Opmetrix Sales User Manual

Version 5.0 onwards

Oct 2016

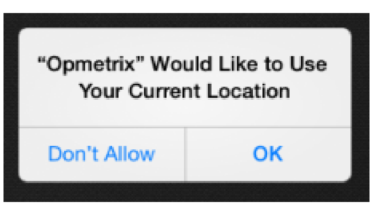
Start and Login

Locate the Home screen on your tablet with the Opmetrix icon and tap it to start.

Every user has their own username and password. This determines the functions available and filters to display an individual customer/store list.

Username and password is not case sensitive. You can use either upper or lower case.

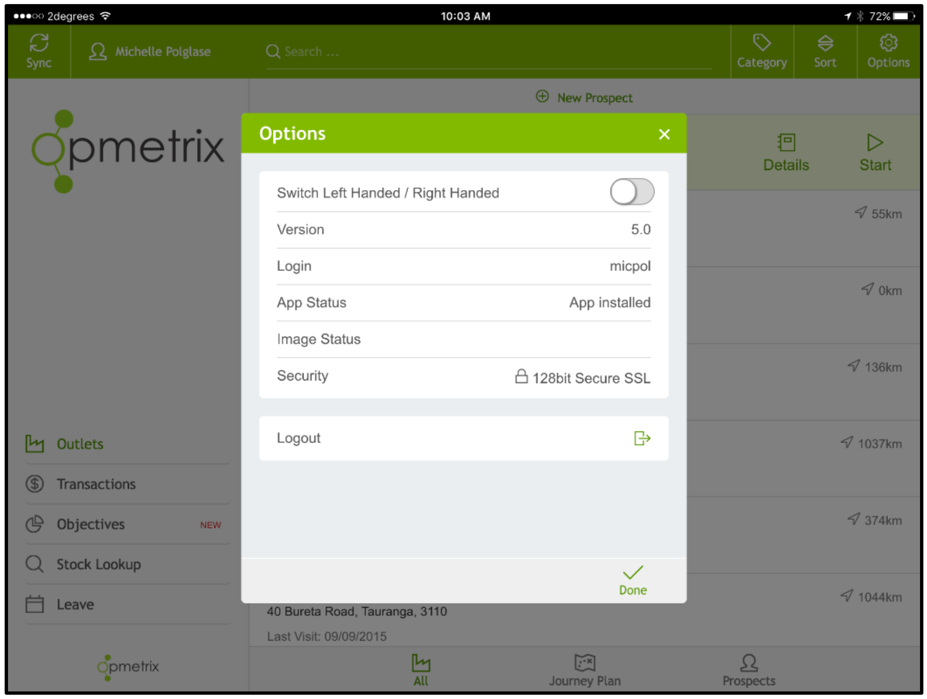
Login	Tap the **Server** field and use the tablet keyboard to enter your server address provided to you by head office. Tap on **Username** and **Password** fields to enter respective information. When complete tap **Login.**



Important: Initially pop-up messages regarding using your current location will appear. <u>Always</u> tap OK to confirm these types of messages. After two confirmations they will not re-appear.

Options Menu

After logging in, users have various options when tapping on the Options Menu.

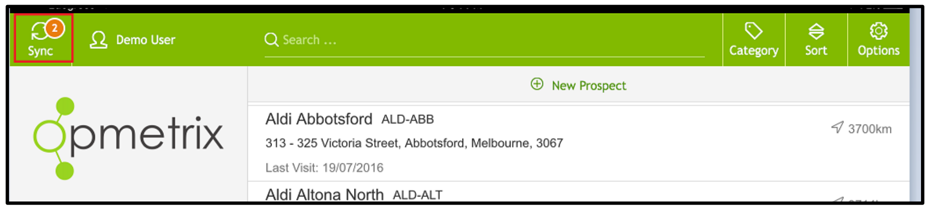


Swap right hand / left hand	Tap "Options" to switch from left to right handed.
Logout	Tap on **Logout** and the user is returned to the login screen. Note, a user can only be logged into Opmetrix on one device at a time. If users switch, for example between an iPad and using a laptop with the Opmetrix app, they must first log out of one device before logging into another.

Sync

We recommend that after every outlet/customer call, you complete a sync, or synchronisation. This is subject to being in good mobile coverage and being online with Opmetrix.

If you are offline all features are still available and it is important to sync when you are next in coverage. Note: you cannot log out of the system unless the system is online.



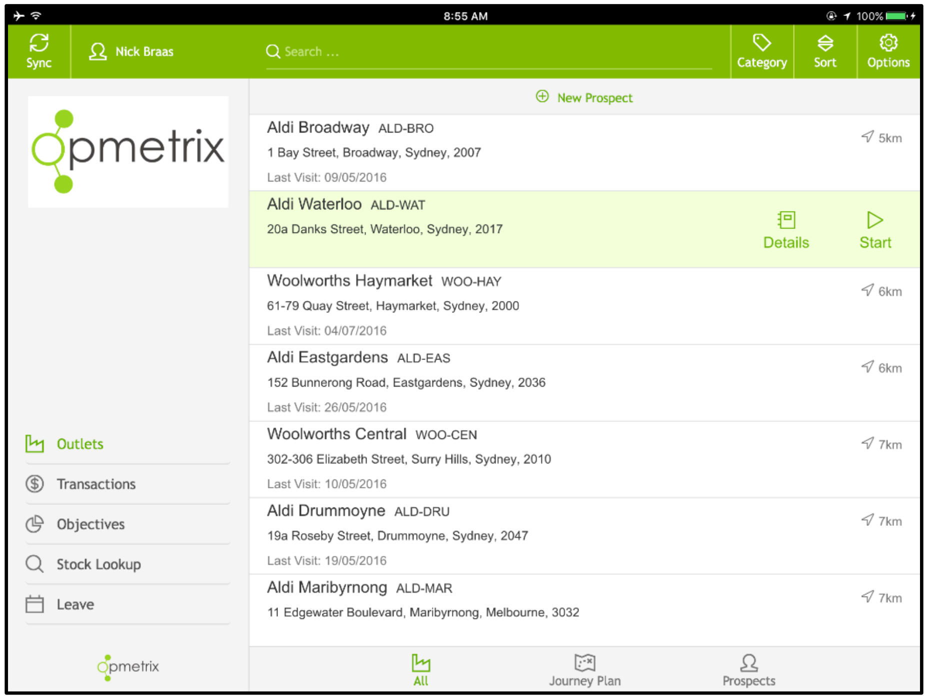
Sync fails: Data is not lost if a sync times out or fails. Continue to the next call and simply try again later.

Sync shows the number of transactions completed but not sent. These may consist of orders, calling cards, emails, photos or merchandising checks. Once a synchronisation is complete this number returns to zero.

Sync	Tap **Sync** at the top of your screen to initiate a data transfer. This sends new data to head office and updates your system with the latest customer and product information. A sync should take between 15 and 60 seconds, depending on coverage.

Customers & Journey Plans

The Store Select screen displays a list of outlets/customers. This list only displays the customers assigned to the login user.



Filter by column:

Tapping Category or Sort headers will bring up a popup option to filter your information.

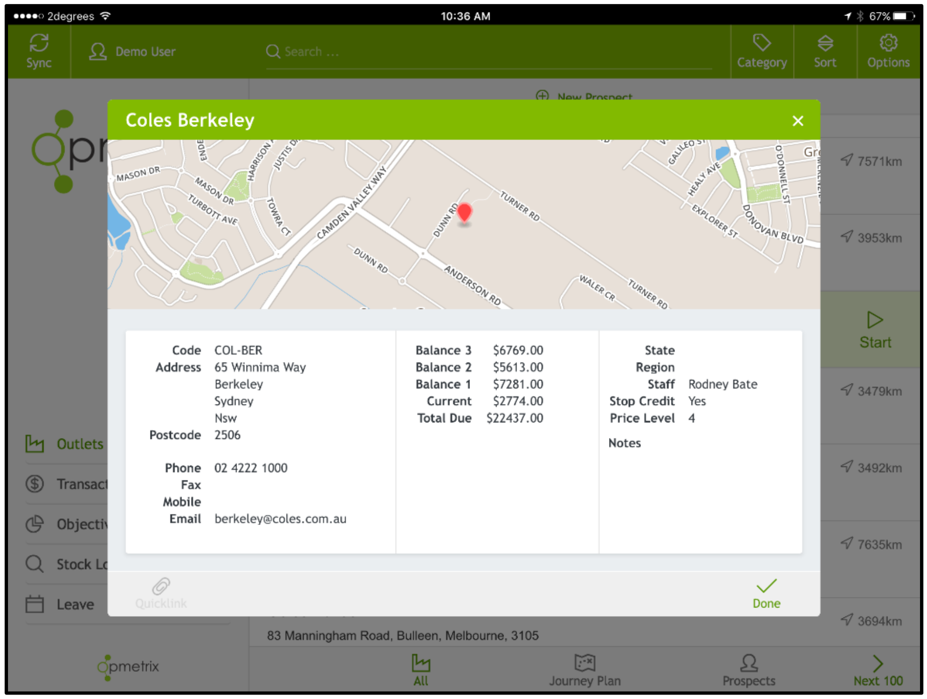
Tip:

Sort by Nearest (Km) to locate stores close to where you are currently located

Select an outlet	Scroll up and down the customer list, tap to select. The selected customer is then highlighted.
Search	Tap in the search box and enter in part of the customer code or name. The list filters to display on matching customers. Search can use **contains** (matches any part of the code or name) or **begins** (matches starting characters only).
Category Filter	Tap to select and filter by category.
Sort Filter	Tap to select and filter your information.

Outlets – Details

Once a store has been selected, tap Details to see further information regarding this customer.



Details	Displays customer details. Information shown will depend on your settings. Select **Done** to close.
Get directions	If online, tap the map to open the Maps application. This can be used to get directions from your current location to the customer. Return to Opmetrix by tapping the home button and selecting the Opmetrix icon.

Outlets – Journey Plan

Customer visits will be displayed if Journey Plan functionality is utilised. Select a date to see customer visits and the order (or time).

Journey Plan maintenance is a head office function and cannot be set on the tablet, however you can schedule a one-off appointment.

