

Opmetrix Sales User Manual

Version 5.0 onwards

Oct 2016

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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.

•••⊙ 2degrees 夺	10:03 AM		1 🕴 72% 📖
		New Prospect	
onmetrix	Options		
opinicinx	Switch Left Handed / Right Handed		Details Start
	Version	5.0	🕫 55km
	Login	micpol	
	App Status	App installed	🔊 0km
	Image Status		
	Security	A 128bit Secure SSL	🗹 136km
Uutlets	Logout	Ŀ	🚽 1037km
(\$) Transactions			
C Objectives NEW			🚽 374km
Q Stock Lookup		✓ —	
E Leave	40 Bureta Road, Tauranga, 3110	Done	🔊 1044km
	Last Visit: 09/09/2015		
opmetrix	Г <u>и</u> All	Journey Plan	2 Prospects

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.

→	8:55 AM	@ 1	100% 📖 +
Sync Q Nick Braas	Q Search	Category Sort	ැටූ Options
	New Prospect		
opmetrix	Aldi Broadway ALD-BRO 1 Bay Street, Broadway, Sydney, 2007 Last Visit: 09/05/2016		√ 5km
	Aldi Waterloo ALD-WAT 20a Danks Street, Waterloo, Sydney, 2017	민 Details	⊳ Start
	Woolworths Haymarket WOO-HAY 61-79 Quay Street, Haymarket, Sydney, 2000		🕫 6km
	Last Visit: 04/07/2016		
	Aldi Eastgardens ALD-EAS 152 Bunnerong Road, Eastgardens, Sydney, 2036 Last Visit: 26/05/2016		🔊 6km
Ly Outlets	Woolworths Central WOO-CEN 302-306 Elizabeth Street, Surry Hills, Sydney, 2010		🕫 7km
(\$) Transactions	Last Visit: 10/05/2016		
└□ Objectives	Aldi Drummoyne ALD-DRU 19a Roseby Street, Drummoyne, Sydney, 2047		🗐 7km
Q Stock Lookup	Last Visit: 19/05/2016		
📋 Leave	Aldi Maribyrnong ALD-MAR 11 Edgewater Boulevard, Maribyrnong, Melbourne, 3032		🗐 7km
opmetrix	All Journey Plan F	<u>Q</u> Prospects	

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

•••• 2deg	grees ᅙ			10:36 A	м			1	\$67% 🗔
CD Sync									ැටූ Options
					(+) Now I	Prospect			
P		Coles Ber	keley					×	
9	pr	WASON DR Ma	Sol on the Fig. Construction of the Sol of t	outre	TURNER RD	Contraction of the second of t	DONNELL ST BL	Grand	7571km 3953km
	/		-UNN RO	ANDERS	W	ne mi		l in the second	
					N RO	LR CR SRNER RD			\triangleright
		Code Address	COL-BER 65 Winnima Way	Balance 3 Balance 2	\$6769.00 \$5613.00	State Region			Start
			Berkeley Sydney	Balance 1 Current	\$7281.00 \$2774.00	Staff Rodney Stop Credit Yes	Bate	1	3479km
		Postcode	Nsw 2506	Total Due	\$22437.00	Price Level 4			
	utlets	Phone	02 4222 1000			Notes		7	3492km
(\$) Tr	ansact	Fax Mobile							
c 🕑 oi	bjectiv	Email	berkeley@coles.com.au						
Q St	ock Lo							4	7635km
На	Pave						Done		
	ure		83 Manningham Road.	Bulleen, Melbo	urne. 3105		2.0110	1	3694km
	ao	metrix		Ly	E]	Ω		>
				All	Journe	/ Plan F	rospects	1	Next 100

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.

