

Document History

Date	Issue	Notes
22 September 2015	10	Corrected an issue in step 6. This step is mandatory whether or not the example template CSV files are being used
6 May 2014	9	Updated pictures with new Cloud layout
29 January 2014	8	Introduction changed
6 November 2013	7	Updated to simplify the instructions & include reference to Forum
12 April 2012	6	Updated the File Mappings Instructions
12 March 2012	5	Included Screen shots and Simplifying the Manual
20 August 2011	4	Included references to Professional Edition specific functionality
15 July 2011	3	Updated the image format information in step 5
7 July 2011	2	Included a section for configuration options
23 June 2011	1	Initial issue

Introduction

What you need before you start

- An iPad (full size or Mini). It doesn't have to be the top model but the more up-to-date the version the better (faster processors). The minimum memory version (16GB) will be fine and it's your choice whether you opt for "Cellular" (SIM card phone contact) or just WiFi (they all come with WiFi). With Cellular you can get a mobile internet connection and without it you are reliant on WiFi hotspots. You will need to set up an email account on this, if you haven't already done so. This will mean that you can get your emails on it but also you will be able to email beautiful order acknowledgements with product photos to your customers (and HQ).
- From your iPad, go to the AppStore, search for Sales Presenter and download the App. Have a play with the demo data to get a feel for how it works.
- A spreadsheet or other file containing details of the products that you sell e.g. your price list.
- A spreadsheet or other file type containing details of your customers.
- A folder of product photos where the filename of each picture is the relevant Product Code.

If you are an Agent representing several principal companies you can set these up separately by tapping the "Companies" then "+" buttons on the App and repeating the process below (without the need to purchase/download the App again).

The steps involved in getting your own data and images into Sales Presenter on your iPad are:

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Getting Started With Your Data



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Steps 1, 2, 4, 6 and 7 are one-off exercises to perform the first time you’re preparing your data.

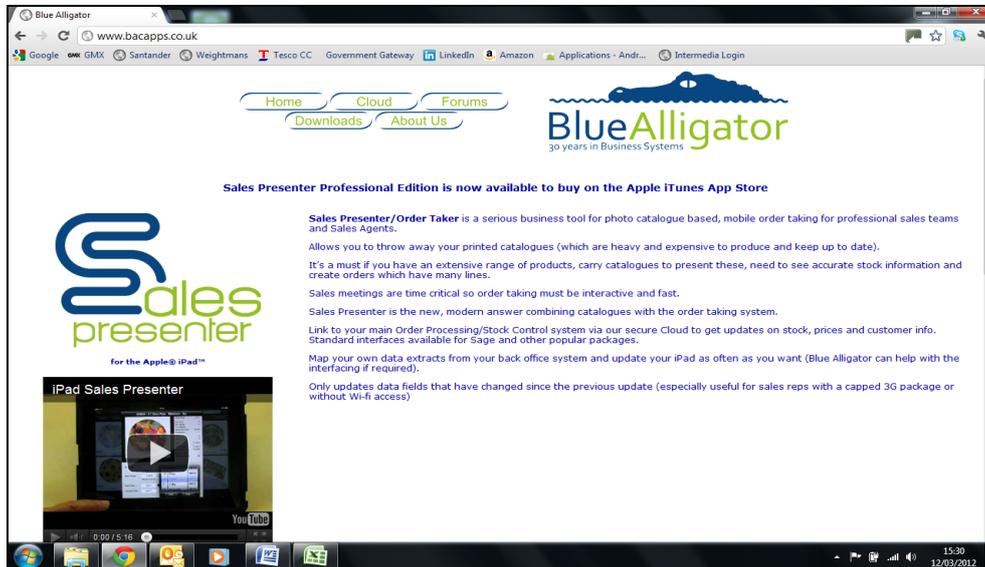
Steps 3, 5, 8 and 9 should be repeated each time you wish to refresh the data in Sales Presenter.

The remainder of this document details each step involved in the process.

It is useful to understand how the various templates of data fit together and there is a section on the Forum which explains this - Blue Alligator Cloud, the first section on the forum.

Step 1 – Create your Blue Alligator Cloud Account

Data and images are transferred to your iPad via the Blue Alligator cloud website at www.bacapps.co.uk

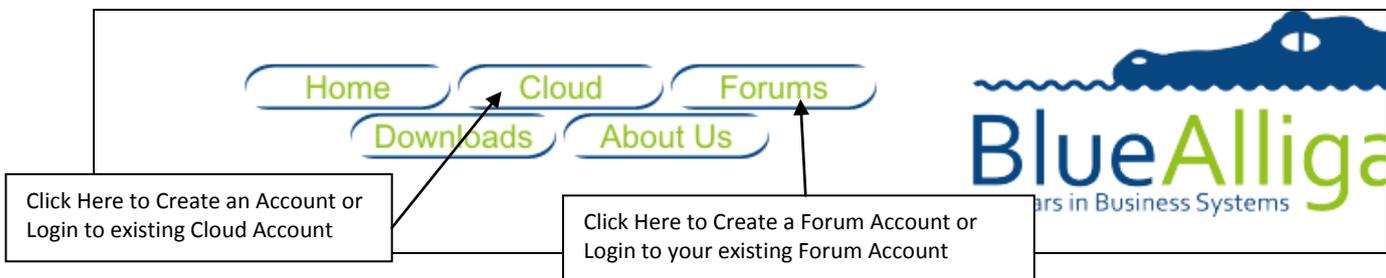


The registration process on the website is simple, free and gives you dedicated storage space (initially 500MB) within the cloud to store the data and image files that you wish to use for Sales Presenter. This should be enough to store up to 25,000 products.

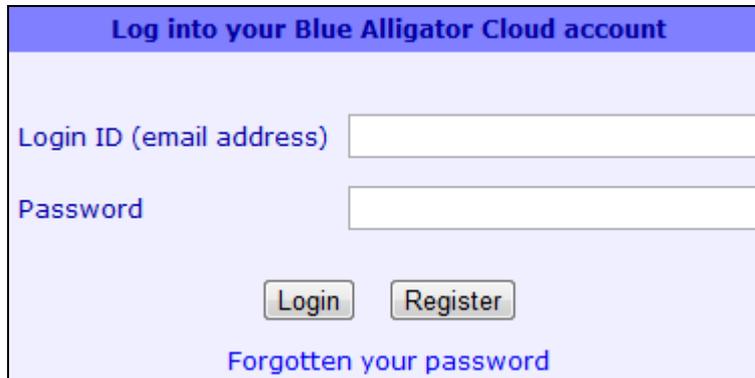
There is also a support forum on the website. You will need to register separately for this. We decided to keep the registration processes for the cloud account and the support forum separate because there may be any number of forum users for a single company (each sales rep or agent may wish to have their own forum account) but there would only be one cloud account (usually created and managed by your system administrator).

