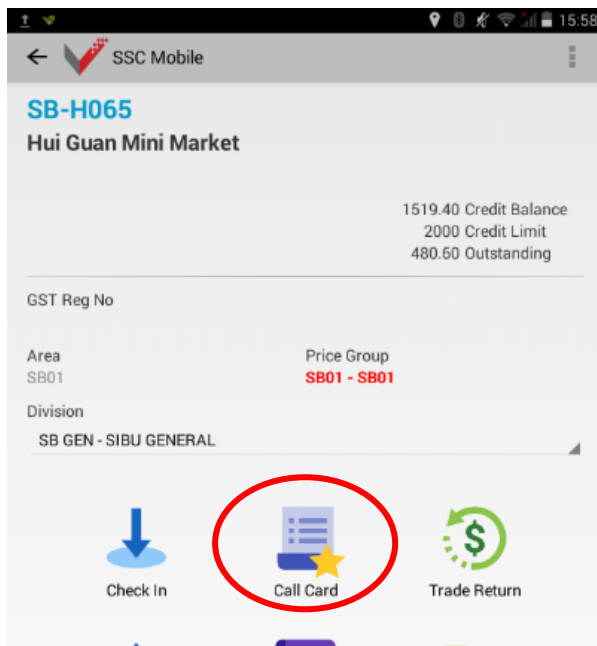
GPS Location Not Found



1. Press Photo Check In if GPS location is not available.
2. Snap a picture and click OK or Take Again (if you want to retake the photo).
3. Press Save once done.
4. After completing Location Check In, the next step will be unlocked.



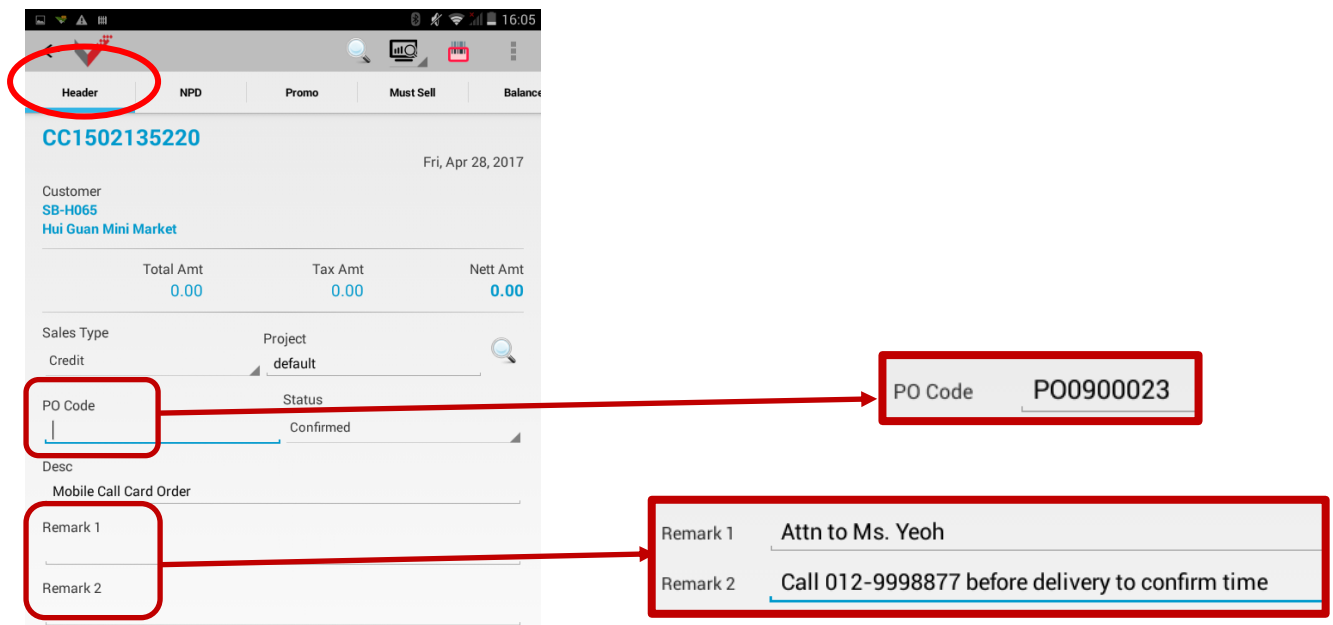
Call Card



1. Press Call Card button to start transaction.

Header

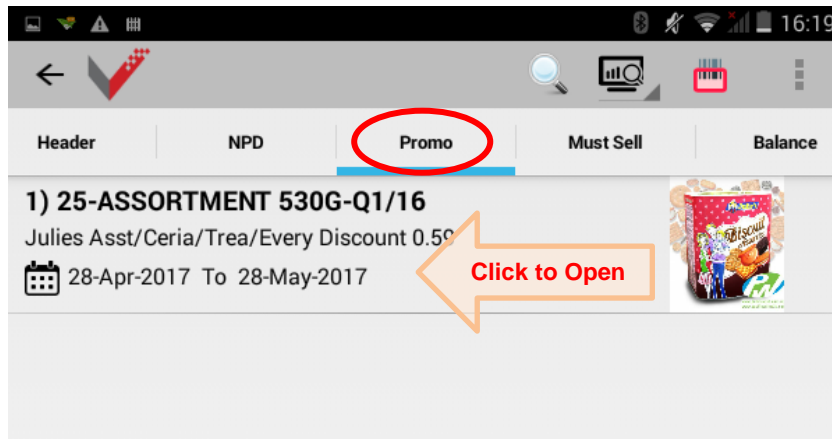
1. HEADER page display the customer detail and sales amount detail.



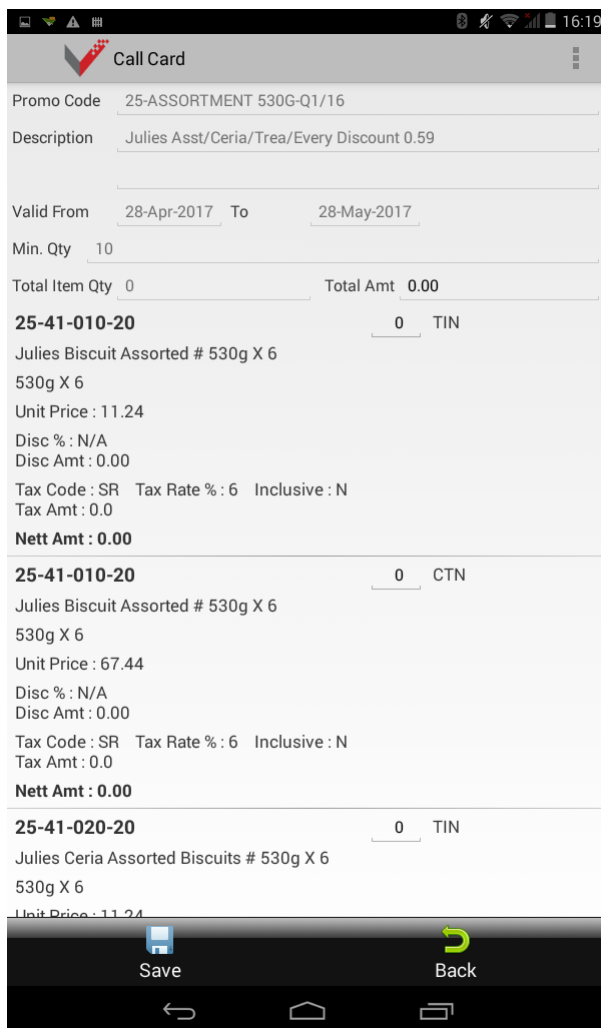
2. Fill in the PO Code (if any).
3. Fill in Remark 1 and Remark 2 (if any).

Promo

1. **PROMO** page display the list of promotion available for the customer.




2. **Click** to open a promotion.
3. The details of Promotion will be shown.



4. Refer **PROMOTION** to know how to key in, edit and delete promotion.

Promotion



310102
KOPIKO COFFEE CANDY 12X12X40G STICK PACK

Prev Orders : 12

Cust. Bal : *N/A* ← 132
In Stock : 2 CTN, 90 STICK (MAIN)
Reserved : 0 STICK

1.15 /STIC ⊖ STIC ⊕ Disc % : *N/A*


13.80 /OUTE ⊖ OUTE ⊕ FOC 0 STICK

165.60 /CTN ⊖ CTN ⊕

PROMOTION (circled in red)

MP2017-H
KOPI CANDY BUY 10 CTN FOC 1 CTN
Min. Qty : 10

165.60 /CTN ⊖ CTN ⊕ FOC 0 CTN




041043
MINT COLA 1 X 12 BTL

Prev Orders : 3+ 60+1 ← 6

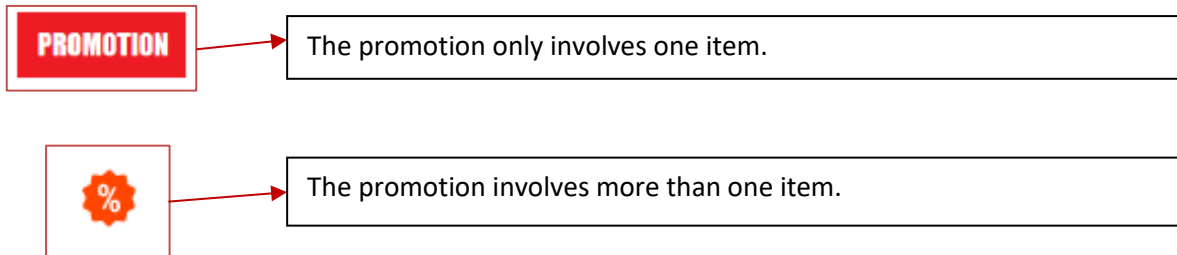
Cust. Bal : *N/A*
In Stock : 955 CTN, 8 UNIT (MAIN)
Reserved : 2 CTN

5.70 /UNIT ⊖ UNIT ⊕ Disc % : *N/A*

68.40 /CTN ⊖ CTN ⊕ FOC 0 UNIT



This 2 buttons means the item is having promotion:



1. Click the ORANGE button to show the item promotion page.

NO IMAGE
AVAILABLE

25-41-130-20
Julies Treasure Assorted Biscuits # 530g X 6
530g X 6

Outlet Balance : *N/A*
In Stock : 40 CTN (D01)
Reserved : 0 TIN

11.83 /TIN ⊖ TIN ⊕ Disc % : *N/A*

70.98 /CTN ⊖ CTN ⊕ FOC 0 TIN



←

Click

2. Click to select a promotion.



25-ASSORTMENT 530G-Q1/16

Julies Asst/Ceria/Trea/Every Discount 0.59

📅 28-Apr-2017 To 28-May-2017

25-ASSORTMENT 530G-10%/16

Julies Asst/Ceria/Trea/Every Discount 1.18

📅 01-Apr-2017 To 30-Jun-2017

←

Click to Open

3. The details of promotion will be shown.
4. Take note of the Minimum Value or Minimum Quantity.

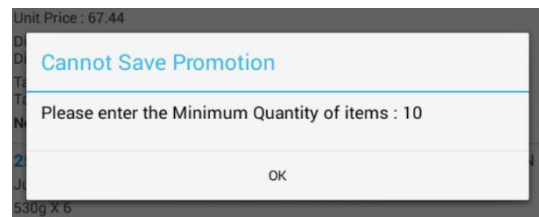
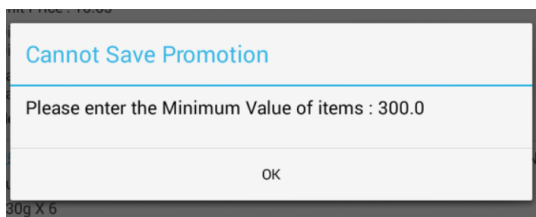
Promo Code	25-ASSORTMENT 530G-10%/16	
Description	Julies Asst/Ceria/Trea/Every Discount 1.18	
Valid From	01-Apr-2017	To 30-Jun-2017
Min. Value (RM)	300.00	
Total Item Qty	0	Total Amt 225.78

Promo Code	25-ASSORTMENT 530G-Q1/16	
Description	Julies Asst/Ceria/Trea/Every Discount 0.59	
Valid From	28-Apr-2017	To 28-May-2017
Min. Qty	10	
Total Item Qty	0	Total Amt 0.00

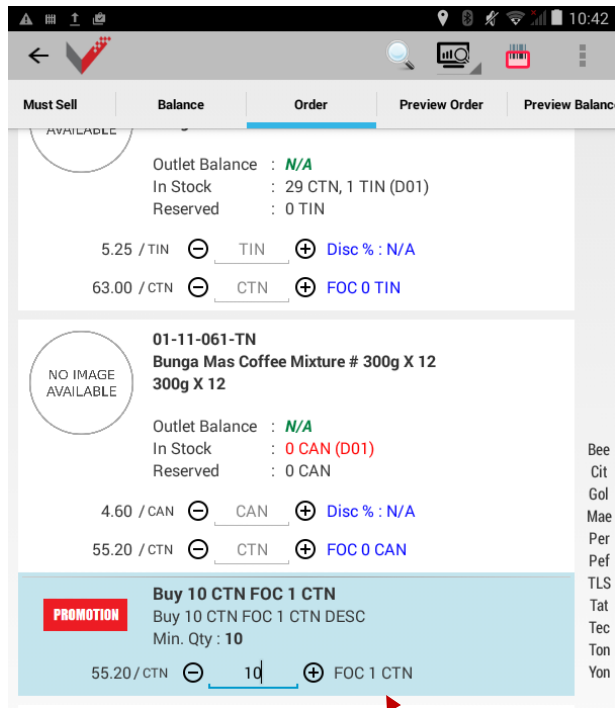
Total amount will be red in colour if it doesn't achieve the minimum value

Promo Code	25-ASSORTMENT 530G-Q1/16	
Description	Julies Asst/Ceria/Trea/Every Discount 0.59	
Valid From	28-Apr-2017	To 28-May-2017
Min. Qty	10	
Total Item Qty	12	Total Amt 857.84
25-41-020-20		
Julies Ceria Assorted Biscuits # 530g X 6		
530g X 6		
Unit Price : 67.44		
Disc % : N/A		
Disc Amt : 0.00		
	12	CTN

5. Enter the quantity.
6. Total amount will be calculated.



8. If entered quantity or total amount is less than minimum quantity or minimum value, system will prompt warning.



9. FOC quantity will be auto calculated and updated based on entered quantity.

FOC item will be automatically entered when it reached the

Promotion Choice Selection

1

Call Card

Promo Code 25-ASSORTMENT 530G-Q1/16

Description Julies Asst/Ceria/Trea/Every Discount 0.59

Valid From 28-Apr-2017 To 28-May-2017

Min. Qty 10

Total Item Qty 0 Total Amt 0.00

25-41-029-20 0 CTN

Julies Everytime Assorted Biscuits # 530g X 6

530g X 6

Unit Price : 70.98

Disc % : 5.00

Disc Amt : 0.00

Tax Code : SR Tax Rate % : 6 Inclusive : N

Tax Amt : 0.0

Nett Amt : 0.00

Please choose 1 item(s).