See future days:

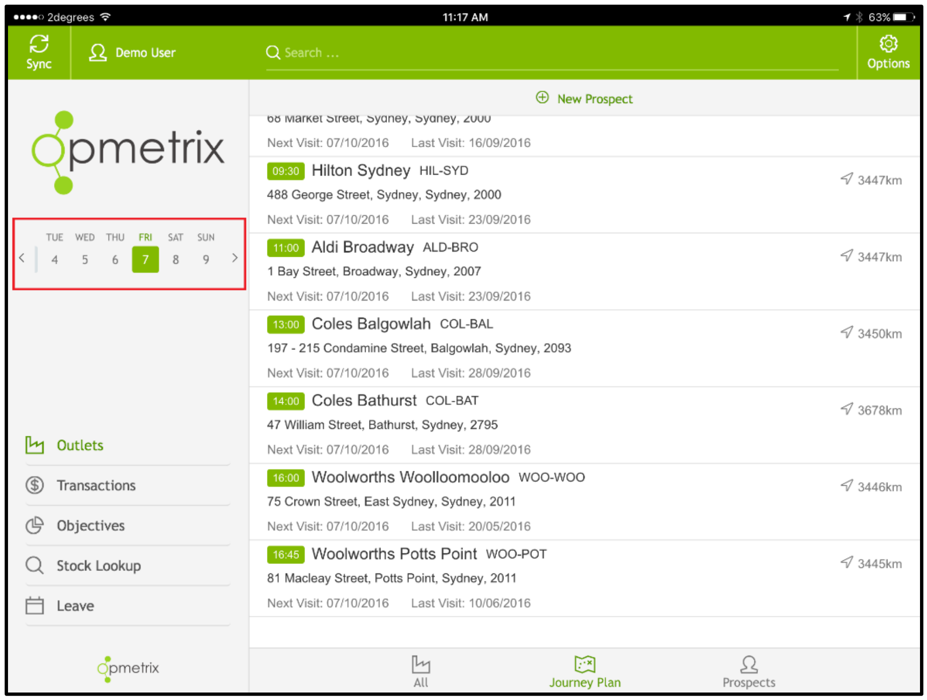
Opmetrix always has the next 14 days worth of appointments preloaded from today.

Tip:

You can still complete an unscheduled call. Select All and then select the customer you require.

All:

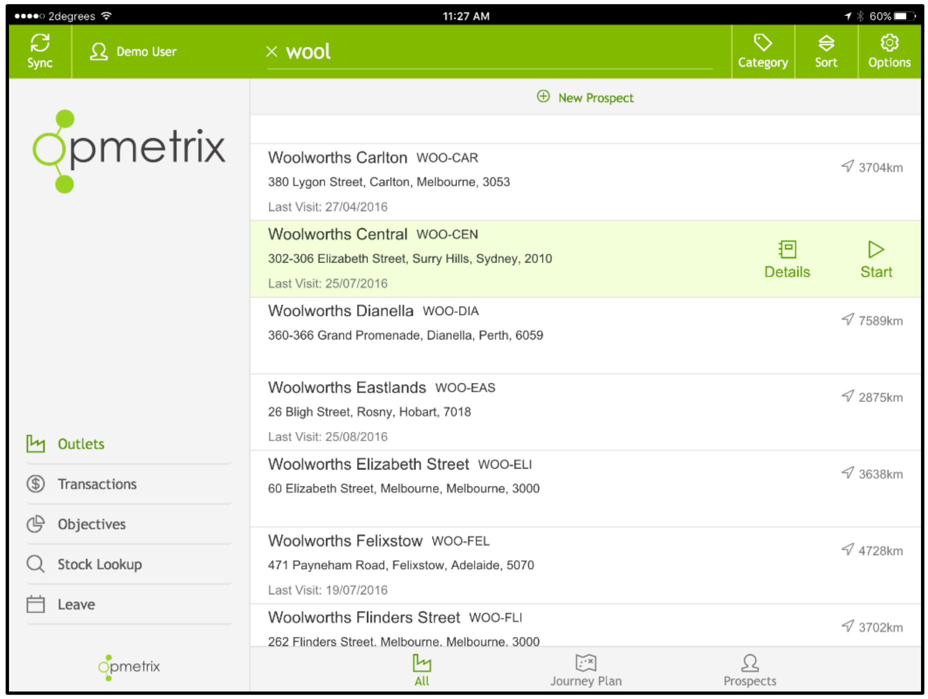
Change from Journey Plan to All to see all customers.



Calendar	System defaults to today's date. Slide and select a date to see another day's calls.
Completed	Once a call has been completed, the line is greyed out.

Store Call - Start a call

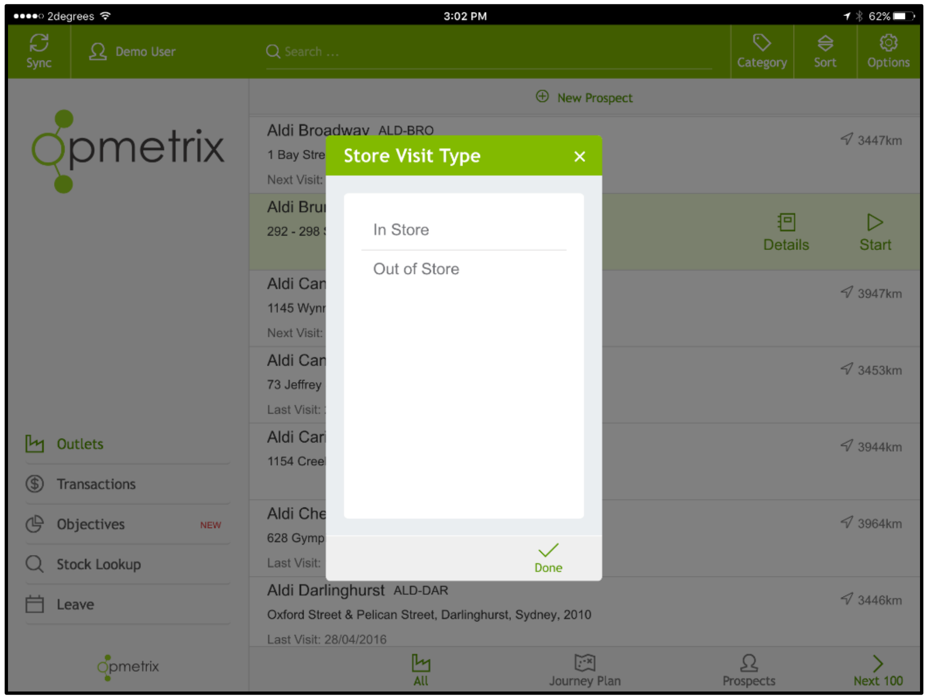
Once a store is selected (highlighted) tap Start to begin the call. This should be done when entering the store or in the car park as it records the start time of the call.



Select customer	Use the Journey Plan (if visible), Category filter or search methods to locate the store. Tap to select it.
Start	Tap **Start** to begin the call and record the start time.

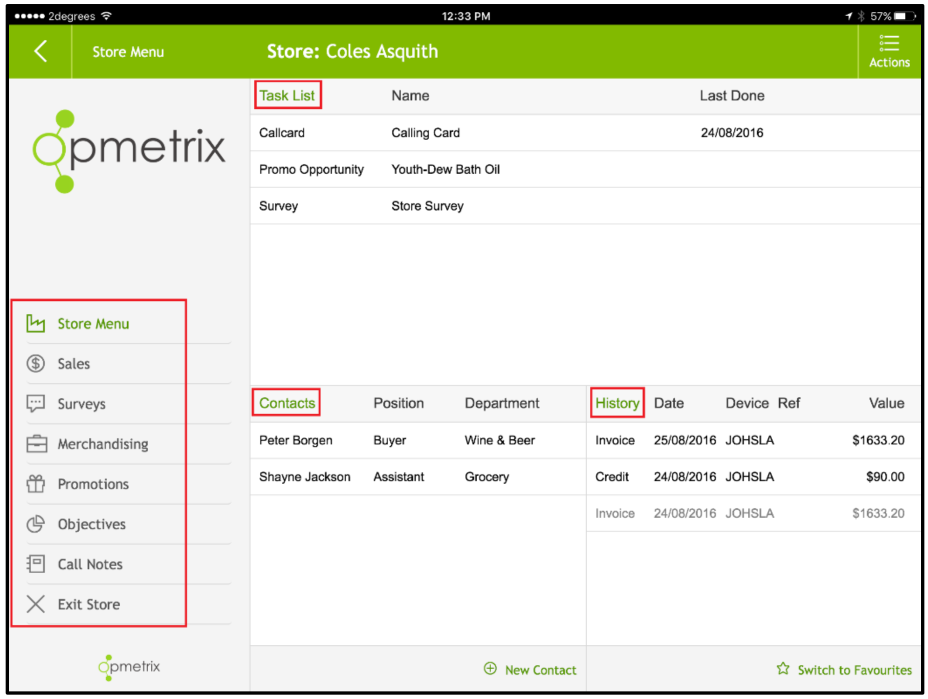
Store Call – Store Visit Type

Once a store is selected, options for users are displayed e.g. a sales rep may tap on Out of Store if they want to review previous call notes and sales.



Store Call – Store Menu Overview

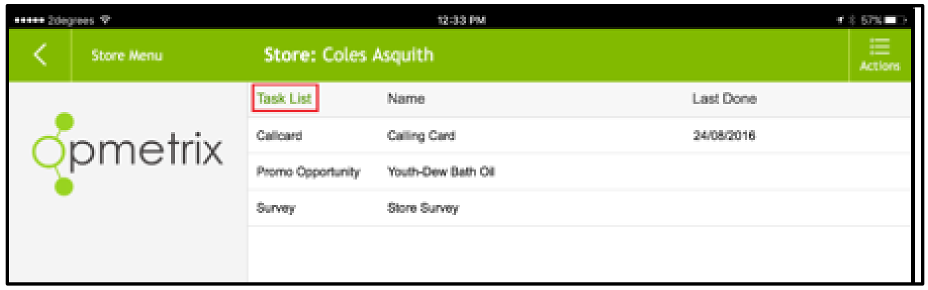
Once a call has been started, Opmetrix will display the store menu.



There are four key areas: Task List, Contacts, History and the Store Menu navigation buttons as shown.

Store Menu	Displays a list which is customisable and could include Sales, Surveys, Merchandising, Promotions, Objectives, Call Notes, along with the option to Exit Store.

Store Call – Task List, History

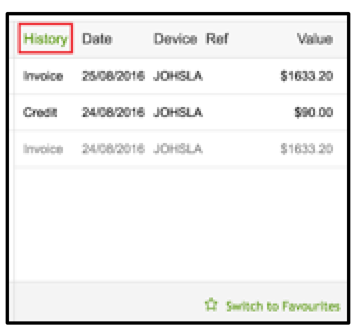


Task List

Displays a list of actions that should be completed for this store. The list is filtered to actions that are appropriate for the store selected.