Use the support forum if you wish to seek help or clarification with anything to do with Sales Presenter or your cloud account.

Action 1 Select **Cloud** from the bacapps website



Action 2 Then select **Register** from the following screen.



Action 3 Follow the instructions on this screen to set up a new Cloud Account for your company.



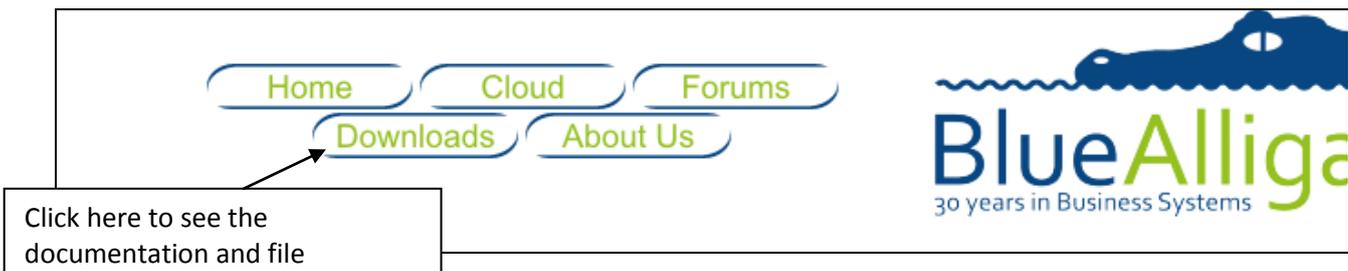
Action 4 Click **Register** on the screen above to set up the new account, you will then receive a Welcome email confirming your registration and providing you with a unique temporary password (you will be able to change this later).

You have successfully set up a New Cloud Account

Step 2 – Download the File Format Documentation and CSV File Templates

There is a **download** section on the on the cloud website at www.bacapps.co.uk from where you can download the various documents and user guides for Sales Presenter. You can also download a zip file containing CSV file templates for each of the types of data file that you can upload to the cloud.

Action 1 Click on the **Downloads** button from the Home page to see all the documentation and the file format templates.



Action 2 Below are the options you will have.

Sales Presenter Downloads			
The latest documentation and sample files relating to Sales Presenter can be downloaded from this page			
Issue Date	File	Size	Description
10 Oct 2011	SalesPresenterUserGuide.pdf	1.22MB	The user guide for Sales Presenter. This document is already available on the iPad when you download and install Sales Presenter. It can be accessed directly from within the app via the Help button displayed at the top-right of most screens.
20 Aug 2011	SalesPresenterGettingStartedWithYourData.pdf	180KB	A step-by-step guide to creating your Blue Alligator Cloud account and getting your data into Sales Presenter on the iPad. This document is a "Must Read" as there are a number of steps that must be followed before you can start using your own data on an iPad. There are also some useful topics on the support forum to help you set up your catalogues and family code lists.
05 March 2012	SalesPresenterImportFileFormats.pdf	287KB	A technical reference document detailing the formats of the various files you can upload to your Blue Alligator Cloud account
08 Jul 2011	SalesPresenterCSVTemplates.zip	1.93KB	Templates of CSV files that you can use as a starting point when preparing your own data. These templates are examples only and may not include every possible file or field. Please see the Sales Presenter Import File Formats document, above, for the latest information on file formats.
21 Jul 2011	DemonstrationDataCSVFiles.zip	6KB	Sample CSV files containing the demonstration database
07 Feb 2012	BlueAlligatorCloudWebServiceReference.pdf	227KB	A technical reference document, for software developers, detailing the Blue Alligator Cloud Web Service that can be used to communicate directly with your cloud account from your back-office system

This document is the second option! You should download the fourth option – SalesPresenterCSVTemplates.zip. This is a great way of getting your data imported quickly if you want to use the CSV data format. Also by downloading the fifth option – SalesPresenterImportFileFormats.pdf this will give you all the technical information on each field format which you will find useful.

Action 3 To download the documents you want just click on the document name. When you are downloading the documents make sure you make a note of where you are saving them to so you can find them later!

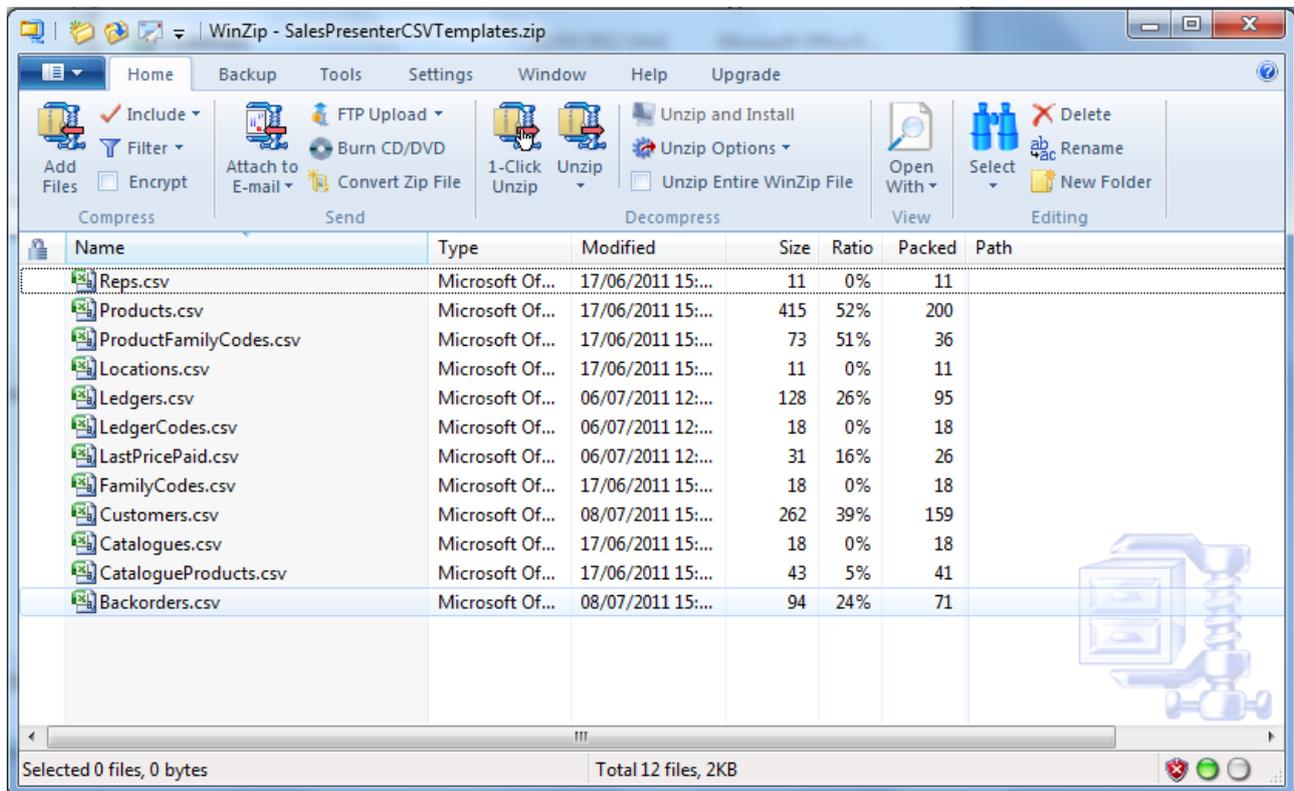
You have successfully Downloaded the File format Files