25-41-010-20

Julies Biscuit Assorted # 530g X 6

530g X 6

Unit Price : 11.24

Disc % : N/A

Disc Amt : 0.00

0 TIN

Nett Amt : 0.00

25-41-010-20

Julies Biscuit Assorted # 530g X 6

530g X 6

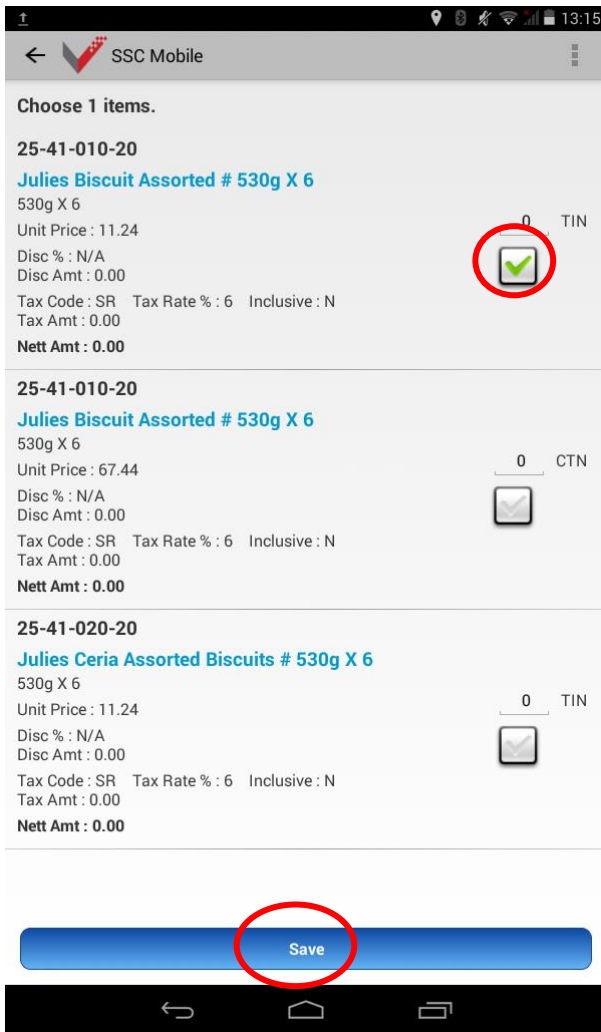
Unit Price : 67.44

Disc % : N/A

Disc Amt : 0.00

Save Back

1. The highlighted in blue items are being grouped and there is an instruction to choose items "Please choose 1 item(s)".
2. Press on the BLUE section to choose items.



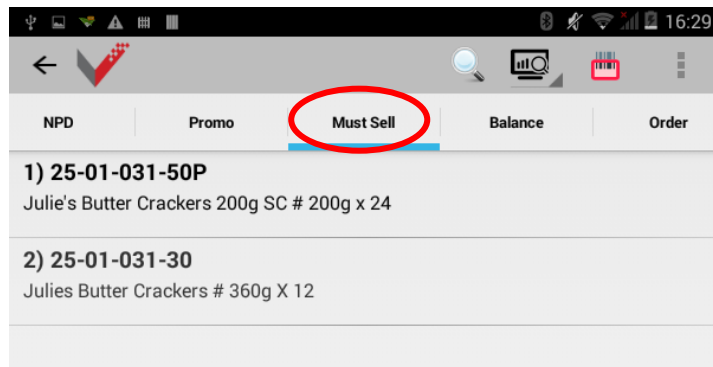
3. Click on Check Box to select item.
4. Click SAVE



5. When it was done and highlighted in GREEN and the items selected will be shown.


Must Sell

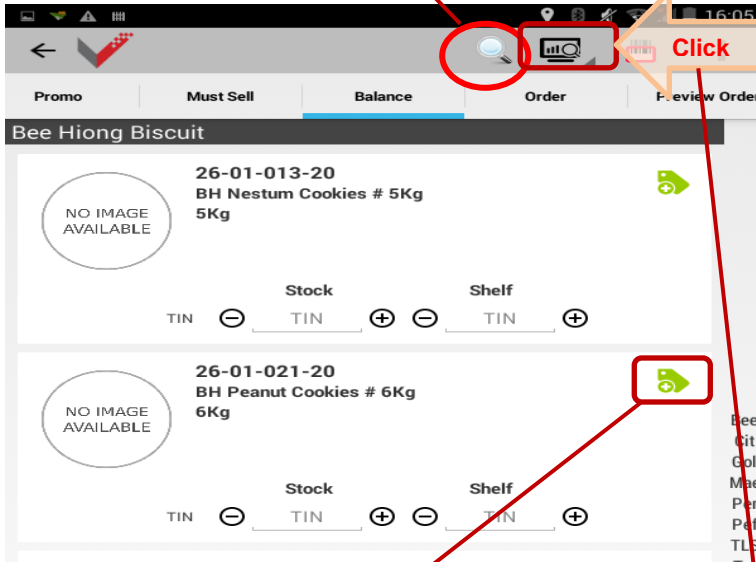
1. **MUST SELL** page display the list of must sell items.



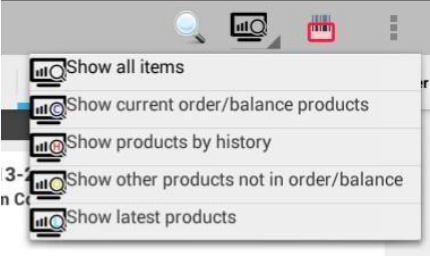
Balance

1. **BALANCE** page display the list of items.

SEARCH item by product keyword
or product code, then click 

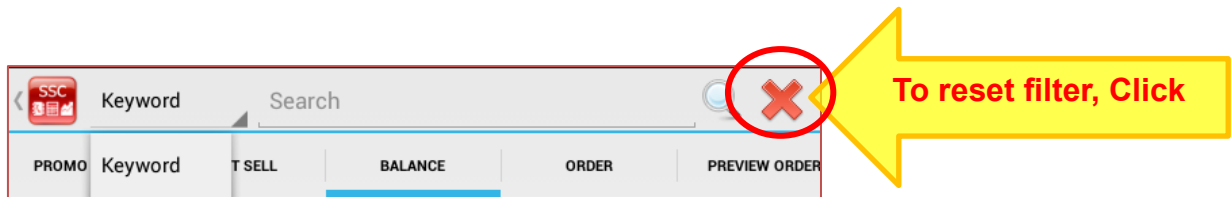
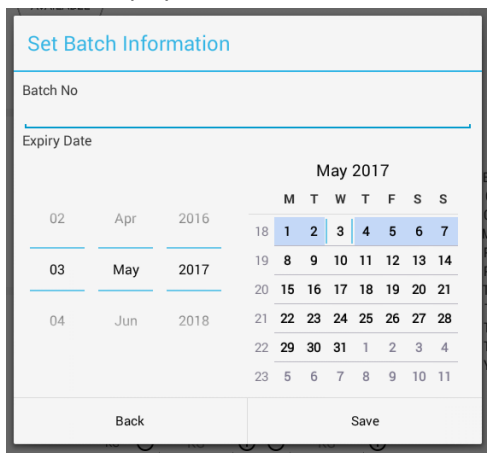


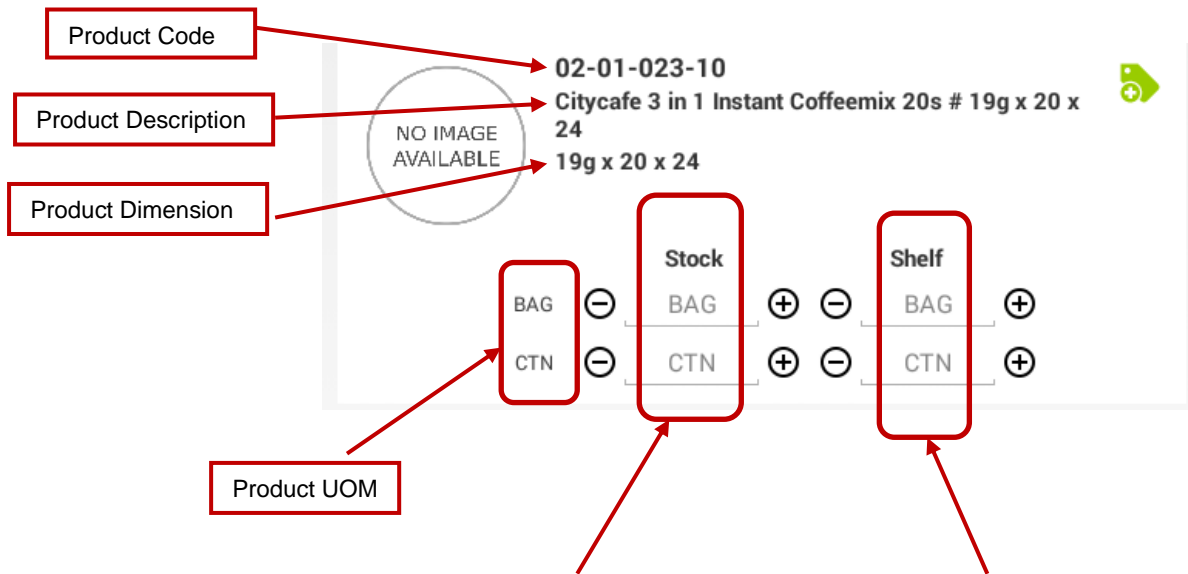
Click to choose Filter type to display the item.





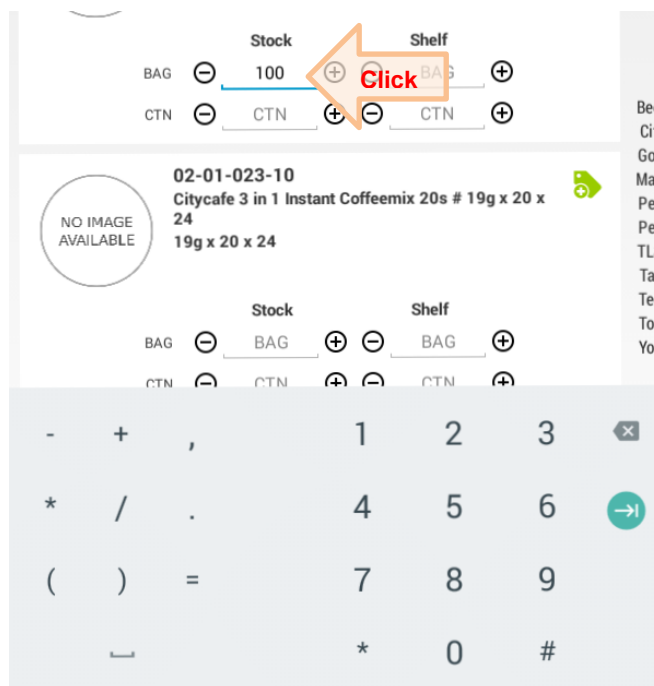
2. Click this icon to set Batch Information.

- Batch No
- Expiry Date



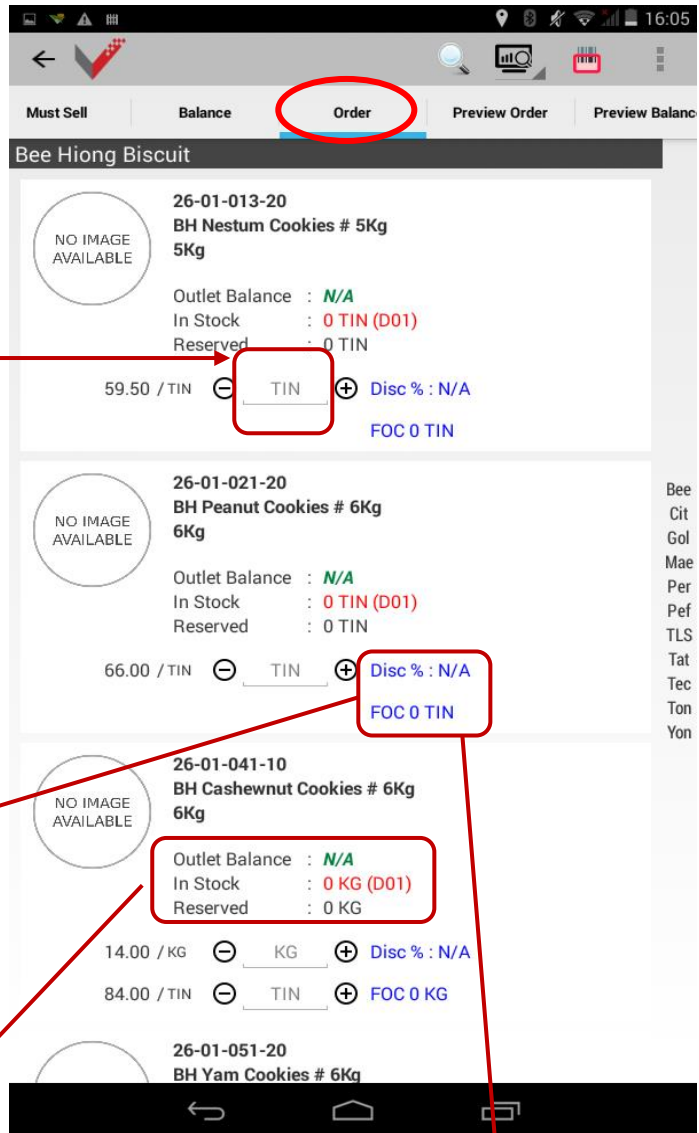


3. Key in the customer's stock balance at **STOCK** (Back-end store room) and at **SHELF** by UOM.
4. Use the  and  button to enter quantity, OR
5. Use the keypad to key in quantity.



Order

1. **ORDER** page display the list of items.
2. Key in order quantity in this page.



Discount %

Discount 1 % :
0.00

Discount 2 % :
0.00

Discount 3 % :
0.00

Discount 4 % :
0.00

Back Save

Discount Percentage (%) for each item
Key in discount percentage up to 4 tiers.