Compulsory actions are highlighted. If you exit the store without completitng these, Opmetrix will prompt you to complete.

The **Calling Card** should be completed at least once per store visit. It can be used to record notes and excalate issues, including using photo capture.



History

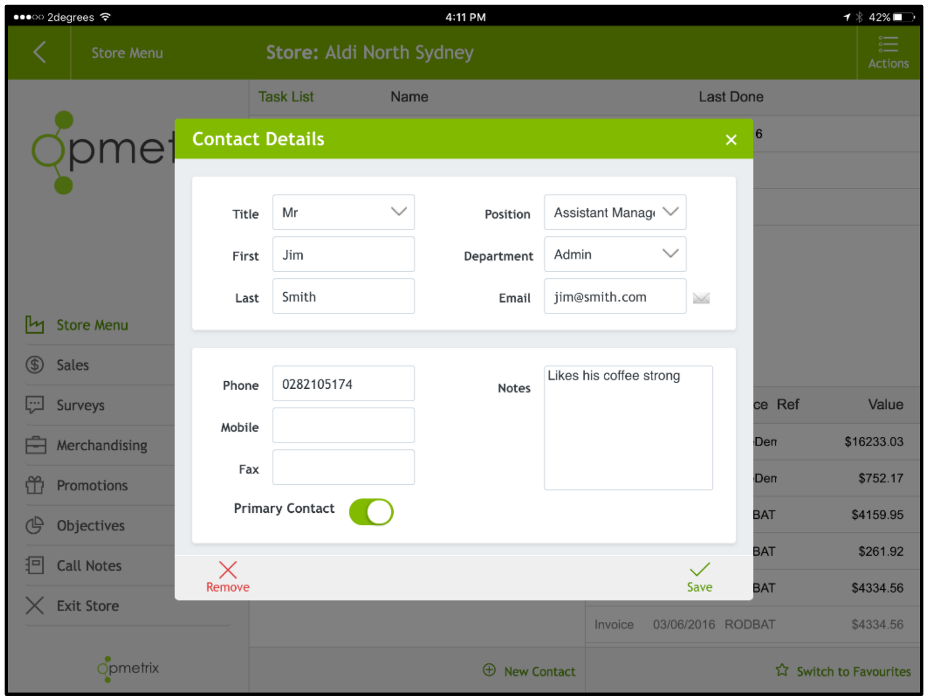
Previous orders, invoices and credits are displayed in the **History** list. Transactions can be viewed by tapping on them.

Contact - Details

Multiple contacts within a store can be added and maintained. Primary contacts can be tagged and highlighted in bold.

If a contact's email is included, a copy of a calling card or sales transaction can be sent to that person.

All contacts sync to the Opmetrix CMS system.

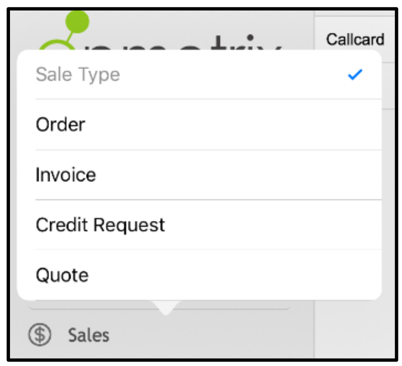


Add contact	Select **New Contact**. Enter data then **Save**.
Edit contact	Select the contact to edit then **Save** when completed.
Delete contact	Select contact then tap **Remove**.

Sales – Order, Invoice and Credit

Selct **Sales** from the Store Menu and a popup will appear.

Opmetrix can be configured to complete four types of transactions – order, invoice, credit and quote.



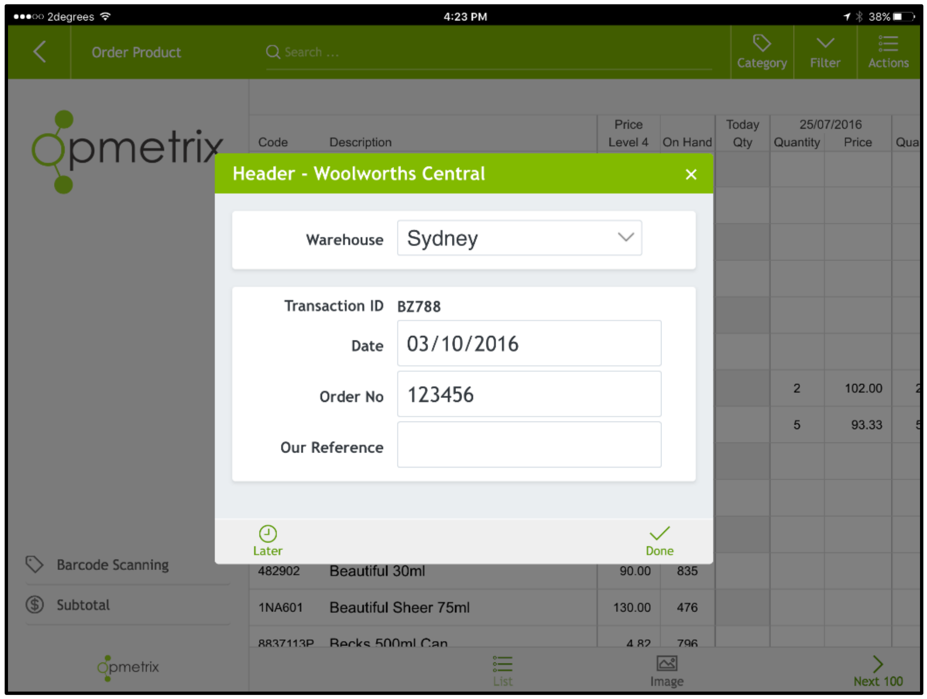
The process for these transactions is nearly identical.

To begin a sales transaction	Select **Sales** then select the transaction type required.

Sales - Header

The Sales **Header** selects the branch, delivery date, order number and optionally an order reference for this transaction.

Sometimes you may not know the order number until the end of the sale. In this situation select **Later** and the system will prompt again prior to finalising the sale.

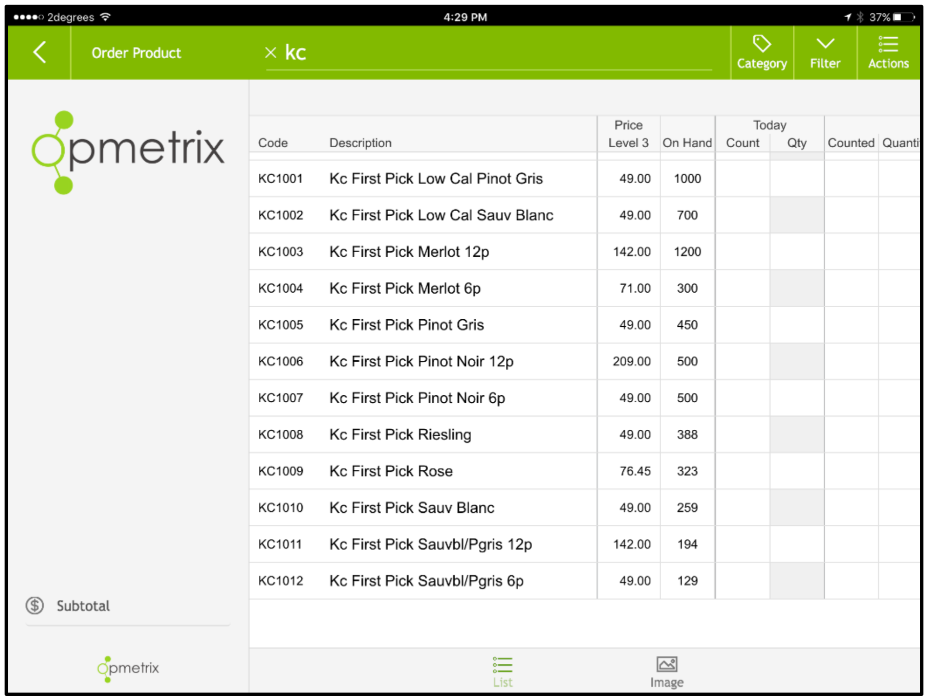


Branch	Select the branch (Warehouse) where stock should be supplied from (optional feature).
Date	The delivery or date for this transaction (can be forward dated.)
Order number	The customer's order number. If this is compulsory it will display ***Required***.
Our reference	Optional field.

Product Entry Overview

There are many ways to enter products on a sale. The fastest way is “Item List” (shown below). To record more detail such as price changes, discounts or promo stock tap an item’s description to display “Item Detail” where more options become available.

There is also a top search box to locate an item by its product code or part of the description (see next page).



To assist in the order process, Opmetrix also displays previous sales. Scrolling to the right displays the date, quantity and price previously ordered.

Product Search, Category, Sort and View

The Search, Category and Sort options are located at the top of your screen.

Toggle between **Search contains** and **Search starts with**

Use your customised **Category** and **Search** filter options at the top of your screen.

Change between **List** and **Image** view at the bottom of your screen.

Search Tap in the search box and using the iPad keyboard enter in part of the product code or

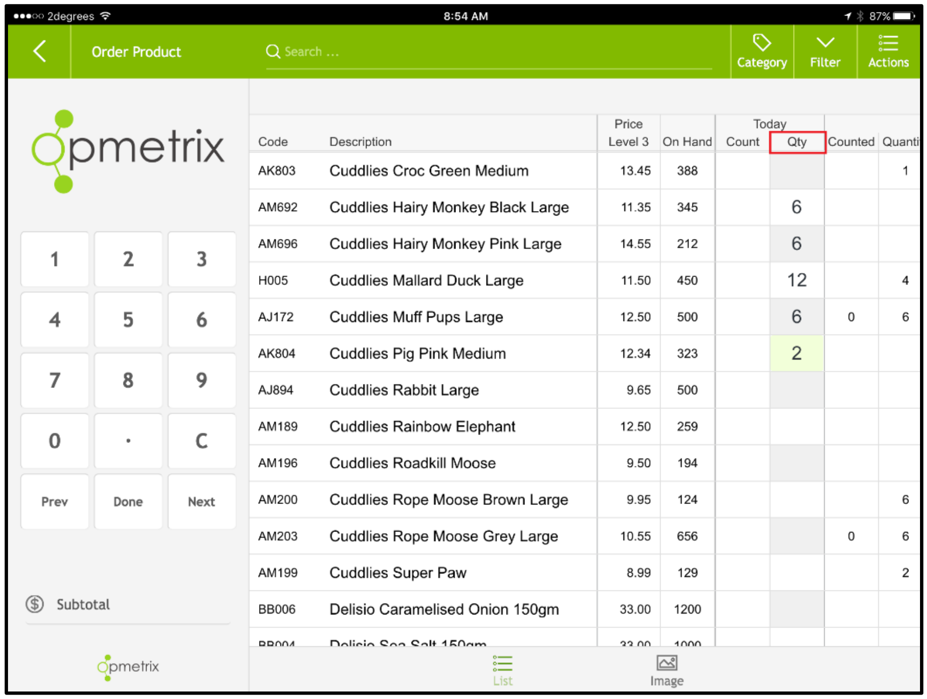
	description. The list filters to display on matching products. Search can be switched from **contains** (matches any part of the code or description) to **begins** (matches starting characters only).
Category	Tap **Category** to bring up a popup with Group or Vendor and select the required category. The list filters to items within that category. Select **ALL** in the filter boxes to display all items.
Sort	To see only previously purchased items, select this filter then tap "**Previously Sold Items**". Reset to ** **All** ** to display all items.
View	Tap on **List** to sell in list mode or **Image** to sell in catalogue mode.