Step 3 – Prepare your CSV Data Files

You can prepare your CSV files by either downloading the CSV template files (as mentioned in Step 2), or creating your own from scratch. Our templates include every possible field you can upload to your cloud account. Simply delete the fields that you don't need. If you are building your data file from scratch the SalesPresenterImportFileFormats.pdf file will give you all the information you require about the format of each field that you want to include.

Step 3a – Prepare your Data Files – Using Our CSV Templates

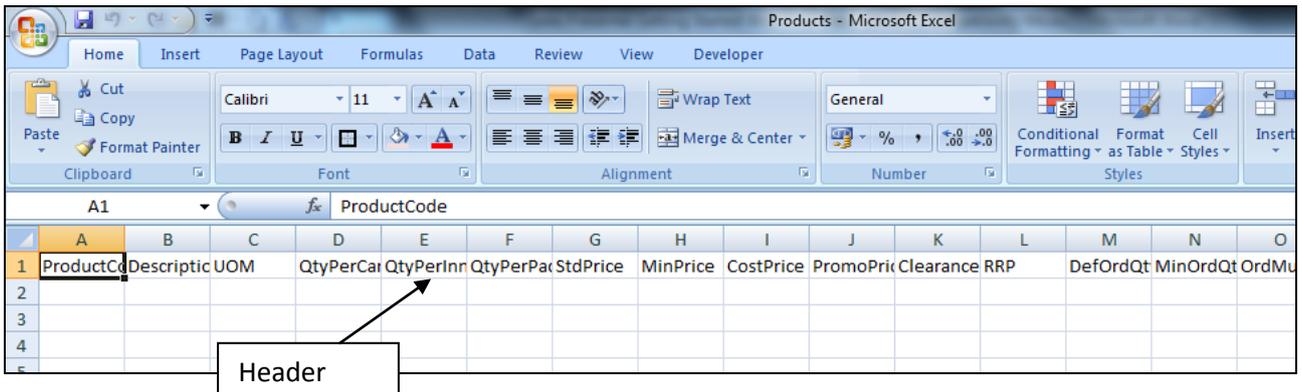
Action 1 To download the template you want, just click on the document name SalesPresenterCSVTemplates.zip which you downloaded in the last step. If you are using our templates then when you double click on the downloaded file you will get the following screen which shows you which CSV templates are in the download.



Action 2 To download the template you want to start with just double click on the document name. When the template opens it will open in your spreadsheet application (probably Microsoft Excel).

Special Note You **do not** need to prepare a complete set of data files. However, you **MUST** prepare “Locations” and “Reps” data files containing at least one entry each.

Action 3 Double click on the Products.csv in the list, you will be asked if you want to open this file, Click Open and it will open in your spreadsheet application. It will look something like this.



This data file has a header row as standard.

Action 4 You can now add your Product Data into these fields. When you have finished adding all your Product Data save the file.

Special Note Ensure that you save the file in a CSV format.

Action 5 Repeat Actions 3 and 4 choosing different CSV templates to hold your specific data – the templates names should be self explanatory – remember you must have at least one entry in the Locations.csv and Reprs.csv template.

Special Note: When the content of the field contains the symbol that you are using as a field separator (in this case a COMMA), then you should surround the entire field contents with double quotes i.e. Teddy Bear, Cub would be “Teddy Bear, Cub”. This ensures that the symbol does not get treated as the field separator.

Step 3b – Prepare your Data Files – Creating your Own Files

We would recommend that you have a look at the CSV templates we have provided to give you the fields that make up each data file.

It is not necessary to use the same field names and you do not have to include all the fields held in our template.

Users with programming or ODBC experience may be able to create a process to extract the data from your back-office system. Doing this is beyond the scope of this document.

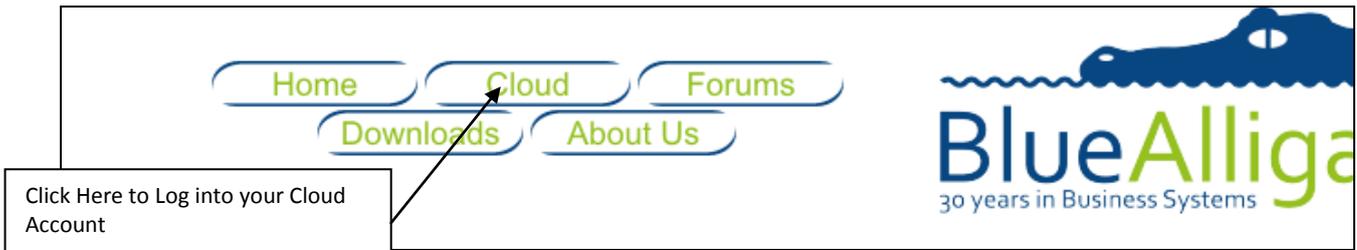
For Sales Presenter Professional Edition users there are some options available from Blue Alligator to assist with interfacing your cloud account with your back-office system. Please contact our sales team to discuss these options.

You have successfully set up your Data Files

Step 4 – Configure the File Mappings within your Cloud Account

This step is about informing your Cloud Account the name of your various data files and must be completed before you Upload your data.

Action 1 Log into your Cloud Account.



Action 2 Enter your Cloud Account login details and click **Login** – (using the password you were emailed when you created your account earlier).

Log into your Blue Alligator Cloud account

Login ID (email address)

Password

[Forgotten your password](#)

Action 3 Click **File Management** and then **File Mappings**.