Outlet Balance
Shows stock balance in the outlet

In Stock
Balance in warehouse

Reserved
Number of item that is already reserved for order

FOC

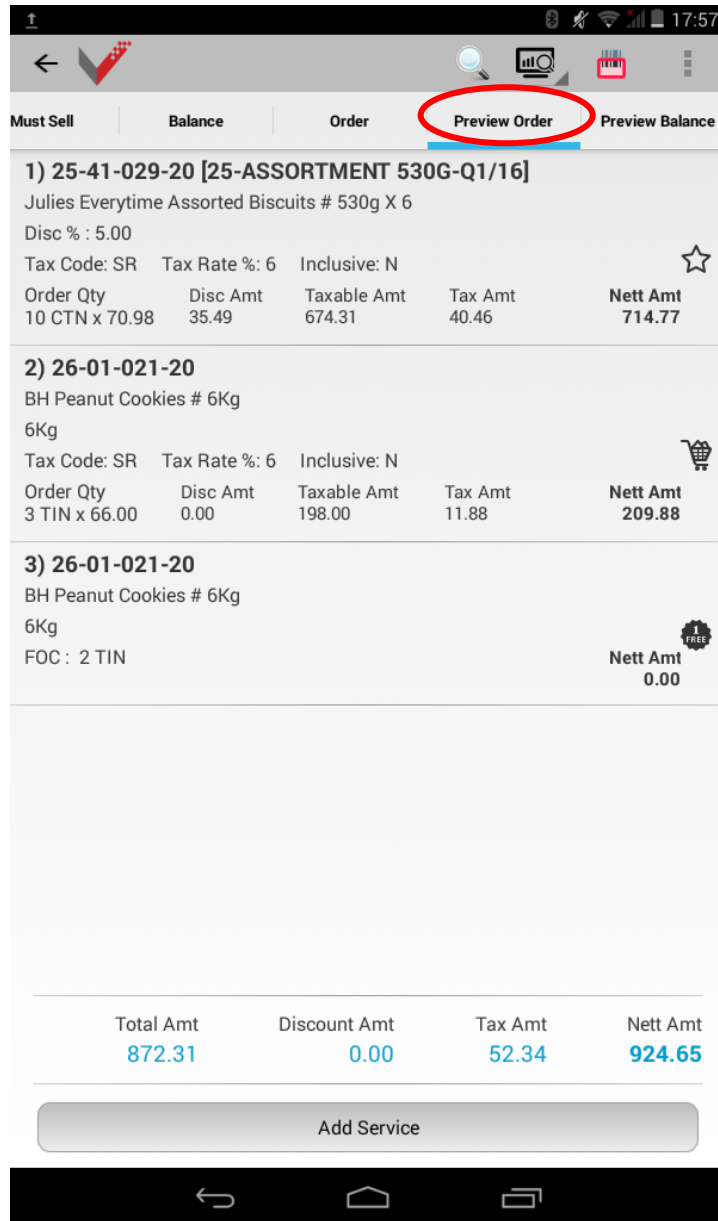
UOM
TIN

FOC
0




Back Save

FOC
Key in FOC quantity and select the UOM.

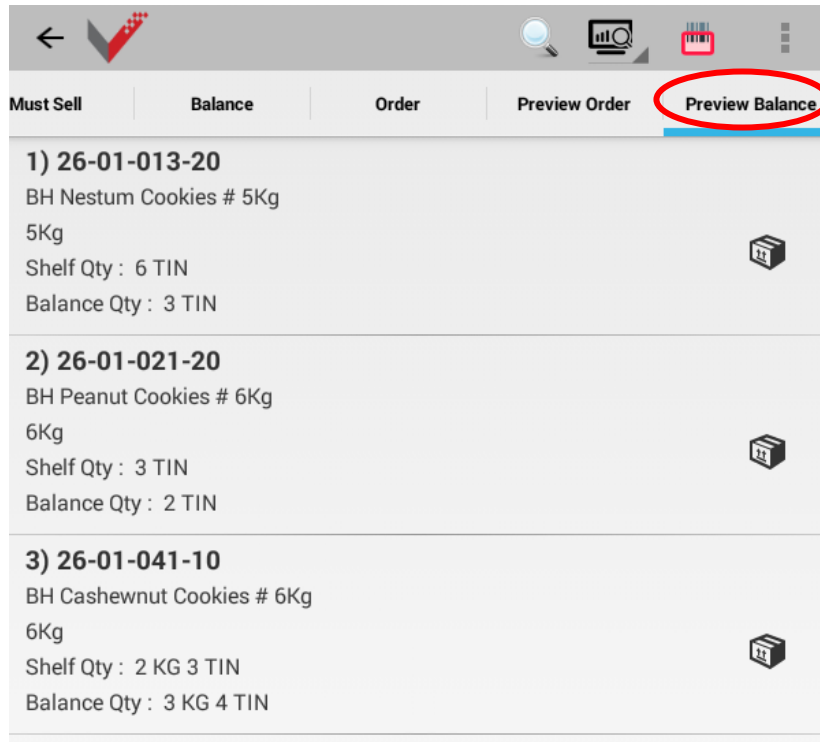
Call Card Preview Order



1. PREVIEW ORDER page display the entry Summary of order

-  Summary of Promotion ordered
-  Summary of Normal ordered
-  Summary of FOC item

Call Card Preview Balance



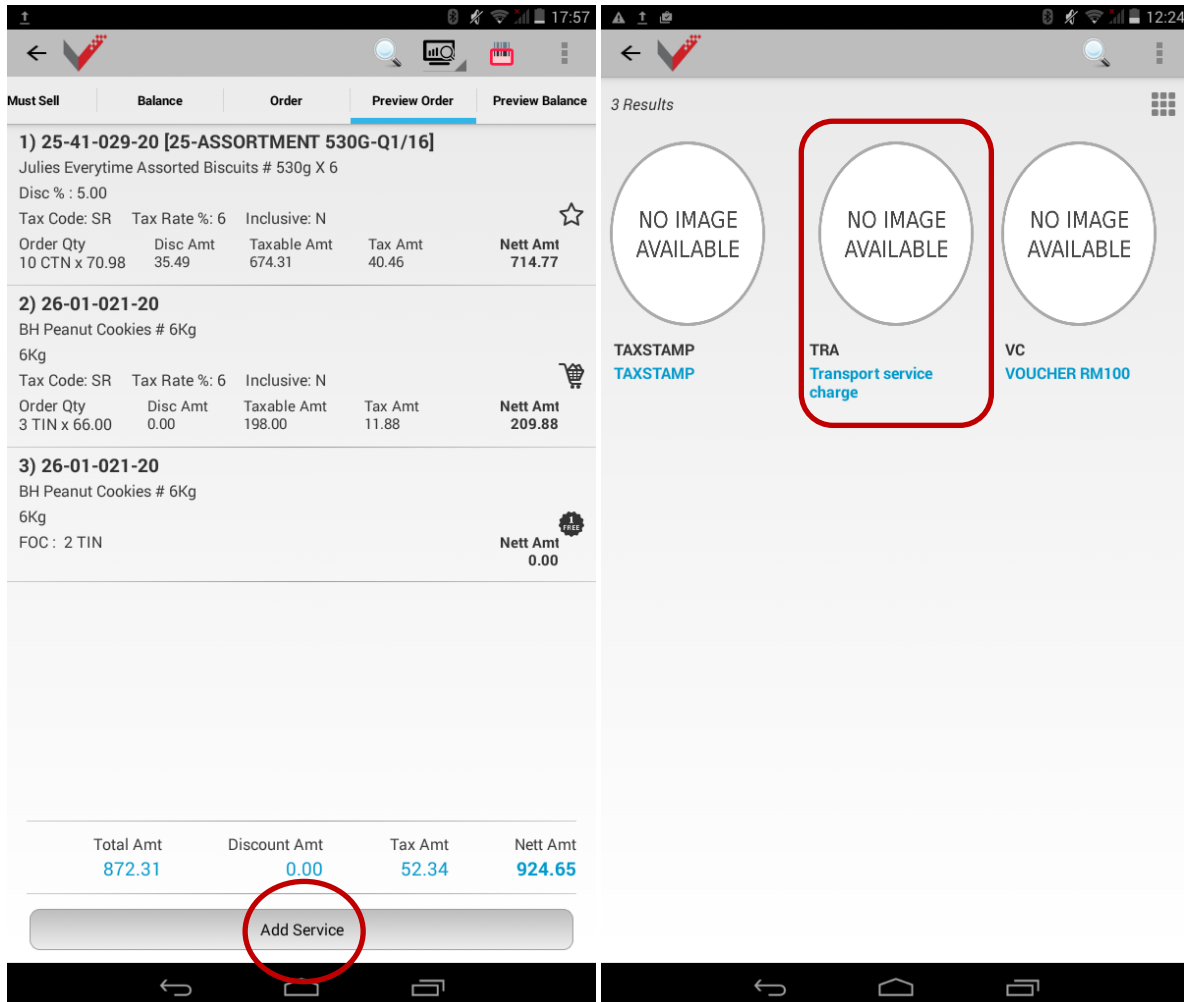
2. PREVIEW BALANCE page display the entry Summary of stock balance



Summary of Stock balance

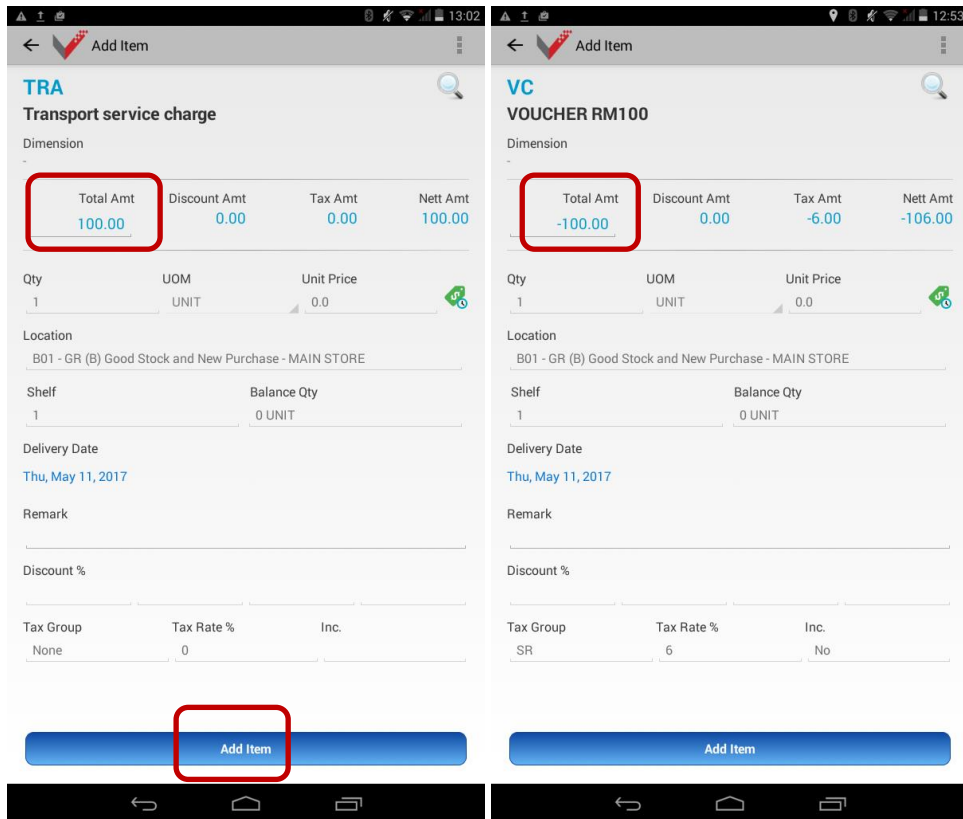
Add Service

1. Add service function allow you to add any extra charges to order that is not related to product

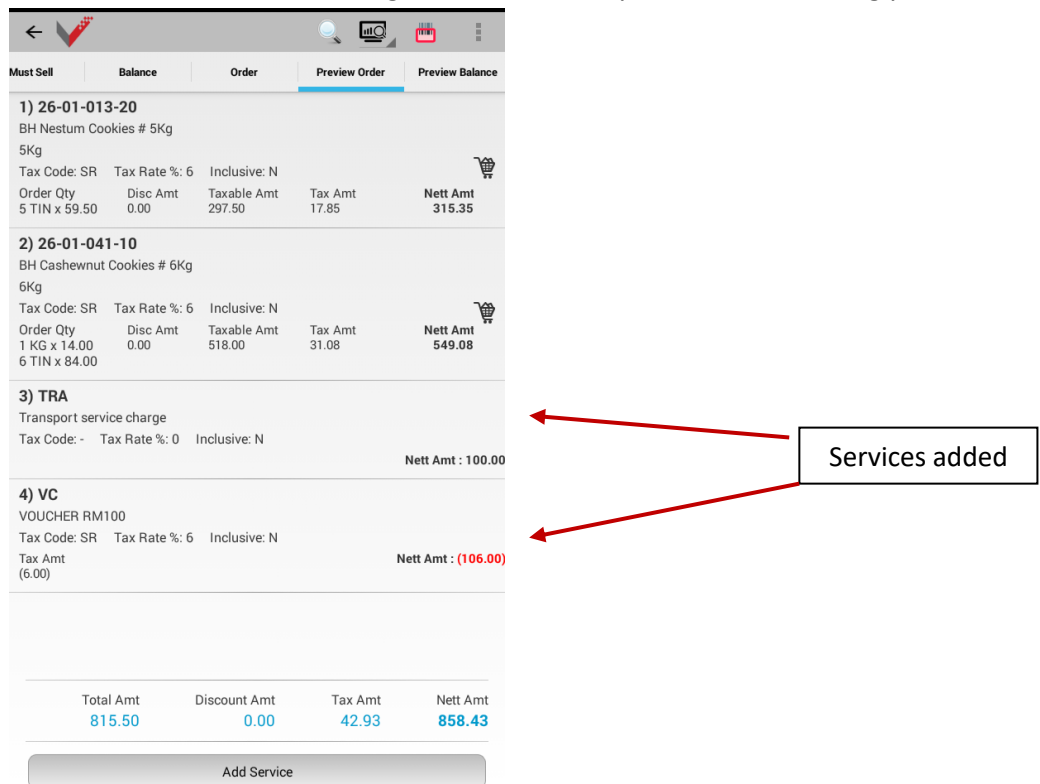


2. Click Add Service button
3. It will go to page with list of services available. Choose desired services

4. Fill in Total Amount. It can be in negative value to give a discount.
5. Click Add Item



6. Service will be add into the Order and service charge will automatically calculated accordingly.



Save Call Card

1. Return to **HEADER** page.

Header NPD Promo Must Sell Balance

CC1502137220 Thu, May 4, 2017

Customer
SB-H065
Hui Guan Mini Market

Total Amt	Tax Amt	Nett Amt
449.00	26.94	475.94

Sales Type: Credit Project: default

PO Code: Status: Confirmed

Desc: Mobile Call Card Order

Remark 1: Remark 2:

Area: SB01 Branch: NONE

Bill Due Date: Wed, Aug 2, 2017 Bill Term: 30

Currency: RM Ringgit Malaysia 1

Save

1. Enter description or remark (if any).
2. Check the Total Amount and Net Amount.
3. Press **SAVE** to save the call card.

View History Order & Stock Balance

The screenshot shows the 'Order' tab for 'Bee Hiong Biscuit'. The product details include:

- 26-01-013-20
- BH Nestum Cookies # 5Kg
- Outlet Balance : 46 ← 2
- In Stock : 0 TIN (D01)
- Reserved : 0 TIN
- Price: 59.50 / TIN
- Disc % : N/A
- FOC 0 TIN

 A red box highlights the 'Outlet Balance', 'In Stock', and 'Reserved' fields. A blue arrow points from this box to a summary table on the right:

Outlet Balance	: 37 ← 3
In Stock	: 0 TIN (D01)
Reserved	: 0 TIN

 Two callout boxes are present:

- 'Current stock balance that just filled in.' points to the 'Outlet Balance' value in the summary table.
- 'History stock balance, up to 4 times' points to the '← 3' value in the 'Outlet Balance' row.