••••• 2degrees रू	11:17 AM	1 🕴 63% 💷 🤇
ମ୍ଭ ରୁ Demo User	Q Search	Options
	New Prospect	
	bo Market Street, Sydney, Sydney, 2000	
	Next Visit: 07/10/2016 Last Visit: 16/09/2016	
	09:30 Hilton Sydney HIL-SYD	🖅 3447km
	488 George Street, Sydney, Sydney, 2000	
TUE WED THU FRI SAT SUN	Next Visit: 0//10/2016 Last Visit: 23/09/2016	
< 4 5 6 7 8 9 >	11:00 Aldi Broadway ALD-BRO	🖅 3447km
	1 Bay Street, Broadway, Syuney, Zuur	
	1900 Coles Balgowian CoL-BAL	🖅 3450km
	Nevt Visit: 07/10/2016 Last Visit: 28/09/2016	
	47 William Street, Bathurst, Sydney, 2795	🖅 3678km
Utlets	Next Visit: 07/10/2016 Last Visit: 28/09/2016	
	1600 Woolworths Woolloomooloo WOO-WOO	4
(\$) Transactions	75 Crown Street, East Sydney, Sydney, 2011	🖅 3446km
Objectives	Next Visit: 07/10/2016 Last Visit: 20/05/2016	
	16:45 Woolworths Potts Point WOO-POT	🖅 3445km
Q SLOCK LOOKUP	81 Macleay Street, Potts Point, Sydney, 2011	
📋 Leave	Next Visit: 07/10/2016 Last Visit: 10/06/2016	
Opmetrix	All Journey Plan Prospects	

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.

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.

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.

Zuegre	es 🕈	T1:27 AM		-1	¥60% □)
C Sync	Ω Demo User	× wool	Category	⊜ Sort	ැටූ Options
		① New Prospect			
	a los a tria				
Qr	omeinx	Woolworths Carlton WOO-CAR		4	2704km
<u>)</u>		380 Lygon Street, Carlton, Melbourne, 3053		V	5704KIII
		Last Visit: 27/04/2016			
		Woolworths Central WOO-CEN	雨		
		302-306 Elizabeth Street, Surry Hills, Sydney, 2010		s	Start
		Last Visit: 25/07/2016	Bottal		otart
		Woolworths Dianella WOO-DIA		4	7589km
		360-366 Grand Promenade, Dianella, Perth, 6059			
		Weelworthe Eastlands WOO FAS			
		26 Bligh Street, Rosny, Hohart, 7018		5	2875km
		Last Visit: 25/08/2016			
Ut Out	lets	Woolworths Elizabeth Street WOO-EU			
(\$) Tran	sactions	60 Elizabeth Street, Melbourne, Melbourne, 3000		57	3638km
(G Obje	ectives	Woolworths Felixstow WOO-FEL		1	47001
Q Stoc	k Lookup	471 Payneham Road, Felixstow, Adelaide, 5070		~~	4728KM
曲 1.000	(D)	Last Visit: 19/07/2016			
Leav	/e	Woolworths Flinders Street WOO-FLI		4	3702km
		262 Flinders Street. Melbourne. Melbourne. 3000	0		
	opmetrix	All Journey Plan P	rospects		

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

••••• 2deg	grees ᅙ			12	:33 PM				1	\$ 57% 💷
<	Store Menu		Store: Cole	s Asquith						∷ Actions
			Task List	Name			La	st Done		
	nmati	riv	Callcard	Calling Car	ď	24/08/2016				
	pmen		Promo Opportunity	Youth-Dew	Bath Oil					
			Survey	Store Surve	ву					
မြာ St	tore Menu									
(\$) Sa	ales									
[∵ Sı	urveys		Contacts	Position	Department	History	Date	Device Ref		Value
Ē M	erchandising		Peter Borgen	Buyer	Wine & Beer	Invoice	25/08/2016	JOHSLA	s	31633.20
📅 Pr	romotions		Shayne Jackson	Assistant	Grocery	Credit	24/08/2016	JOHSLA		\$90.00
(ol	bjectives					Invoice	24/08/2016	JOHSLA	ş	1633.20
E Ca	all Notes									
ХБ	xit Store									
	opmetrix				① New Contact			ជ ទា	witch to F	Favourites

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 c					
	include Sales, Surveys, Merchandising,				
	Promotions, Objectives, Call Notes, along with				
	the option to Exit Store.				

