

**Inverze Sdn Bhd**

# **DMS Mobile SFA User Guide**

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Inverze Sdn Bhd  
A-18-28, The Scott Garden,  
289 Jalan Klang Lama,  
58000 Kuala Lumpur, Malaysia.

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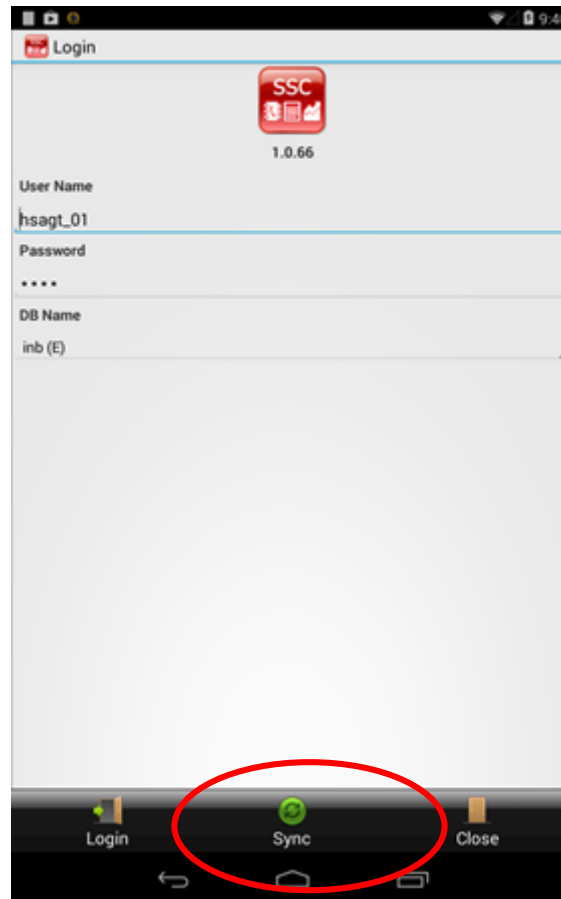
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## Sync Data

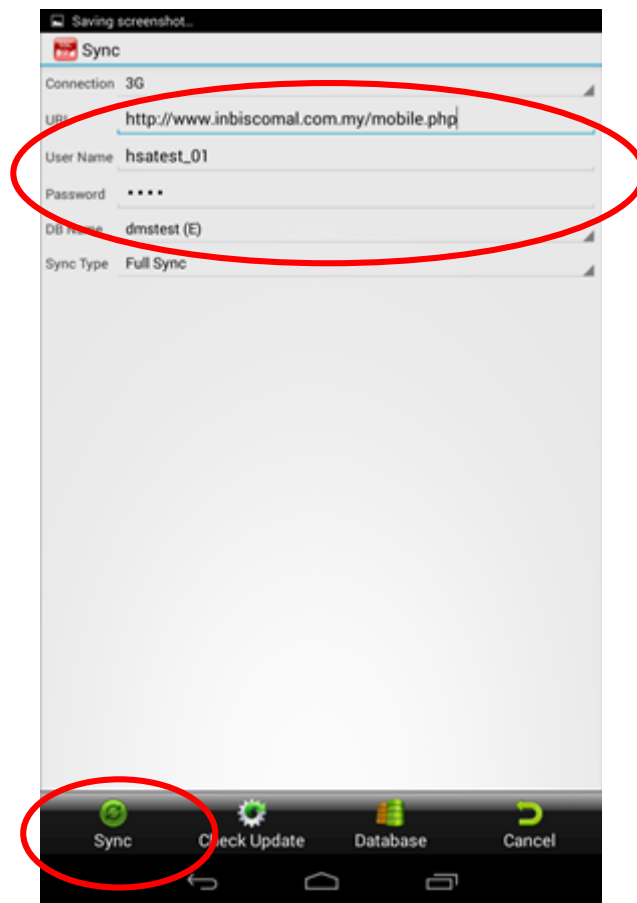


1. Press Sync in the Main Login screen.

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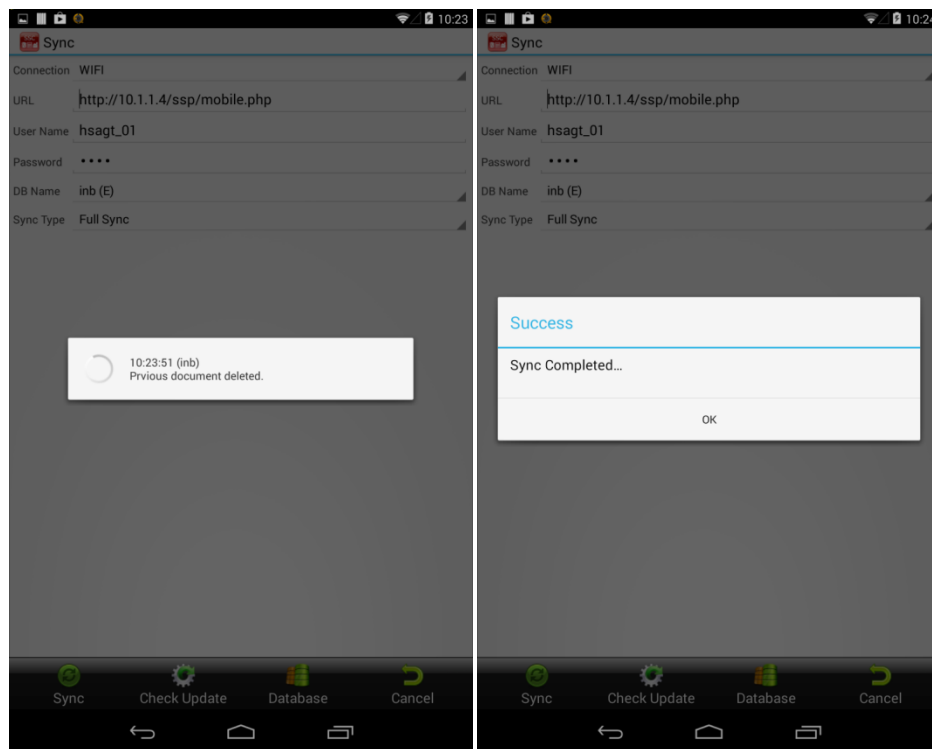


2. Enter the correct URL, User Name and Password.
3. Press Sync.

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

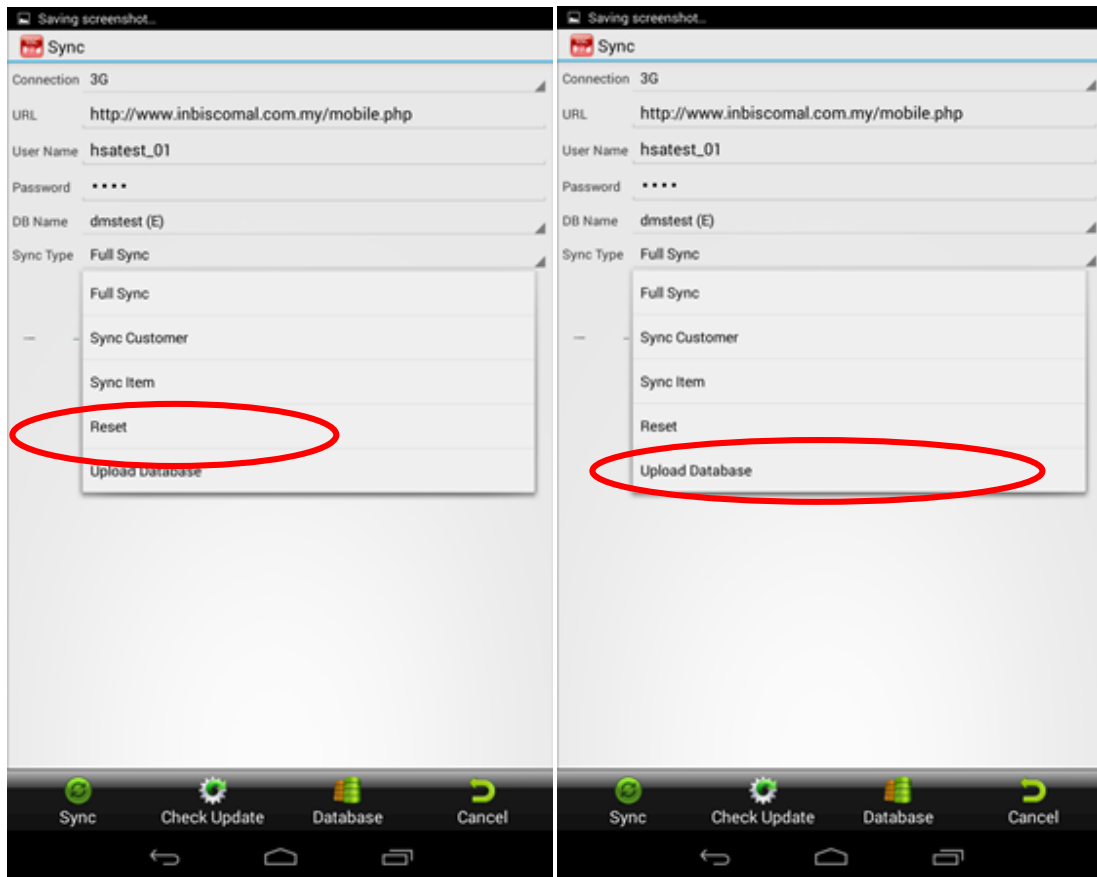
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## Reset and Upload Database

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



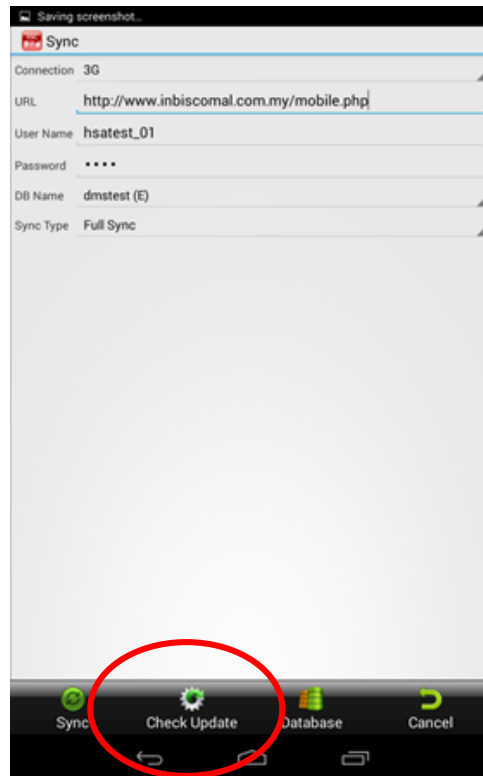
2. Upload Database is to upload a copy of mobile database to server for troubleshooting.

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## Check Update

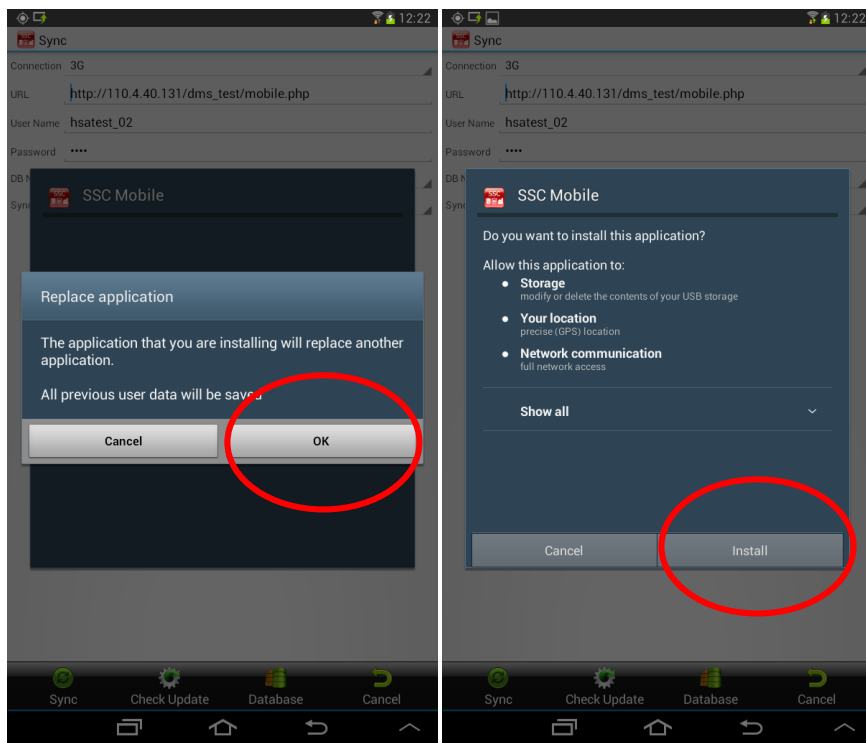


1. Press Check Update button to install new version of application.

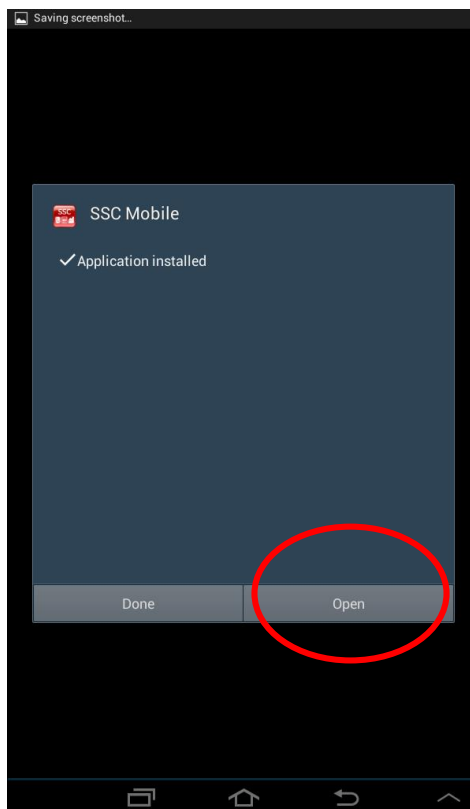
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2. Press OK and Install to install.
3. Press Open when installation is completed.