- Home
- ▶ File Management
 - Manage Data Files
 - Manage Images
 - Manage Movies
 - Manage PDFs
 - Upload Files
 - File Mappings
 - Process Files
 - Device Pairing Details
 - Registered Devices

Welcome to your Blue Alligator Cloud Account

Storage Usage

	Files	Size
Data:	25	0.13 MB
Images:	429	14.96 MB
Movies:	1	5.80 MB
PDF documents:	2	1.27 MB
Total Used:	457	22.16 MB 4.43 %
Storage Limit:	n/a	500.00 MB
Storage Available:	n/a	477.84 MB

Last time files were processed: **03 Apr 2014 10:48**

Action 4 This screen comes in two sections, firstly, check the General File Settings. If you have used our CSV Templates then the defaults entered in the General File Settings will be correct, if however, you have created your own data files you might need to amend these settings.

Cloud - File Mappings

General File Settings

Tick this box if the first line of each file contains headings (such as field names) instead of actual data. This line will then be skipped when the files are processed

Specify the delimiter (field separator) used in the data files. For CSV files this should be a "comma" symbol

If you do wish to change them ensure you click on the **Update Settings** button afterwards to save your changes.

Action 5 The second half of the screen allows you to enter the filenames of your data files – everyone must do this section. You will see in the example below we have already entered the customer Accounts filename as customers.csv. You need to map all your data files to the correct File Type.

File Type	Current Filename Mapping	Details	Uploaded Files	Mapped Fields	Action
Catalogue/Product Matrix	<input type="text"/>	Contains one line per catalogue code/product code combination.	0	0	<input type="button" value="Field Mappings"/>
Catalogues	<input type="text"/>	Contains one line per catalogue code.	0	0	<input type="button" value="Field Mappings"/>
Customer Accounts	customers.csv	Contains one line per customer account code/address number combination.	1	16	<input type="button" value="Field Mappings"/>

When you have finished please click the **Update** button (which is at the bottom of the screen) to save your changes.

Standard Narrative	<input type="text" value="standardnarrative.csv"/>	Contains one line per standard narrative that can be selected during order entry	1	2	<input type="button" value="Field Mappings"/>
Total Records:					
<input type="button" value="Update"/>					

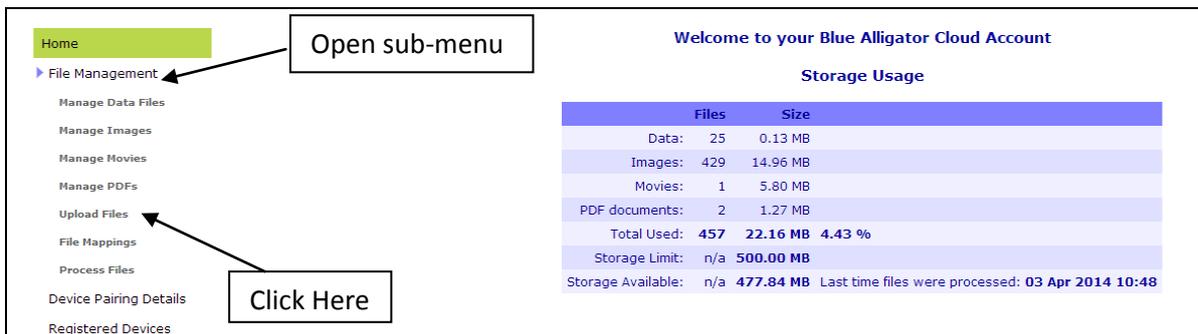
You have Successfully Mapped Your Data Files

Step 5 – Upload your Data and Image Files to Your Cloud Account

This step allows you to browse to, and select, the files on your computer that you wish to upload.

Special Note To assist with the bulk upload of files it is possible to use a compressed file containing your data and image files (i.e. ZIP format). The process will automatically uncompress each of the files within your ZIP file and store them in your cloud storage area, the compressed file can contain folders. **WARNING** Your ZIP file cannot contain a compressed file – if it does the embedded compressed file will be ignored.

Action 1 Select **File Management** and then **Upload Files**



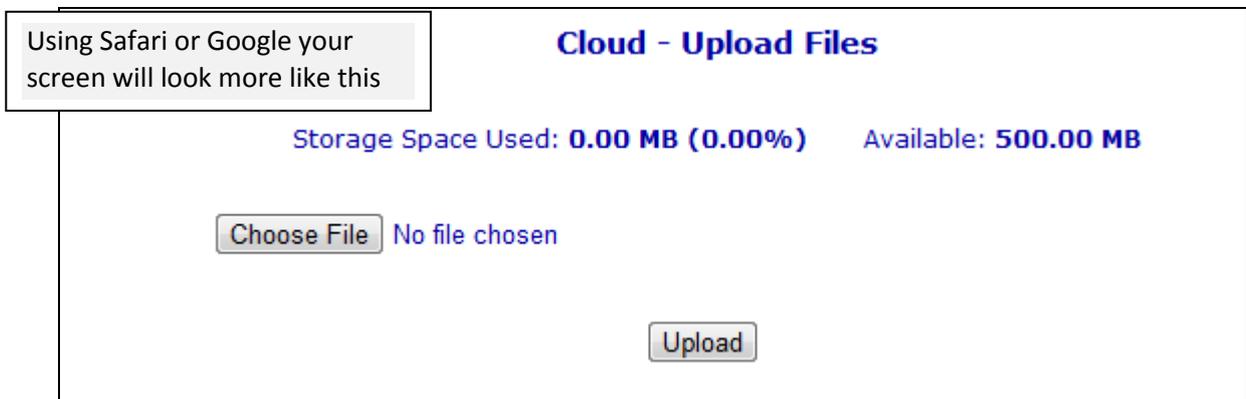
The screenshot shows the 'Home' page of the Blue Alligator Cloud Account. On the left, a navigation menu is visible with 'File Management' selected. An arrow points to 'File Management' with the label 'Open sub-menu'. Another arrow points to 'Upload Files' with the label 'Click Here'. On the right, the 'Storage Usage' table is displayed:

	Files	Size
Data:	25	0.13 MB
Images:	429	14.96 MB
Movies:	1	5.80 MB
PDF documents:	2	1.27 MB
Total Used:	457	22.16 MB 4.43 %
Storage Limit:	n/a	500.00 MB
Storage Available:	n/a	477.84 MB

At the bottom of the table, it states: 'Last time files were processed: 03 Apr 2014 10:48'.