When a product have been ordered before. The application will show PREV ORDER number that shows the quantity ordered in previous invoiced

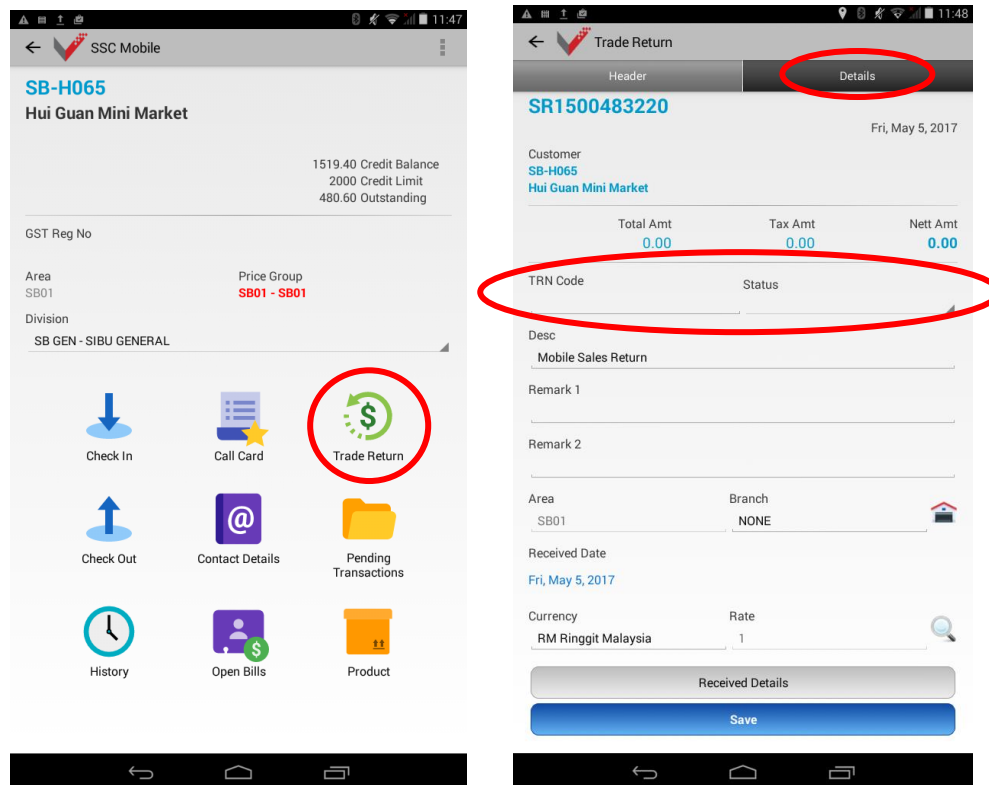
The screenshot shows the 'Order' tab for 'Julie's Sugar Crackers 345g Promo # 345g x 12'. The product details include:

- 25-01-012-70P
- Julie's Sugar Crackers 345g Promo # 345g x 12
- Prev Orders : 12
- Outlet Balance : 0
- In Stock : 43 CTN, 1 PKT (D01)
- Reserved : 0 PKT
- Price: 3.13 / PKT
- Disc % : N/A
- FOC 0 PKT

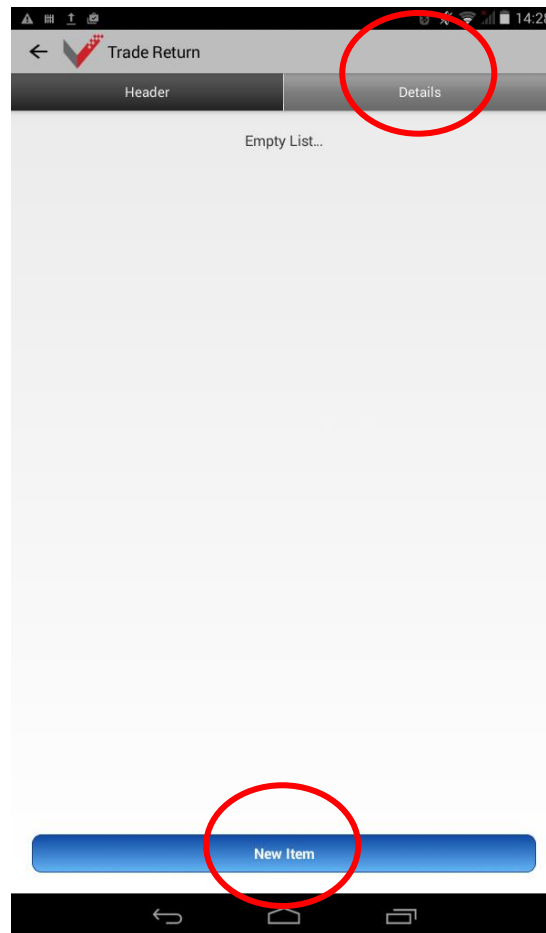
 A red box highlights the 'Prev Orders : 12' field. A blue arrow points from this box to the text 'Prev Orders : 12' on the right side of the image.

1. In Stock: Stock in warehouse
2. Reserved: Stock that is reserved for other customer

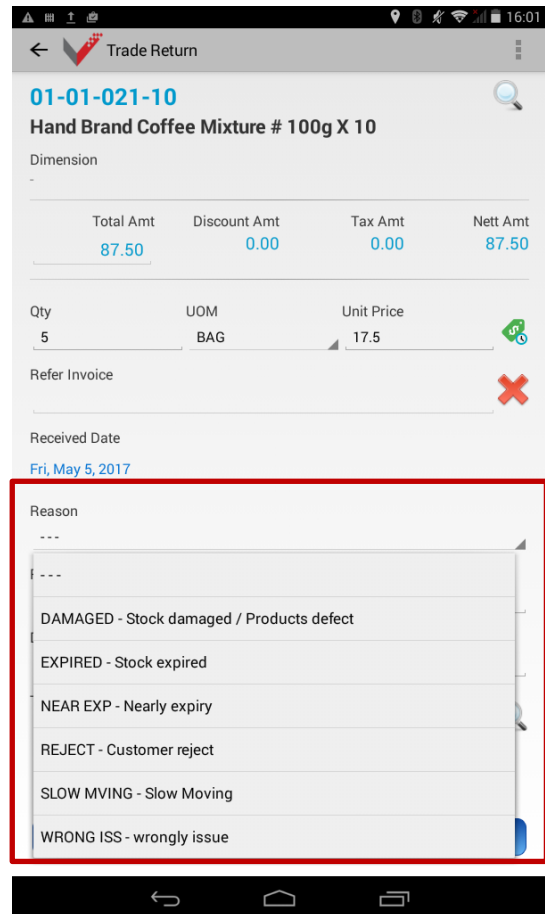
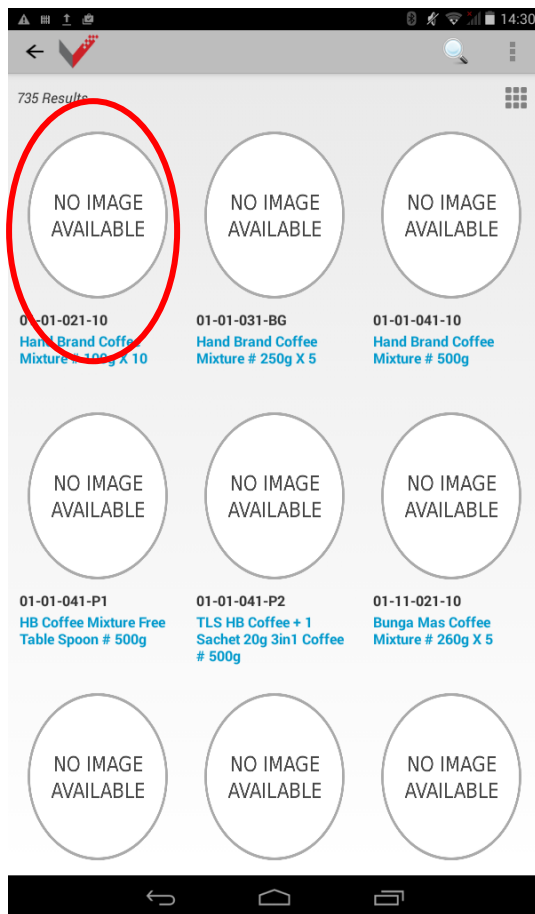
Trade Return



1. Press Trade Return button to key in Trade Return.
2. Enter the **TRN number** following the running number in the TRN paperwork.
3. Press Detail to enter return items.

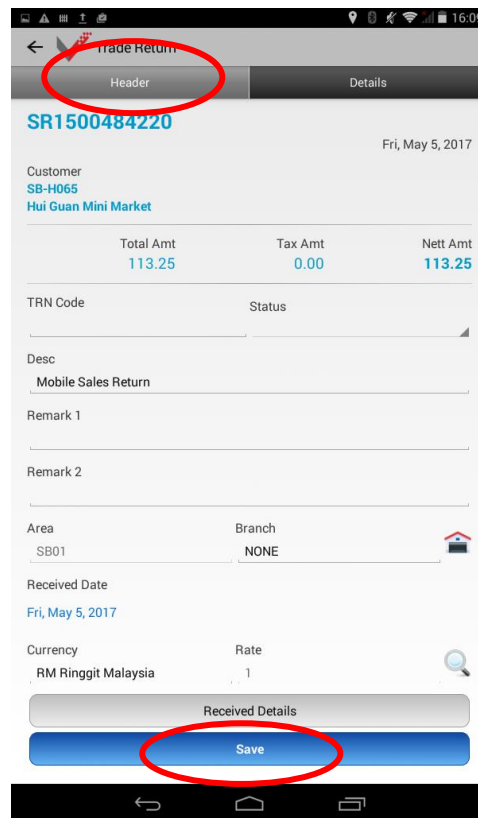
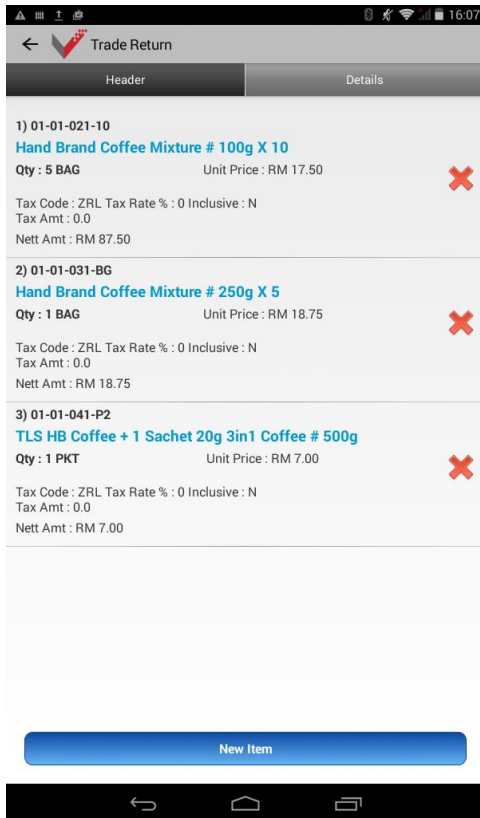


4. Press New Item to select item.
5. Press icon to choose item.



6. Press Item to select.
7. Select a return Reason.

8. Press  button to add.



9. Check the return item list.



10. Press the [X] button to delete any undesired item


11. Press Header if all items are correct.

12. Check the total amount.

13. Press Save to save.

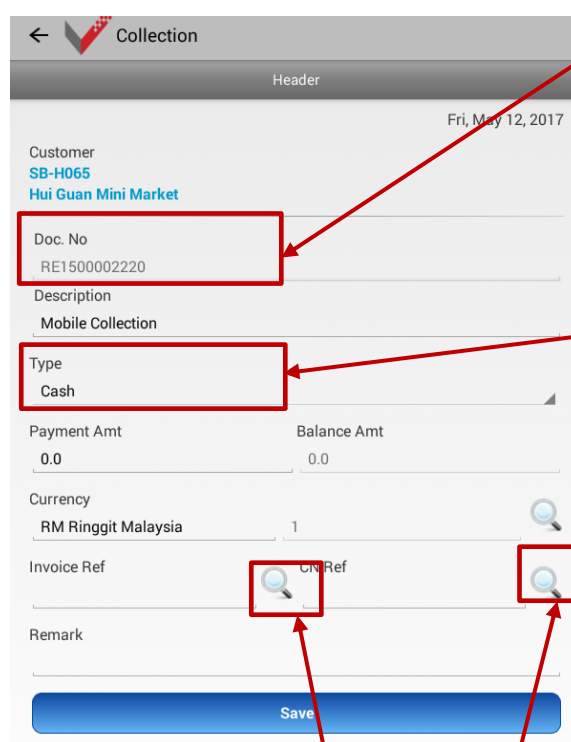
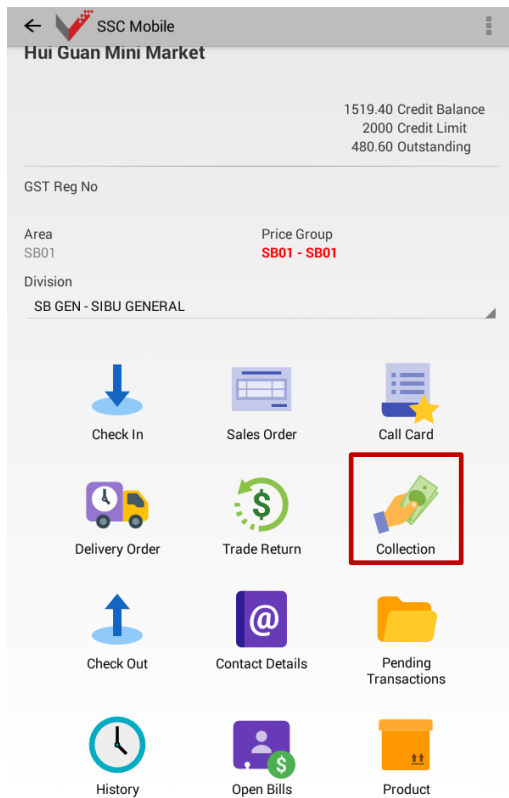
Refer Invoice



1. Click the Green tag  to see the history invoice
2. Choose related invoice by pressing REFER INVOICE button
3. Refer invoice number will automatically filled in in Refer Invoice section


Collection

1. Click the Collection icon to go to Collection page
2. Fill in the payment amount on Payment Amt. section
3. Choose type of payment.
4. Choose Invoice Ref / Credit Note ref
5. Fill in the Remark section if the customer partially paid his invoice.
6. Click the Save button once done.