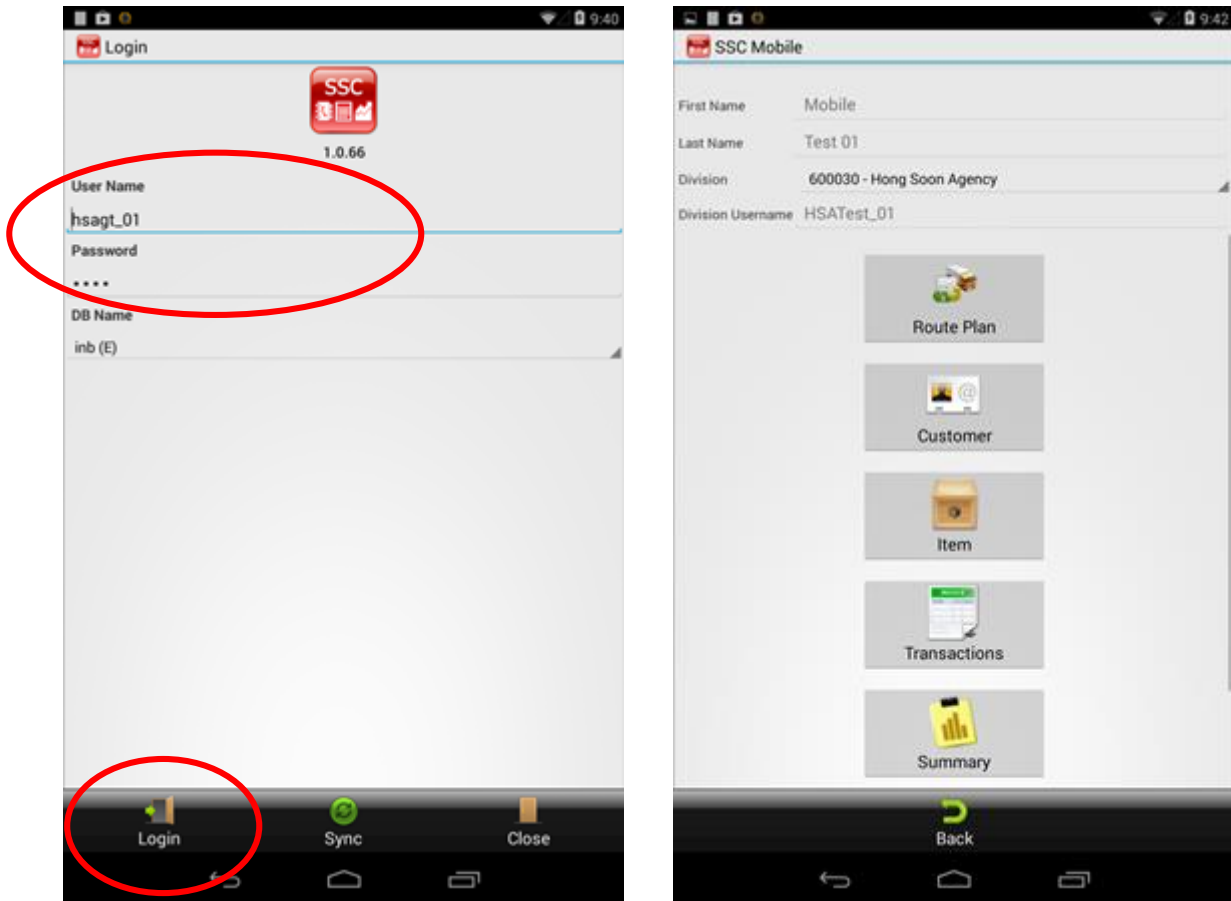




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## Login and Main Screen



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

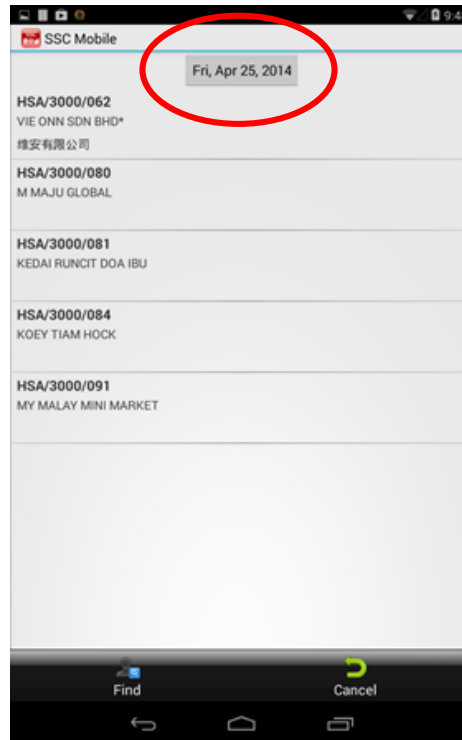
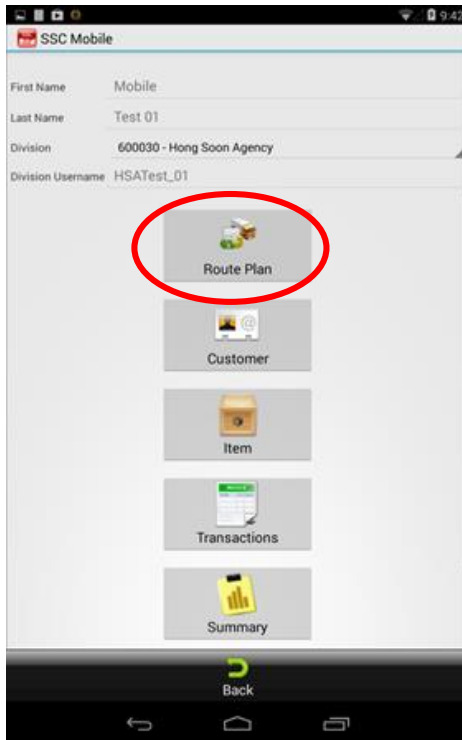
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## Route Plan

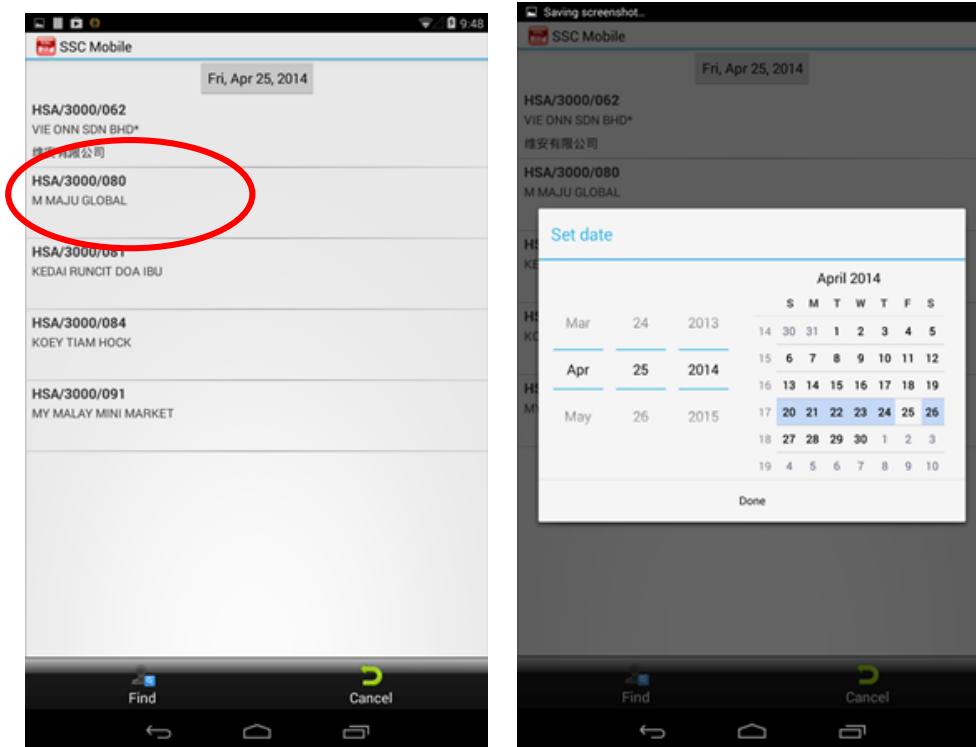
1. Press Route Plan.
2. Route Plan screen will show the customer list for the day.
3. You can change the date.



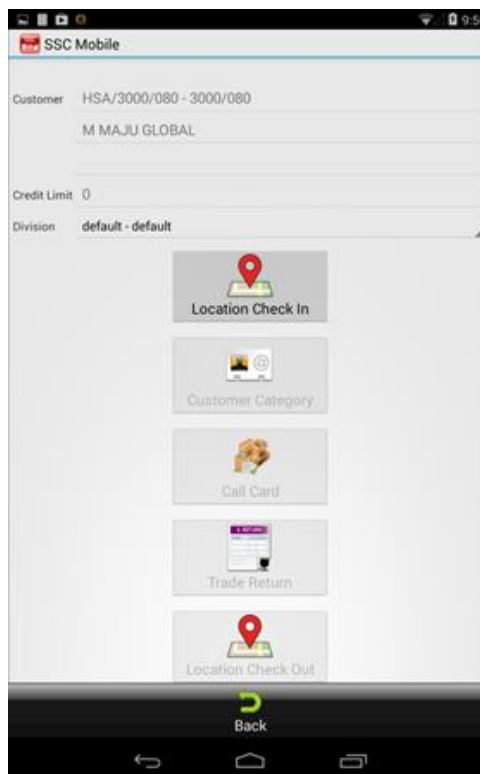
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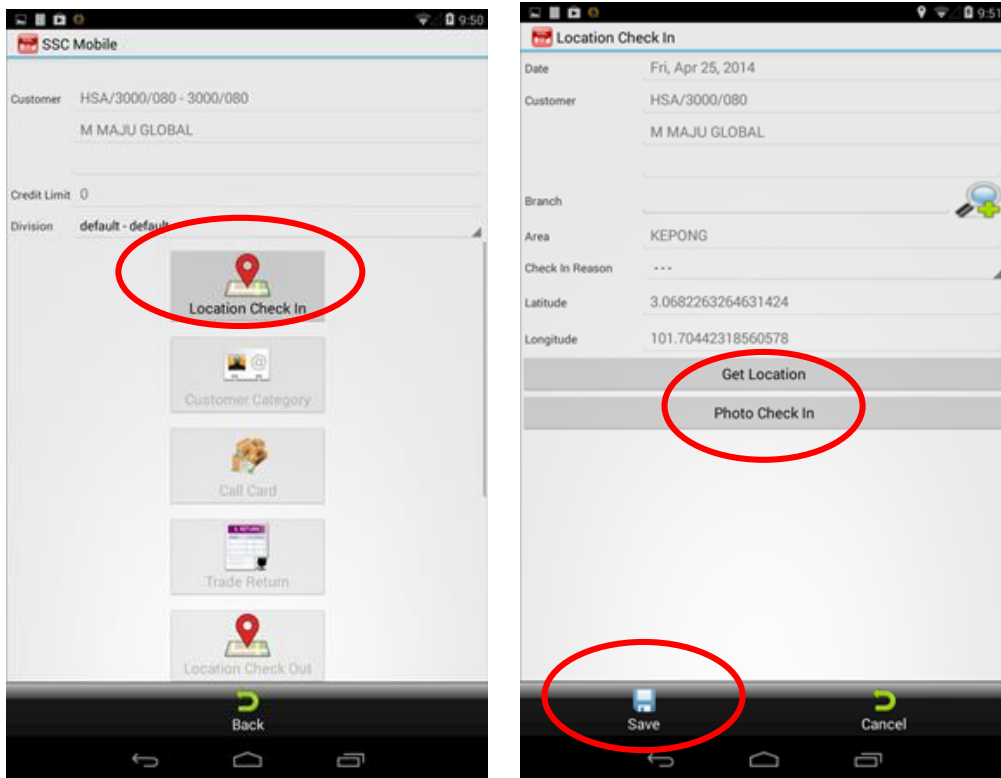
4. Select a Customer to begin transaction.