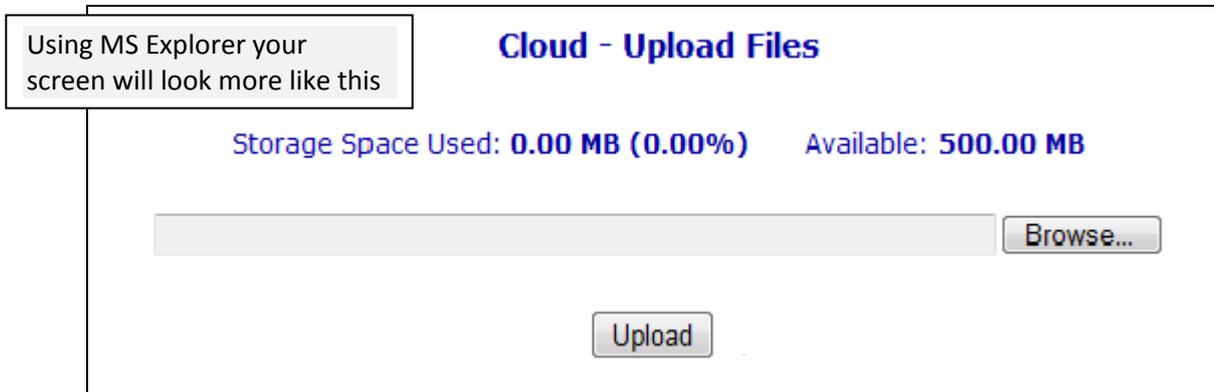
Action 2 Select **Choose File**

Using Safari or Google your screen will look more like this



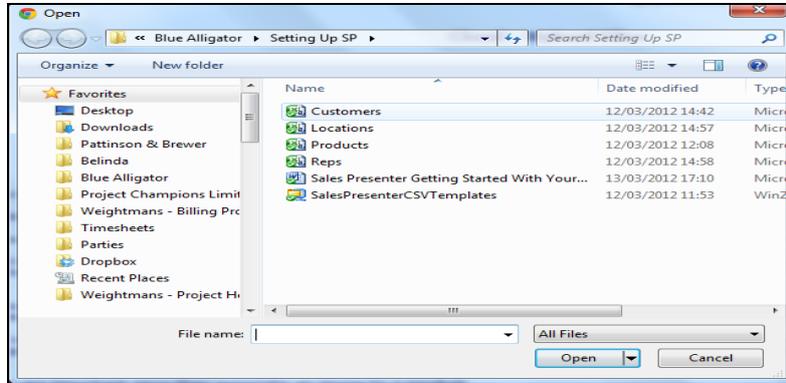
The screenshot shows the 'Cloud - Upload Files' page. At the top, it displays 'Storage Space Used: 0.00 MB (0.00%)' and 'Available: 500.00 MB'. Below this, there is a 'Choose File' button followed by the text 'No file chosen'. At the bottom, there is an 'Upload' button.

Using MS Explorer your screen will look more like this



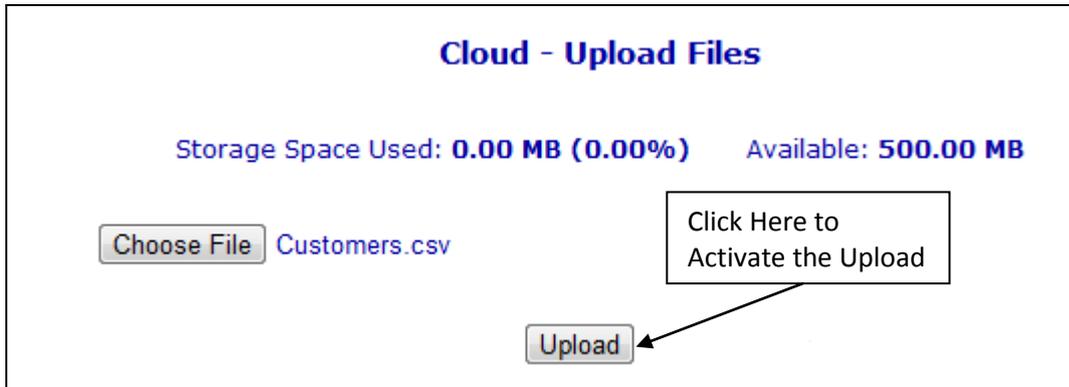
The screenshot shows the 'Cloud - Upload Files' page. At the top, it displays 'Storage Space Used: 0.00 MB (0.00%)' and 'Available: 500.00 MB'. Below this, there is a text input field followed by a 'Browse...' button. At the bottom, there is an 'Upload' button.

Action 3 Select **Choose File** or **Browse** this will open the Browser window on your computer for you to navigate to the folder where you have saved your Data and Image files.



Action 4 To select the file to upload just double click on the file name, this will then appear next to the **Choose File** or **Browse** button (below shows that we have chosen our Customers.csv file).

Action 5 To upload the data from this file click on the **Upload** button. If you are using a compressed file to upload your data then you will only have to do this action once, otherwise you will need to repeat this for each data file you have.



Special Note Uploading a large file may take some time, this will also depend on the speed of your internet connection. Therefore, after choosing the file to upload and clicking the **“Upload”** button you should leave your browser window open and untouched until the file has been fully uploaded. You will receive a **“file uploaded ok”** or **“failed to upload file”** message when the process has finished.

You can upload image files of various formats (such as JPG, BMP, GIF, PNG). The upload process will automatically resize large image files and convert them to JPG’s (if they are not already in this format) – this assists in managing your storage area, improves the download performance and reduces the system resources required on the iPad.

Technical Note : If you are uploading images in the PNG or GIF format that contain alpha or transparency layers or channels and you wish to keep this information you can configure your cloud account (**General** page) to keep the native formats for any image files you upload. However, doing so will impact the download performance on the iPad as the larger file sizes will need to be downloaded. The iPad will also need to use more system resources when working with these images in Sales Presenter.

Action 6 The filename you use for your images is important; they need to be associated with the product. The default option is to ensure you use the following format:

<product code>.<format>

Where: **<product code>** is the product code
 <format> is the image format (such as JPG, BMP, GIF, PNG)

For example, the filename for the product **PROD1** image could be **PROD1.JPG**.

However, it is also possible to specify the image filename in the Products Data file as there is a field called 'Photoref', just add the image file name in this field. This has been useful where you wish to use the same image for several products.

For Sales Presenter Professional Edition users ONLY: a product can have any number of additional images associated with it. The user can swipe through the additional images when viewing the product details. Additional images should be in the following format:

<product code><separator><suffix>.<format>

Where: **<product code>** is the product code
 <separator> is a symbol such as a dash or underscore
 <suffix> is any number of alphanumeric characters
 <format> is the image format (such as JPG, BMP, GIF, PNG)

For example, **PROD1-A.JPG** and **PROD1-B.JPG** would be regarded as additional images for product **PROD1**.

If your product codes are a standard length i.e. all 6 digits long, they you do not need to use a **<separator>**, however if they are variable lengths it is important that you use a **<separator>** to distinguish the difference between the products **PROD1** and **PROD11**. By using a separator, an additional image for **PROD1** could be named **PROD1-1.JPG**, distinguishing it from **PROD11.JPG**.

When displaying additional images for a product, they are presented in alphanumeric sequence (i.e. **PROD1-A.JPG** would be displayed before **PROD1-B.JPG**).