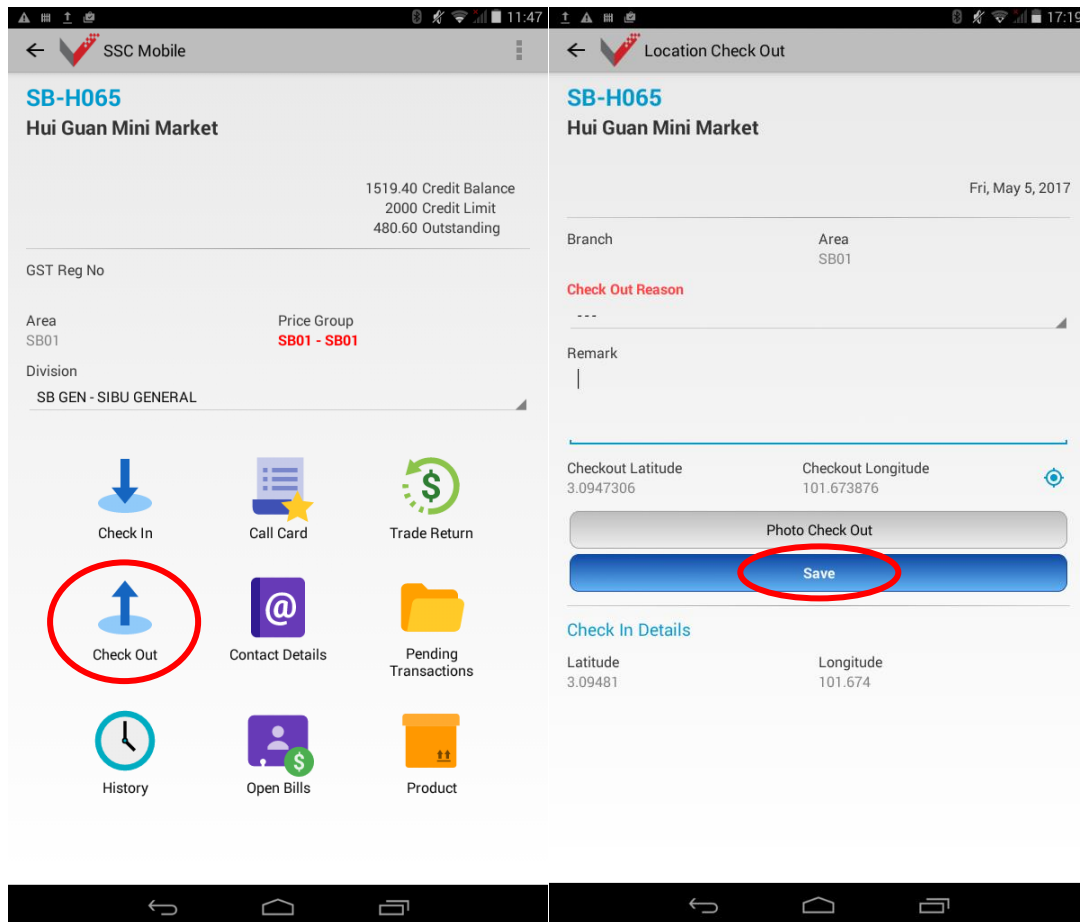


Automatically generated

You can choose the payment method either Cash or Cheque

Click the  to Search for related Invoice or Credit Note (CN)

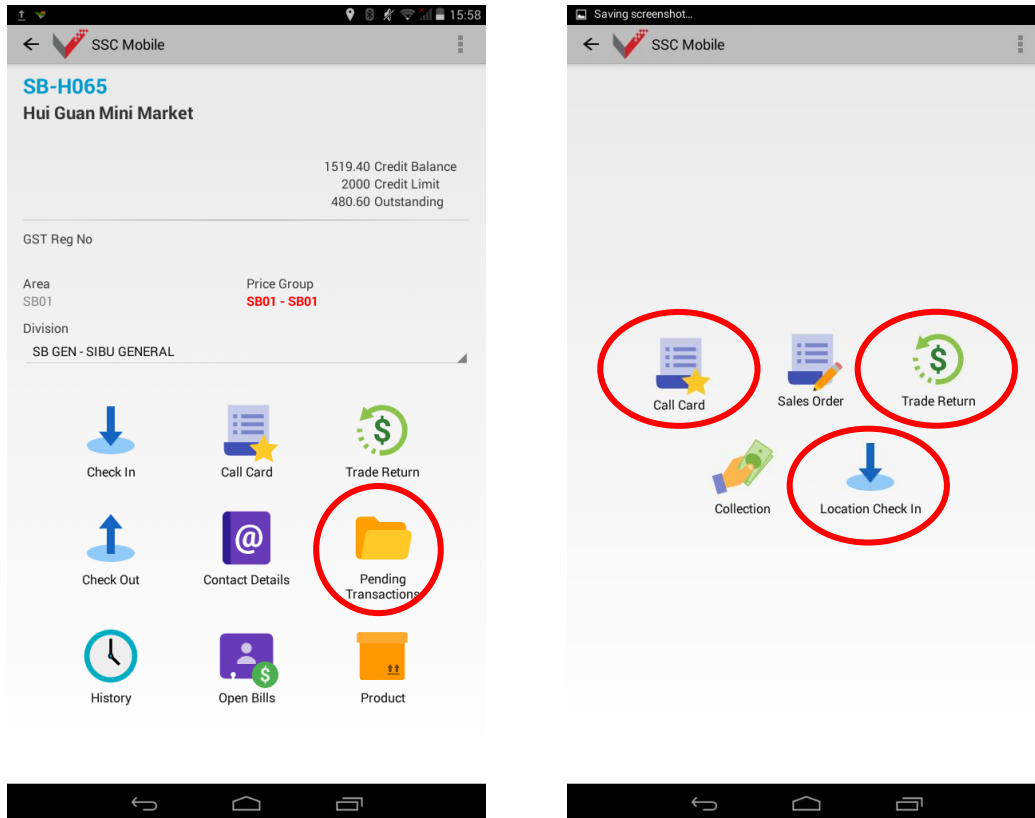
Location Check Out



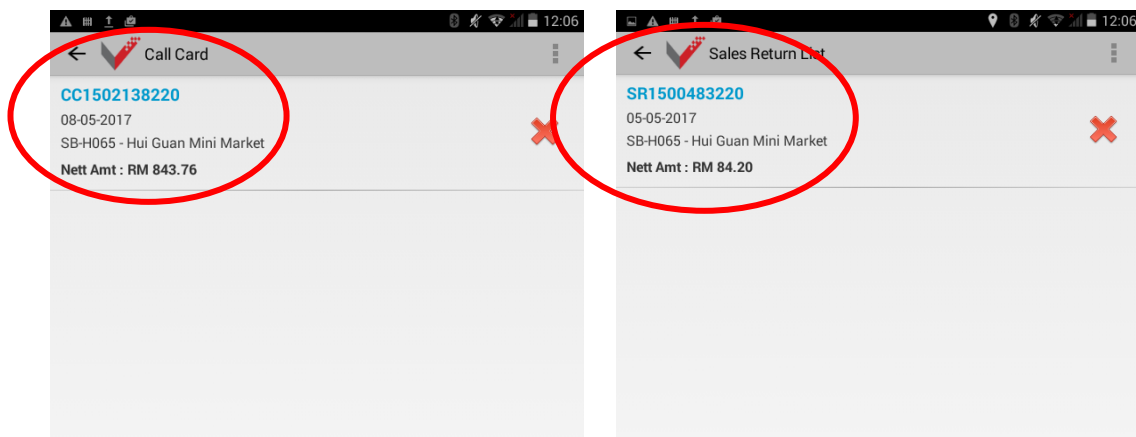
1. It will auto detect the GPS location.
2. Press Photo Check Out if GPS location is not available and take a picture.
3. Press Save once GPS or Photo is entered.

Pending Transaction

Edit Customer Call Card and Trade Return

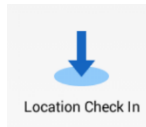


1. Press Pending transactions.
2. Choose Call Card or Trade Return.

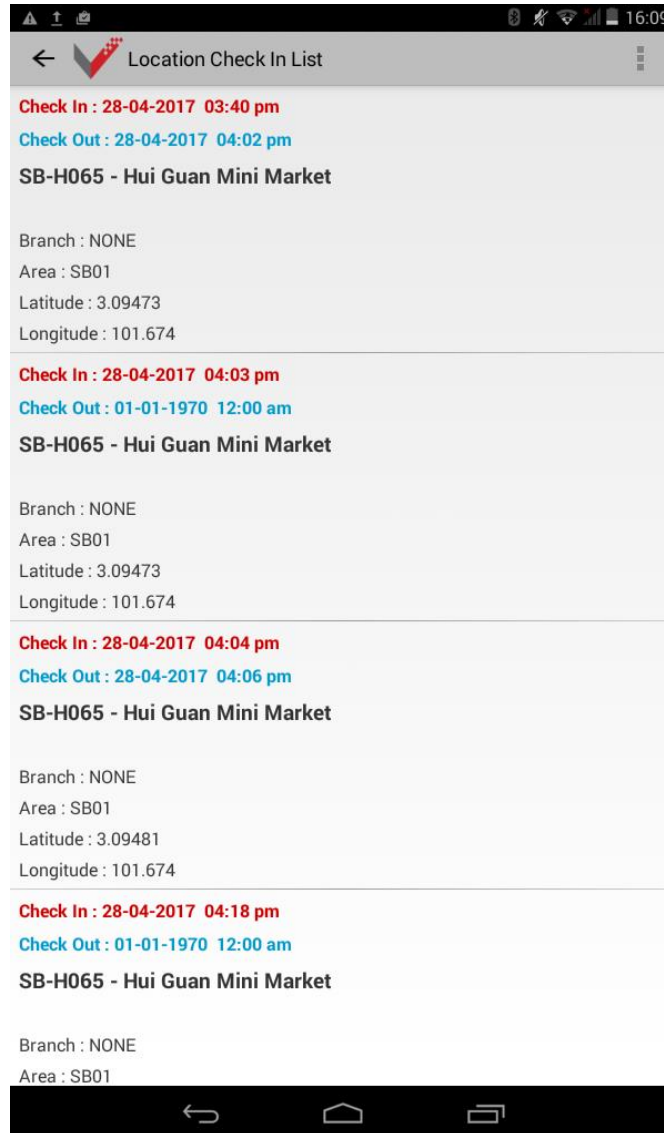


3. Choose a Call Card or Trade Return to edit.
4. Call Card or Trade Return screen will be displayed

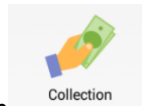
View Location Check in List



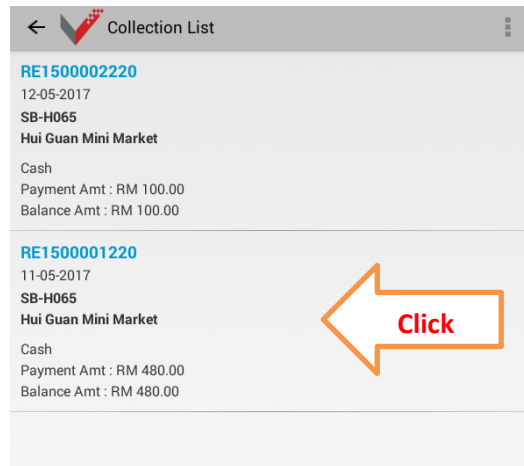
1. Press Location Check In to view all the location checked in detail



Edit Collection



1. Click Collection icon
2. It will redirect to list of collection made on the day.
3. Choose desired Collection
4. Edit desired section



Collection

Header

Thu, May 11, 2017

Customer
SB-H065
Hui Guan Mini Market

Doc. No
RE1500001220

Description
payment april

Type
Cash

Payment Amt Balance Amt
480.0 480.0

Currency
RM Ringgit Malaysia 1

Invoice Ref CN Ref
BIV0011098

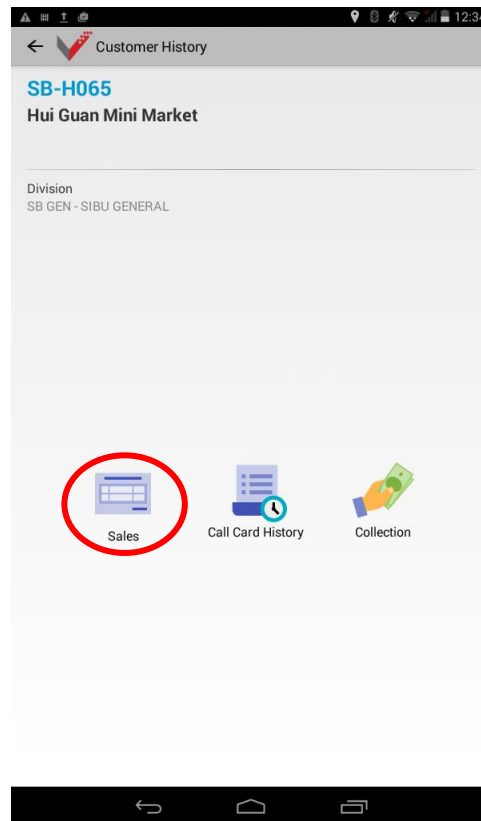
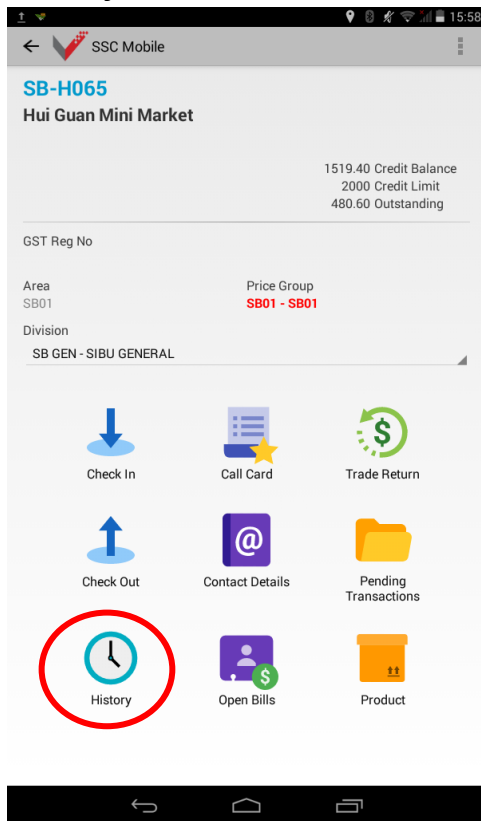
Remark

Save

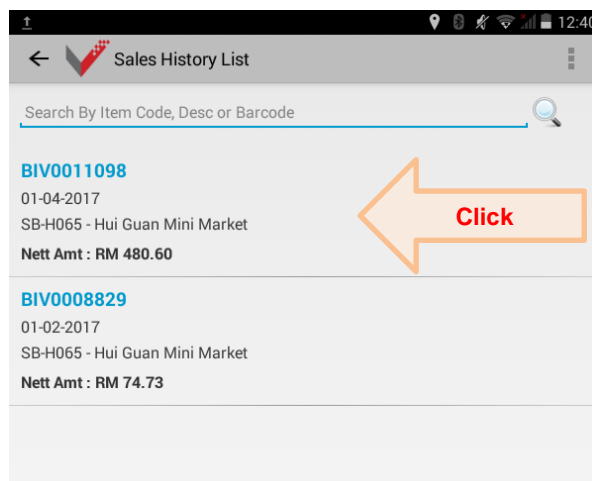
5. Click Save button once done

History

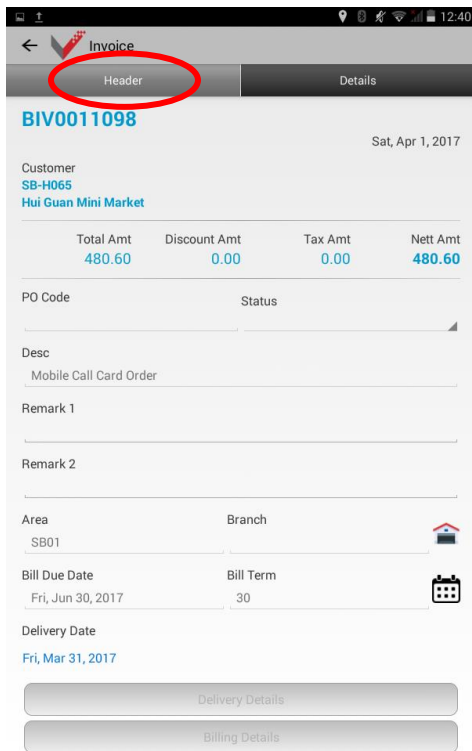
Sales History



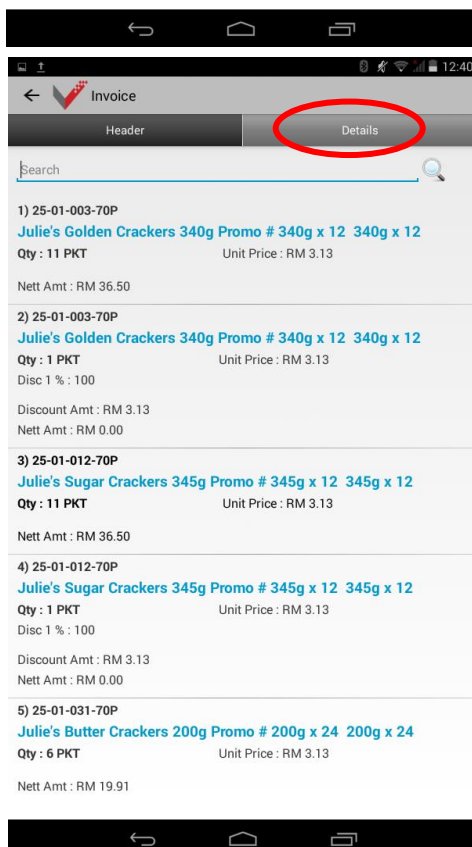
1. Press History to view Sales, Call card and Collection history.
2. Choose Sales.