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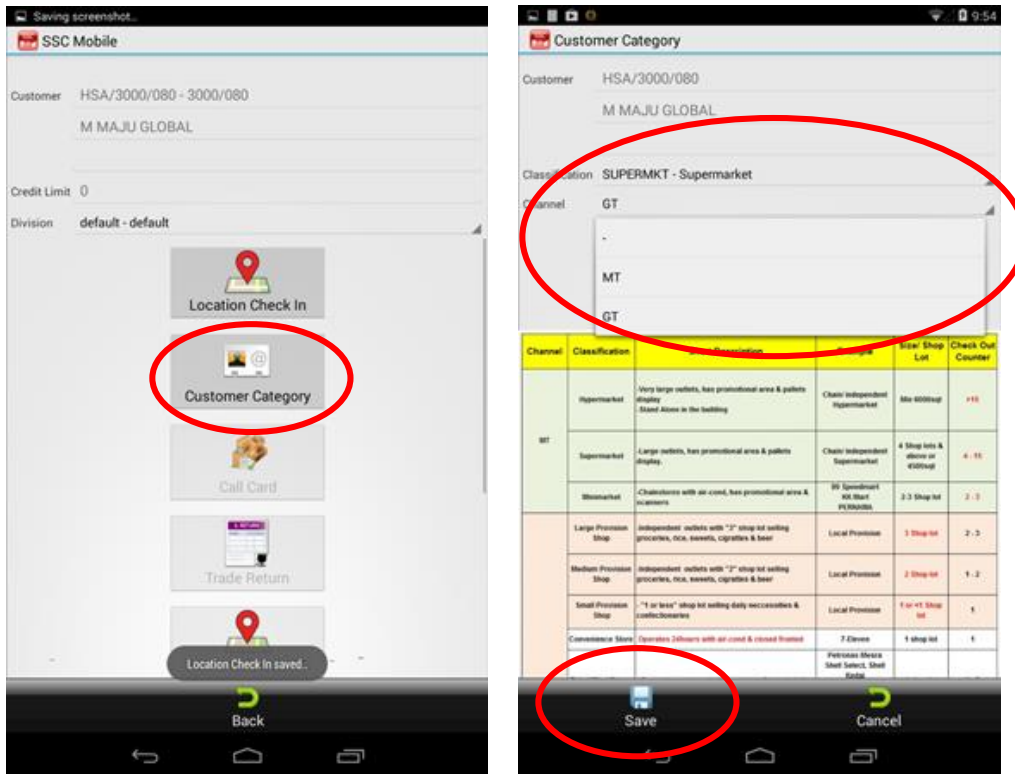
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## Location Check In



1. It will auto detect the GPS location.
2. Press Get Location if it did not auto detect.
3. Press Photo Check In if GPS location is not available.
4. Press Save once GPS or Photo is entered.
5. After completing Location Check In, the next step will be unlocked.

## Customer Category

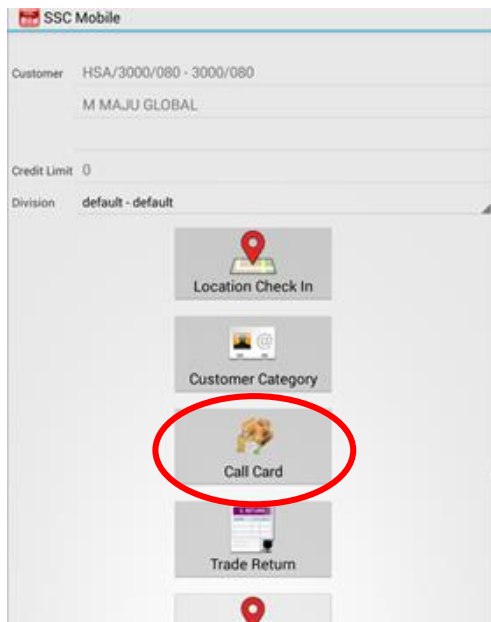


1. Press Customer Category button.
2. Select Classification.
3. Select Channel.
4. Press Save.
5. After completing Customer Category, the next step will be unlocked.

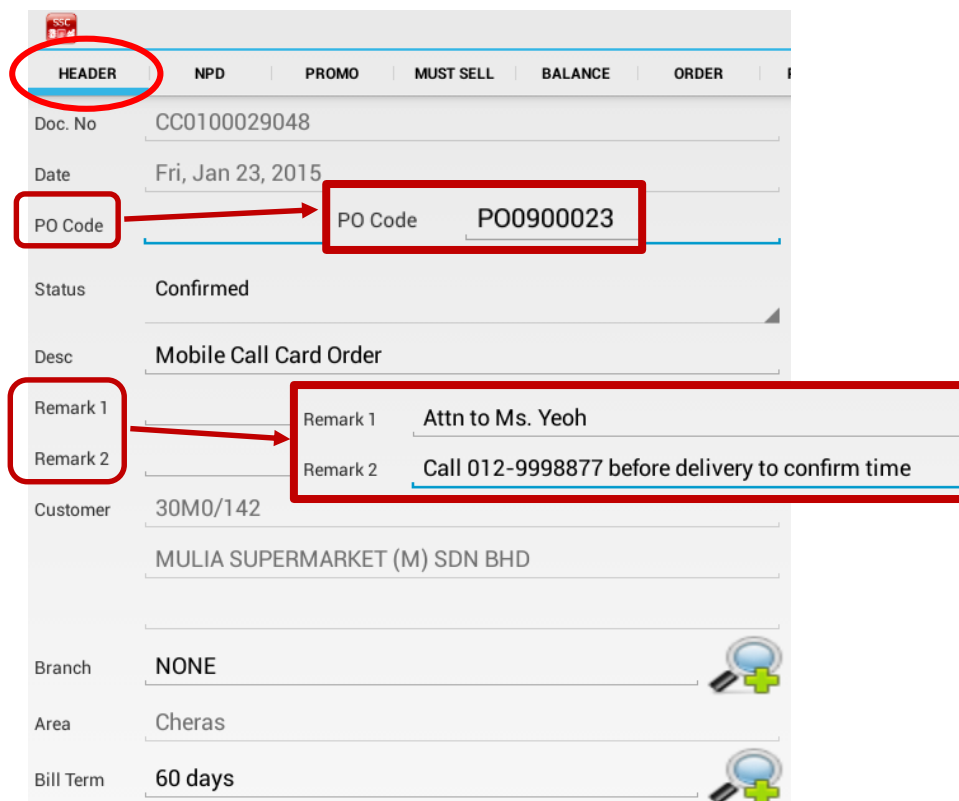
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## Call Card



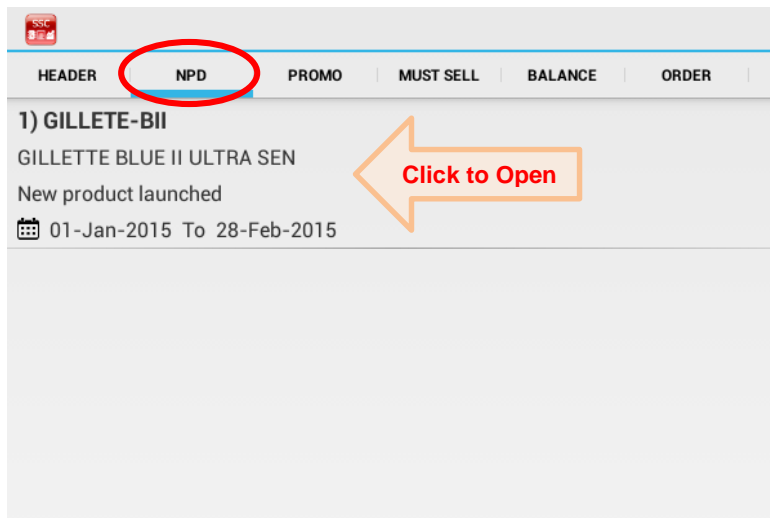
1. Press Call Card button.
2. **HEADER** page display the customer detail and sales amount detail.



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

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5. NPD page display the list of NPD promotion.
6. Click to open a NPD.
7. The details of NPD will be shown.

Promo Code: GILLETE-BII  
Description: GILLETTE BLUE II ULTRA SEN  
New product launched  
Valid From: 01-Jan-2015 To: 28-Feb-2015  
Min. Qty: 1  
Total Item Qty: 0 Total Amt: 0.00

LHM82176957	Qty 0 UNIT
GILLETTE BLUE II ULTRA SEN	
Unit Price : 1.53	
Disc % : N/A	
Disc Amt : 0.00	
Nett Amt : 0.00	
LHM82176957	Qty 0 POLY
GILLETTE BLUE II ULTRA SEN	
Unit Price : 73.50	
Disc % : N/A	
Disc Amt : 0.00	
Nett Amt : 0.00	
LHM82176957	Qty 0 CTN
GILLETTE BLUE II ULTRA SEN	
Unit Price : 1013.76	
Disc % : N/A	
Disc Amt : 0.00	
Nett Amt : 0.00	

Save Back

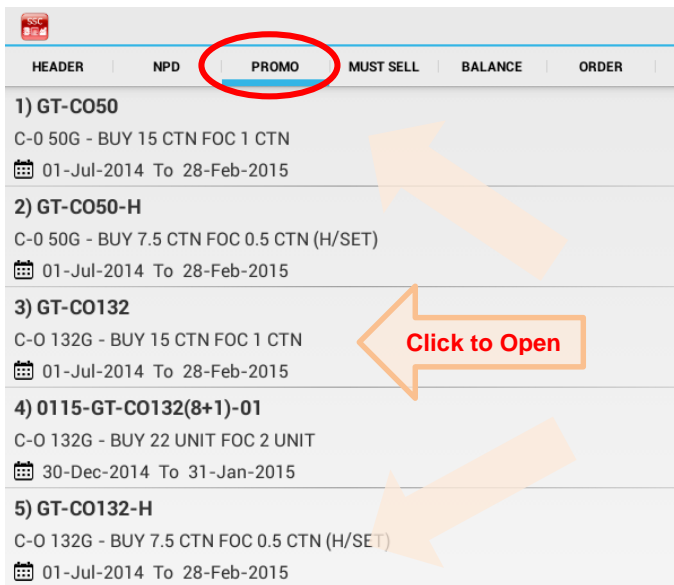
8. Key in the order quantity.

9. Then, click SAVE  to save the NPD order.

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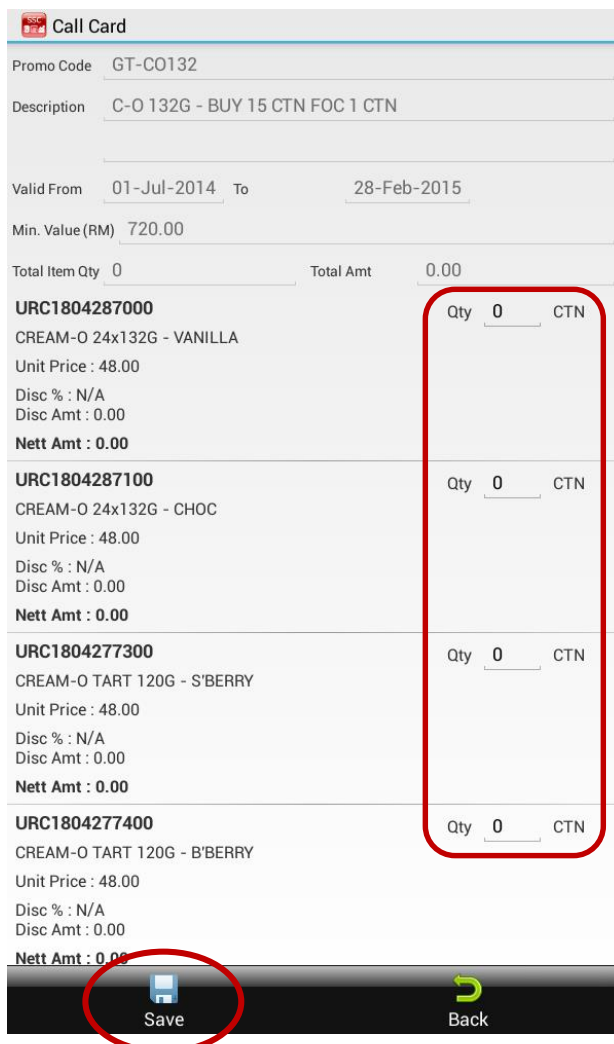
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10. **PROMO** page display the list of promotion available for the customer.




