

## Introduction

Here at Opmatrix we like to develop new features so that productivity out in the field is quick and easy. We hope you enjoy our second edition of tips and tricks which we're sure will make a difference to your working day.

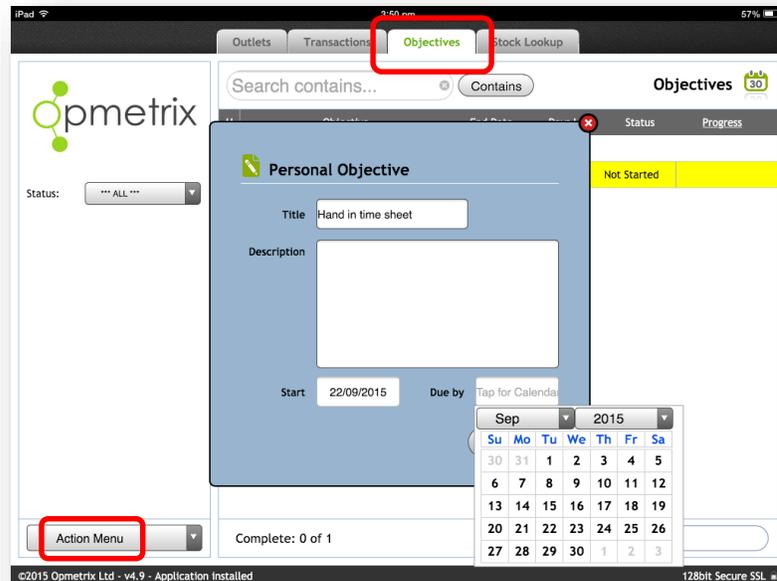


### Add your own reminders

Need to remember to hand in your timesheet or complete an expense claim? Add your own reminders in Opmatrix!

To create personal reminders, select the **Objectives** tab at the top of the screen then select the **Action Menu** and **New Objective**. Fill out the simple form and enter the date you want to complete the reminder by. You're all done!

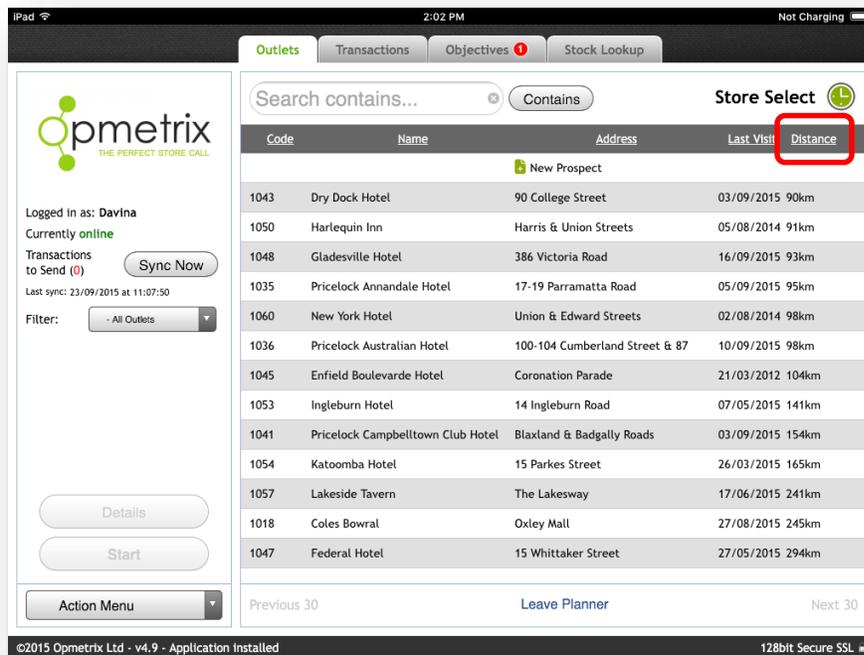
Opmatrix records your list of reminders in the **Objectives** tab and when the date is close it highlights in red so you can prioritise them. Be sure to complete the reminders and track your task progress.



### I've got some spare time – which customers are close by?



If you have spare time on your hands why not complete an impromptu sales call? To find out which customers are in close proximity just tap on the **Distance** column on the customer list screen. Now your closest customers will appear at the top of the list. Time to go and grab an extra sale!