3. Transactions can only be viewed. Cannot edit past transactions.
4. Click on a sales invoice to view details.

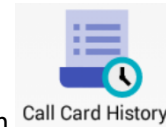
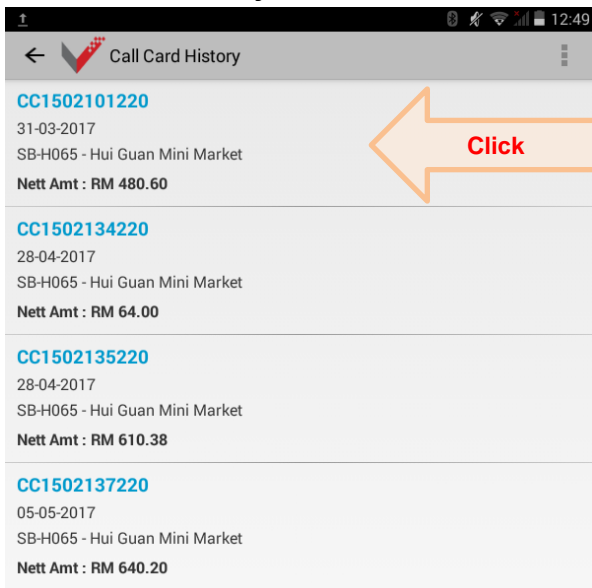


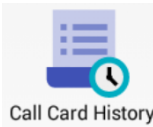
5. Header show the total before tax amount, Tax amount, discount amount, and nett amount of the invoice.

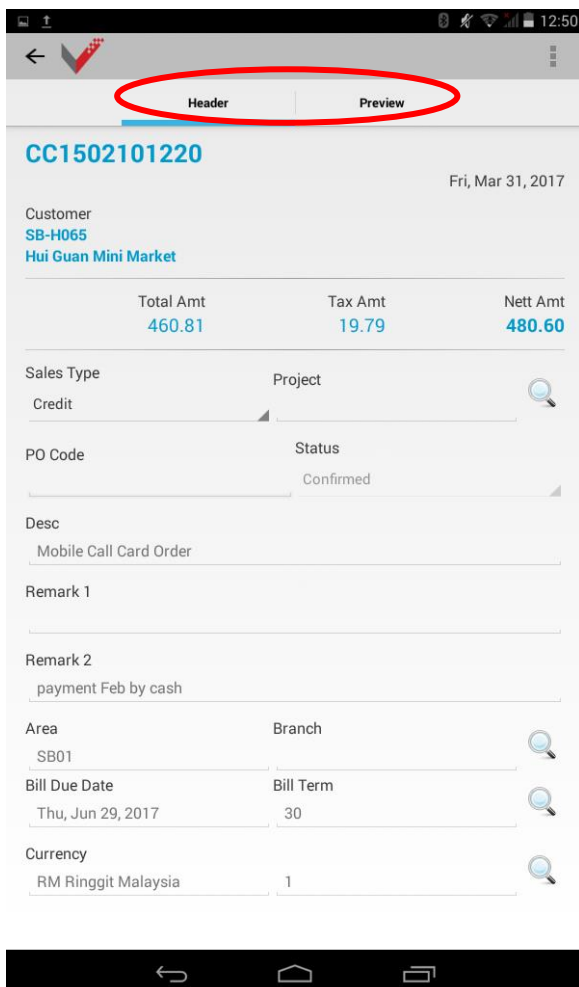


6. Click on the Details to view item details of the invoice.

Call Card History

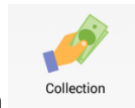


1. Click on  to view list of call card history
2. Choose call card that you want to view

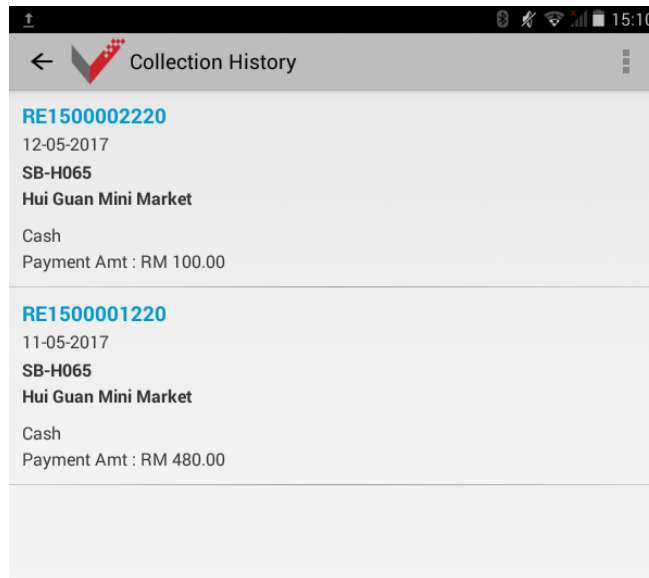


3. Header will show the call card summary.
4. Preview will show the list of item that was ordered in the call card.

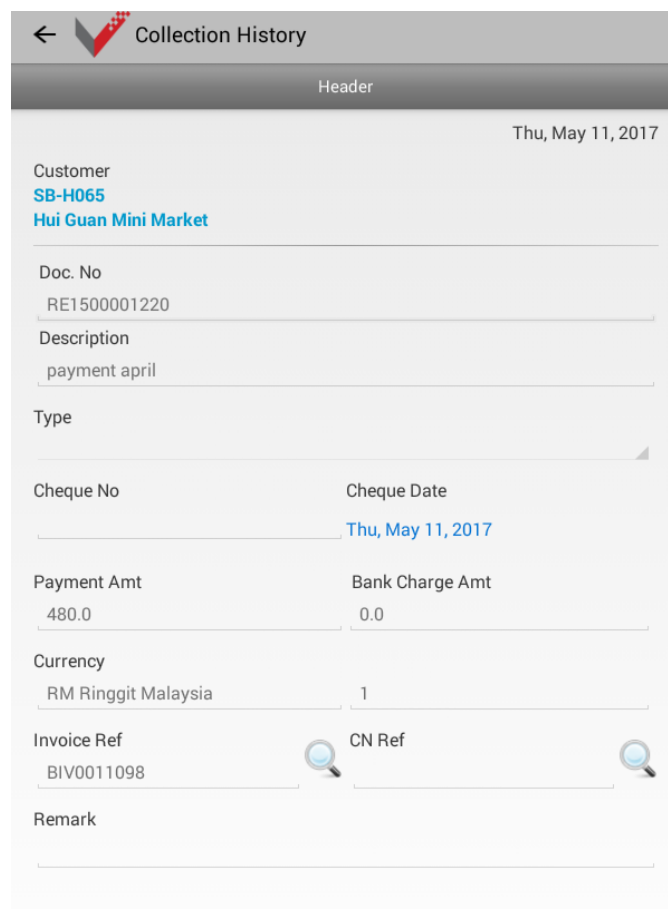
Collection History



1. Click Collection button.
2. List of Collection from the web system is shown

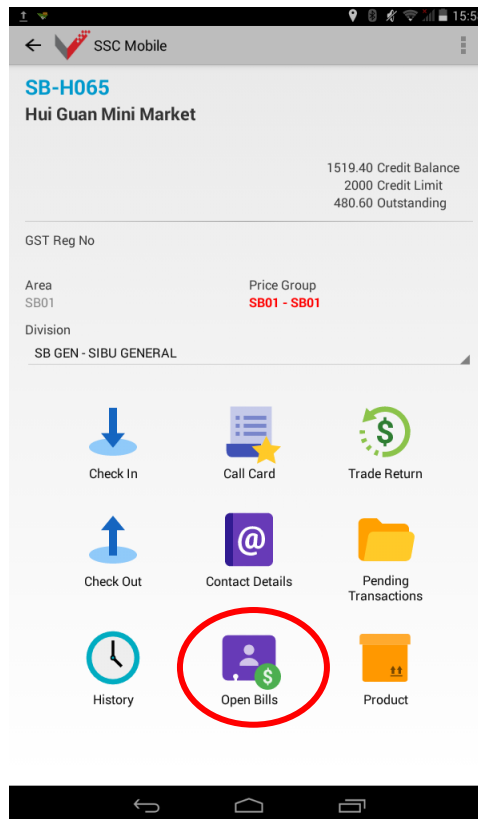


3. Choose desired document to view the details. History can't be edited

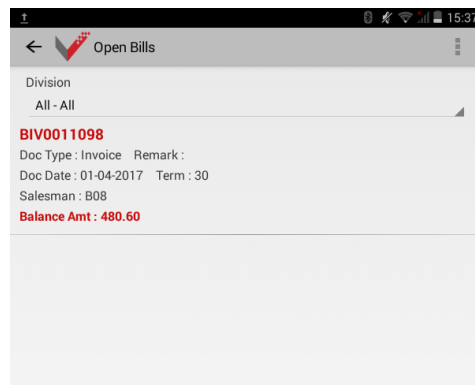


Open Bill

To view outstanding bill that the customer have



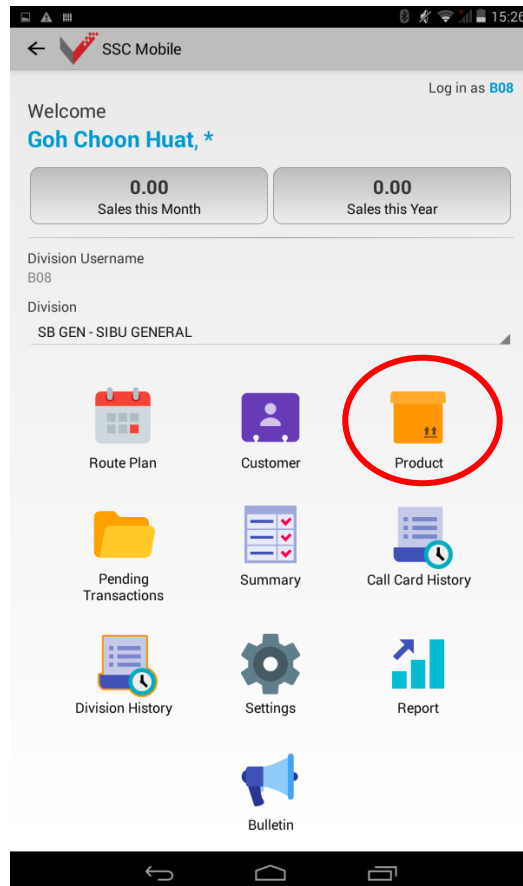
1. Click OPEN BILLS.

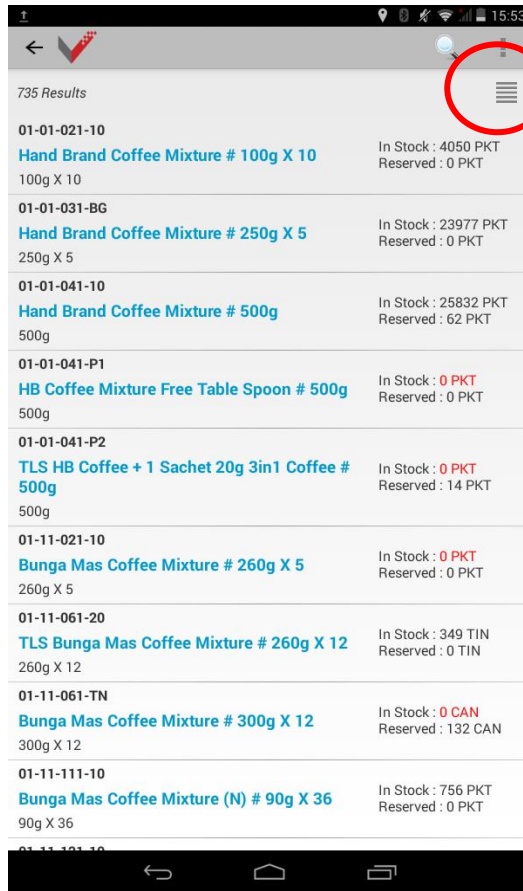


2. A list of due invoices and credit note will be shown.

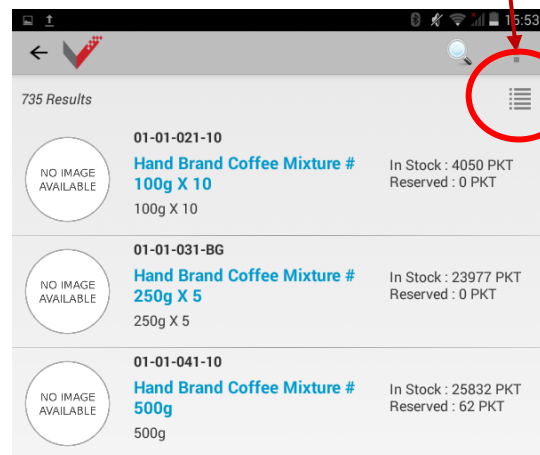
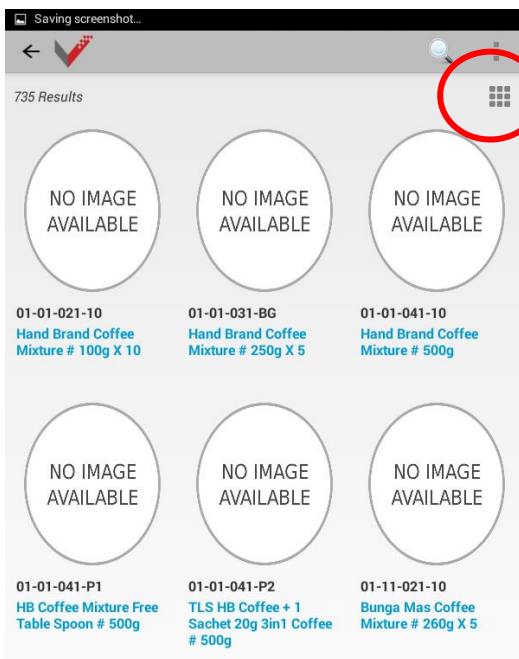
Product

1. At the Main screen, press Product button to display the product list screen.
2. Search for item by code or description in the search box.
3. Filter items by item group.