11. **Click** to open a promotion.

12. The details of Promotion will be shown.



13. Key in order quantity.

14. Then, click **SAVE**  to save the promotion order.



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

The screenshot shows a navigation bar with tabs: ADER, NPD, PROMO, MUST SELL (highlighted with a red circle), BALANCE, ORDER, and PREVIEW. Below the navigation bar, there is a list of three items:

1) URC1814317600 MAGIC TWIN (POLY BAG) - BUTTER.CREAM
2) URC1814317100 MAGIC TWIN (POLY BAG) - CHOC.CREAM
3) URC1814317300 MAGIC TWIN (POLY BAG) - S'BERRY

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

**SEARCH** item by product keyword  
or product code, then click

The screenshot shows the BALANCE page with a navigation bar containing NPD, PROMO, MUST SELL, BALANCE (highlighted with a red circle), ORDER, and PREVIEW. Below the navigation bar, there is a search bar and a dropdown menu set to 'All'. There are three filter fields: Group, Category, and Brand. Annotations include a red arrow pointing from the search bar to the 'SEARCH' text box, a red box around the search bar with a magnifying glass icon, a red box around the 'All' dropdown with an arrow labeled 'Click', and a red box around the filter fields with an arrow labeled 'Click'.

**Click** to filter item by  
Group/Category/Brand

The screenshot shows a dropdown menu with the following options:

Group	All - All
Category	All - All
Brand	All - All
URC1100	---
JuJ POTAT	---
15G - SALT	---
10x8sx15G	C2 - C2
	CANDY 25'S - C9 CANDY 25'S
URC1100	---
JuJ POTAT	---
3x20sx45G	CANDY RB - C9 CANDY REFILL BAG

Click to choose Filter type to display the item.

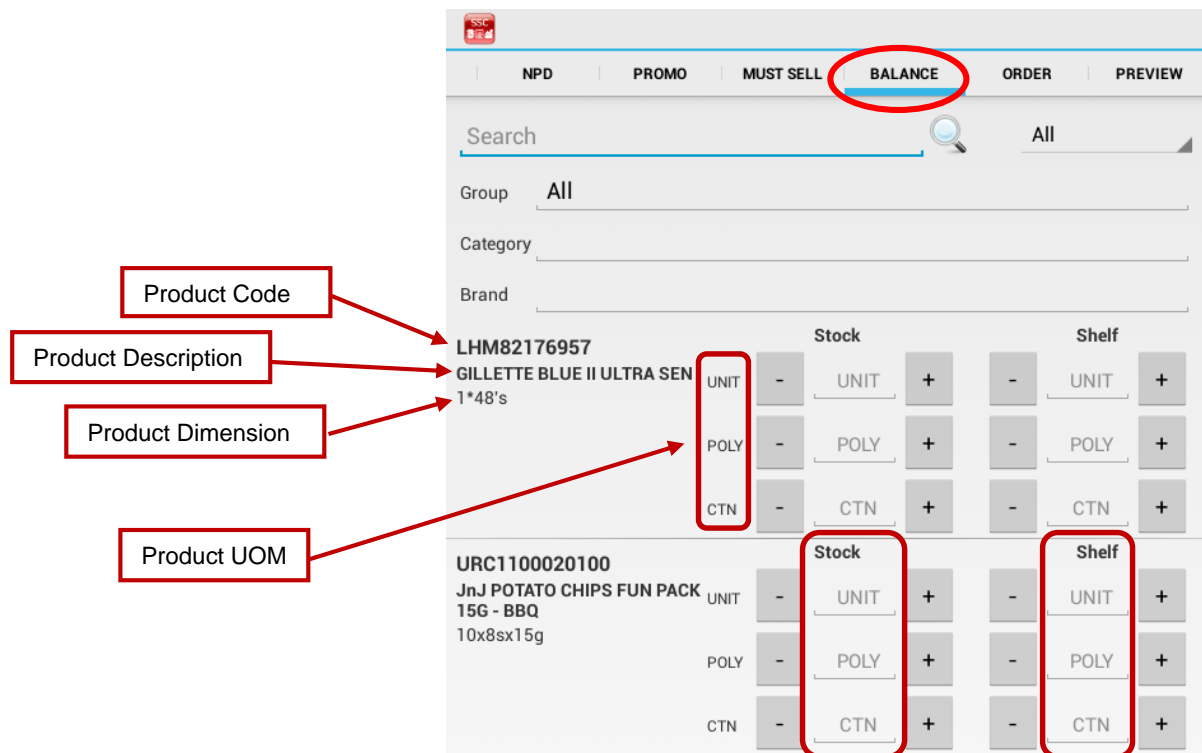
The screenshot shows a dropdown menu with the following options:

All
All
Filled
Empty
History

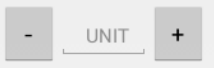
- 1) All – Display ALL items.
- 2) FILLED – Display already filled items.
- 3) EMPTY – Display not yet fill items.
- 4) HISTORY – Display last invoiced items.

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17. Key in the customer's stock balance at **STOCK** (Back-end store room) and at **SHELF** by UOM.

18. Use the - and +  button to enter quantity, OR



19. Use the keypad to key in quantity.

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20. **ORDER** page display the list of items.

21. Key in order quantity in this page.

The screenshot shows the 'ORDER' page with two items listed. The 'ORDER' tab is circled in red. The first item is URC1100020300, 'JnJ POTATO CHIPS FUN PACK 15G - SALSA', with a unit price of 40.00 and a balance of 5.30. The second item is URC1100050100, 'JnJ POTATO CHIPS 45G - BBQ', with a unit price of 27.20 / 81.60 and a balance of 4.15. The interface includes search filters for Group, Category, and Brand, and a 'Filled' status indicator. The 'FOC' (Free Offer Quantity) section is highlighted with a red box, showing a dropdown menu with options for POLY and CTN. The 'DISC %' (Discount Percentage) section is also highlighted, showing a table with 4 tiers.

**Unit Price**  
27.20 – unit price per POLY  
81.60 – unit price per CTN

**Customer's Stock Balance**  
The UOM of quantity shown is the smallest UOM display here.  
5.30 CTN  
4.15 POLY

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

**FOC**  
Key in FOC quantity and select the UOM.

FOC 1 POLY  
POLY  
CTN

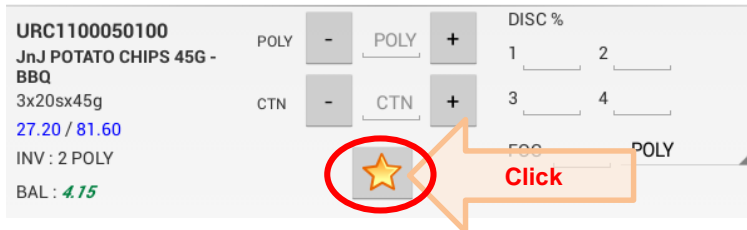
Click

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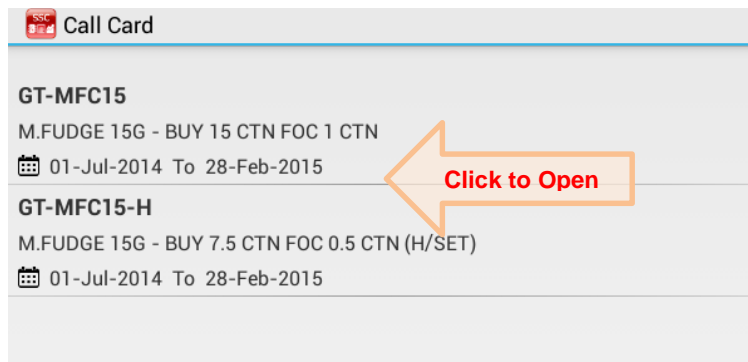
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## Promotion

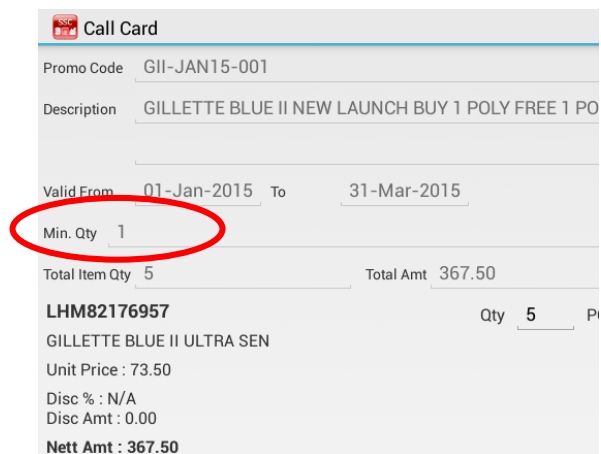
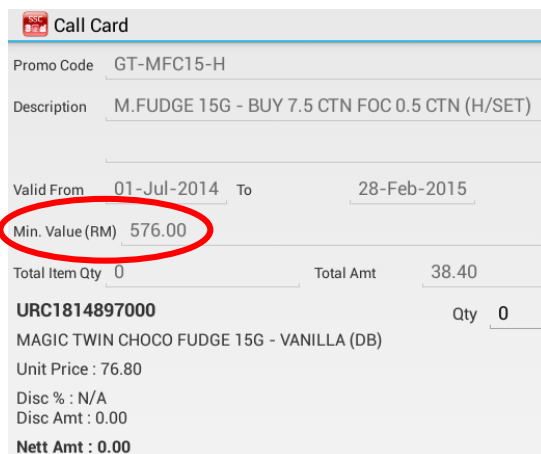
1. Star button for an item means there is promotion for that item.
2. Click Star button to show the item promotion page.



3. Click to select a promotion.



4. The details of promotion will be shown.



5. Take note of the Minimum Value or Minimum Quantity.

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**Call Card**

Promo Code: GT-MFC15

Description: M.FUDGE 15G - BUY 15 CTN FOC 1 CTN

Valid From: 01-Jul-2014 To: 28-Feb-2015

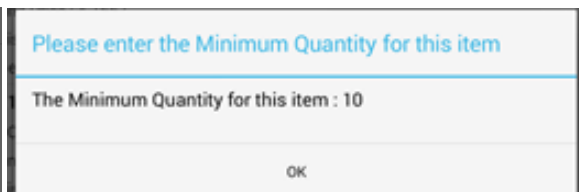
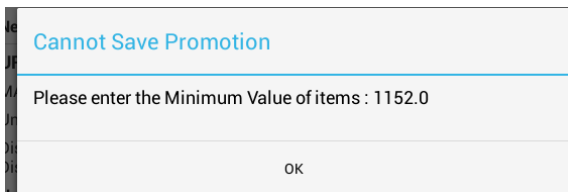
Min. Value (RM): 1152.00

Total Item Qty: 0 Total Amt: 921.60

**URC1814897000** Qty: 12 CTN  
MAGIC TWIN CHOCO FUDGE 15G - VANILLA (DB)  
Unit Price: 76.80  
Disc %: N/A  
Disc Amt: 0.00  
Nett Amt: 921.60

6. Enter the quantity.

7. Total amount will be calculated.



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

**Call Card**

Promo Code: GII-JAN15-001

Description: GILLETTE BLUE II NEW LAUNCH BUY 1 POLY FREE 1 POLY

Valid From: 01-Jan-2015 To: 31-Mar-2015

Min. Qty: 1

Total Item Qty: 5 Total Amt: 367.50

**LHM82176957** Qty: 5 POLY  
GILLETTE BLUE II ULTRA SEN  
Unit Price: 73.50  
Disc %: N/A  
Disc Amt: 0.00  
Nett Amt: 367.50

**LHM82176957** Qty: 5 POLY  
GILLETTE BLUE II ULTRA SEN  
Unit Price: 0.00  
Disc %: N/A  
Disc Amt: 0.00  
Nett Amt: 0.00

FOC item

Save Back

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

10. Click SAVE



to save the promotion.

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11. Promotion Saved will be tagged with a grey label.

GTMFC15 (1) x 15 CTN

Promo Code Set no. 1 Quantity Ordered

**URC1814897000**  
MAGIC TWIN CHOCO FUDGE  
15G - VANILLA (DB)  
16x20sx15g  
4.80 / 76.80  
INV : 2 OUTER  
BAL : *N/A*

OUTER  OUTER   
CTN  CTN

DISC %  
1  2   
3  4

FOC  OUTER

GT-MFC15 (1) x 15 CTN

## Promotion Choice Selection

**Call Card**

Promo Code: 0115-WS-PC60(6+1)-D8  
Description: PC60G - BUY 6 CTN FOC 1 CTN + 8%  
Valid From: 30-Dec-2014 To: 31-Jan-2015  
Min. Value (RM): 397.44  
Total Item Qty: 0 Total Amt: 0.00


**URC1100363800(6+1)** Qty: 0 CTN  
JnJ POTATO CHIPS 60G - SCO  
Unit Price: 72.00  
Disc %: 8.00  
Disc Amt: 0.00  
Nett Amt: 0.00

**Please choose 1 item(s).**

**URC1100360100(6+1)**  
JnJ POTATO CHIPS 60G - BBQ  
Unit Price: 72.00  
Disc %: 100.00  
Disc Amt: 72.00  
1 CTN  
Nett Amt: 0.00

**URC1100360300(6+1)**  
JnJ POTATO CHIPS 60G - SALSA  
Unit Price: 72.00  
Disc %: 100.00  
Disc Amt: 72.00  
1 CTN  
Nett Amt: 0.00

**URC1100360400(6+1)**  
JnJ POTATO CHIPS 60G - L.SALTED  
Unit Price: 72.00  
Disc %: 100.00  
Disc Amt: 72.00  
1 CTN  
Nett Amt: 0.00



1. Press on the BLUE section to choose items.

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Choose 1 items.

