



Sales Presenter User Manual

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1 Sales Presenter – Facility Options

Sales Presenter from Blue Alligator is available in various levels of functionality to suit users who require 'no frills' usability up to professional sales organisations with multiple, dispersed sales reps.

Sales Presenter is downloadable from the App Store (search for Sales Presenter or Blue Alligator). Data can be uploaded to the iPad via the Blue Alligator Cloud server and orders taken can be emailed to the customer and the user company.

All editions are pre-configured to use the Blue Alligator demonstration data and will automatically do this when the 'Download from Cloud' button is clicked (see section 7.1). The demo data enables you to immediately see its potential. Before you start to download your own data you will need to go to the Download Manager>Settings screen and Reset your database – this removes the demo data.

One of the great things about the Blue Alligator Cloud service is that it does 'net change' data updates i.e. it only transfers data/photos that are new or have changes e.g. stock figures.

1.1 Standard Edition

This edition is for small companies who want to replace their printed catalogues but only have a simple one product price, no discounts, order-taking requirement.

1.2 Professional Edition

This edition is for companies with sales teams who need a professional, rapid order capture system together with customer account management facilities. It is ideal for users who have the skills to manage their own data uploads/downloads to/from their back office system and need the facilities of rapid order capture at exhibitions.

Professional edition users also have the option of upgrading their cloud account from a Basic level to a Premium level. This is a direct service from Blue Alligator that provides tools to automate the preparation of your data for upload to the iPads and the importing of orders from the Blue Alligator Cloud back to your main order processing system. Extra information may be populated on the iPads - Accounting status and outstanding transactions, Sales History and Back Orders. Comprehensive pricing and sales units options are also included.

2 Getting your data and photos onto the iPads

Before you can do this you will need to log onto the Blue Alligator Cloud www.bacapps.co.uk, go to the Cloud page, register a new account and follow the instructions for mapping your data. A guide to getting started with your data and documentation relating to file formats can be accessed via the site.

Cloud usage is free if you stay within the current free storage space limit (this changes from time to time so is not published here) thereafter there is the option of renting more space by paying a nominal bi-annual fee.

On each iPad, before you start to download your own data, you will need to go to the Download Manager>Settings screen and Reset your database – this removes the demonstration data.

You will also need to enter a user name and pass code that can be found within the cloud account “devices” screen, to pair the iPad with your company cloud account (see section 7.4). On the first attempt to download data from the cloud account, the iPad will display a message that it needs to be authorised before it can download the data. This is a security measure. The device will appear as “disabled” on the devices screen within the cloud account. The user (of the Cloud Account) can use the “authorise” button to authorise an iPad. The iPad can then download the data. The user can subsequently disable an iPad to prevent further downloads.

3 Introduction and Application Front Page

This manual describes the functionality of the Blue Alligator Sales Presenter (SP) app for iPad. It is applicable to all editions but does not cover the methods of populating the SP database with product and customer information (see the appropriate SP Data Interface manual for this).

Please note: all screenshots in this manual show the Professional Edition of Sales Presenter.

The Front Page of the App appears as follows:



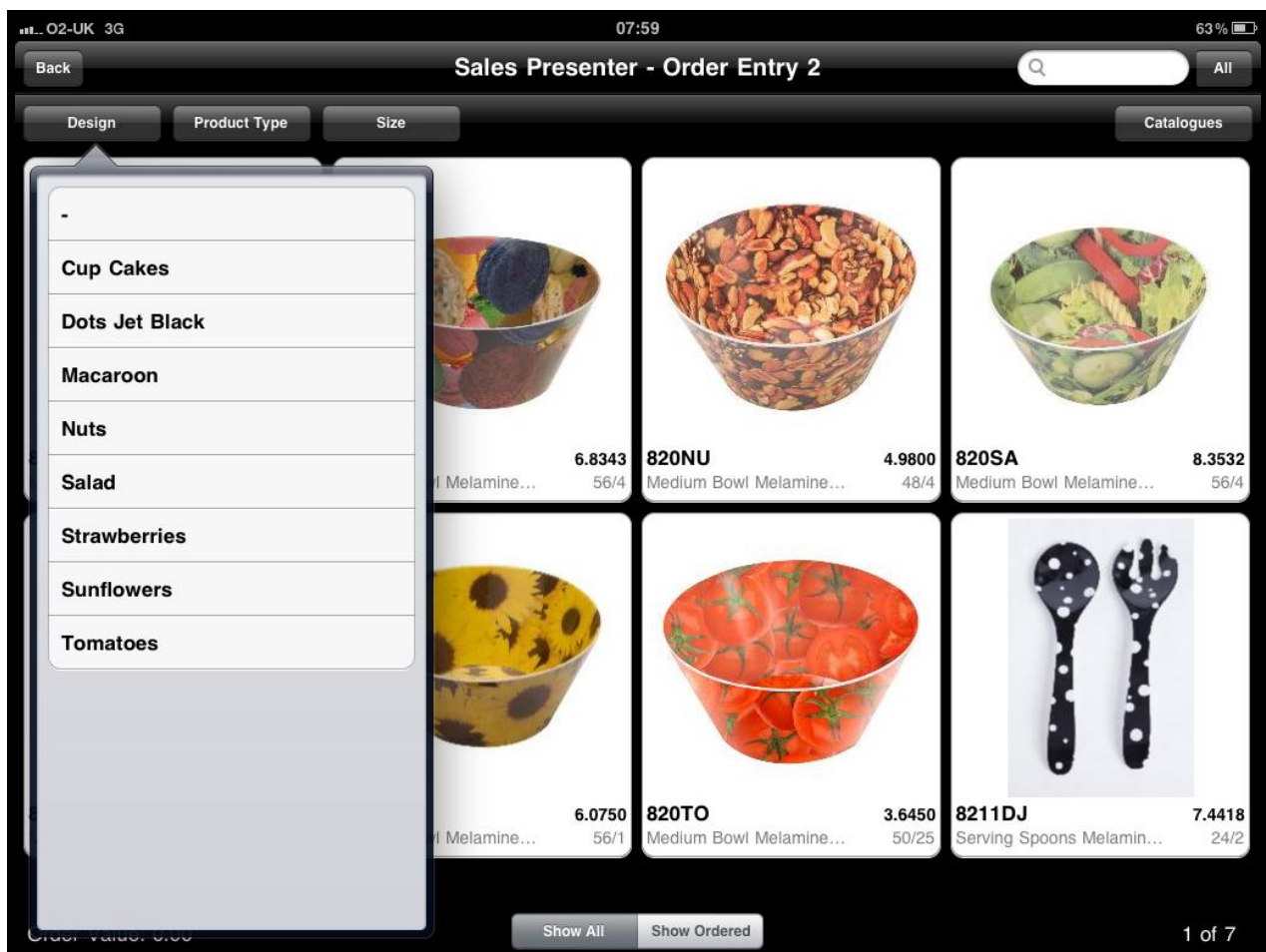
See following sections for Product Catalogues, Customers, Order History and Download Manager.

4 Product Catalogue

This function is used to browse through product catalogues and check details of individual products e.g. Stock, Price etc.

On entry of this function the user is presented with some menu buttons but otherwise a blank screen.

To populate this with product photos you can either tap the “All” button in the top right of the screen or tap “Product Catalogues” and select the required catalogue (assuming that you have catalogues in the data set that you can filter by) or add multi level Family code filters using the drop down buttons. To cancel the filters simply tap “-” in the appropriate drop down.