Store Call – Task List, History

••••• 2deg	prees 🕈		12-33 PM		≮ 8 57% ∎⊖
<	Store Menu	Store: Coles	Asquith		⊟ Actions
		Task List	Name	Last Done	
onmetriv		Calicard	Calling Card	24/08/2016	
Y	pineliix	Promo Opportunity	Youth-Dew Bath Oil		
		Survey	Store Survey		

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.

Date	Device Ref	Value
25/08/2016	JOHSLA	\$1633.20
24/08/2016	JOHSLA	\$90.00
24/08/2016	JOHSLA	\$1633.20
	ŵ s	witch to Favourites
	Date 25/08/2016 24/08/2016 24/08/2016	Date Device Ref 28/08/2016 JOHSLA 24/08/2016 JOHSLA 24/08/2016 JOHSLA 24/08/2016 JOHSLA

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.

•••00 2	degrees 🗢				4:11 PM					1 🕴 42% 🔳 🔿
		Та	ask List	Name				Last [Done	
C	omet	Contact I	Details					×	6	
		Title	Mr	\sim	Position	Assis	tant Manage	\sim		
		First	Jim		Department	Admi	n `	\checkmark		
		Last	Smith		Email	jim@	smith.com			
Ŀ	Store Menu									
\$	Sales	Phone	0282105174		Notes	Likes	his coffee stro	ng		
÷	Surveys	Historie .			Notes				ce Ref	Value
Ê	Merchandising	Mobile							Den	\$16233.03
Ť	Promotions	Fax							Den	\$752.17
¢	Objectives	Prima	ry Contact	\bigcirc					BAT	\$4159.95
: :	Call Notes	×						\checkmark	BAT	\$261.92
×	Exit Store	Remove						Save	BAT	\$4334.56
							Invoice 03	/06/2016 R	ODBAT	\$4334.56
	pmetrix				① New Co	ontact			압 Swit	ch to Favourites

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.

	Callcard
Sale Type	~
Order	
Invoice	
Credit Request	
Quote	
Sales	

The process for these transactions is nearly identical.

To begin a sales	Select Sales then select the transaction
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.

•••⊙ 2degrees 🗢		4:23 PM					1 ∦3	8% 💶)
C Order Product								
			Price		Today	25/0	17/2016	
	eader - Woolwort	ths Central	Level 4	On Hand	Qty	Quantity	Price	Qua
	Warehouse	Sydney	\sim					
	Transaction ID	BZ788						
	Date	03/10/2016						
	Order No	123456				2	102.0	10 2
	Our Reference					5	93.3	3 5
	0		1	/				
S Barcode Scanning	482902 Beautiful	30ml	90.00	835				
Subtotal	1NA601 Beautiful	Sheer 75ml	130.00	476				
opmetrix	8837113P Recks 50	Oml Can	4 82 I	796			Nex	> t 100

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).

•••• 2degrees 穼		4:29 PM					1 *	37% 💷)
C Order Product	× kc				Categ			:三 Actions
	Code	Description	Price Level 3	On Hand	Too Count	Jay Qty	Counte	d Quanti
	KC1001	Kc First Pick Low Cal Pinot Gris	49.00	1000				
	KC1002	Kc First Pick Low Cal Sauv Blanc	49.00	700				
	KC1003	Kc First Pick Merlot 12p	142.00	1200				
	KC1004	Kc First Pick Merlot 6p	71.00	300				
	KC1005	Kc First Pick Pinot Gris	49.00	450				
	KC1006	Kc First Pick Pinot Noir 12p	209.00	500				
	KC1007	Kc First Pick Pinot Noir 6p	49.00	500				
	KC1008	Kc First Pick Riesling	49.00	388				
	KC1009	Kc First Pick Rose	76.45	323				
	KC1010	Kc First Pick Sauv Blanc	49.00	259				
	KC1011	Kc First Pick Sauvbl/Pgris 12p	142.00	194				
_	KC1012	Kc First Pick Sauvbl/Pgris 6p	49.00	129				
Subtotal								
Opmetrix		:== List	h	mage				

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.