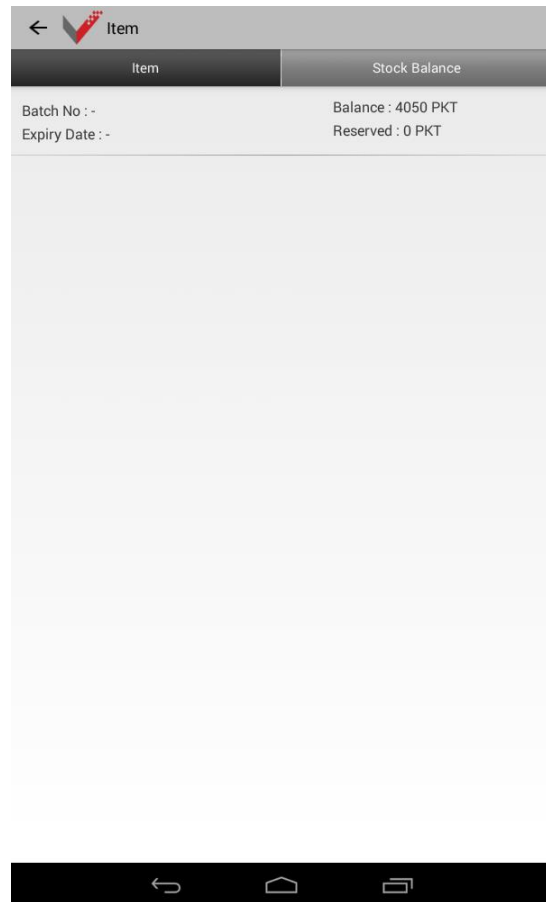
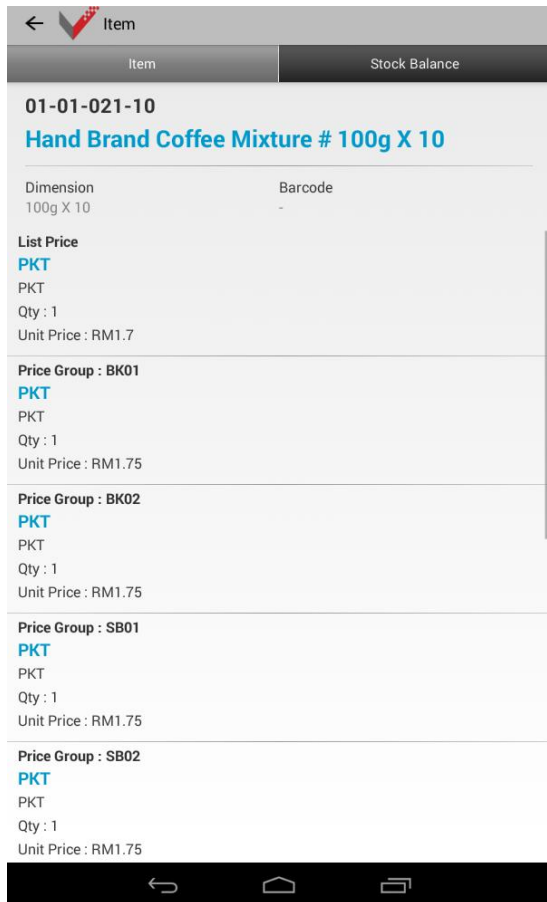




To change the viewing styles of the product list

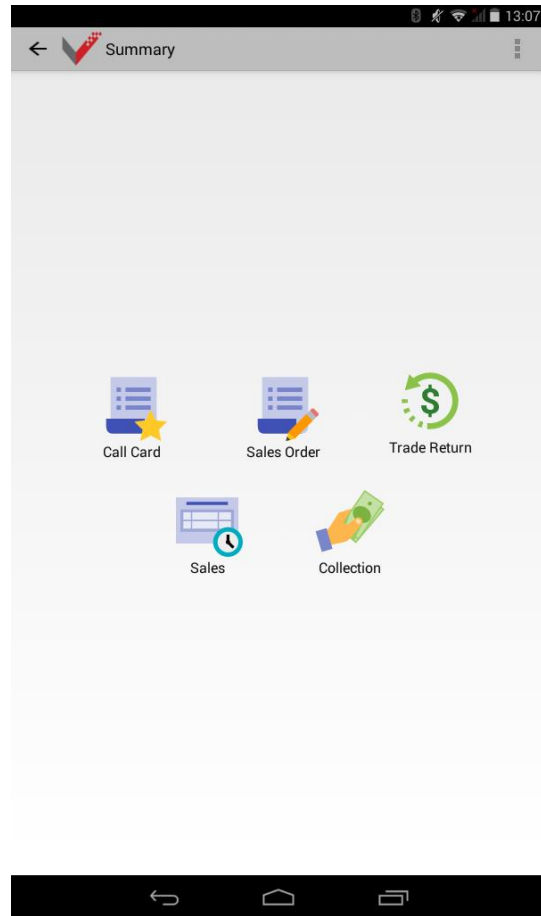
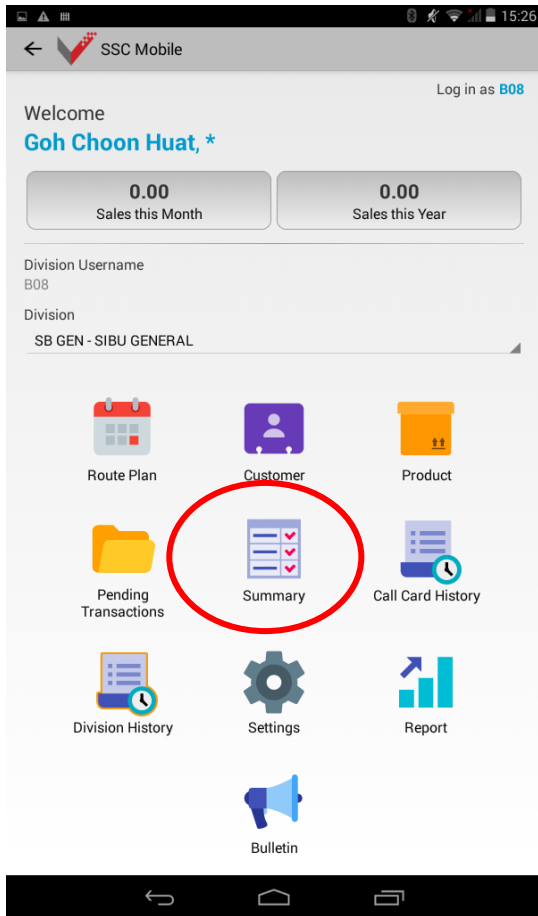


4. Select an Item to display the Item Detail screen.

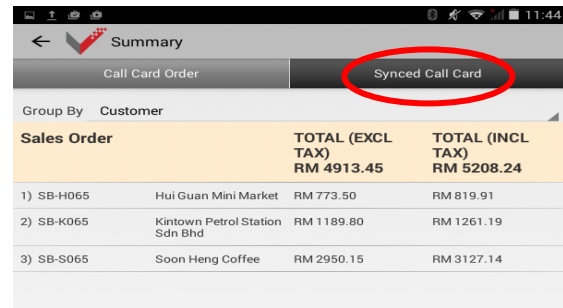
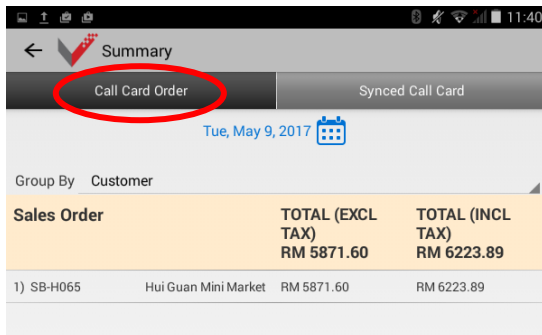


5. Item tab show the item detail, while Stock Balance tab shows the item stock balance in the warehouse.

Summary



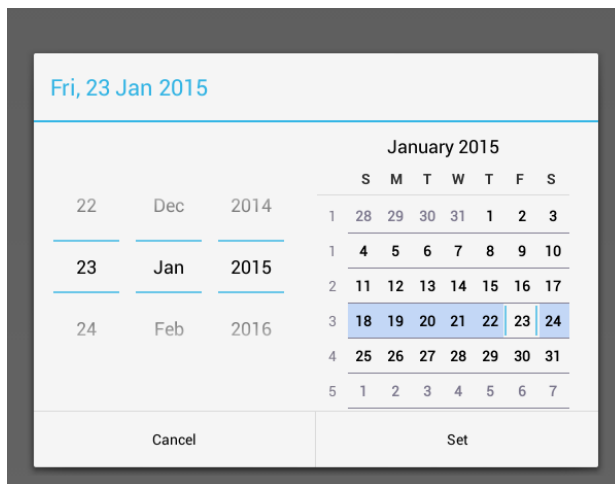
1. At Main Screen Press Summary.



2. Choose Call Card Order to view summary of call card ordered.
3. Synced Call card display call card that have been synced into the system Choose Synced Call Card to view the previous synced record for a specific day.
4. You can also choose the date that you want to view by clicking the calendar button



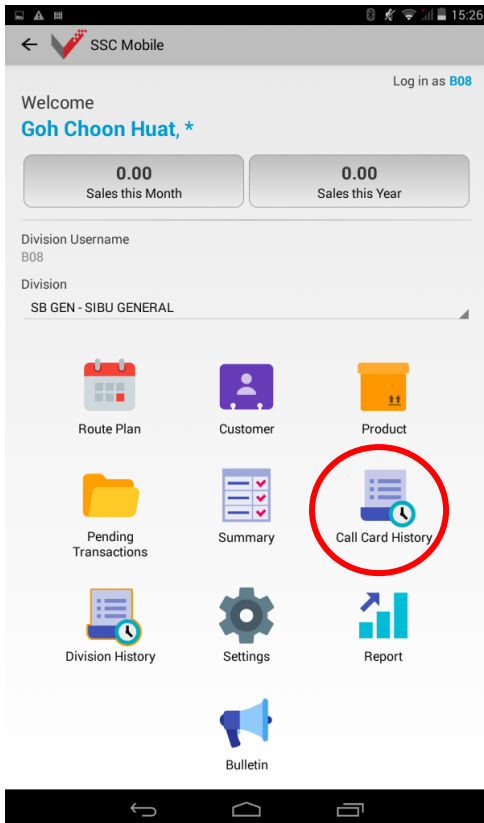
5. Click on the date.



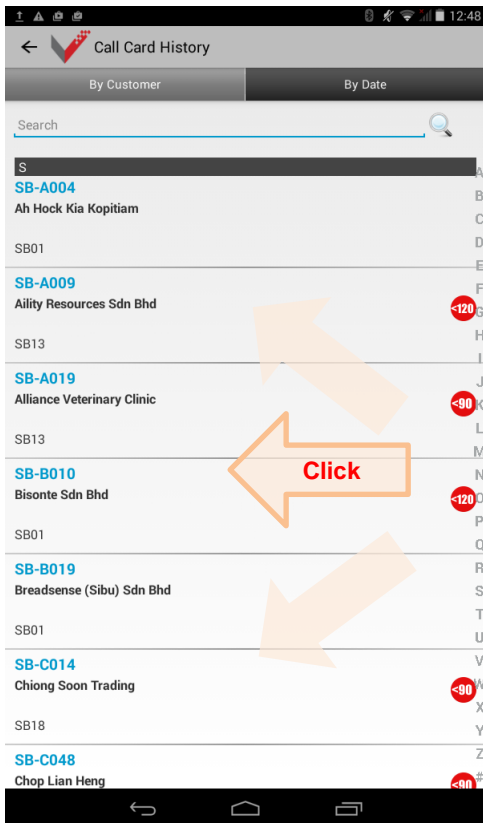
6. Choose the date and click Set.

7. The synced call card for the specific date will be displayed.

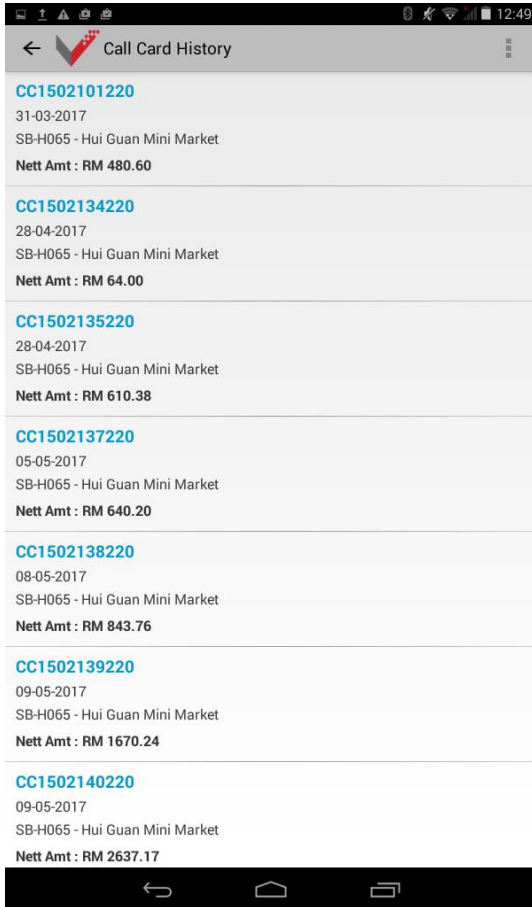
Call Card History



1. Click on the Call Card History.



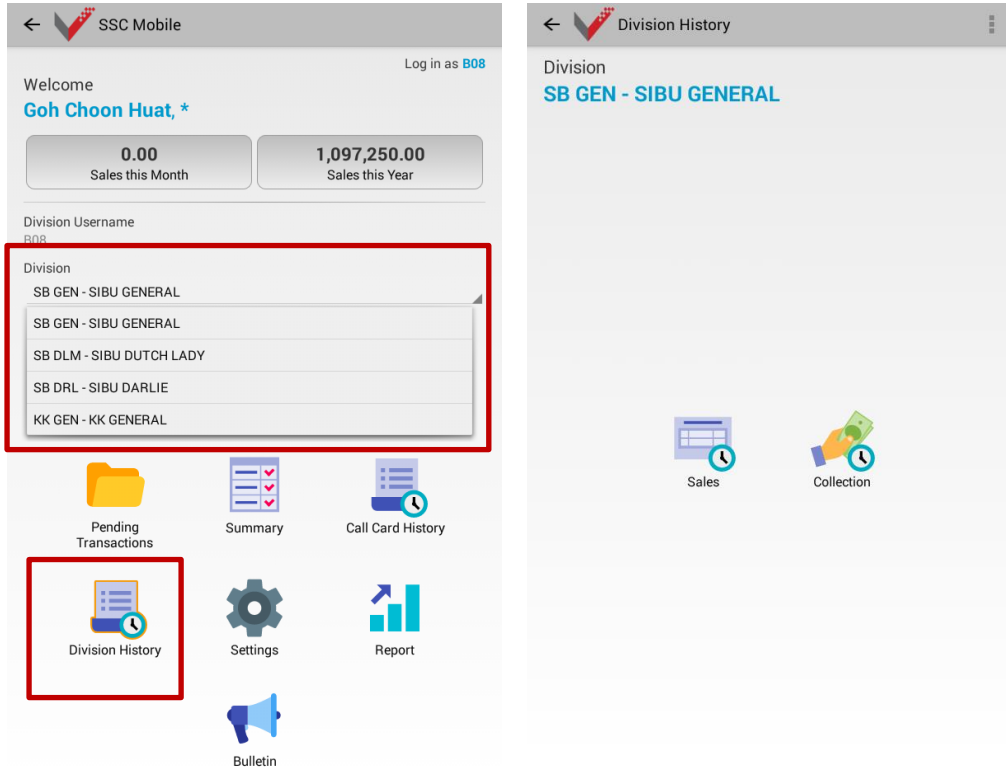
2. Choose to view call card history by Customer or by Date
3. Click on a customer to view the call card history.
4. Or Search desired customer on Search section.