Product Item - List Entry

To enter quantities in a transaction, tap in the **Today** - **Qty** column alongside the correct product. The keyboard then pops up enabling the quantity to be entered.

Tip

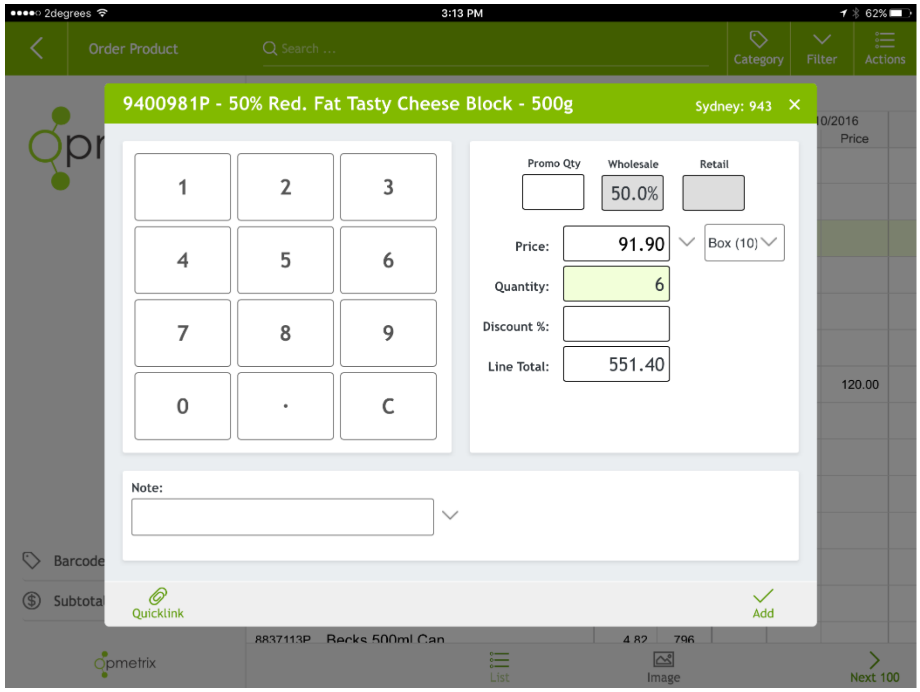
Use the Previous and Next buttons on the keypad to move up and down the column



Stock on Hand Values based on last sync are available by tapping in the On Hand column in list mode. If multiple stock locations are utilised a pop-up box as seen below appears. (Optional)

Product Item - Detail Entry

To enter additional data regarding a product, tap on the product description. The item details box appears.

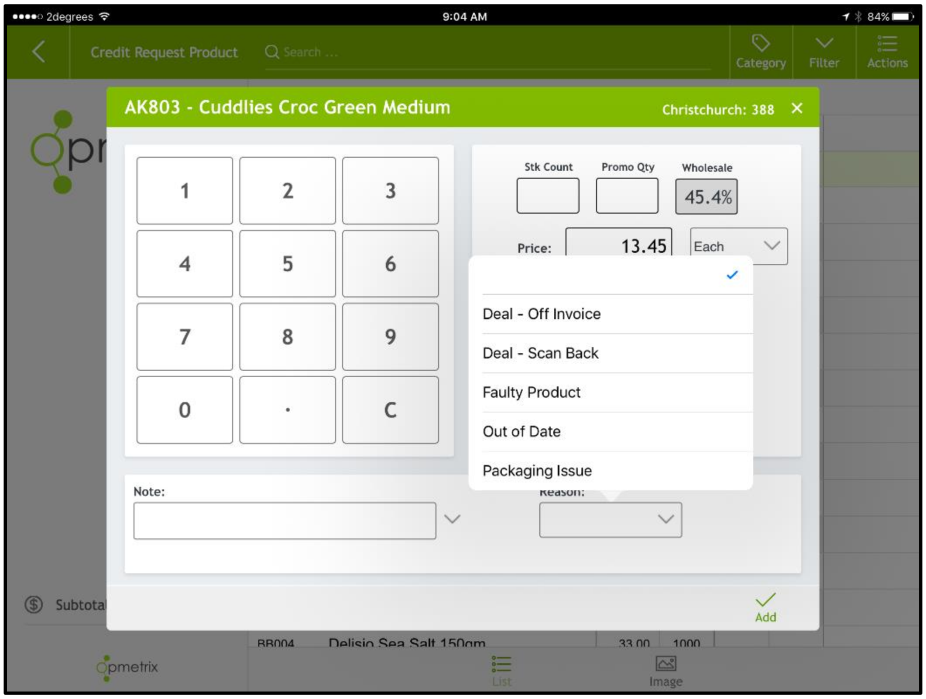


Quantity	Tap to enter in the quantity required using the onscreen keyboard.
Price Level	Tap the arrow beside the price to show up to 8 price levels **(optional feature)**.
Discount %	Enter the percentage discount for this product **(optional feature)**.
Note	Tap in the note field to write a note or select from the list using the drop down arrow.
Promo Qty	Input any free promo stock **(optional feature)**.
Wholesale/Retail	Refer margin calculator

Credit Reasons

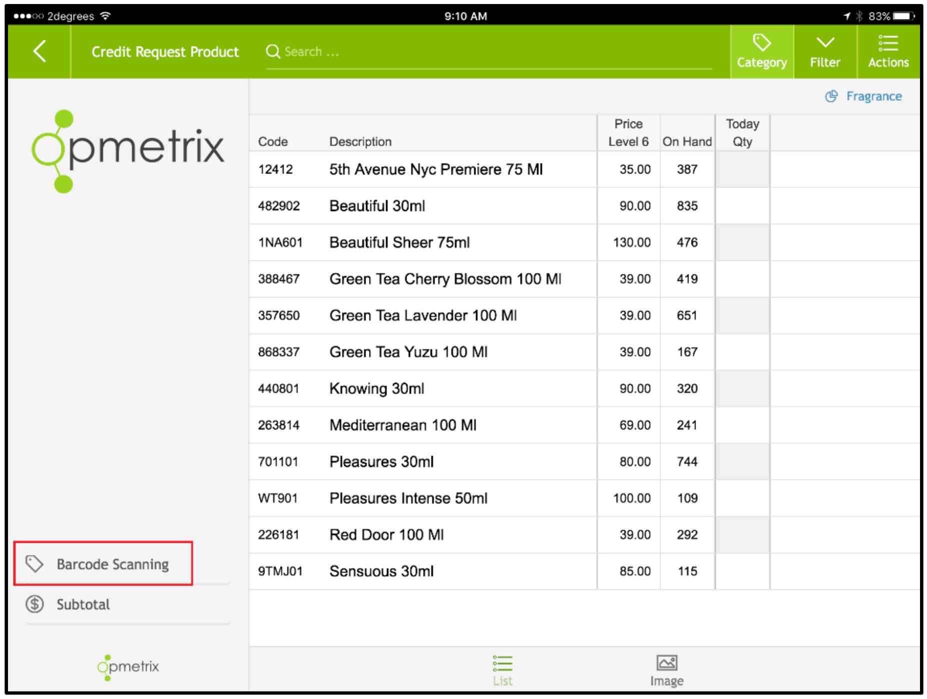
Credits can have credit reasons added on a line by line basis.

From Product List, tap on the stock item to bring up the product item detail screen. On the right hand side of notes is a Reason option drop down. Tap on drop down and select pre-entered credit reason.



Barcode Entry

To input items via barcode scanning, tap on Barcode Scanning.



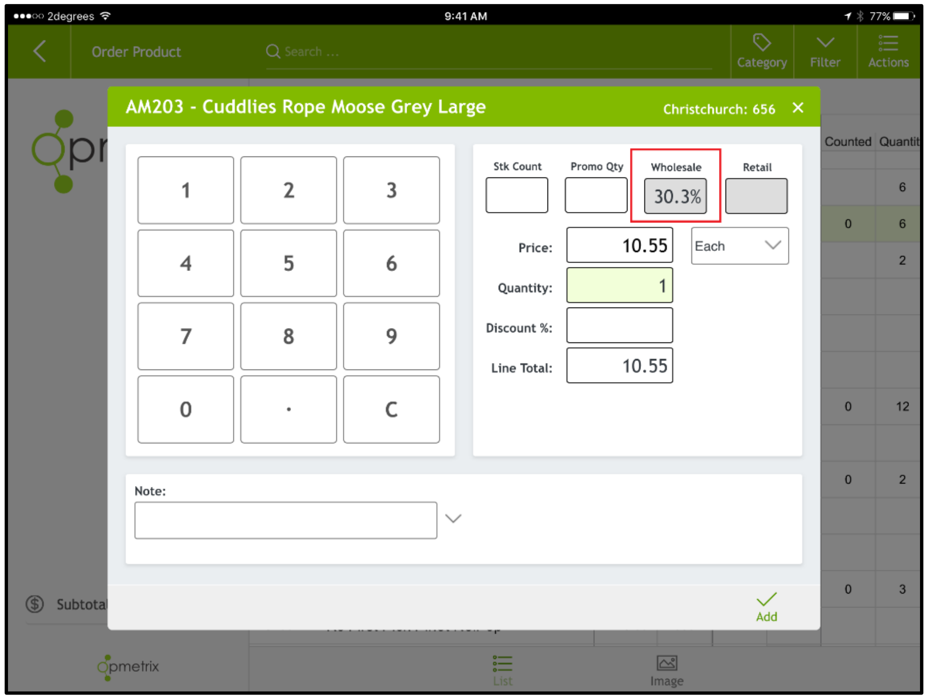
Scan barcode and adjust quantities on screen, or scan again to increase in increments of one. Scan new item for next product ordered.