11:27 AM		1	* 60% 💷
× wool	Category	⊜ Sort	i Options

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.

<u> </u>	_
÷—	
List	Image



	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.

1 ± 87% ■

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.

Тір

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

<	Order Produ	uct	Q Searc	h	Categ	ory Fi	√ lter ⊿			
	\sim	triv	Code	Description	Price	On Hand	Too	iay Otv	Counted	Quanti
Q	pme	IIIX	AK803	Cuddlies Croc Green Medium	13.45	388				1
)		AM692	Cuddlies Hairy Monkey Black Large	11.35	345		6		
			AM696	Cuddlies Hairy Monkey Pink Large	14.55	212		6		
_	2	3	H005	Cuddlies Mallard Duck Large	11.50	450		12		4
4	5	6	AJ172	Cuddlies Muff Pups Large	12.50	500		6	0	6
			AK804	Cuddlies Pig Pink Medium	12.34	323		2		
7	8	9	AJ894	Cuddlies Rabbit Large	9.65	500				
0		C	AM189	Cuddlies Rainbow Elephant	12.50	259				
v			AM196	Cuddlies Roadkill Moose	9.50	194				
Prev	Done	Next	AM200	Cuddlies Rope Moose Brown Large	9.95	124				6
			AM203	Cuddlies Rope Moose Grey Large	10.55	656			0	6
			AM199	Cuddlies Super Paw	8.99	129				2
Subtotal		BB006	Delisio Caramelised Onion 150gm	33.00	1200					
			BB004	Dolicio Soo Solt 150am	33.00	1000				
	opmetrix			≣ List	h	<u>ය</u> mage				

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.

•••• 2deg	rees 穼			3:1	13 PM		1 🕴 62% 💷 🗎
		9400981P -	50% Red. Fat	Tasty Cheese 3 6 9 C	e Block - 500g sy Promo Qty Wholesale R 50.0% Price: 91.90 Quantity: 6 Discount %: Line Total: 551.40	Category rdney: 943 a etail Box (10) >>	Filter Actions 0/2016 9 Price 9 120.00 9 120.00 9
⇒ Ba ⑤ Su	ircode	Quicklink	8837113P Re	cks 500ml Can	4.82 796	Add	
		metrix			List Image		> Next 100

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.

•••• 2deg	grees 穼			9:04	1 AM	1 🕴 84% 🔲
<						
8	n	AK803 - Cudd	llies Croc G	reen Medium	Christchurch: 388 🗙	
9	Ы	1	2	3	Stk Count Promo Qty Wholesale	
		4	5	6	Price: 13.45 Each V	
		7	8	9	Deal - Off Invoice Deal - Scan Back	
		0	•	с	Faulty Product Out of Date	
					Packaging Issue	
		Note:			Reason;	
				\sim	~	
(\$) Su	ibtota				Add	
	्र	ometrix	BB004 D	elisio Sea Salt 150	am 33.00 1000	

Barcode Entry

•••⊙ 2degrees 🗢		9:10 AM				1	* 83% 💷)
Credit Request Product	Q Searc				Categ		:三 Actions
						🕒 Fi	ragrance
onmotriv	Code	Description	Price Level 6	On Hand	Today Qty		
Qhineiiix	12412	5th Avenue Nyc Premiere 75 MI	35.00	387			
-	482902	Beautiful 30ml	90.00	835			
	1NA601	Beautiful Sheer 75ml	130.00	476			
	388467	Green Tea Cherry Blossom 100 Ml	39.00	419			
	357650	Green Tea Lavender 100 MI	39.00	651			
	868337	Green Tea Yuzu 100 MI	39.00	167			
	440801	Knowing 30ml	90.00	320			
	263814	Mediterranean 100 MI	69.00	241			
	701101	Pleasures 30ml	80.00	744			
	WT901	Pleasures Intense 50ml	100.00	109			
	226181	Red Door 100 MI	39.00	292			
Sarcode Scanning	9TMJ01	Sensuous 30ml	85.00	115			
Subtotal							
opmetrix		int List	li	mage			

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.