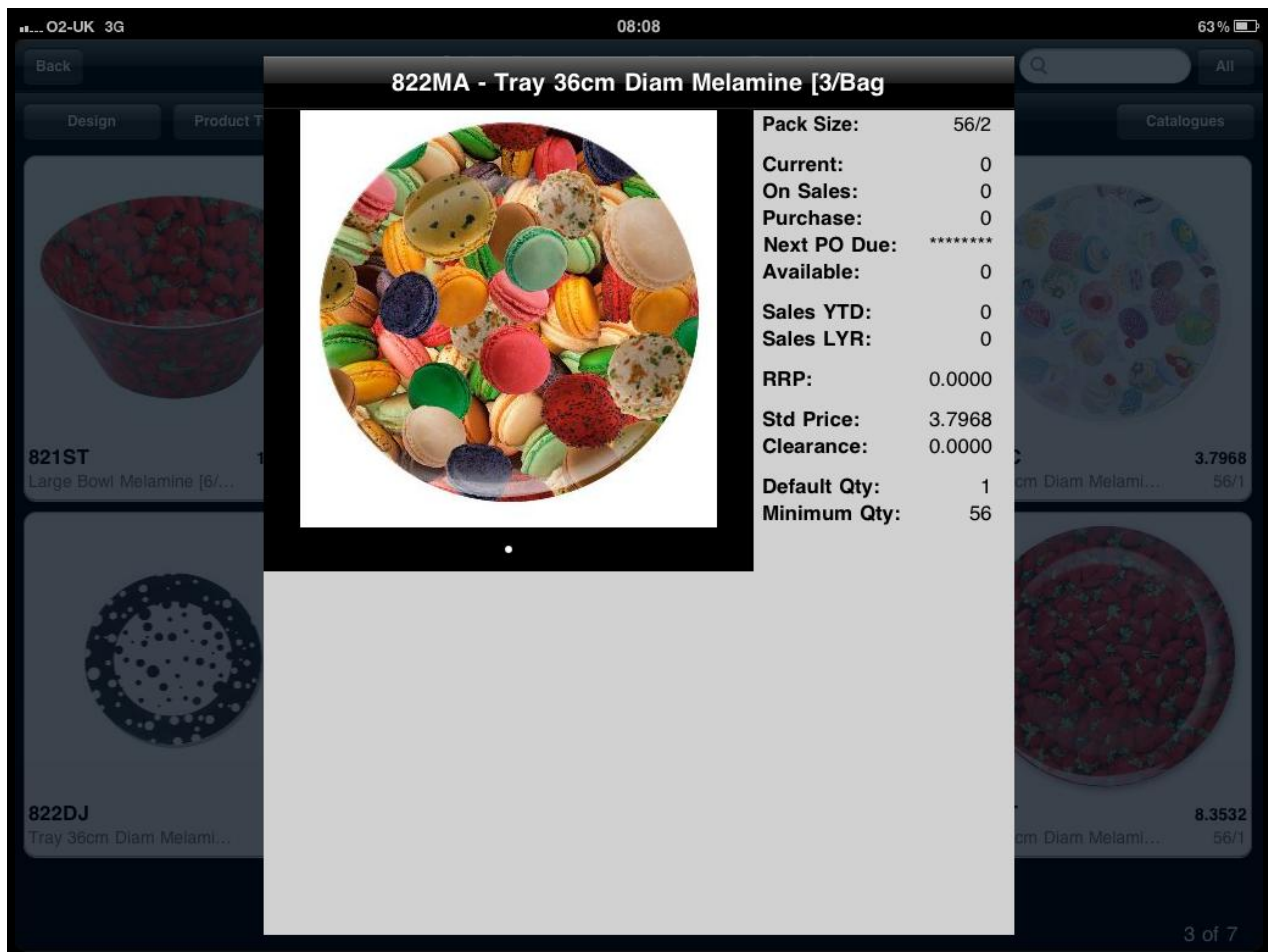
The user may also:

- Search for products by entering a search string in the top right search box and tapping the “Search” button on the ‘on screen’ keyboard (this appears when you tap on the search box). SP will search both Product code and description for matches and filter the catalogue accordingly. To cancel the filter, simply tap the top, right button (which is now named “Clear”).

To clear the keyboard from the screen, tap the keyboard symbol in the bottom, right corner.

- ‘Swipe’ forwards and backwards through the catalogue.

If more information is required, simply tap the required photo to see the relevant details. Note these will vary depending upon the data that has been downloaded to the iPad



If multiple photos exist for a product (Professional Edition only) then the user can swipe left and right across the photo to view each photo.

To see a full screen photo, double tap it – you can then ‘pinch’ the photo to zoom in and out, and pull it around the screen if necessary.