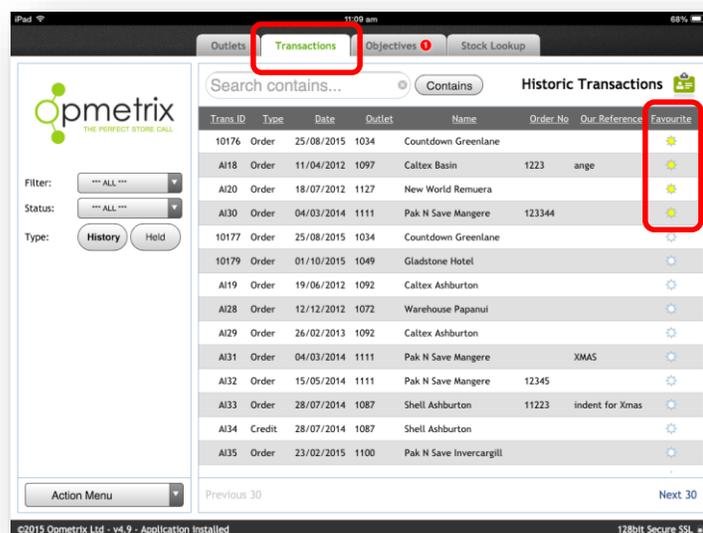


## Standing orders and sales templates

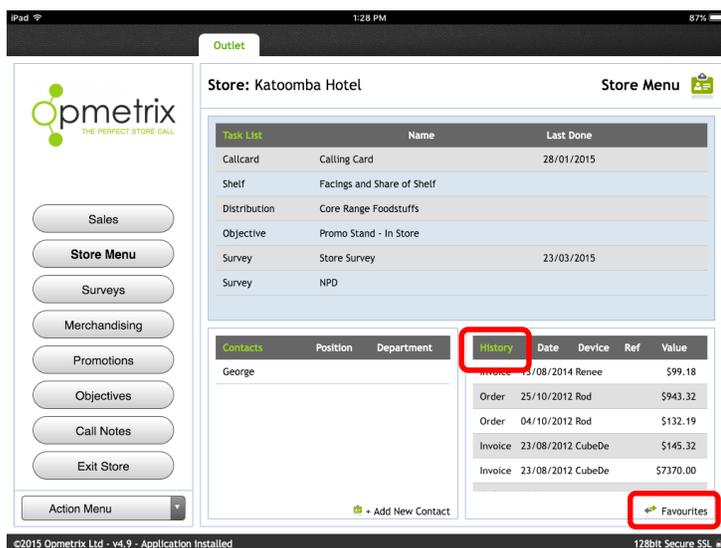


Selling the same items to lots of customers? You can make this process faster by marking a previous order as ‘favourite’ and you can repeat that order for any of your other customers.

To tag an order as a favorite, select the **Transactions** tab at the top of the screen then tap the **Favorite star** to tag the transactions you want.



During a store visit you can access favorite transactions by tapping the **Favorites** button in the sales **History** box on the Store Menu. You can now view your tagged favorites and repeat the order for any customer.



## Email a contact



Email a contact directly from Opmetrix by selecting the store and then the contact name. Tap the envelope icon beside the email address and this will open your default emailing system. Type your email and send.

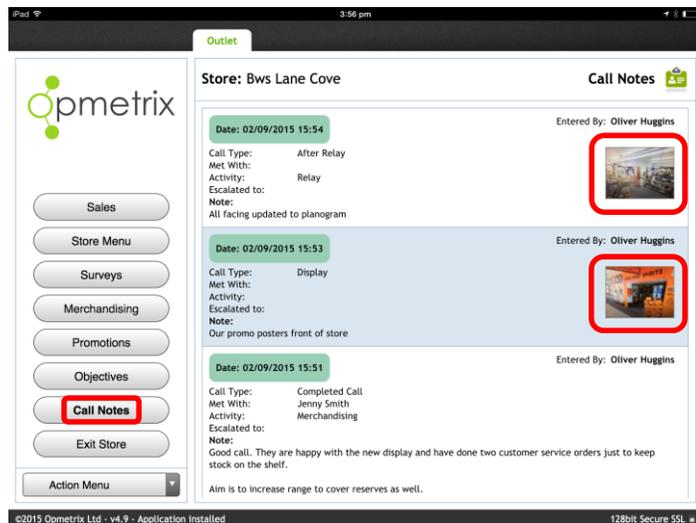


## Viewing call note photos



Photos are a great way of recording what happens with a customer in-store. Opmetrix users take a lot of photos and it's handy to be able to quickly review the customer's photos on file.

The easiest way to do this is to tap the customer's call notes then tap on any photo icon that appears. The photo will expand to full screen and you can swipe left and right to see the photos for that customer.



## Have a question?

Our help desk team is free to call! So if you need a hand with any of these tips or have any Opmetrix queries, we'd love to hear from you via phone or email.

**Email:** [Support@opmetrix.com](mailto:Support@opmetrix.com)

**Telephone:**

New Zealand	03 374 6490
New South Wales	02 8210 5174
Victoria	03 9018 7995
Western Australia	08 7200 3088
Queensland	07 3040 4428