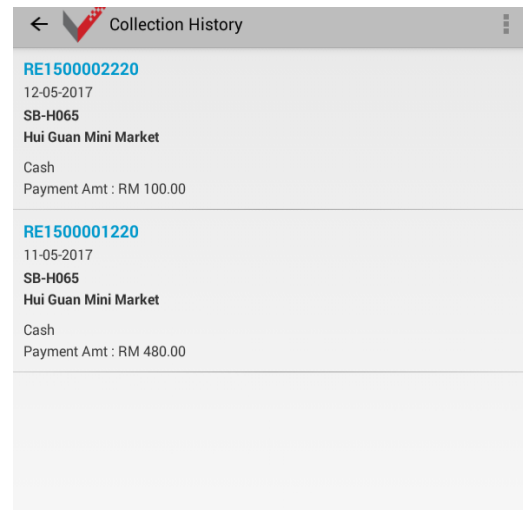
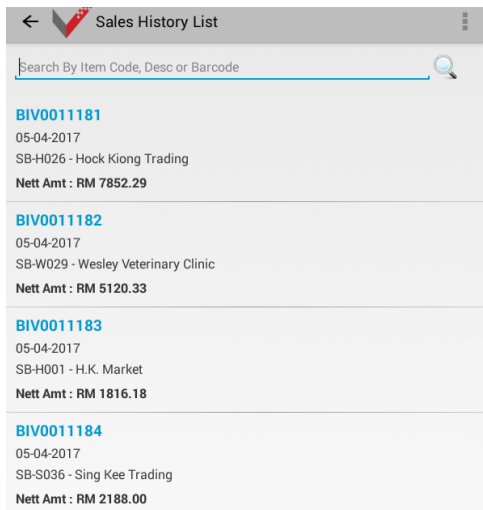
5. It will displayed a list of call card.
6. Click on the call card to view the details.

Division History

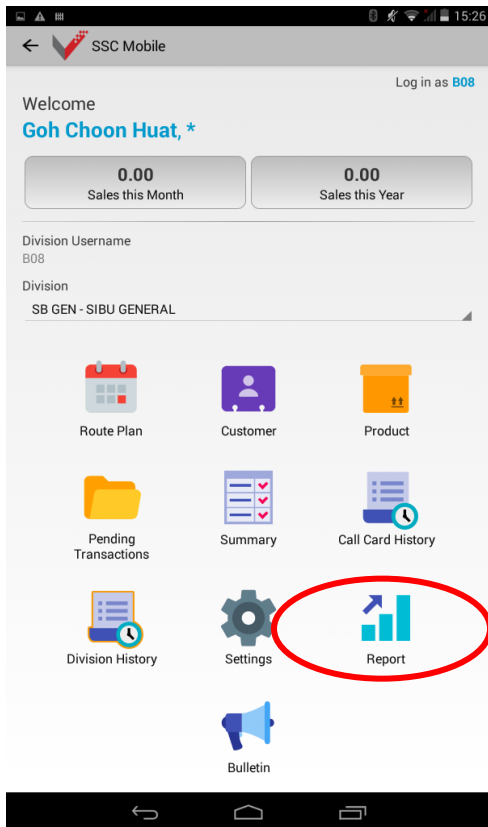
1. Division History shows Sales and Collection History by division



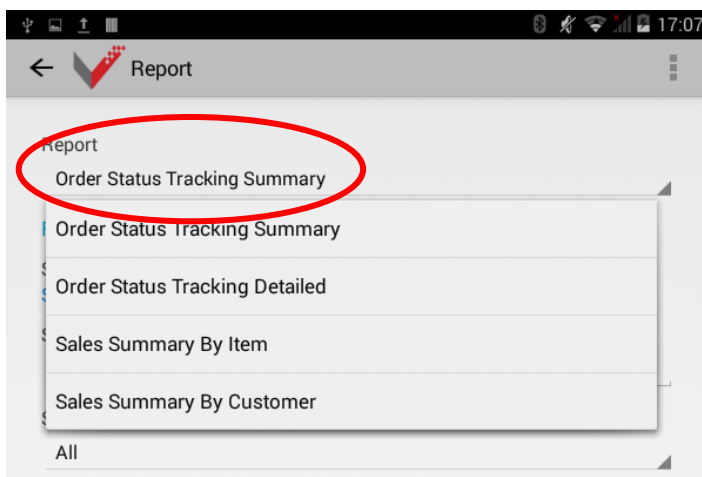
2. Click on Sales or Collection to view the history.
3. List of previous Sales and Collection will be shown
4. Choose desired document to view.



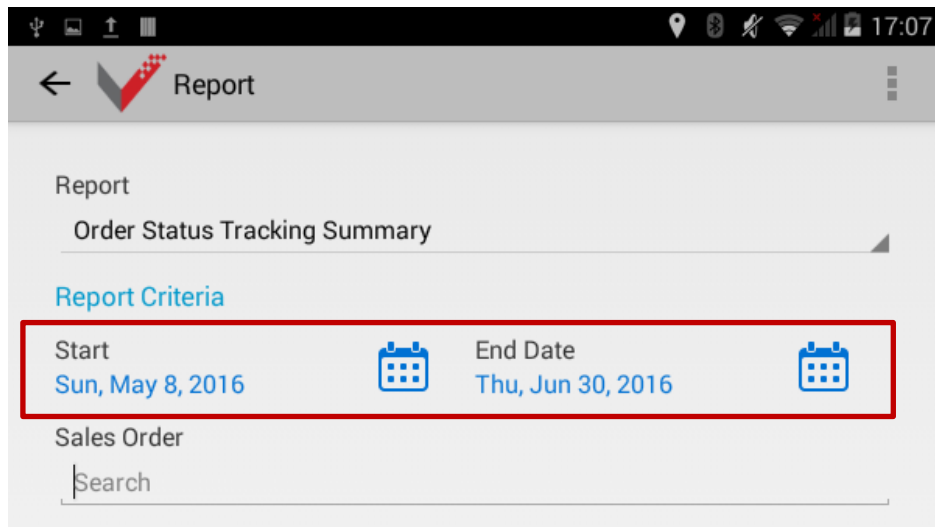
Report



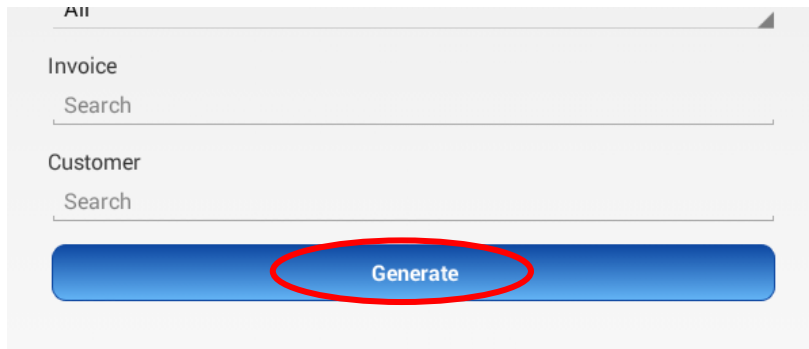
1. Click the Report.



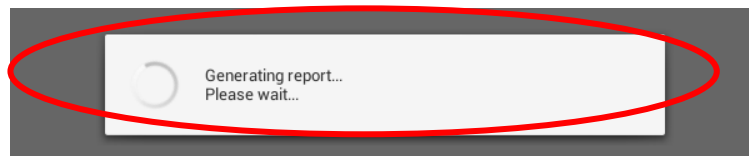
2. Select the report type.



3. Choose the start date and end date.

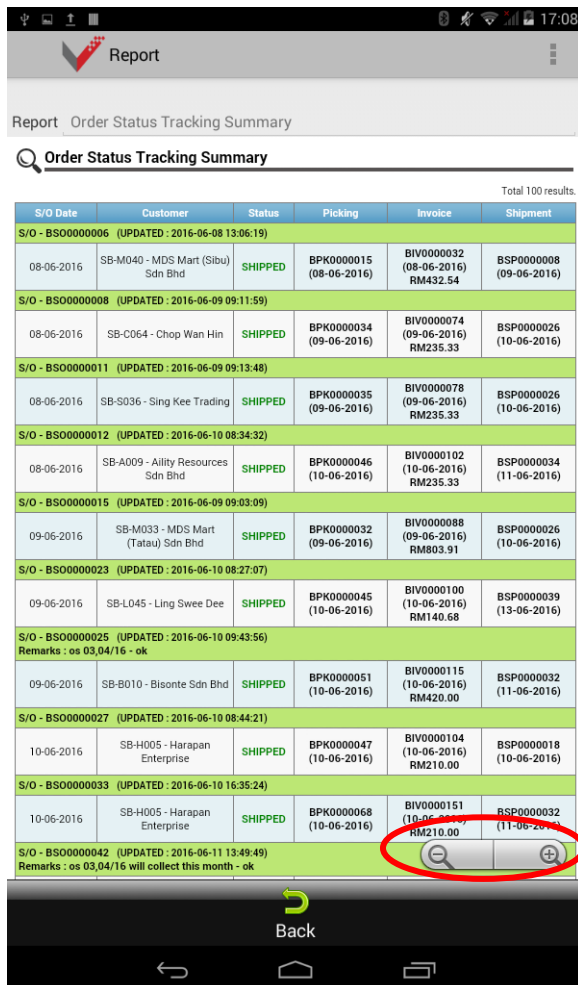


4. Click Generate.

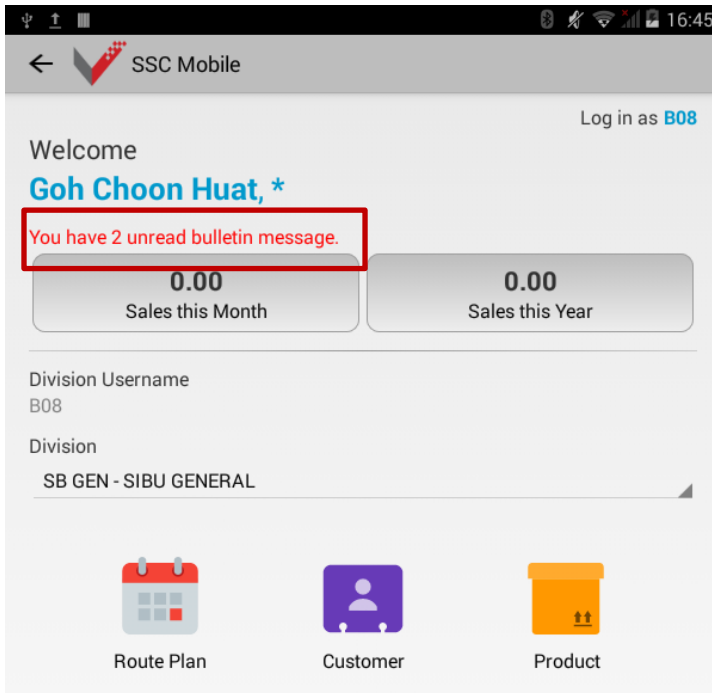


5. Wait for the report to be generated.

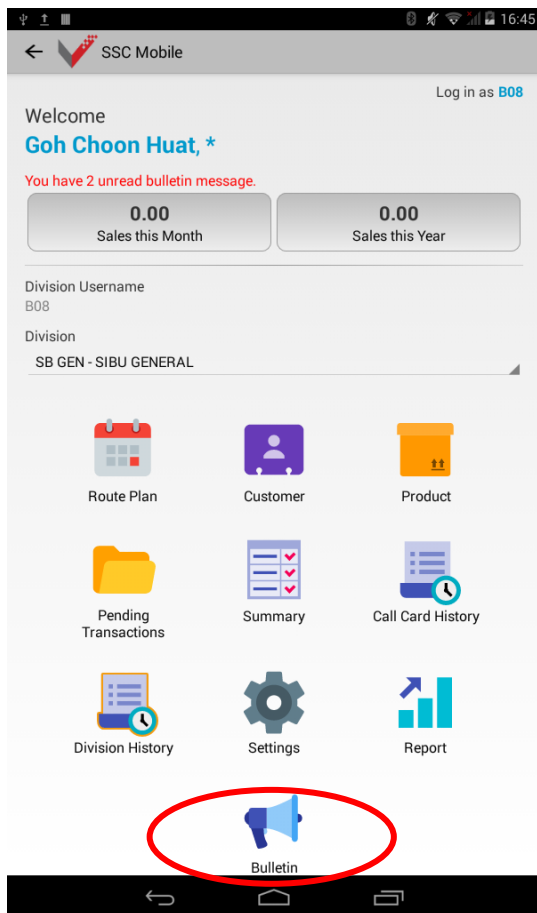
6. Click on the zoom in and zoom out button to enlarge the image.



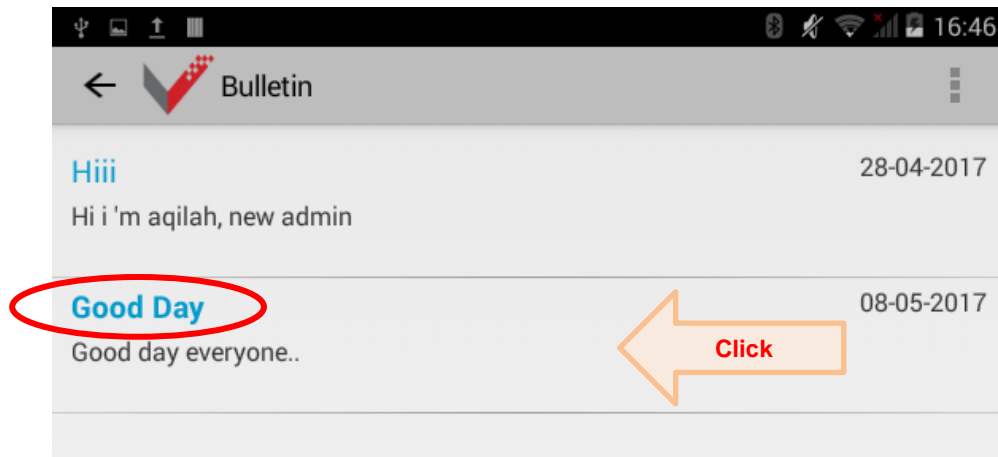
Mobile Bulletin Message Board



1. A message will be shown at the top of main page to notify you there are 1 unread bulletin message.



2. Click Bulletin.



1. Unread message title will be in bold
2. Click on the message to open.