**URC1100360100(6+1)**  
JnJ POTATO CHIPS 60G - BBQ  
Qty 1 CTN  
Unit Price : 72.00  
Disc % : 100.00  
Disc Amt : 72.00  
Nett Amt : 0.00

**URC1100360300(6+1)**  
JnJ POTATO CHIPS 60G - SALSA  
Qty 1 CTN  
Unit Price : 72.00  
Disc % : 100.00  
Disc Amt : 72.00  
Nett Amt : 0.00

**URC1100360400(6+1)**  
JnJ POTATO CHIPS 60G - L.SALTED  
Qty 1 CTN  
Unit Price : 72.00  
Disc % : 100.00  
Disc Amt : 72.00  
Nett Amt : 0.00

**URC1100363600(6+1)**  
JnJ POTATO CHIPS 60G - PASLI  
Qty 1 CTN  
Unit Price : 72.00  
Disc % : 100.00  
Disc Amt : 72.00  
Nett Amt : 0.00

**URC1100363800(6+1)**  
JnJ POTATO CHIPS 60G - SCO  
Qty 1 CTN  
Unit Price : 72.00  
Disc % : 100.00  
Disc Amt : 72.00  
Nett Amt : 0.00

Save Back

2. Click on Check Box to select item.

3. Click SAVE



**URC1100363800(6+1)** Qty 0 CTN  
JnJ POTATO CHIPS 60G - SCO  
Unit Price : 72.00  
Disc % : N/A  
Disc Amt : 0.00  
Nett Amt : 0.00

**Please choose 1 item(s).**

**URC1100360300(6+1)**  
JnJ POTATO CHIPS 60G - SALSA  
Unit Price : 72.00  
Disc % : 100.00  
Disc Amt : 72.00  
1 CTN  
Nett Amt : 0.00

4. GREEN section will display the items selected.

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## Edit or Delete Promotion

1. Click on the grey label to open promotion.

URC1814897000  
MAGIC TWIN CHOCO FUDGE  
15G - VANILLA (DB)  
16x20sx15g  
4.80 / 76.80  
INV : 2 OUTER  
BAL : *N/A*

OUTER  
CTN

DISC %  
1 2  
3 4

FOC  
OUTER

GT-MFC15 (1) x 15 CTN

Click to Open

Call Card

Promo Code GT-MFC15

Description M.FUDGE 15G - BUY 15 CTN FOC 1 CTN

Valid From 01-Jul-2014 To 28-Feb-2015

Min. Value (RM) 1152.00

Total Item Qty 0 Total Amt 1152.00

**URC1814897000** Qty 15 CTN  
MAGIC TWIN CHOCO FUDGE 15G - VANILLA (DB)  
Unit Price : 76.80  
Disc % : N/A  
Disc Amt : 0.00  
**Nett Amt : 1152.00**

**URC1814897000** Qty 1 CTN  
MAGIC TWIN CHOCO FUDGE 15G - VANILLA (DB)  
Unit Price : 76.80  
Disc % : 100.00  
Disc Amt : 76.80  
**Nett Amt : 0.00**

2. Edit the promotion.
3. Press SAVE once edit done.
4. To delete the promotion, press DELETE.

Save Delete Back



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The screenshot shows a mobile application interface for a 'Call Card'. The form contains the following information:

- Promo Code: GT-MFC15
- Description: M.FUDGE 15G - BUY 15 CTN FOC 1 CTN
- Valid From: 01-Jul-2014 To: 28-Feb-2015
- Min. Value (RM): 1152.00
- Total Item Qty: 0 Total Amt: 1152.00
- Item: URC1814897000 Qty: 15 CTN
- Item Description: MAGIC TWIN CHOCO FUDGE 15G - VANILLA (DB)
- Unit Price: 76.80
- Disc %: N/A
- Disc Amt: 0.00







A 'Delete' dialog box is overlaid on the form, asking: 'Are you sure you want to delete this promotion?'. The dialog has two buttons: 'No' and 'Yes'. At the bottom of the screen, there are three navigation icons: 'Save', 'Delete', and 'Back'.

5. A message will prompt.
6. Click Yes to confirm delete.
7. Click No to cancel delete.





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## Call Card Preview

NPD	PROMO	MUST SELL	BALANCE	ORDER	PREVIEW
<b>1) GII-JAN15-001</b>					
GILLETTE BLUE II NEW LAUNCH BUY 1 POLY FREE 1 POLY					
Order Qty : 1 Set 					
Nett Amt : MYR 367.50					
<b>2) GT-MFC15</b>					
M.FUDGE 15G - BUY 15 CTN FOC 1 CTN					
Order Qty : 1 Set 					
Nett Amt : MYR 1152.00					
<b>3) URC1100360400(6+1)</b>					
JnJ POTATO CHIPS 60G - L.SALTED					
Order Qty : 2 POLY x 24.00 / 2 CTN x 72.00					
Disc % : 2.00 					
Disc Amt : MYR 3.84					
Nett Amt : MYR 188.16					
<b>4) URC1100360400(6+1)</b>					
JnJ POTATO CHIPS 60G - L.SALTED					
FOC : 1 POLY 					
<b>5) URC1814317300</b>					
MAGIC TWIN (POLY BAG) - S'BERRY					
Shelf Qty : 9 UNIT 1 PACK 					
Balance Qty : N/A					
<b>6) URC1100020300</b>					
JnJ POTATO CHIPS FUN PACK 15G - SALSA					
Shelf Qty : 3 POLY 1 CTN 					
Balance Qty : 4 CTN					

1. PREVIEW page display the entry Summary of order and stock balance.

-  Summary of Promotion ordered
-  Summary of Normal ordered
-  Summary of FOC item
-  Summary of customer's stock balance

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## Save Call Card

1. Return to **HEADER** page.


The screenshot shows the 'Save Call Card' screen in the Inverze mobile application. The 'HEADER' tab is highlighted with a red circle. The form contains the following fields:

- PO Code: P00900023
- Status: Confirmed
- Desc: Mobile Call Card Order
- Remark 1: Attn to Ms. Yeoh
- Remark 2: Call 012-9998877 before delivery to confirm time
- Customer: 30M0/142  
MULIA SUPERMARKET (M) SDN BHD
- Branch: NONE
- Area: Cheras
- Bill Term: 60 days
- Bill Due Date: Tue, Mar 24, 2015
- Currency: MYR Ringgit Malaysia

At the bottom of the form, there are the following fields:

- Total Amt: 1707.66
- Discount %: 1 3 2 1  
3 4
- Discount Amt: 67.79
- Tax Amt: 0.00
- Nett Amt: 1639.87

The 'Save' button is highlighted with a red box. The 'Back' button is also visible.

1. Enter footer discount percentage (%) up to 4 tiers (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 a product list with the following details for the first item:

- Product: LHM82176957 GILLETTE BLUE II ULTRA SEN 1\*48's
- Price: 1.53 / 73.50 / 1013.76
- Inventory: INV : 25147 UNIT
- Stock Balance: BAL : *N/A* ← 47
- Order Quantity History: ODR : 192 ← 480

The callout box displays:

BAL : *N/A* ← 47

ODR : 192 ← 480

Explanatory text boxes:

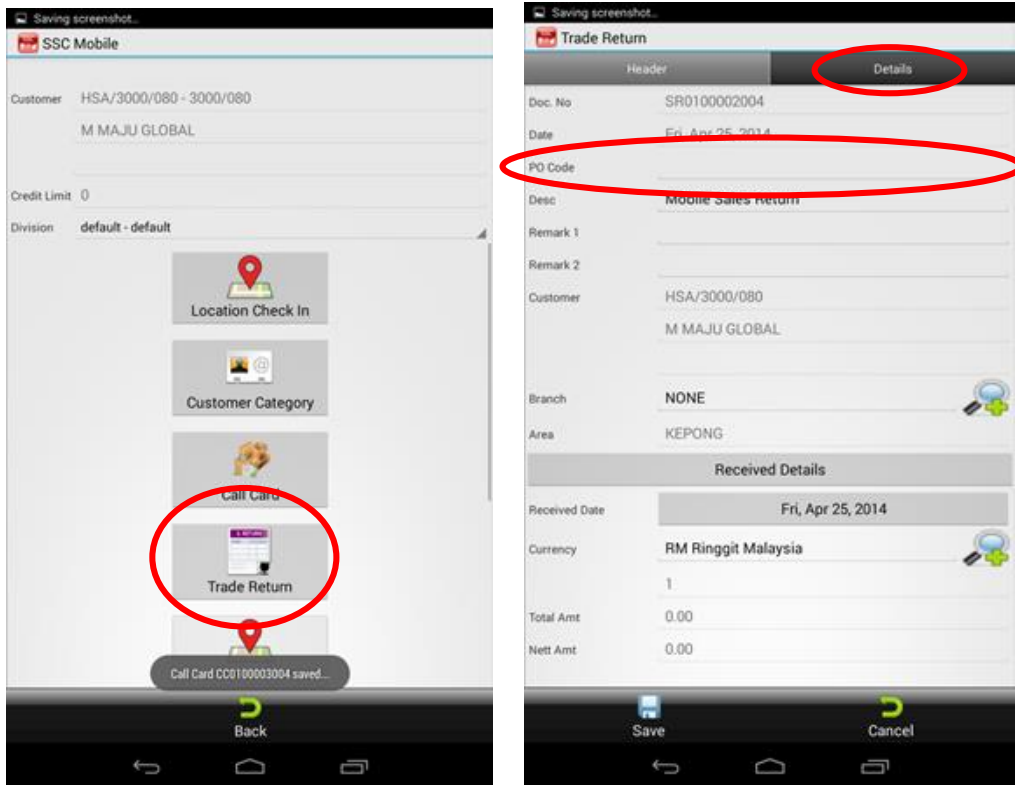
- Current stock balance that just filled in. (points to BAL)
- History stock balance, up to 4 times (points to ODR)
- History invoiced quantity, up to 4 times (points to ODR)

1. BAL is the customer's stock balance.
2. ODR is the order quantity history.

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## Trade Return

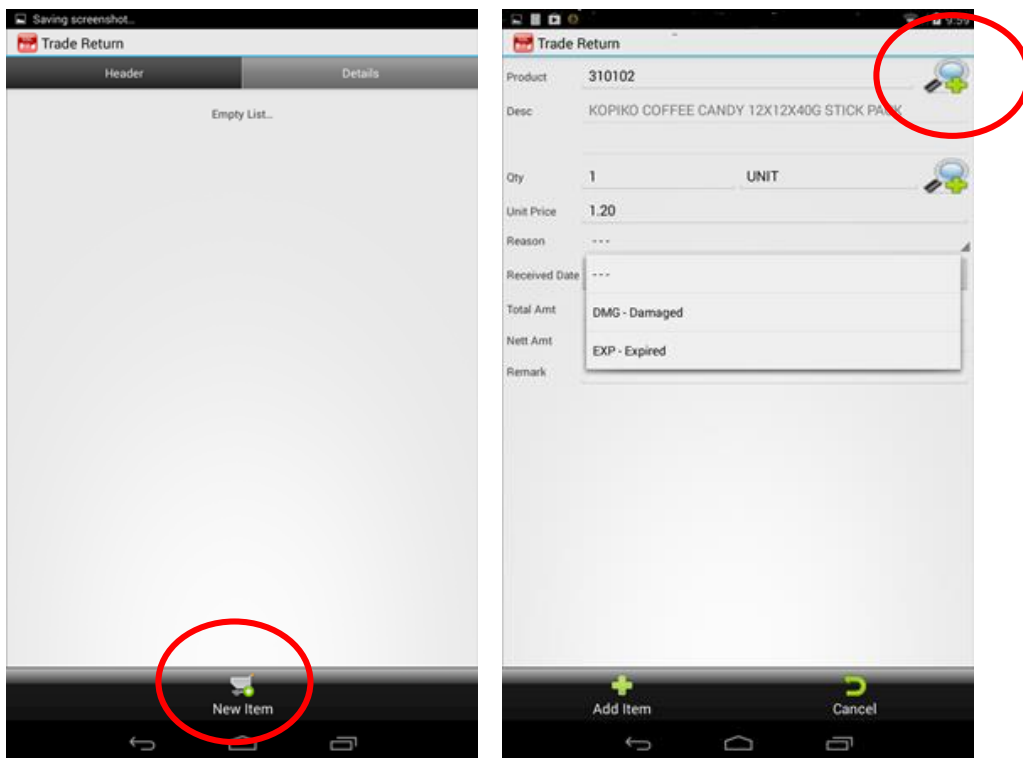


1. Press Trade Return button to key in Trade Return.
2. Enter the TRN number based on the number in the paperwork.
3. Press Detail to enter return items.