To set the symbol you wish to use for the **<separator>** you can do this in the configuration section of your cloud account. To do this once you are logged into your Cloud Account select the **Configuration** sub-menu and then **General**

The screenshot shows the 'Configuration' menu on the left and a 'Storage Usage' table on the right. Two callout boxes are present: 'Open sub-menu' pointing to the 'Configuration' menu item, and 'Click Here' pointing to the 'General' sub-item under Configuration.

Files	Size
Data: 25	0.13 MB
Images: 429	14.96 MB
Movies: 1	5.80 MB
PDF documents: 2	1.27 MB
Total Used: 457	22.16 MB 4.43 %
Storage Limit: n/a	500.00 MB
Storage Available: n/a	477.84 MB

Last time files were processed: 03 Apr 2014 10:48

You will then have a list of options in front of you, scroll down the screen until you reach the option shown below, and add your **<separator>** in the box.

The screenshot shows a text area with instructions. A callout box points to a small input field with a horizontal line, containing the text: 'Enter your chosen <separator> here – we have chosen an'.

Once you have entered the **<separator>** scroll to the bottom of the screen and select **Update** to save your changes.

For Sales Presenter Professional Edition users ONLY Please Note : There are some options available from Blue Alligator to assist with the automatic uploading of data and images to your cloud account. Please contact our sales team to discuss these options.

You have Successfully Uploaded your Data and Image Files

Step 6 – Configure the Field Mappings within your Cloud Account

Action 1 Once you have configured your file mappings and uploaded your first set of data files you can configure the field mappings for each of the types of data file.

You should log into your cloud account and select the **File Mappings** option from the **File Management** sub-menu.

Welcome to your Blue Alligator Cloud Account

Storage Usage

	Files	Size
Data:	25	0.13 MB
Images:	429	14.96 MB
Movies:	1	5.80 MB
PDF documents:	2	1.27 MB
Total Used:	457	22.16 MB 4.43 %
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Storage Available:	n/a	477.84 MB

Last time files were processed: 03 Apr 2014 10:48

Against each type of file you can select the **Field Mappings** option.

File Type	Current Filename Mapping	Details			Field Mappings
Catalogue/Product Matrix	<input type="text"/>	Contains one line per catalogue code/product code combination.	0	0	Field Mappings
Catalogues	<input type="text"/>	Contains one line per catalogue code.	0	0	Field Mappings
Customer Accounts	customers.csv	Contains one line per customer account code/address number combination.	1	16	Field Mappings

Click Here for Field Mappings

Action 2 The next screen will now display all the fields that Sales Presenter can use from that data file type, for instance if we chose the Customer Accounts Field Mappings button we would see something like this;

Current Data: **Customer Accounts** File Mapping: **customers.csv** Number of upload

Target Field	Data Type	Description	Mapped From
AccountCode	String	Unique code within the system for the customer.	-
AddressNo	Integer	Unique (within a customer account) delivery address number for customers with more than one delivery address Use a default value of 0 if your customers do not have multiple delivery addresses.	Field 0 - AccountCode Field 1 - AddressNo Field 2 - CompanyName Field 3 - Address1 Field 4 - Address2 Field 5 - Town Field 6 - County Field 7 - CountryCode Field 8 - Country
CompanyName	String	Customer company/trading name	
Address1	String	1st line of the delivery address.	
Address2	String	2nd line of the delivery address.	

Dropdown list of Column Headings from your Customer

Action 3 The 'Mapped From' column above gets its information from the Header row (if you configured this in the configurations area) of your data file. Each Column Heading in the data file will be listed in the dropdown list. You need to ensure that the entry you choose in the 'Mapped From' column holds the information required in the 'Target Field' column for Sales Presenter.

Action 4 For most fields that you do not wish to map you do not have to provide a default value, but there are some which MUST have a default value even if this is zero. These fields will specify in the Description column that they require a default value for instance in the Products File:

		product, such as "EACH".		
QtyPerCarton	Integer	Number of pieces within a carton. Use a default value of 1 if you are not providing this value.	-	1
QtyPerInner	Integer	Number of pieces within an inner. Use a default value of 1 if you are not providing this value.	-	1
QtyPerPack	Integer	Number of pieces within a pack. Use a default value of 1 if you are not providing this value.	-	1

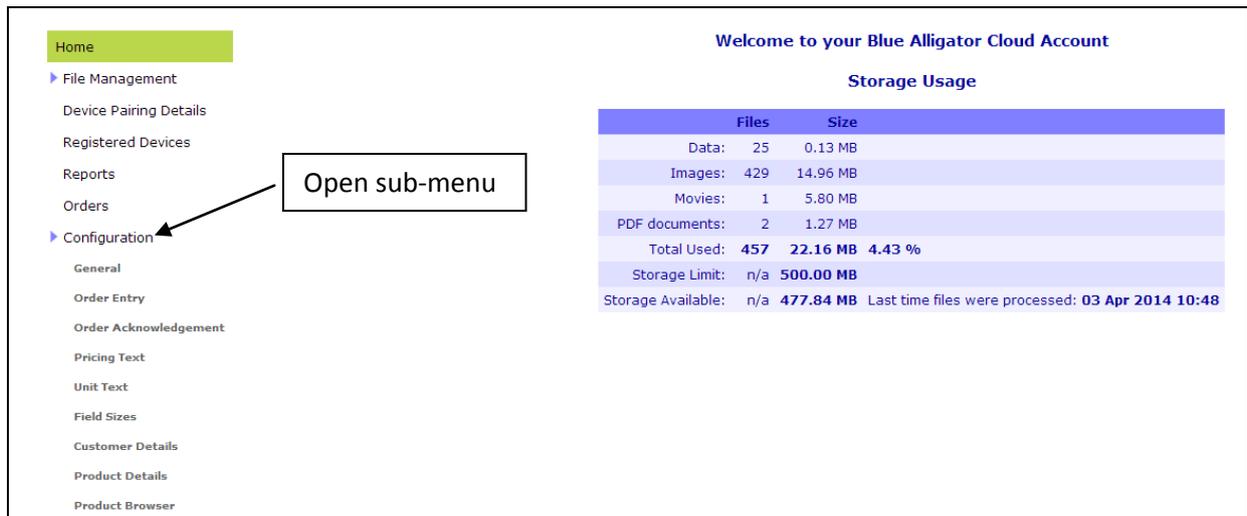
Action 5 Once you have completed your field mappings for each file select **Update** which is at the bottom of the screen and this will save your settings.