Barcode scanning is available from list or image mode via Bluetooth scanner.

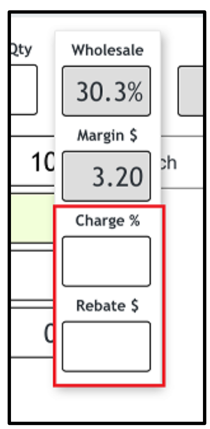
Margin Calculator – Gross Profit Margin

The wholesale calculator calculates your own Gross Profit.

1. Tap on Wholesale.



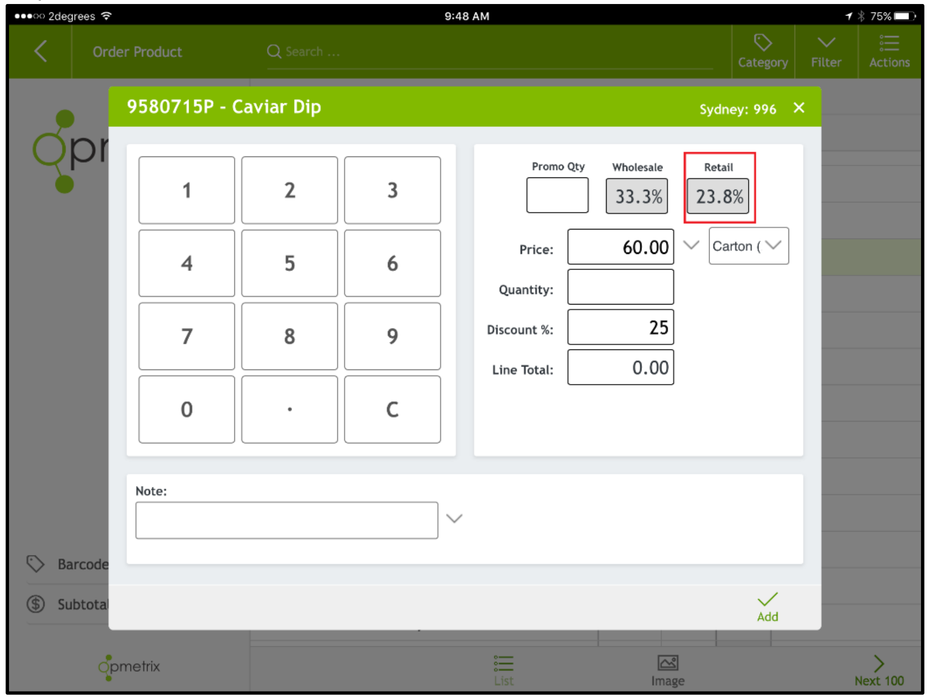
2. Enter Charge Percentage or Rebate Dollars using onscreen number pad.



Note: This is a calculator only and any price change or discount dollars will still need to be entered in the pricing area.

The retail calculator calculates your customer's Gross Profit.

1. Tap on Retail.



2. Enter the customer's RRP either GST Inclusive or GST Exclusive in the box below.

In this example the retail selling price of $65.00 results in a retail GP of 23.8% and retail margin of $14.09.

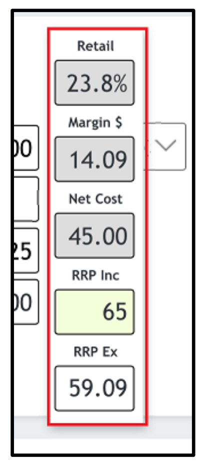
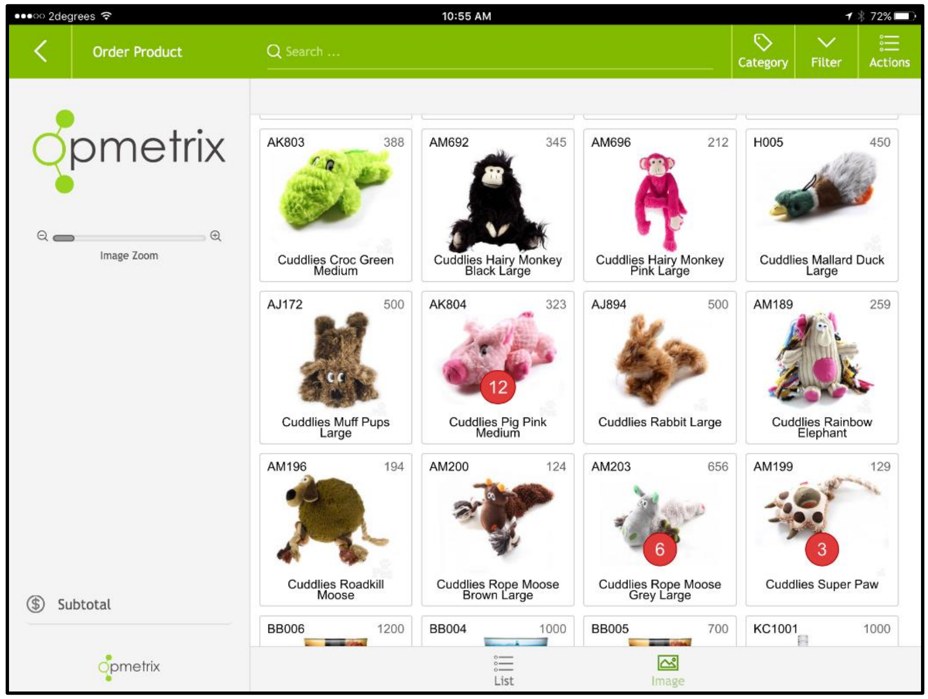


Image Catalogue

Items can also be displayed as an image catalogue. Tap Image to switch to this mode. You can still sell items by simply tapping on the image and entering the sale details for that product.

Tip:

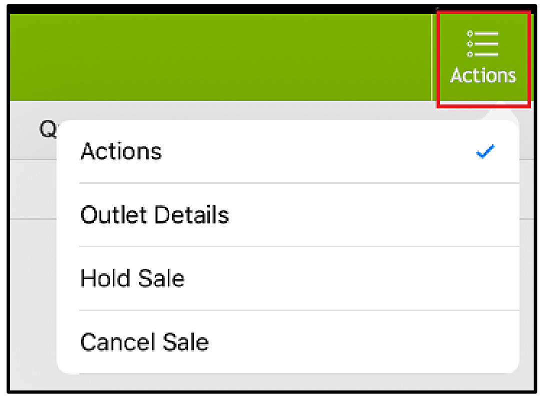
Quantities ordered in this current order display in a red circle as highlighted in image.



Searching	Same search methods as Product List Mode apply.
Filters	Same filters as Product List Mode apply.
Image Zoom	Adjust the zoom bar to achieve zoom level.

Actions Menu

At any point during the transaction the Actions Menu can be expanded.

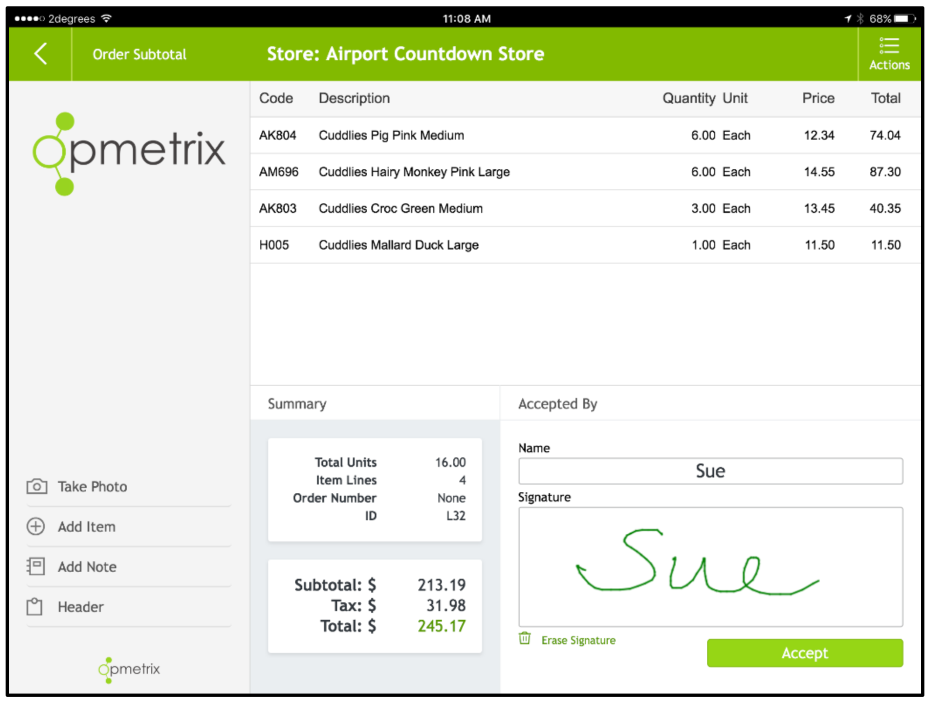


Outlet Details	Show outlet details, including map.
Hold Sale	Allows current sale to be placed on hold (refer to Recalling Held Transactions for more information).
Cancel Sale	Deletes the current transaction, with a prompt to confirm.

Subtotal

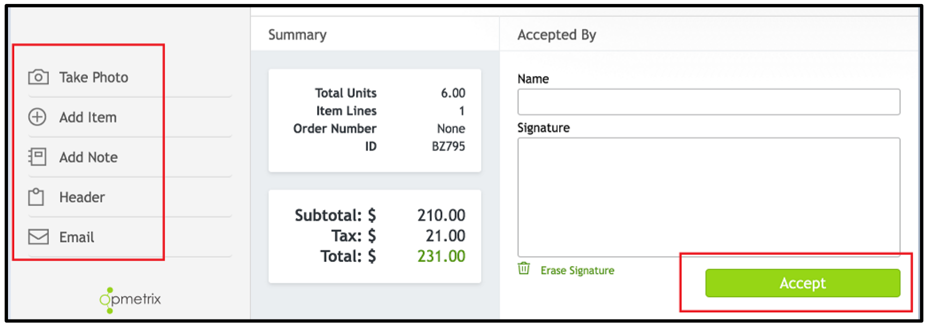
At any point during transaction entry tap Subtotal to view the transaction so far.