•••o 2degr	ees 🗢				9:41 AM		1 *	77% 🗖
<								
		AM203 - Cud	dlies Rope A	Aoose Grey I	Large Christchur	ch: 656 🗙	Counte	ed Quantit
	J	1	2	3	Stk Count Promo Qty Wholesale	Retail	0	6
	L	4	5	6	Price: 10.55 Each Quantity: 1	\sim		2
	L	7	8	9	Discount %: Line Total: 10.55			
	L	0	•	С			0	12
	ľ	Note:			~		0	2
(\$) Sut	otota		_			Add	0	3
	opm	ietrix			List Image			

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.

•••• 2de	arees ବ			9:	48 AM	1 * 75%
<	Ord	der Product	Q Search			Category Filter Actions
2		9580715P - 0	Caviar Dip		Sydne	ey: 996 ×
2	pr	1	2	3	Promo Qty Wholesale Retail	×
		4	5	6	Price: 60.00 V Car	rton (🗸
		7	8	9	Discount %: 25 Line Total: 0.00	
		0	·	с		
		Note:		~	/	
S Ba	arcode					
\$ Su	ibtota					Add
	0	pmetrix			List Image	> Next 100

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.



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.

Tip:

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

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.

•••• 2de	grees 🗢			11:08 AM			1	\$ 68% 💷
<	Order Subtotal	Store	e: Airport	Countdown	Store			:三 Actions
		Code	Description			Quantity Unit	Price	Total
6	nmetriv	AK804	Cuddlies Pig F	Pink Medium	6.00 Each	12.34	74.04	
Y	рпспл	AM696 Cuddlies Hairy Monkey Pink Large 6.00 Ea					14.55	87.30
	•		Cuddlies Croc	Green Medium	3.00 Each	13.45	40.35	
		H005	Cuddlies Malla	ard Duck Large		1.00 Each	11.50	11.50
		Summary Accepted By						
			Total Units	16.00	Name	Sue		
Ta	ake Photo	Or	der Number	4 None	Signature			
⊕ A¢	dd Item		U	L3Z		_		
<u>е</u> Ас	dd Note	SI	ubtotal: \$	213 19	1	SURD	/	
Ľ H	eader	50	Tax: \$	31.98				
	opmetrix		iotal: \$	240.17	Erase Signature	A	ccept	

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.

	Summary		Accepted By
Take Photo	Total Units	6.00	Name
🕀 Add Item	Item Lines Order Number	1 None	Signature
曰 Add Note	ID	BZ795	
[^o] Header	Subtotal: \$	210.00	
🖂 Email	Tax: \$	21.00	
opmetrix	Iotai. Ş	231.00	Erase Signature Accept

You can also use the Action Menu to select Hold Sale

	∷ Actions
Actions	~
Outlet Details	
Hold Sale	
Cancel 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.

•••o 2deg	grees ᅙ			11:2	0 AM				1 🕴 65% 💷 🗎
		em Countdo							
Code	Description			Quant	ity Unit	Price	Total		
AK803	Cuddlies Croc	Green Medium		6.	00 Each	13.45	80.70	6	omotriv
AM692	Cuddlies Hair	y Monkey Black La	irge	5.	00 Each	11.35	56.75	Y	рпепх
AM696	Cuddlies Ha	Print and E	mail						
H005	Cuddlies Ma								
H005	Cuddlies Ma	Print layout	A4	\sim	Contact(s) Custo	omer Service	es 🗸	
AJ172 Summa	Cuddlies Mu				Quick Add C	Contact			
	Total Units Item Lines				sue@sm	ith.com			to
Ord	ID	Print Now		<i>C</i> .					d Item
Su	ıbtotal: \$ Tax: \$	293.75 44.06		>l	<u>N</u>			P Ad	ld Note
	Total: \$	337.81	🔟 Erase Signatu	re	A	ccept			pmetrix

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

Actions Actions Outlet Details Hold Sale Cancel Sale

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.