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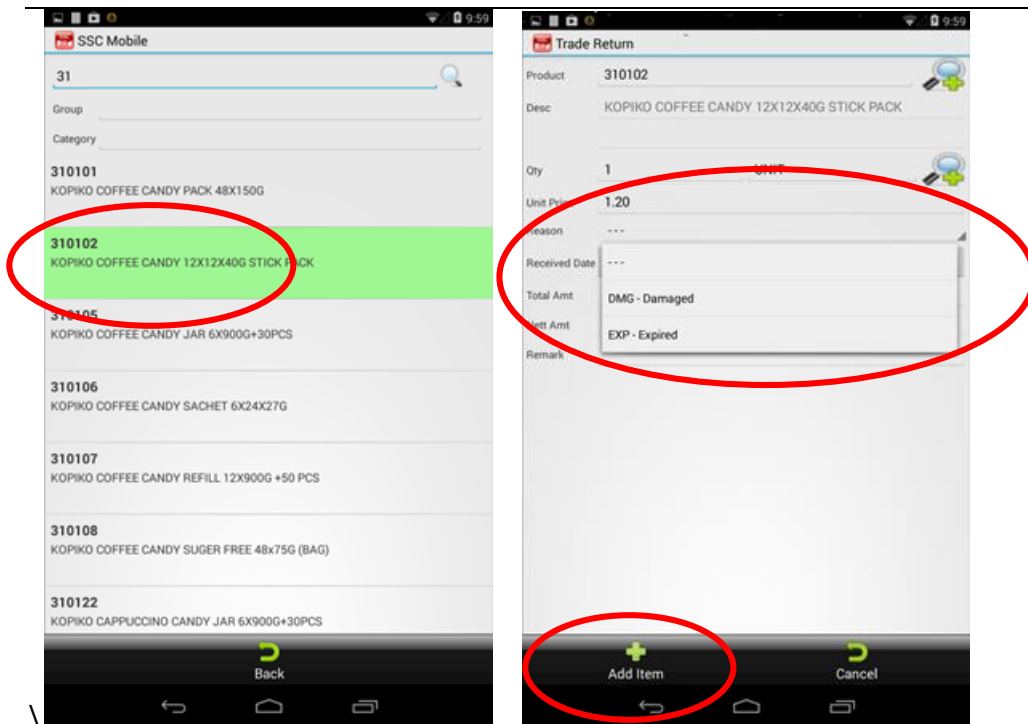
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4. Press New Item to select item.
5. Press icon to choose item.

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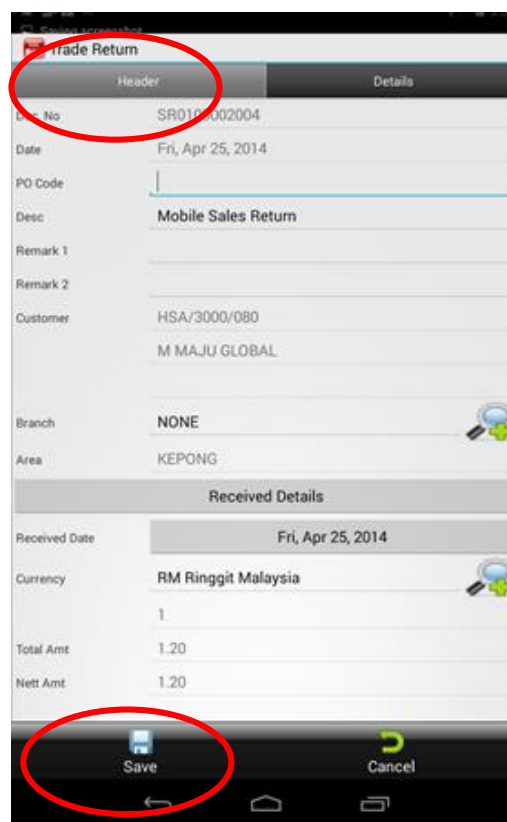
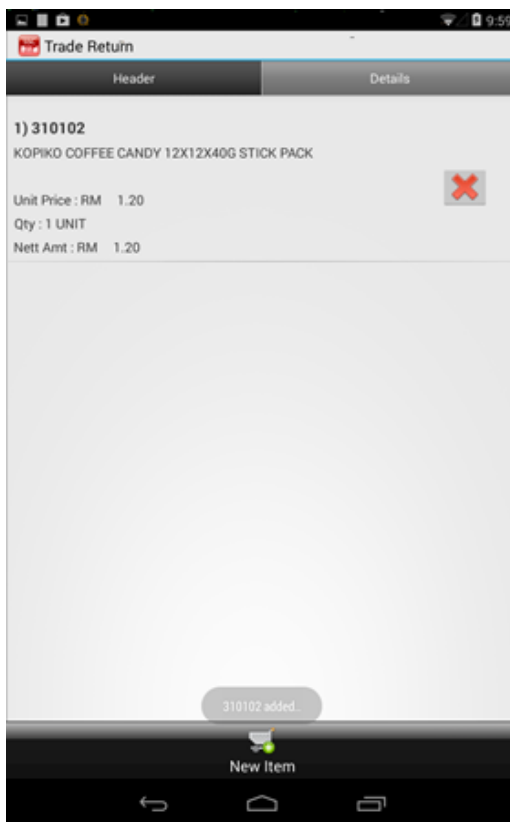


6. Press Item to select.
7. Select a return reason.
8. Press Add Item to add.
9. Press Cancel when done.

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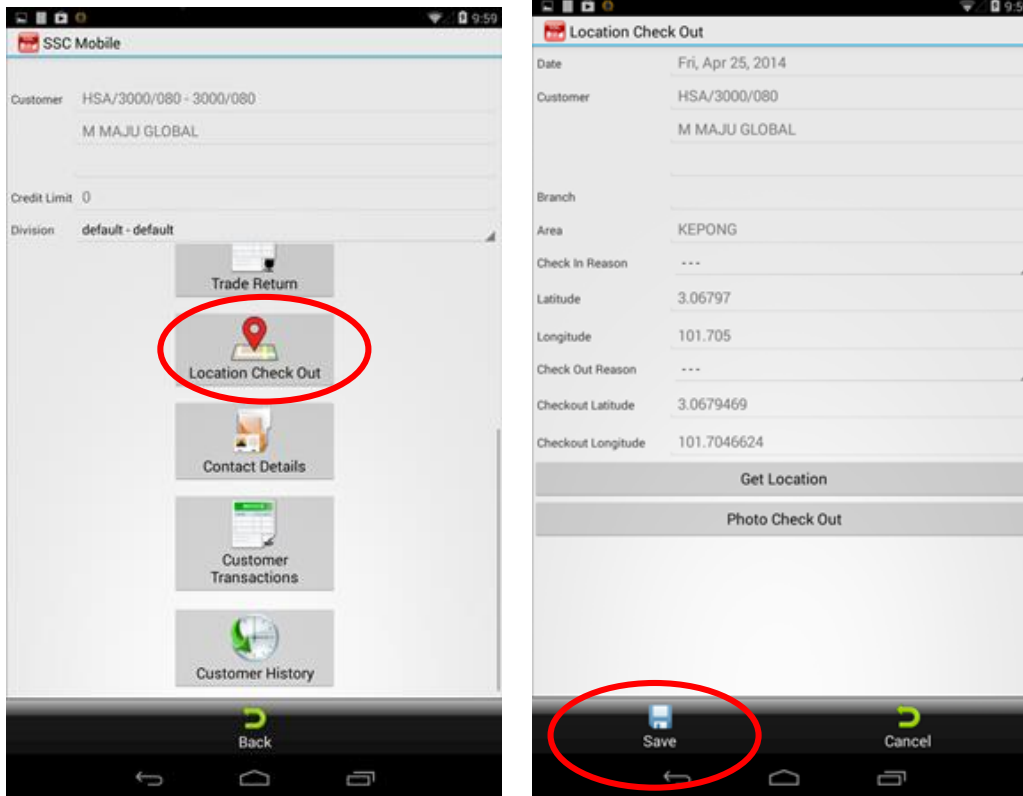
10. Check the return item list.
11. Press Header if all items are correct.
12. Check the total amount.
13. Press Save to save.



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## Location Check Out



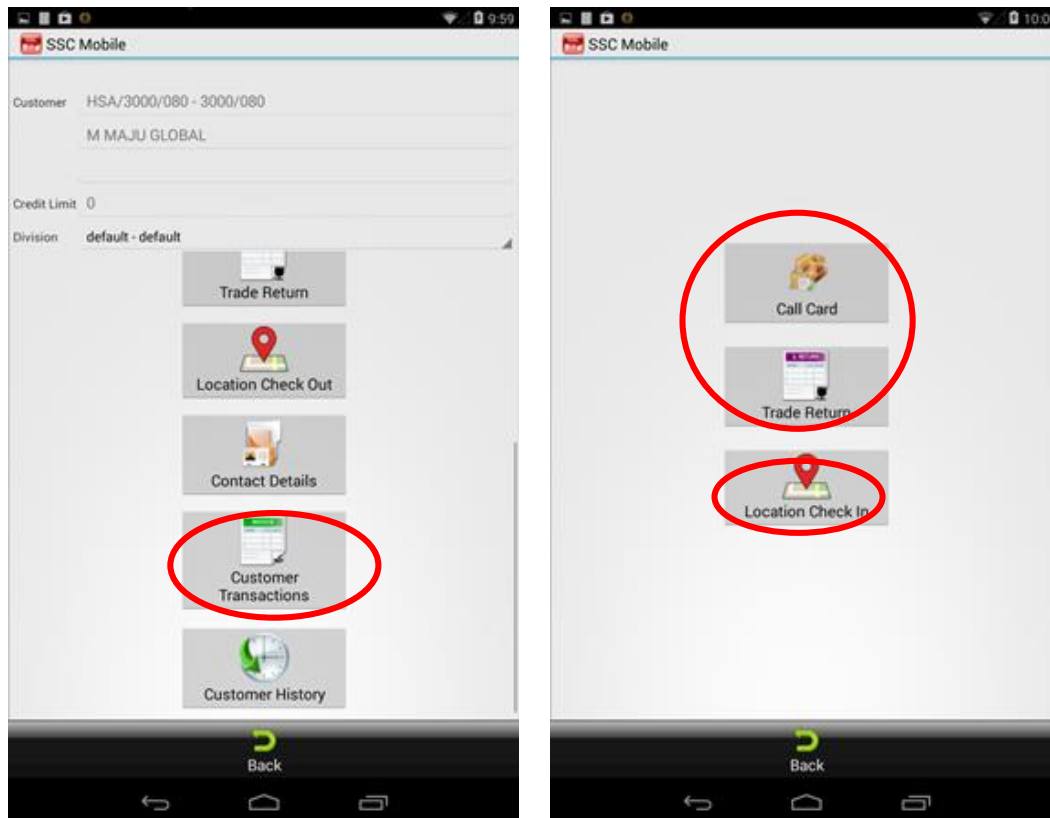
1. It will auto detect the GPS location.
2. Press Get Location if it did not auto detect.
3. Press Photo Check Out if GPS location is not available and take a picture.
4. Press Save once GPS or Photo is entered.