All items are displayed (scroll down to see more items), including promo stock in red.

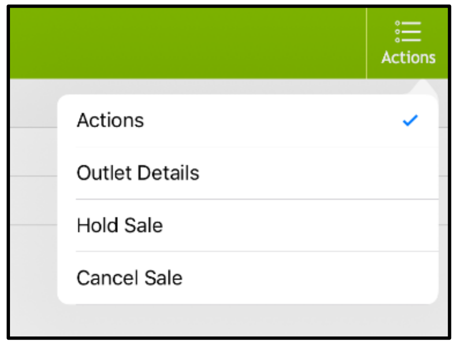


Add a **Name** and **Signature** to the order.

You can also take a photo, add more items, add a note or edit the header on the Invoice Subtotal Menu.



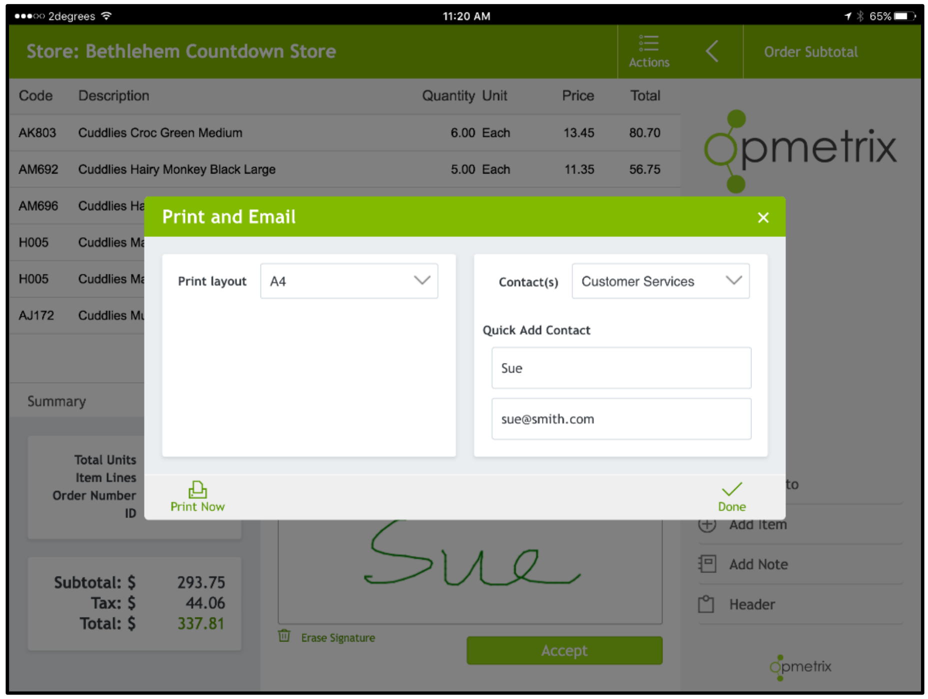
You can also use the Action Menu to select **Hold Sale**



The **Accept** button on the subtotal screen completes the sale. This is the point of no return and the sale cannot be edited or cancelled after the Accept button is selected.

Email

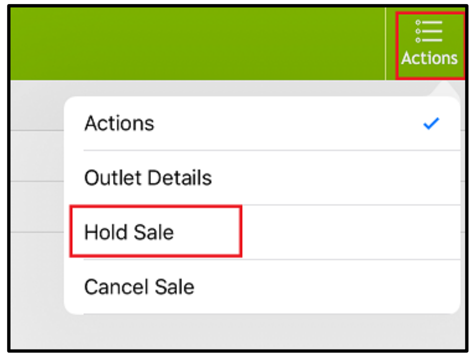
Once a transaction has been accepted, Opmetrix can optionally print or email a copy of the transaction.



Edit/ Delete	Tap on the product line to edit or delete
Signature	Customer can sign on the screen and enter their name.
Take Photo	Captures a photo and attaches it to this sale.
Add Item	Add more items to your order.
Add note	Add a note to the last item of the order.
Header	Tap on Header to edit Header details
Print/ Email	Tap on Accept and a popup option to Print or Email the order will display. Use existing contact list or add a new contact.

Held Transactions

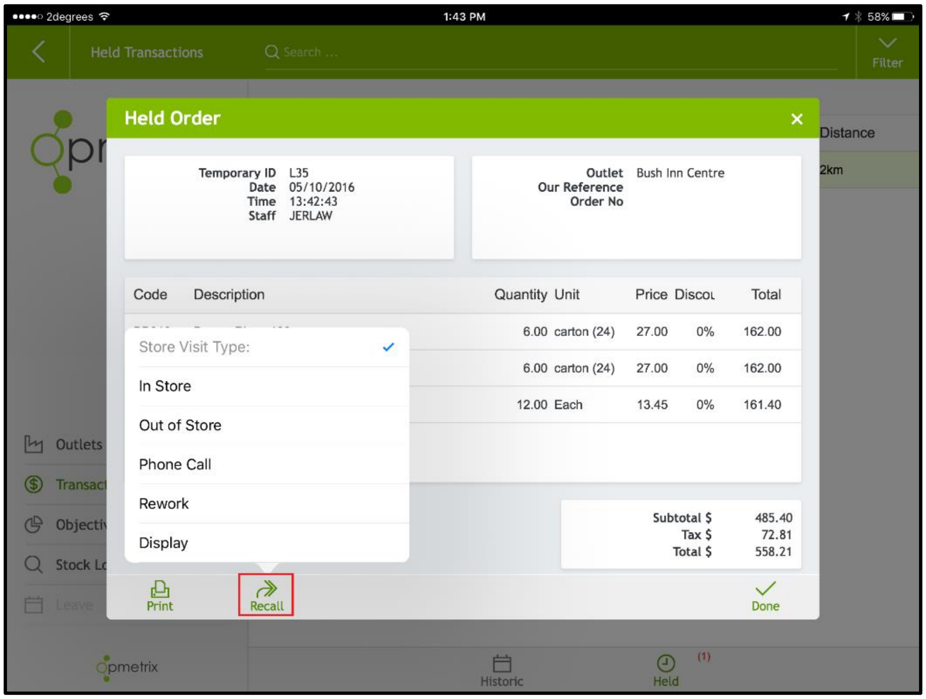
You can put a transaction on **Hold Sale** using the top **Actions** dropdown menu.



Held transactions will show on your task list for the outlet.

You can also navigate to **Transactions** and select **Held** to view all held transactions for all outlets.

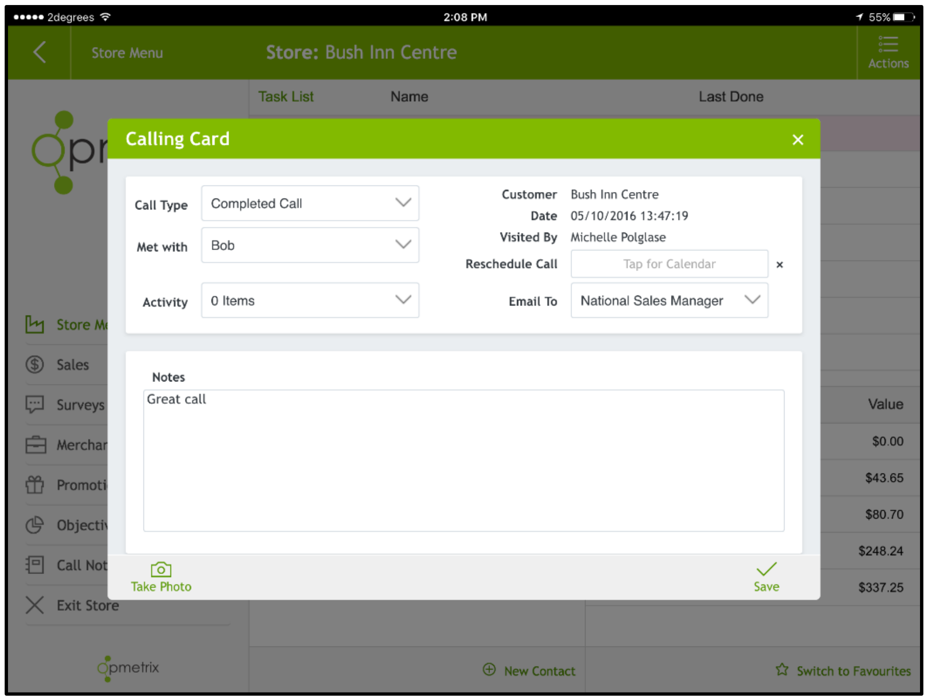
Select Select the held order from the list and continue, or select the customer, store visit type and recall the sale. Once the transaction is recalled to the subtotal screen, items can be added or amended, and the sale accepted or cancelled.



Calling Card - Overview

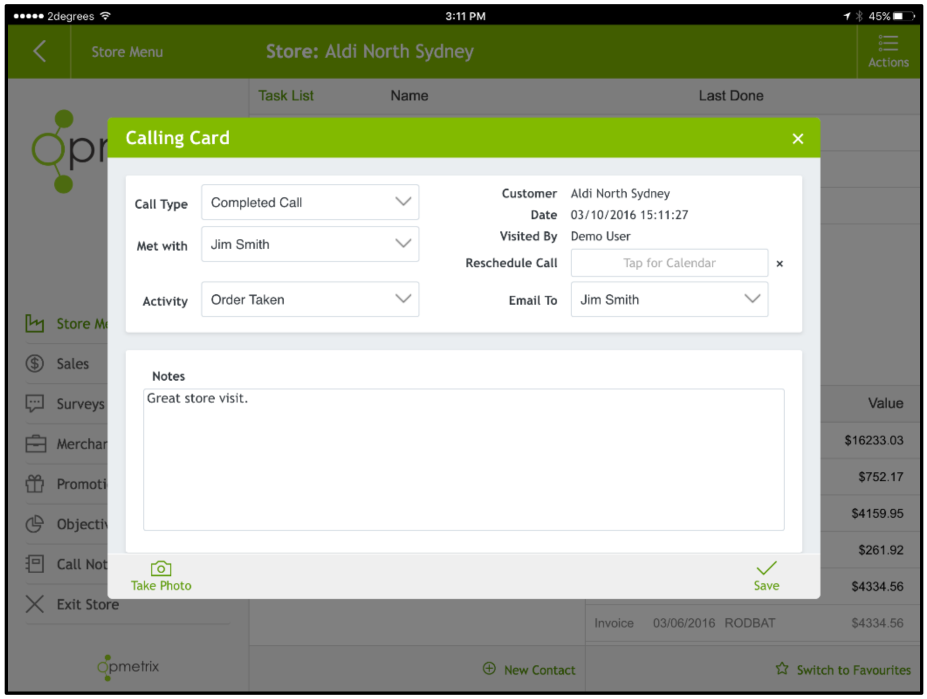
Calling cards are used to record various information regarding the store currently being called on. They are often used to:

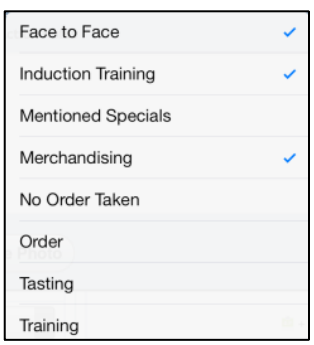
- Record what happened on each store visit.
- Escalate issues, problems or competitor information.
- Record detail changes e.g. address, phone numbers.
- (Optional feature) Reschedule a visit and add this to the Journey Plan as a one-off visit.
- Take one photo per calling card.