You have Successfully Mapped your Data Fields

Step 7 – Customising your Configuration Options

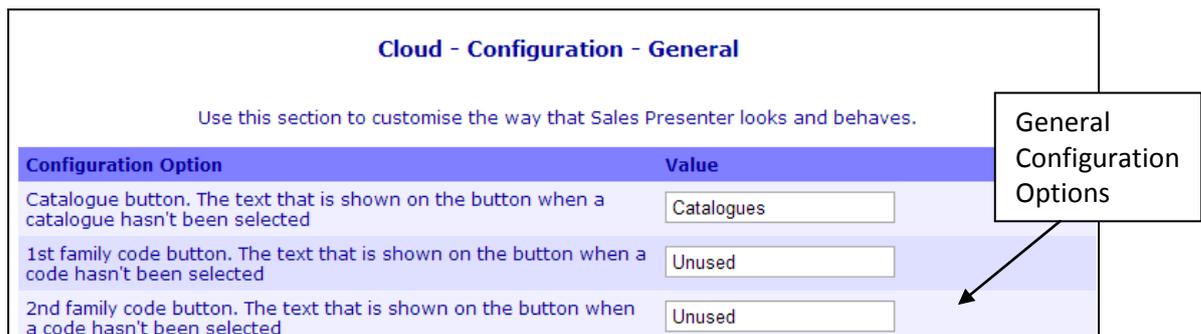
In the configuration section of your cloud account you can customise the way in which certain features in Sales Presenter look and act. Below we have highlighted the main areas of configuration, however, we recommend that you browse through each configuration button and see how you can customise your version of Sales Presenter.

Once logged into your Cloud Account choose **Configuration** from the menu list on the Cloud Home screen.



Files	Size
Data: 25	0.13 MB
Images: 429	14.96 MB
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PDF documents: 2	1.27 MB
Total Used: 457	22.16 MB 4.43 %
Storage Limit: n/a	500.00 MB
Storage Available: n/a	477.84 MB Last time files were processed: 03 Apr 2014 10:48

By selecting Configuration, the sub-menu will open with a variety of different configuration options. Each menu option includes a variety of different configurable options.



Configuration Option	Value
Catalogue button. The text that is shown on the button when a catalogue hasn't been selected	<input type="text" value="Catalogues"/>
1st family code button. The text that is shown on the button when a code hasn't been selected	<input type="text" value="Unused"/>
2nd family code button. The text that is shown on the button when a code hasn't been selected	<input type="text" value="Unused"/>

- General configuration – allows you to change various options that don't specifically fall into one of the sub-sections below, such as the wording shown on the family code and catalogue buttons, the unit of quantity that will be entered by the rep during order entry and the format of any date fields that are being uploaded as part of your data. You need to go down this list of Configuration Options and set the Value to your requirements.

Cloud - Configuration - Order Acknowledgement

The following fields allow you to customise the look of the order acknowledgement.

Configuration Option	Value
Your company/trading name	<input type="text" value="Project Champions Limited"/>
First line of your address	<input type="text"/>
Second line of your address	<input type="text"/>
Third line of your address	<input type="text"/>

- Order acknowledgement (as shown above) – allows you to change the way the order acknowledgement looks. You can configure the way your address appears, whether your company logo is used and which columns (from an assortment) are displayed for each product.

Cloud - Configuration - Pricing Text

The following fields allow you to customise the actual text that appears in Sales Presenter for the given types of price.

Configuration Option	Display Text	Apply Discount?	Encode Price?	Selectable During Order Entry?
Standard selling price	<input type="text" value="Std"/>	<input checked="" type="checkbox"/>		
Last price paid by the customer	<input type="text" value="Last"/>			
Clearance price	<input type="text" value="Clearance"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Pricing text – allows you to change the actual wording that appears in Sales Presenter for the various types of price (e.g. standard, clearance, promotional).

Cloud - Configuration - Field Sizes

used when creating new customer accounts or orders within Sales Presenter. Where orders are being imported into your system. This ensures that the user doesn't enter more text for a field than your system uses.

Configuration Option	Value	Required
Customer account code	<input type="text" value="10"/>	<input checked="" type="checkbox"/>
The customers company/trading name	<input type="text" value="40"/>	<input checked="" type="checkbox"/>
Your contact at the customer	<input type="text" value="30"/>	<input checked="" type="checkbox"/>

- Field sizes – allows maximum input field sizes to be used when creating new customer accounts or orders within Sales Presenter. Where orders are being imported into your back-office system you should set the field sizes to match your back-office system. This ensures that the user doesn't enter more data for a field than your system uses.

You have Successfully Customised Sales Presenter

Step 8 – Prepare your uploaded data for Sales Presenter

This process takes your latest uploaded files, analyses them and prepares a set of data that can be downloaded to each of your iPads running Sales Presenter.

Action 1 Log into your Cloud Account and select **Process Files** from the Cloud Home screen.

Files	Size
Data: 25	0.13 MB
Images: 429	14.96 MB
Movies: 1	5.80 MB
PDF documents: 2	1.27 MB
Total Used: 457	22.16 MB 4.43 %
Storage Limit: n/a	500.00 MB
Storage Available: n/a	477.84 MB

Last time files were processed: 03 Apr 2014 10:48

This process may take some time based on the volume of data that you have uploaded. After clicking the **Process Files** button you should leave your browser window open and untouched until you receive a confirmation message that the data files have processed successfully as below.

Process Files

Data files processed ok

Last time files were processed: 06 May 2014 10:45

This process takes your latest uploaded files, analyses them and prepares a set of data that can be downloaded to each of your iPads running Sales Presenter.

This process may take some time based on the volume of data that you have uploaded. After clicking the Process Files button you should leave your browser window open and untouched until you receive a confirmation message that the data files have processed successfully as below.

Process Files

You can refresh your data by performing steps 3, 5 and 8 as often as you wish.

You can refresh or change your product images simply by performing step 3.

You have Successfully Processed Your Data and Images

Step 9 – Download the Data and Images to your iPad

This is where you will register your iPads to your Cloud Account, and then you, or the Sales Reps or Agents, will download the Data and Images to these registered iPads.

Action 1 Log into your Cloud Account and click the option **Device Pairing Details** on the menu.

Unique User Name and Pass Code

Device Pairing Details

You can pair any number of iPads with this cloud account by providing your sales reps with the user name and pass code shown below. These two pieces of information are entered in the settings screen within Sales Presenter.

You can change your user name and/or pass code at any time. However, this will mean that any existing iPads paired with this account won't be able to synchronise until the values have also been changed on each iPad.

User Name:	6203120001	<input type="button" value="Change"/>	Early versions of Sales Presenter refer to this field as the Licence Number
Pass Code:	2301-1972-C343-694A	<input type="button" value="Change"/>	Early versions of Sales Presenter refer to this field as the Activation Code

There is a unique system generated User Name and Pass Code for your Cloud Account. It is possible to change these to something more memorable by clicking on the **Change** button and following the instructions.