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## Edit Customer Call Card and Trade Return

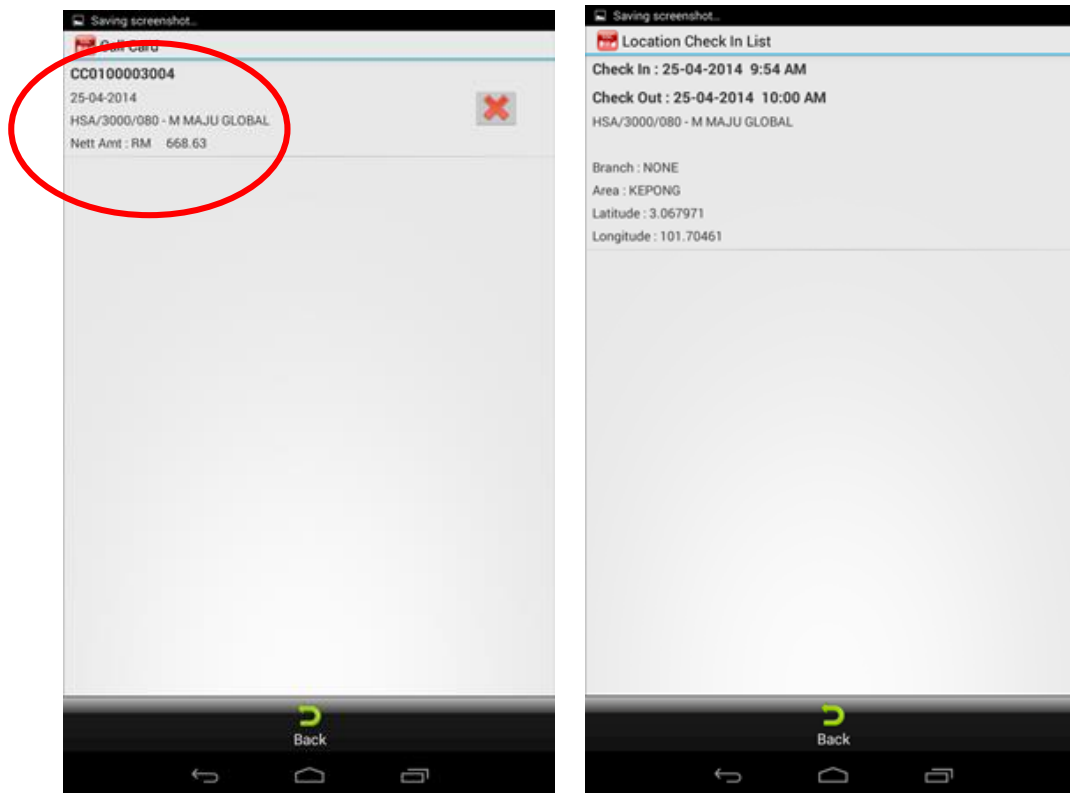


1. Press Customer Transactions.
2. Choose Call Card or Trade Return.
3. Press Location Check In to view all the location check in.

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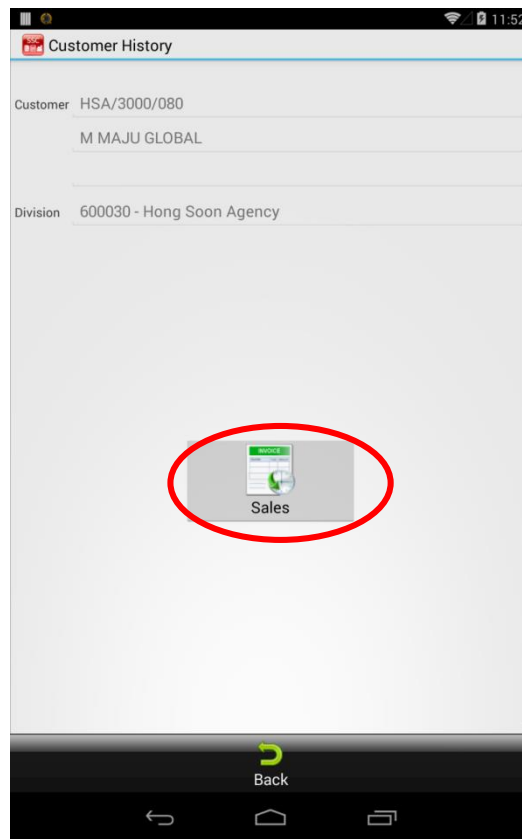
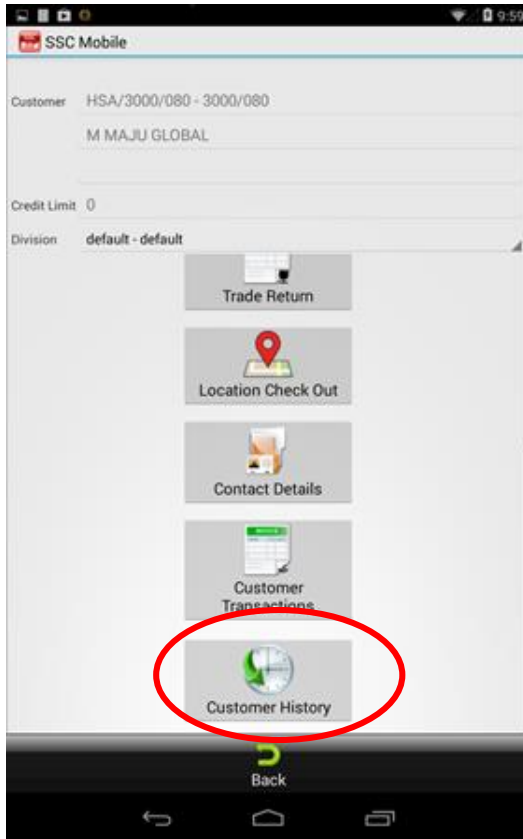


4. Choose a Call Card or Trade Return to edit.
5. Call Card or Trade Return screen will be displayed.

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## View Customer History



1. Press Customer History to view.
2. Choose Sales.

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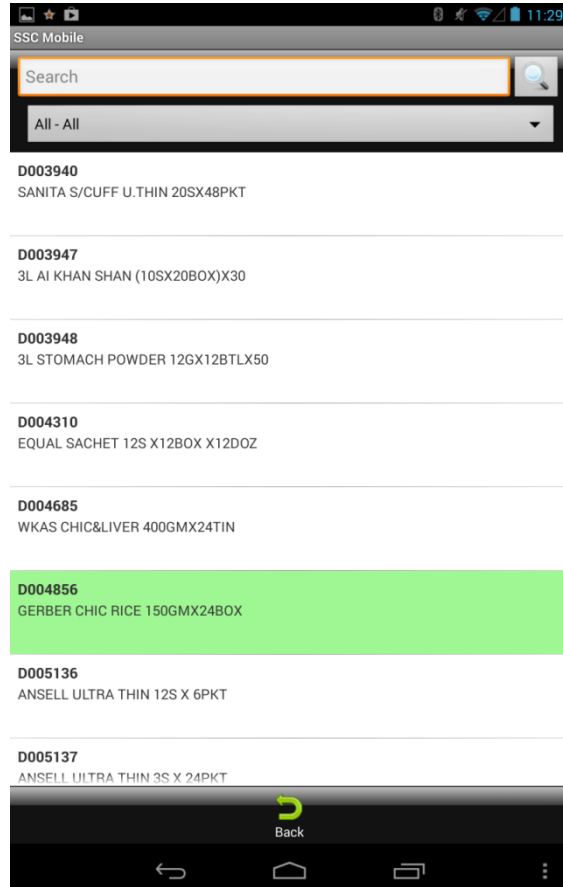
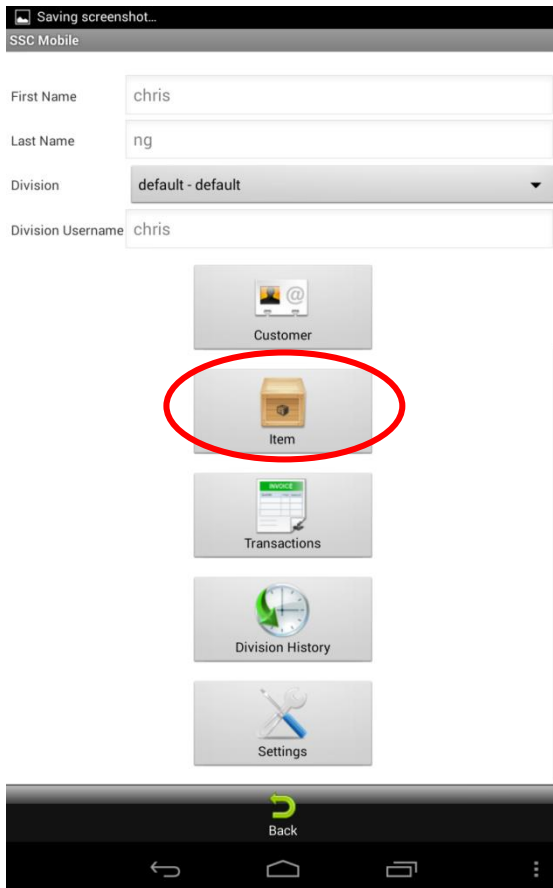
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3. Transactions can only be viewed. Cannot edit past transactions.

## View Item

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

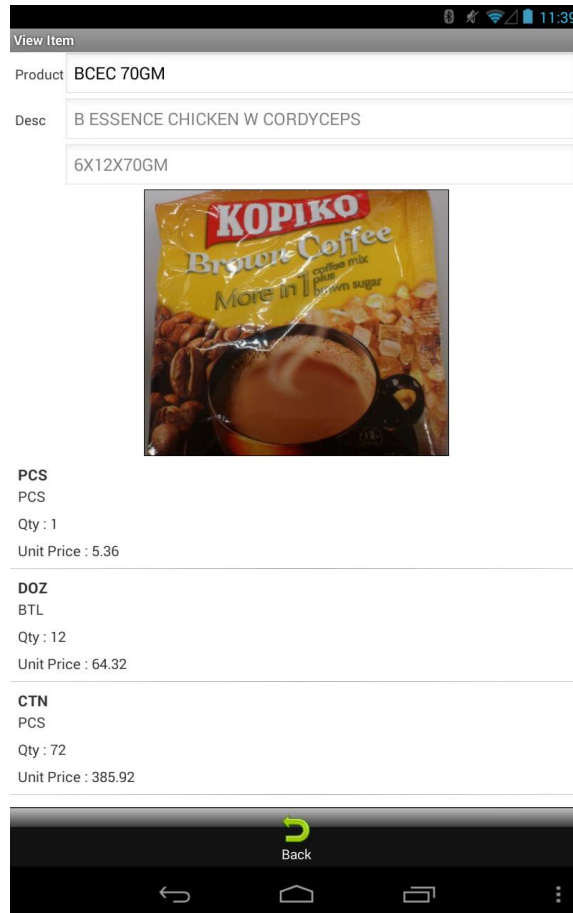


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4. Select an Item to display the Item Detail screen.

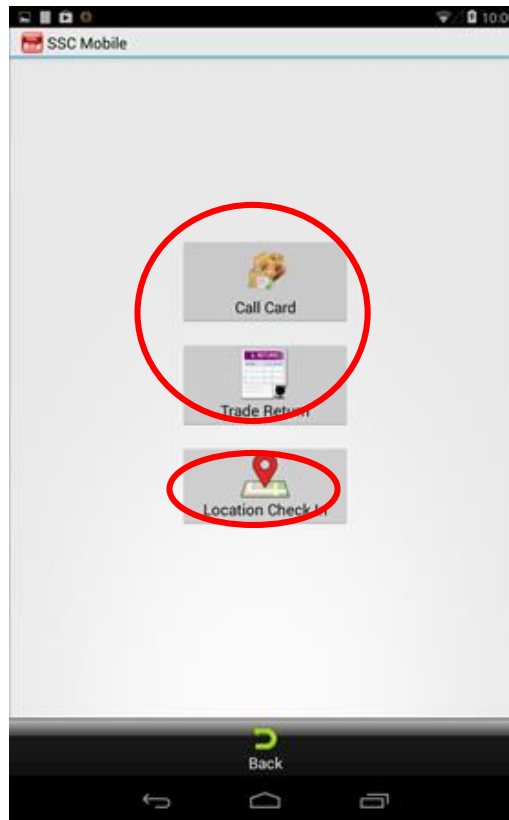
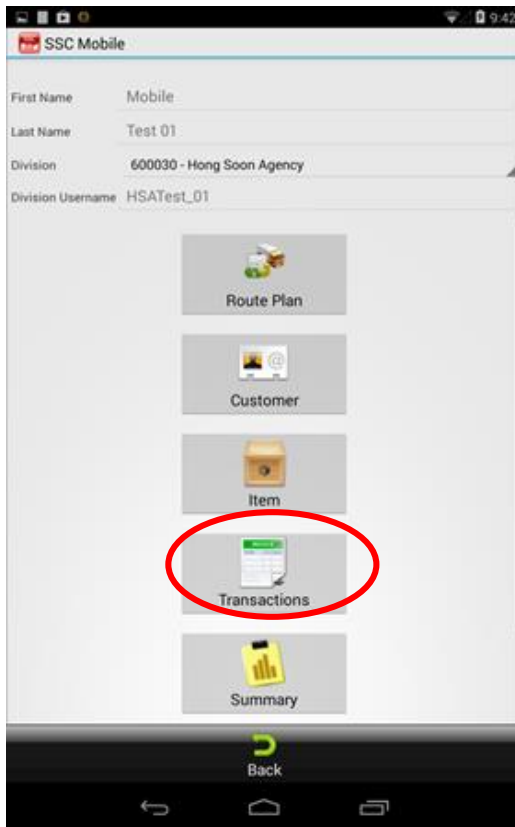


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## Edit Call Card and Trade Return