<	Store Menu	Store: Bethle	ehem Countdown Store		: Actions
		Task List	Name	Last Done	
	nmatriv	Held Order	L41	20/10/2016	
	рпешх	Callcard	Calling Card	20/10/2016	
		Distribution	Core Range - Kim Crawford		

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

Ŀ	Outlets	
\$	Transactions	(2)
¢	Objectives	NEW
Q	Stock Lookup	
Ë		
	opmetrix	

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.

••••• 2degrees 🕈	Transactions Q Search	1:43 PM		1	¥ 58% ■⊃ Filter
opr	Held Order Temporary ID L35 Date 05/10/2016 Time 13:42:43 Staff JERLAW	Outlet Our Reference Order No	Bush Inn Centre	X Dista	nce
	Code Description Store Visit Type:	Quantity Unit 6.00 carton (24)	Price Discou 27.00 0%	Total 162.00	
[너 Outlets	In Store Out of Store Phone Call	6.00 carton (24) 12.00 Each	27.00 0% 13.45 0%	162.00	
 Transact Objectiv Stock Lo 	Rework Display		Subtotal \$ Tax \$ Total \$	485.40 72.81 558.21	
Op.	Print Recall	Historic	(1) Held	Done	

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.

••••• 2deg	rees 🗟				2:08 PM				≠ 55%
<									
			Task List	Name		Last	Done		
6	Calling	Card							
	Call Typ	e Comp	leted Call	\sim	Customer Date	Bush Inn Centre 05/10/2016 13:47:19			
	Met wit	h Bob		\sim	Visited By	Michelle Polglase			
		0.11			Reschedule Call	Tap for Calendar	×		
Ly St	Activit ore Me	y 0 Item	IS	\checkmark	Email To	National Sales Manager	\sim		
(\$) Sa	les								
	Note: Great	s call							Value
									\$0.00
E Me	erchar								\$0.00
Pro	omoti								\$43.65
C Ob	ojectiv								\$80.70
는 Ca	ill Not 👩						\checkmark		\$248.24
× Ex	Take Pho tit Store	to					Save	-	\$337.25
	opmetrix				New Conta	nct	٤	ኛ Switch to	Favourites

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**.

••••• 2degrees 중					3:11 PM				1 🕴 45% 💷 🔿
< Store									
			Task List	Name			Last Done		
Opr	Calling C	ard						×	
	Call Type Met with	Comple Jim Sm	eted Call hith	~	Customer Date Visited By Reschedule Call	Aldi North Sydney 03/10/2016 15:11:2 Demo User Tap for Ca	.7 lendar	×	
ငြး Store Ma	Activity	Order	laken	\sim	Email To	Jim Smith	\sim	. 1	
Sales	Notes								
💬 Surveys	Great sto	ore visit.							Value
Merchar									\$16233.03
👚 Promoti									\$752.17
(Objectiv									\$4159.95
고 Call Not									\$261.92
	Take Photo						Save	•	\$4334.56
Exit Store						Invoice 03/06	5/2016 RODBAT		\$4334.56
opr	metrix				① New Conta	ct		ය Switch to	Favourites

Face to Face	~			
Induction Training	~			
Mentioned Specials				
Merchandising	~			
No Order Taken				
Order				
Tasting				
Training	<u>.</u>			

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.

alling C	ard			***	Executive ***	
				Cree	dit Controller	
Call Type		\sim	Cust	Customer Services		
Met with	0 Items	\sim	Visit، Reschedul،	National Sales Manager		~
Activity	0 Items	\sim	Ema	il To	National Sales Manager	

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.