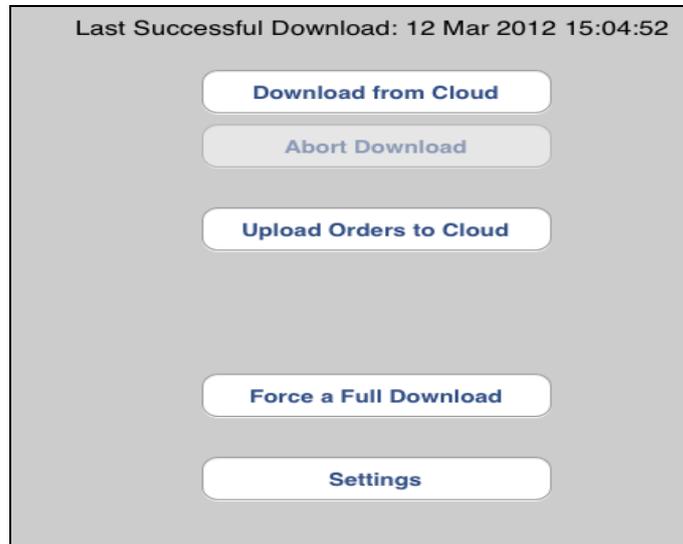
Action 2 Make a note of the User Name and Pass Code and give this to your Sales Reps and Agents who have installed Sales Presenter on their iPads.

Action 3 Your Sales Reps and Agents should Open Sales Presenter on their iPad.

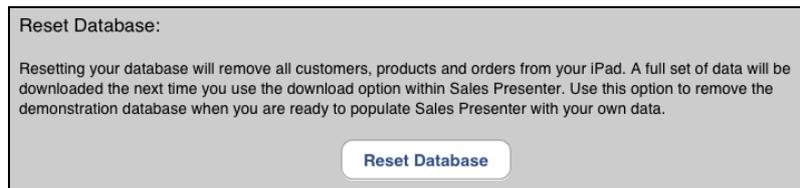
Action 4 Select **Download Manager** from the iPad's front screen.

Product Catalogues	Products in the system: 6
Customers	Customers in the system: 2
Order History	Live orders in the system: 1 Exported orders: 0
Download Manager	Last successful download: 12 Mar 2012 15:04:52

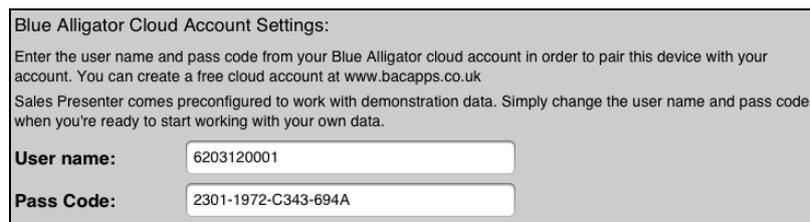
Action 5 Select **Settings**



Action 6 Choose **Reset Database** from the button at the bottom of the screen, this will remove any existing data (such as the demonstration data) from their iPad.



Action 7 Now enter the User Name and Pass Code in the fields at the top of the screen.



Action 8 Select **Back** in the top left hand corner of the screen to exist the settings screen.

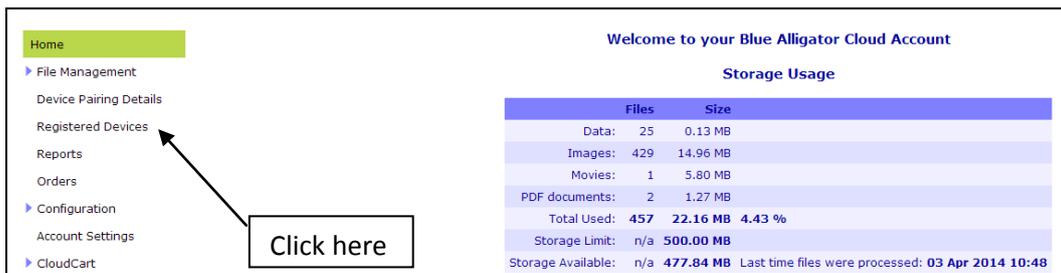


Action 9 Select **Download from Cloud** after a short time you will receive the following Message:



This device must be authorised from within your Blue Alligator Cloud account before Sales Presenter can download any data

Action 10 You (the Cloud Administrator) should now log into your cloud account (or refresh the screen by clicking on the **Cloud** button)



On the menu list is the **Registered Devices** option which will display the **Registered Devices** list.



Action 11 The new iPad will now need to be authorised. To do this click on the **Authorise** button next to the iPad.



For Sales Presenter Professional Edition Users ONLY it is possible to restrict the information the Sales Rep or Agent can see in particular the customers they can view.

Action 1 From the Home Screen of your Cloud Account select **Edit Restrictions** for the iPad that you wish to restrict.

Registered Devices							
Device Name	Status	Product	Version	Last Synchronised	Current Sales Rep Restriction*	Apply Group/Rep Exclusions To This Device?	Actions
BAC Demo 01 iPad	Authorised	SP Professional	1.1.1	12 Mar 2012 15:00:37		No	<input type="button" value="Disable"/> <input type="button" value="Edit Restrictions"/>

Action 2 Once you have selected Edit Restrictions you will get to the Manage Device Screen below

Cloud - Manage Device							
Device Name	Status	Action	Product	Version	Last Synchronised	Current Sales Rep Restriction (see below)	Apply Group/Rep Exclusions To This Device?
BAC Demo 01 iPad	Authorised	<input type="button" value="Disable"/>	SP Professional	1.1.1	12/03/2012 15:00:37		No <input type="button" value="Change"/>

Rep Restrictions

Below this is the List of Reps/Agents, this list has come from the reps.csv data file that you will have uploaded earlier in this manual.

Action 3 By ticking the box next to the Reps name you are restricting this particular iPad to that particular Rep – you can select as many Reps as you wish to be restricted to this iPad.

Selected	Rep Code	Rep Name
<input type="checkbox"/>	3	Andy Blane
<input type="checkbox"/>	2	Jill Blane

Action 12 On the iPad itself the Sales Rep or Agent now needs to select **Download from Cloud** again and the data will now be downloaded.

Please Note This process may take some time the first time you download all the data and images, so please ensure that you are using a broadband or WiFi connection and that you allow sufficient time (which could be several hours).

Once this initial download of data has been completed when you run this process again to update the data and images only the changes (delta updates) are transmitted to the iPad and therefore it will be quicker and could be performed via a 3G connection whilst the Rep/Agent is on the road.

**You have Successfully Prepared the iPad and are Ready to Use Sales
Presenter with your Data and Images
CONGRATULATIONS**