Calling Card - Entry

To add a new card tap on **Calling Card** on the Task List. The calling card details screen will display. Record all relevant information then select **Save**.





Call Type The actions completed on this call.

Met with This list comes from the store contact list.

Activity The activities completed on this call. You can select as many as required.

Notes Enter information and notes regarding this call.

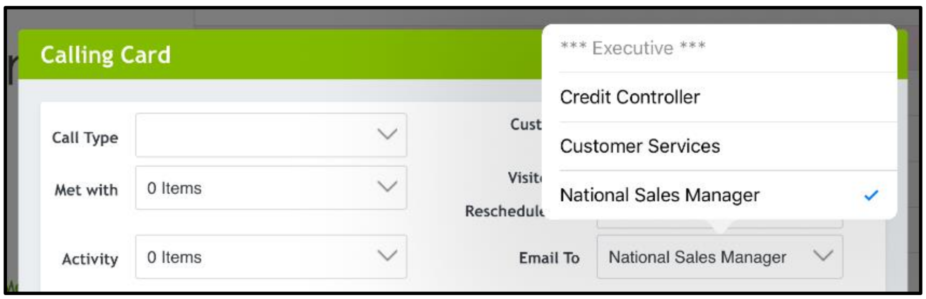
Take Photo Captures **ONE** photo and attaches it to the calling card. Multiple calling cards per store visit can be made.

Calling Card – Email To

Optionally you can notify other staff or customer contacts by email regarding this calling card. Select **Email To**, select the staff or contacts required, then save.

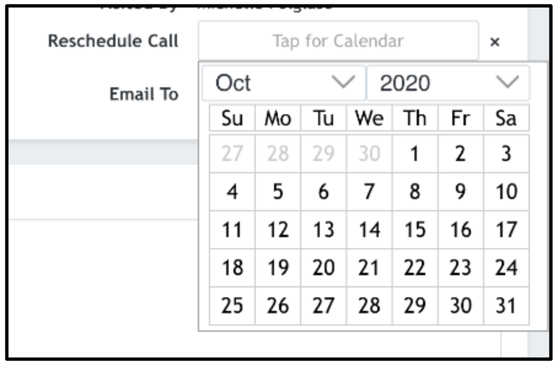
Once a sync is complete a copy of the calling card will be emailed to those staff members.

This is useful to escalate an issue or non compliance. If a photo has been taken with this calling card, the photo is sent by email as an attachment.

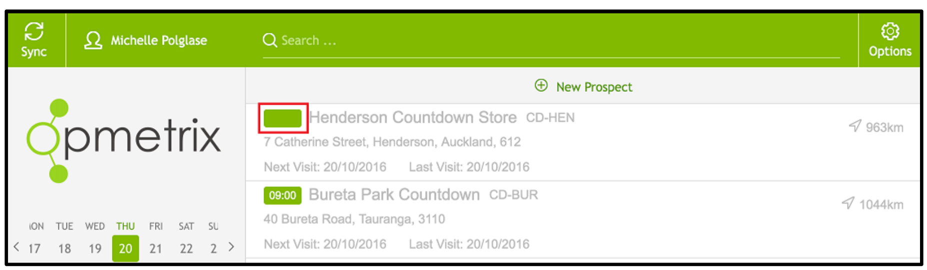


Calling Card – to create a one-off Call

To create a one-off call, use a **Calling Card** for the store and tap **Reschedule Call.** Select the new date from the calendar and **Save** the calling card. The new appointment then becomes part of your **Journey Plan** cycle.



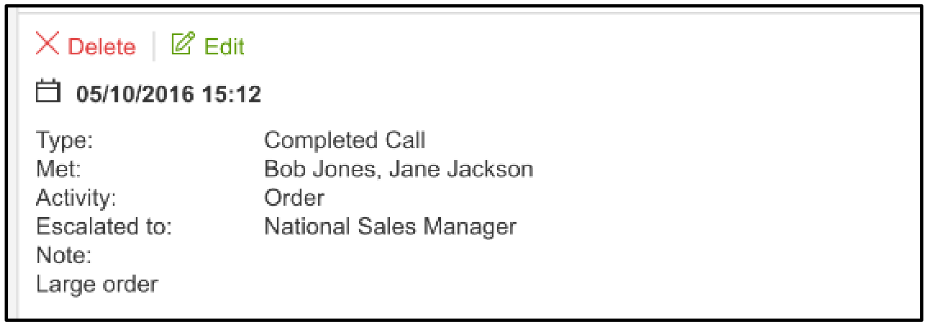
Note that this does not change the preset **Journey Plan**; it adds an additional one-off appointment on the selected date. This will show at the top of your day's Journey Plan.



Note: Journey Plan is an optional feature and may or may not be visible.

Calling Card – Edit or Delete

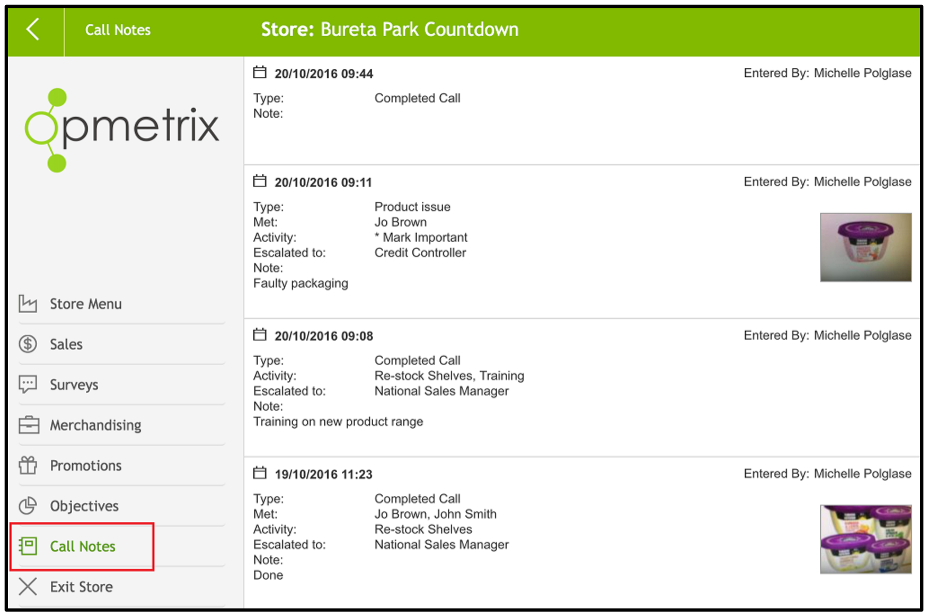
An option is available to **edit** or **delete** a call card prior to selecting **Exit Store**. Tap on pencil to edit or X to delete.



Note: Calling Cards cannot be edited once user has selected Exit Store.

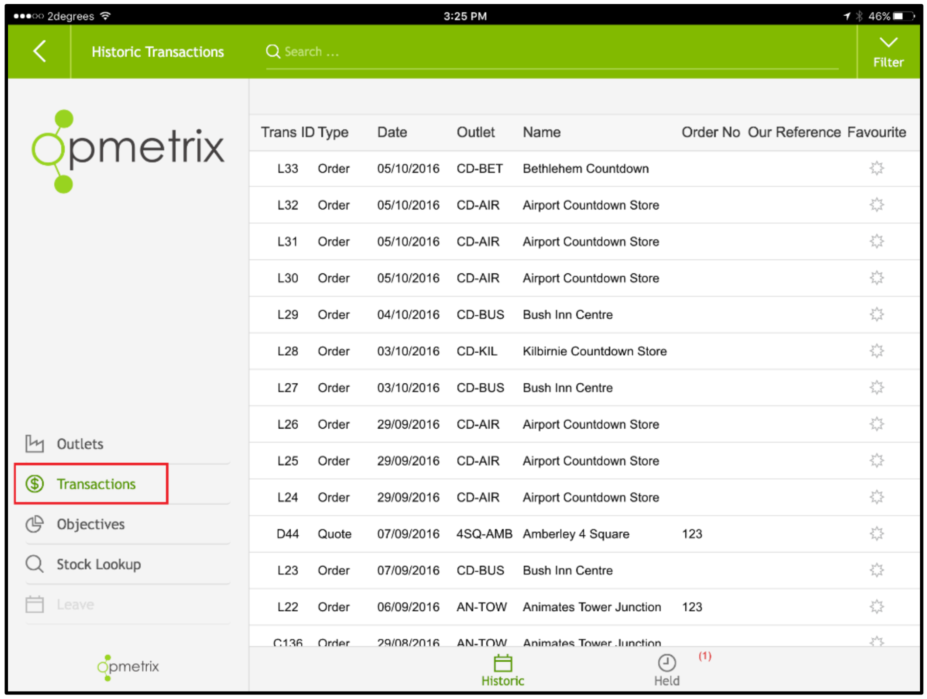
Calling Card - History

All calling cards become part of the call history for that client and can be accessed via **Call Notes** on your Store Menu. You'll see a list of your recent cards, including any attached photos.