Reschedule Call		Tap for Calendar					×
Email To	Oct		~	/ 2	020		\sim
	Su	Мо	Tu	We	Th	Fr	Sa
	27	28	29	30	1	2	3
	4	5	6	7	8	9	10
	11	12	13	14	15	16	17
	18	19	20	21	22	23	24
	25	26	27	28	29	30	31

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.

X Delete 🛛 🖉 E	lit
📋 05/10/2016 1	:12
Type: Met: Activity: Escalated to: Note: Large order	Completed Call Bob Jones, Jane Jackson Order National Sales Manager

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.

Call Notes	Store: Bureta Park Countdown	
	闫 20/10/2016 09:44	Entered By: Michelle Polglase
	Type: Completed Call Note:	
-	闫 20/10/2016 09:11	Entered By: Michelle Polglase
	Type: Product issue Met: Jo Brown Activity: * Mark Important Escalated to: Credit Controller Note: Faulty packaging	
🔄 Store Menu		
Sales	台 20/10/2016 09:08	Entered By: Michelle Polglase
Surveys	Activity: Re-stock Shelves, Training Escalated to: National Sales Manager	
Merchandising	Training on new product range	
T Promotions	□ 19/10/2016 11:23	Entered By: Michelle Polglase
Dijectives	Type: Completed Call Met: Jo Brown, John Smith	
E Call Notes	Activity: Re-stock Shelves Escalated to: National Sales Manager Note:	
🔀 Exit Store	Done	

Transactions

•••oo 2deg	grees 秺			3	3:25 PM		1	∦ 46% 🔳)
<	Historic Transactions	Q Sear						
6	nmatriv	Trans IE	ОТуре	Date	Outlet	Name	Order No Our Reference Fa	avourite
Y	pinein	L33	Order	05/10/2016	CD-BET	Bethlehem Countdown		$\tilde{\gamma}^{Ag}_{\gamma q^2}$
		L32	Order	05/10/2016	CD-AIR	Airport Countdown Store		$\tilde{\gamma}_{\gamma 2}^{A_{\frac{p}{2}}}$
		L31	Order	05/10/2016	CD-AIR	Airport Countdown Store		₹ [∧] ₹
		L30	Order	05/10/2016	CD-AIR	Airport Countdown Store		$\xi^A_{\gamma 2}$
		L29	Order	04/10/2016	CD-BUS	Bush Inn Centre		2 ^A 5 2 _V 2
		L28	Order	03/10/2016	CD-KIL	Kilbirnie Countdown Store		$\xi^A_V \xi$
		L27	Order	03/10/2016	CD-BUS	Bush Inn Centre		$\xi^{Ag}_{V}\xi$
		L26	Order	29/09/2016	CD-AIR	Airport Countdown Store		$_{\lambda \gamma t}^{\gamma \Lambda \gamma}$
<u>Р</u> Ч О.	utlets	L25	Order	29/09/2016	CD-AIR	Airport Countdown Store		\$\$\$
(\$) Tr	ansactions	L24	Order	29/09/2016	CD-AIR	Airport Countdown Store		3 ^A 4 Xyt
C Ot	ojectives	D44	Quote	07/09/2016	4SQ-AMB	Amberley 4 Square	123	$\tilde{\gamma}_{\rm syst}^{\rm Aut}$
Q St	ock Lookup	L23	Order	07/09/2016	CD-BUS	Bush Inn Centre		$_{2\gamma e_{1}}^{2\beta e_{1}}$
📋 Le		L22	Order	06/09/2016	AN-TOW	Animates Tower Junction	123	$\tilde{\gamma}_{\gamma q 1}^{\Lambda_{\gamma}}$
		C136	Order	29/08/2016	AN-TOW	Animates Tower Junction	(1)	ξ ^A Ş
	opmetrix				Histor	ic Hel) (7 Id	

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 popup list.
- The repeat transaction process is then the same as a normal transaction.