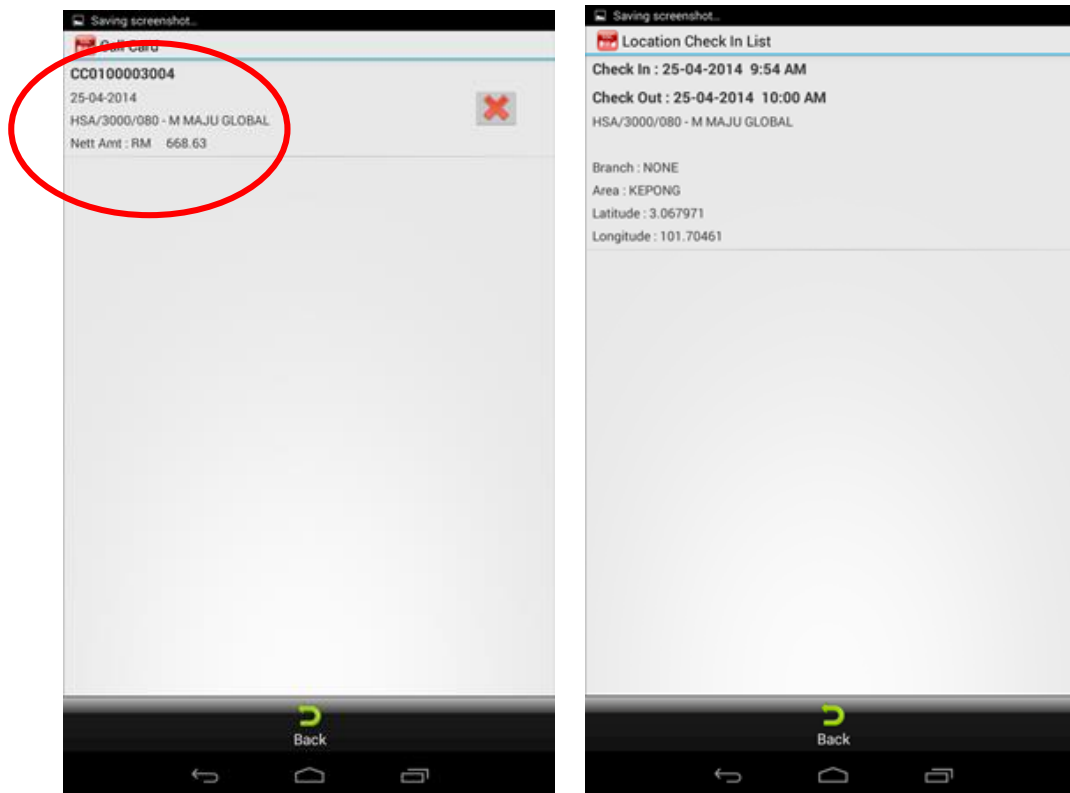
1. At Main Screen Press Transactions.
2. Choose Call Card or Trade Return.
3. Press Location Check In to view all the location check in.



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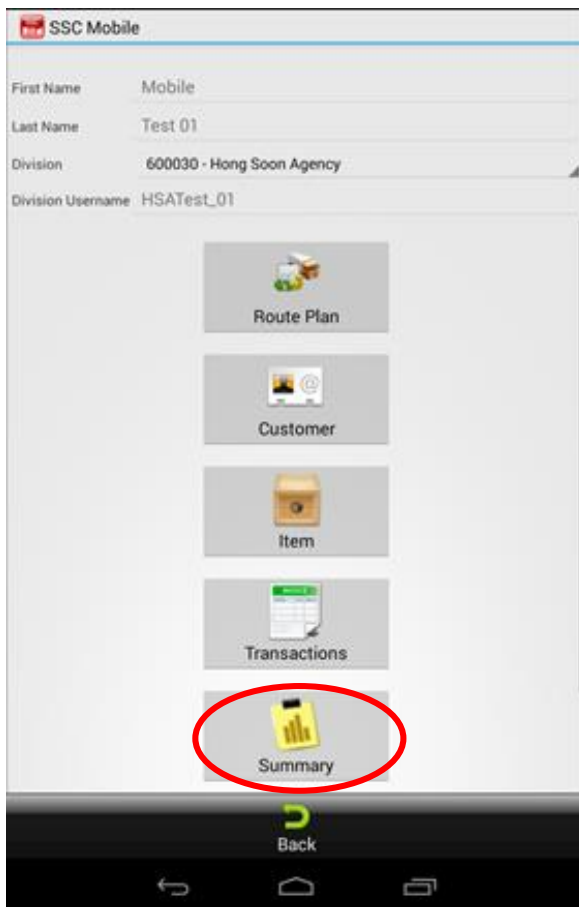


4. Choose a Call Card or Trade Return to edit.
5. Call Card or Trade Return screen will be displayed.

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## View Summary



Summary		
Call Card Order	Synced Call Card	Sales Return
<b>Sales Order</b>	<b>Total Amt</b>	<b>MYR 1639.87</b>
1) 30M0/142	MULIA SUPERMARKET (M) SDN BHD	MYR 1639.87

1. At Main Screen Press Summary.

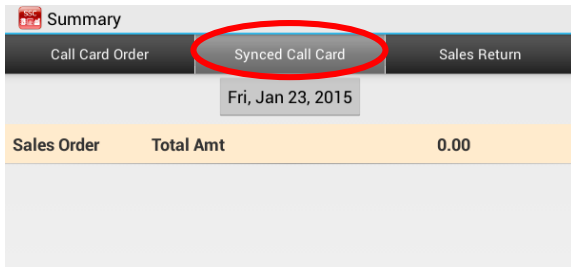
Summary		
Call Card Order	Synced Call Card	Sales Return
<b>Sales Order</b>	<b>Total Amt</b>	<b>MYR 1639.87</b>
1) 30M0/142	MULIA SUPERMARKET (M) SDN BHD	MYR 1639.87

Summary		
Call Card Order	Synced Call Card	Sales Return
<b>Sales Return</b>	<b>Total Amt</b>	<b>MYR 55.00</b>
1) 30M0/142	MULIA SUPERMARKET (M) SDN BHD	MYR 55.00

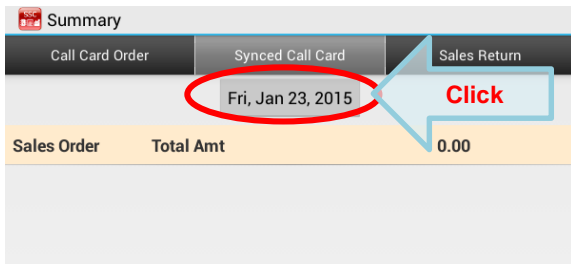
2. Choose Call Card Order or Sales Return.
3. It will display the total amount grouped by customer.

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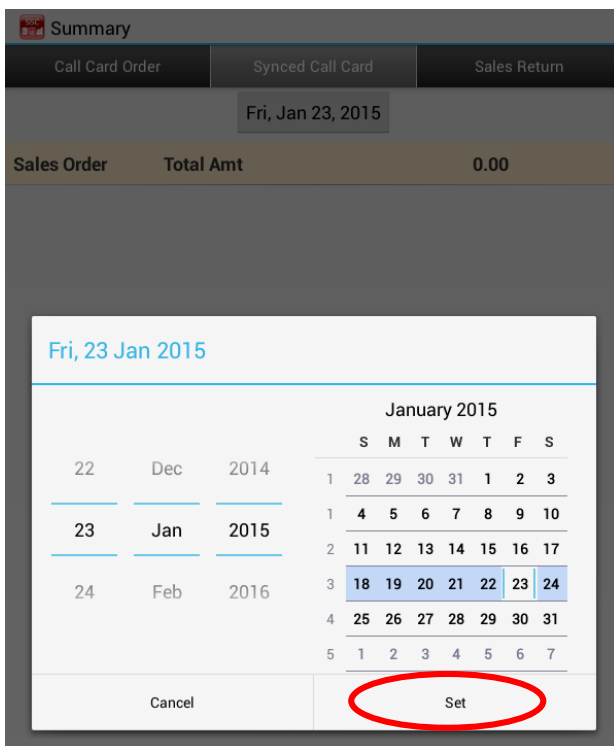
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4. Choose Synced Call Card to view the previous synced record for a specific day.



5. Click on the date.



6. Choose the date and click Set.

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

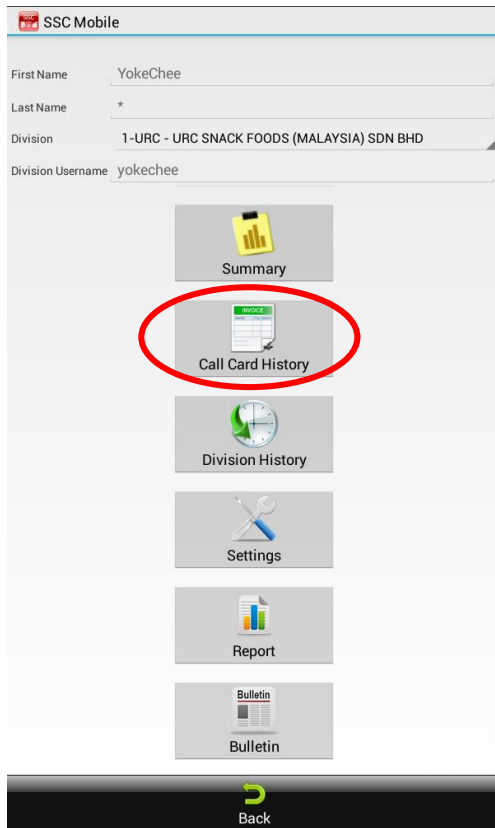
Summary		
Call Card Order	Synced Call Card	Sales Return
Wed, Jan 21, 2015		
<b>Sales Order</b>	<b>Total Amt</b>	<b>MYR 18055.10</b>
1) 30A0/011	A.O.ENTERPRISE	MYR 3175.06
2) 30A0/015	ABAH MAJU S/B	MYR 1369.50
3) 30A0/151	AWAL BESTARI SDN BHD	MYR 692.00
4) 30A0/169	AZZA RESOURCES ENTERPRISE	MYR 635.20
5) 30A0/183	AVS MART (A ONE MINI MARKET)	MYR 6991.50
6) 30B0/038	BASIC ACCORD S/B (6)	MYR 613.44
7) 30B0/166	BONUS AA ENTERPRISE	MYR 836.00
8) 30D0/092	DIANG RENDANG ENTERPRISE	MYR 1550.40
9) 30K0/014	PASAR MINI LEIN FONG	MYR 2192.00

  
Back

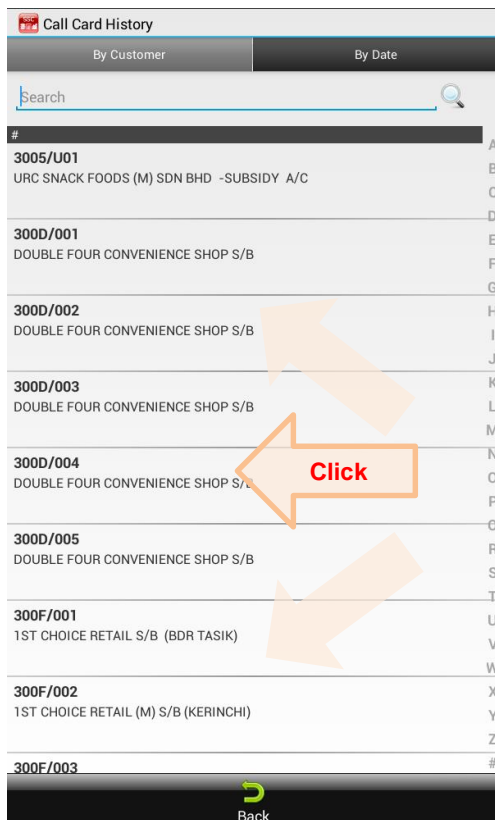
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## View Call Card History



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.

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Call Card History	
By Customer	By Date
Tue, Jan 20, 2015	
<b>CC0100006048</b>	
20-01-2015	
30B0/153 - BIG APPLE TRADING SDN. BHD.	
Nett Amt : MYR 804.00	
<b>CC0100007048</b>	
20-01-2015	
30C0/013 - CAHAYAJAYA ENTERPRISE (SHELL)	
Nett Amt : MYR 865.83	
<b>CC0100008048</b>	
20-01-2015	
30D0/073 - DYNASTY HOTEL KUALA LUMPUR	
Nett Amt : MYR 2041.49	
<b>CC0100009048</b>	
20-01-2015	
30K0/668 - KFS PETROMART (PETRONAS)	
Nett Amt : MYR 570.24	
<b>CC0100010048</b>	
20-01-2015	
30P0/577 - PASAR MINI HARAPAN BARU	
Nett Amt : MYR 372.48	
<b>CC0100011048</b>	
20-01-2015	
30P0/577 - PASAR MINI HARAPAN BARU	
Nett Amt : MYR 506.88	

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