Transactions

Transaction history can be viewed by tapping on **Transactions.**



This option allows users to:

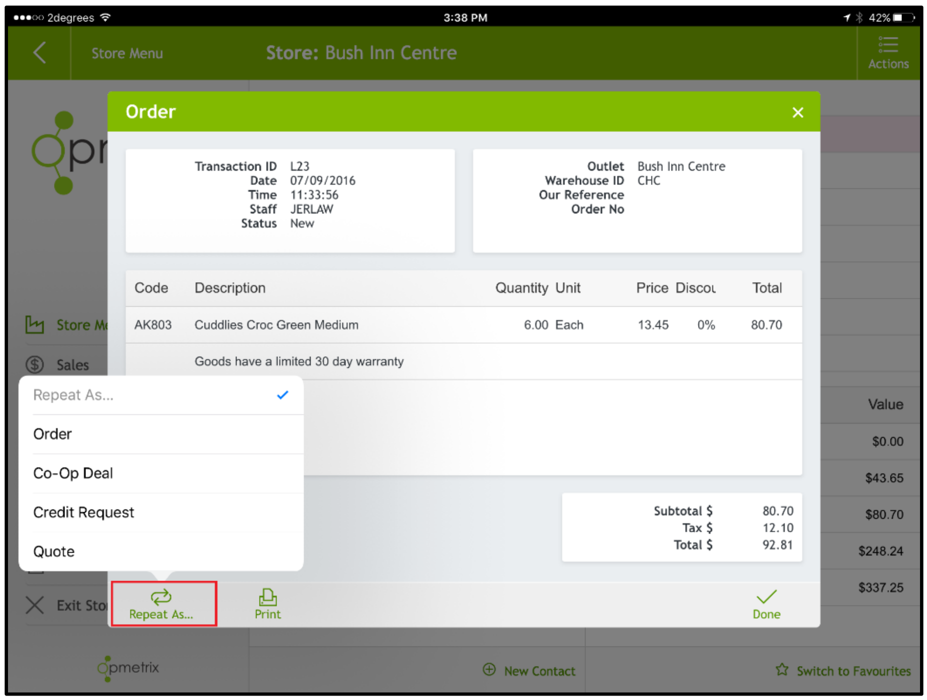
- View recent transactions.
- Re-print (optional).
- Highlight an order as a ‘Favourite’, this reflects a sale that could be repeated at a different outlet.
- To repeat a transaction or utilise a ‘favourite’, users need to exit this screen and then select the outlet required.

Repeat Transaction

Transactions can be repeated and utilised as a template with stock items, quantities etc to be amended, added or deleted.

After selecting the outlet required, users can:

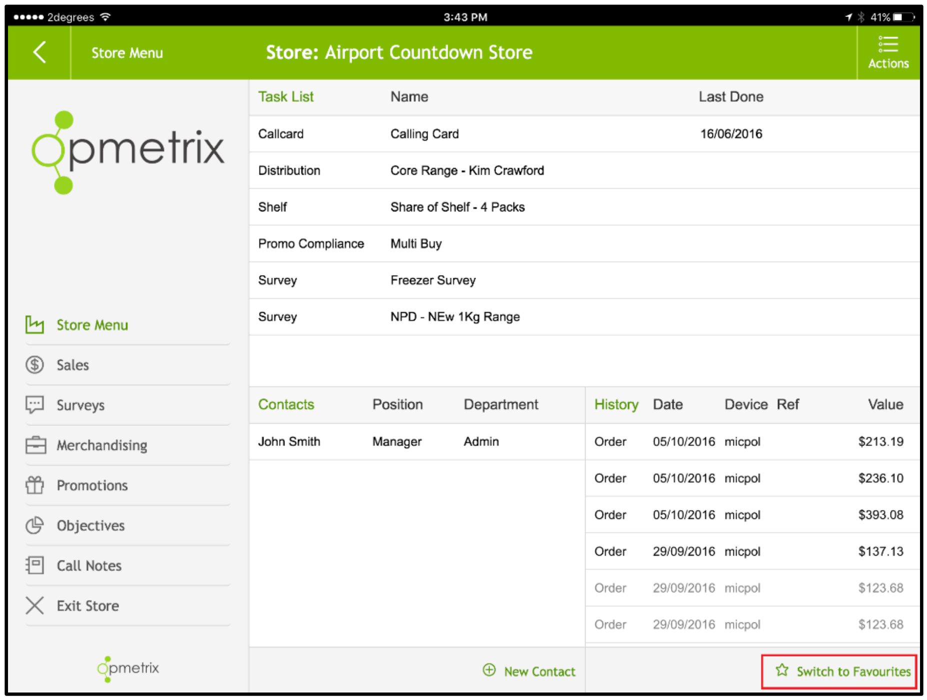
- In the store menu's sales history, tap on a previous transaction to display on screen.
- Select **Repeat As** and select transaction type from pop-up list.
- The repeat transaction process is then the same as a normal transaction.



Utilising Favourites

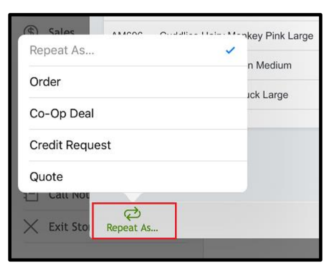
A Favourite is a transaction that can be utilised as a template for all customers. Once selected, favourites can have stock items deleted or added to create a new transaction.

Favourite orders are highlighted in the sales History section.

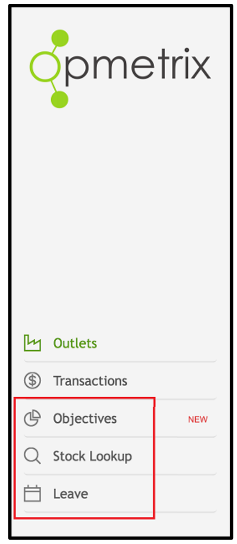


To use a Favourite order:

- Select outlet and start sale.
- Switch to Favourites.
- Tap on the favourite transaction and follow the same process as repeating a transaction.



Objectives, Stock Lookup and Leave



Under Outlets and Transactions you can select **Objectives**, **Stock Lookup** and **Leave**.

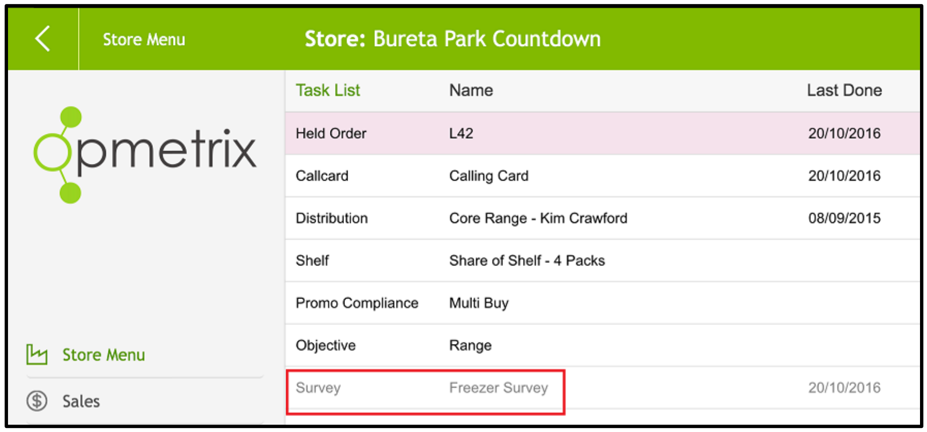
Objectives can be set from the back office CMS, or you can set your own personal store objectives.

Stock Lookup takes you to a list or image view of your products.

Leave Planner enables you to enter your leave days

Surveys

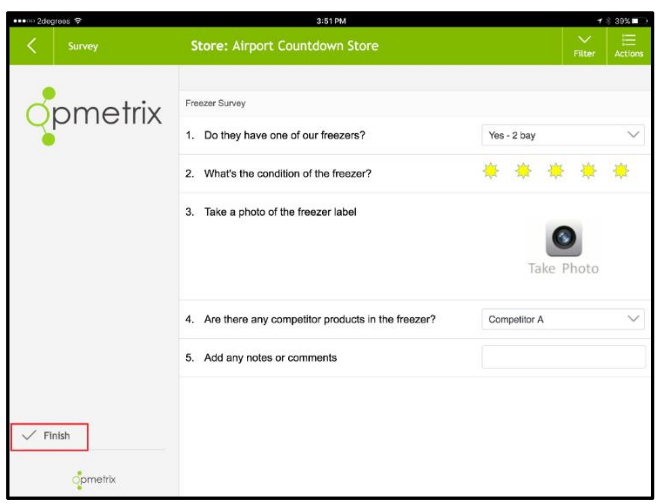
If you have a survey to complete for your store it will show on your **Task List**.



Survey questions are added from the back office CMS, and can include:

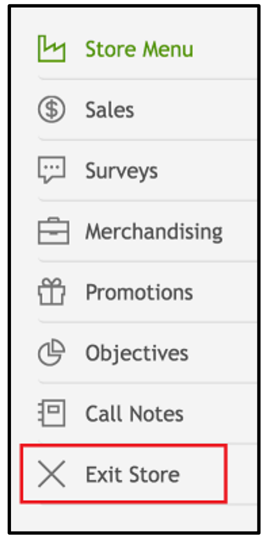
- Input text to add notes or comments
- Input number
- Single choice answer
- Multi-choice answers
- Rating scale 1-5
- Instruction
- Photo capture

If the survey is compulsory it will need to be completed before you exit the store. Once all answers have been completed, tap on Finish.

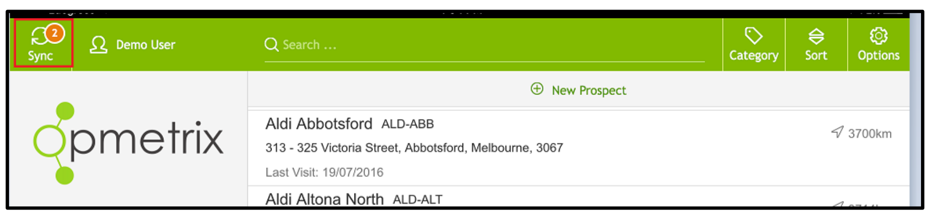


Store Call – Exit

Exit the store on completion of your store visit. Exiting the store records the end time of this store visit.



Sync your data on leaving the store at your first opportunity.



To exit	Tap **Exit Store.**
Confirm	Tap **YES** to confirm exit prompt.
Sync	Complete the **sync** process if you are online with good Wi-Fi/3G coverage after every call. The number of transactions to sync will show.

Contact Details

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Email	support@opmetrix.com
Hours of Operation*	8.30am – 6pm Monday – Friday

*NZ Time and excludes New Zealand Public Holidays