•••• 2degrees	Ŷ		3:3	88 PM			1 🕴 42% 🔳
< s							
ø	Order						
Qp	r	Transaction ID I Date (Time Staff S	23 77/09/2016 11:33:56 LERLAW New	Ou Warehous Our Refere Orde	utlet Bush Inn Centre se ID CHC ence rr No		
	Code	Description		Quantity Unit	Price Discou	Total	
Ly Store A	AK803	Cuddlies Croc Gre	een Medium	6.00 Each	13.45 0%	80.70	
Sales		Goods have a limi	ited 30 day warranty				
Repeat As	5	~					Value
Order							\$0.00
Co-Op De	eal						\$43.65
Credit Red	quest				Subtotal \$	80.70	\$80.70
Quote					Total \$	92.81	\$248.24
X Exit St	o Repeat As	Print				Done	\$337.25
	opmetrix			① New Contact		ជ៌ Swit	tch to Favourites

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.

••••• 2degrees 🗢			3	:43 PM					1 🕴 41% 🔳
<	Store Menu	Store: Airpo	ort Countd	own Store					∷ Actions
		Task List	Name			La	st Done		
6	nmetriv	Callcard	Calling Ca	rd	16/06/2016				
Y	рпспіх	Distribution	Core Rang	ge - Kim Crawford					
		Shelf	Share of S	helf - 4 Packs					
		Promo Compliance	Multi Buy						
		Survey	Freezer Su	rvey					
لم الح	tore Menu	Survey	NPD - NEV	v 1Kg Range					
(\$) Sa	ales								
Ş∵ Sı	urveys	Contacts	Position	Department	History	Date	Device	e Ref	Value
É M	erchandising	John Smith	Manager	Admin	Order	05/10/2016	micpol		\$213.19
П Р	romotions				Order	05/10/2016	micpol		\$236.10
@ 0	bjectives				Order	05/10/2016	micpol		\$393.08
⊡ c	all Notes				Order	29/09/2016	micpol		\$137.13
× E	xit Store				Order	29/09/2016	micpol		\$123.68
					Order	29/09/2016	micpol		\$123.68
	opmetrix			① New Contact			[岱 Switch t	o Favourites

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.

Sales Aucon Culuita Hala	**-nkey Pink Large
Repeat As	n Medium
Order	Jck Large
Co-Op Deal	
Credit Request	
Quote	
K Exit Sto Repeat As	

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**.

<	Store Menu	Store: Bureta Park Countdown				
pmetrix		Task List	Name	Last Done		
		Held Order	L42	20/10/2016		
		Callcard	Calling Card	20/10/2016		
		Distribution	Core Range - Kim Crawford	08/09/2015		
		Shelf	Share of Shelf - 4 Packs			
		Promo Compliance	Multi Buy			
		Objective	Range			
(\$) Sa	les	Survey	Freezer Survey	20/10/2016		

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.

•••∞ 2degrees 🕏	3:51 PM		1	\$ 39% ■ →
< Survey	Store: Airport Countdown Store		Filter	Actions
opmetrix	Freezer Survey 1. Do they have one of our freezers?	Yes - 2 bay		~
	2. What's the condition of the freezer?	* * *	*	*
	3. Take a photo of the freezer label	Take) Photo	
	4. Are there any competitor products in the freezer?	Competitor A		\sim
	5. Add any notes or comments			
V Finish				

Store Call – Exit

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

ſ	Ь	Store Menu
	\$	Sales
	÷	Surveys
	Ê	Merchandising
	Ť	Promotions
	G	Objectives
	1	Call Notes
	\times	Exit Store

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

New Zealand	+64 3 374 6490
Sydney, Australia	+61 2 8210 5174
Melbourne, Australia	+61 3 9018 7995
Email	support@opmetrix.com
Hours of Operation*	8.30am – 6pm Monday – Friday

*NZ Time and excludes New Zealand Public Holidays