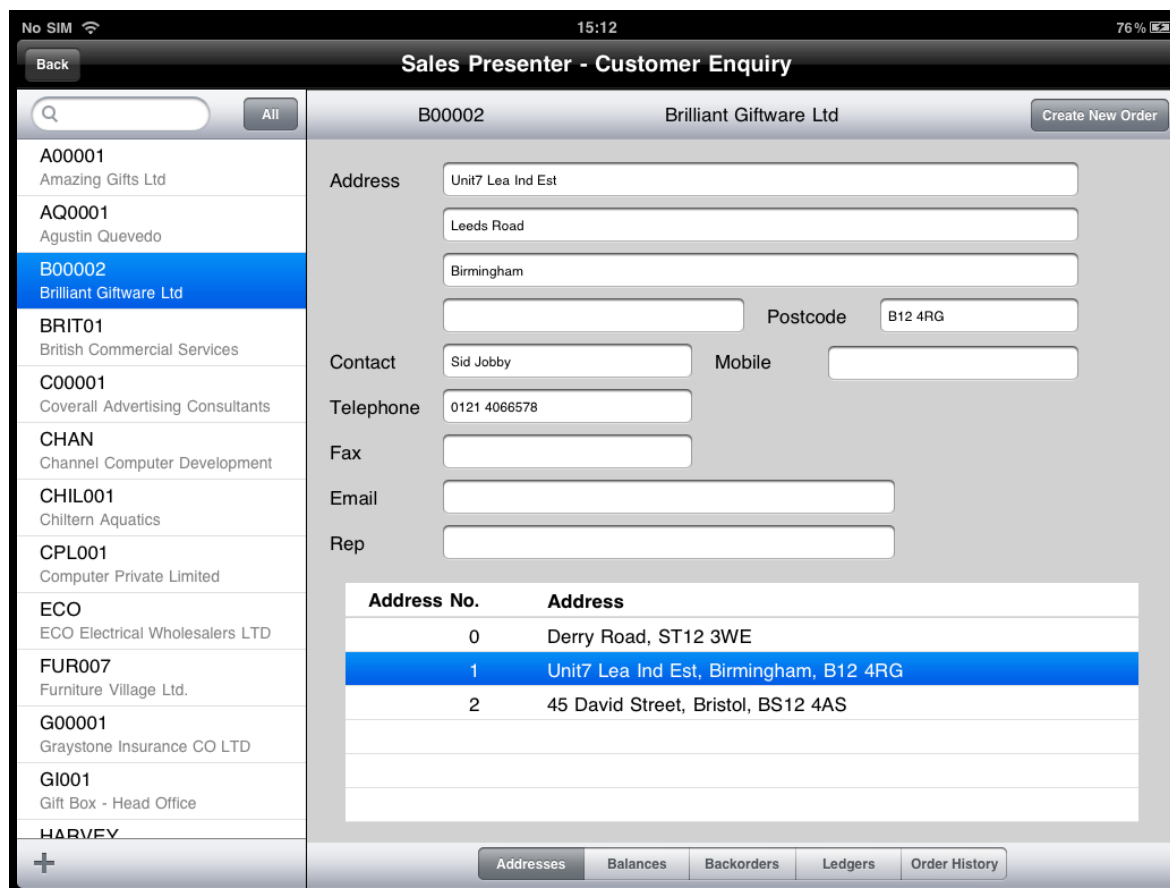
To exit this function, tap the “Done” button in the top, right corner.

5 Customers (Order Entry)

This function is used to enquire on customer data and for the entry of new Sales Orders.

On entry of this function a scrolling list of valid, existing customers can be populated (tap “All”) on the left of the screen (if the iPad is in ‘landscape’ display – if in portrait tap the “Customers” button in the top, left or rotate the screen). A search string may be entered via the on screen keyboard, which appears when the search box is selected. SP will search Customer Code, Name, Address and Postcode for matches and filter the list accordingly. To cancel the filter simply tap the “All” button at the bottom of the list. To clear the keyboard from the screen, tap the keyboard symbol in the bottom right corner.

For users of the Professional Edition, tapping the “+” symbol allows you to create a new customer account (Premium cloud account users will want to make sure that your interface handles new customers).



Sales Presenter - Customer Enquiry

Back | All | B00002 | Brilliant Giftware Ltd | Create New Order

Search: []

Customer Details:

Address: Unit7 Lea Ind Est
Leeds Road
Birmingham
Postcode: B12 4RG

Contact: Sid Jobby | Mobile: []

Telephone: 0121 4066578

Fax: []

Email: []

Rep: []

Address List:

Address No.	Address
0	Derry Road, ST12 3WE
1	Unit7 Lea Ind Est, Birmingham, B12 4RG
2	45 David Street, Bristol, BS12 4AS

Addresses | Balances | Backorders | Ledgers | Order History

If the customer has multiple delivery addresses these are listed and, when selected, the relevant details are populated in the contact details above.

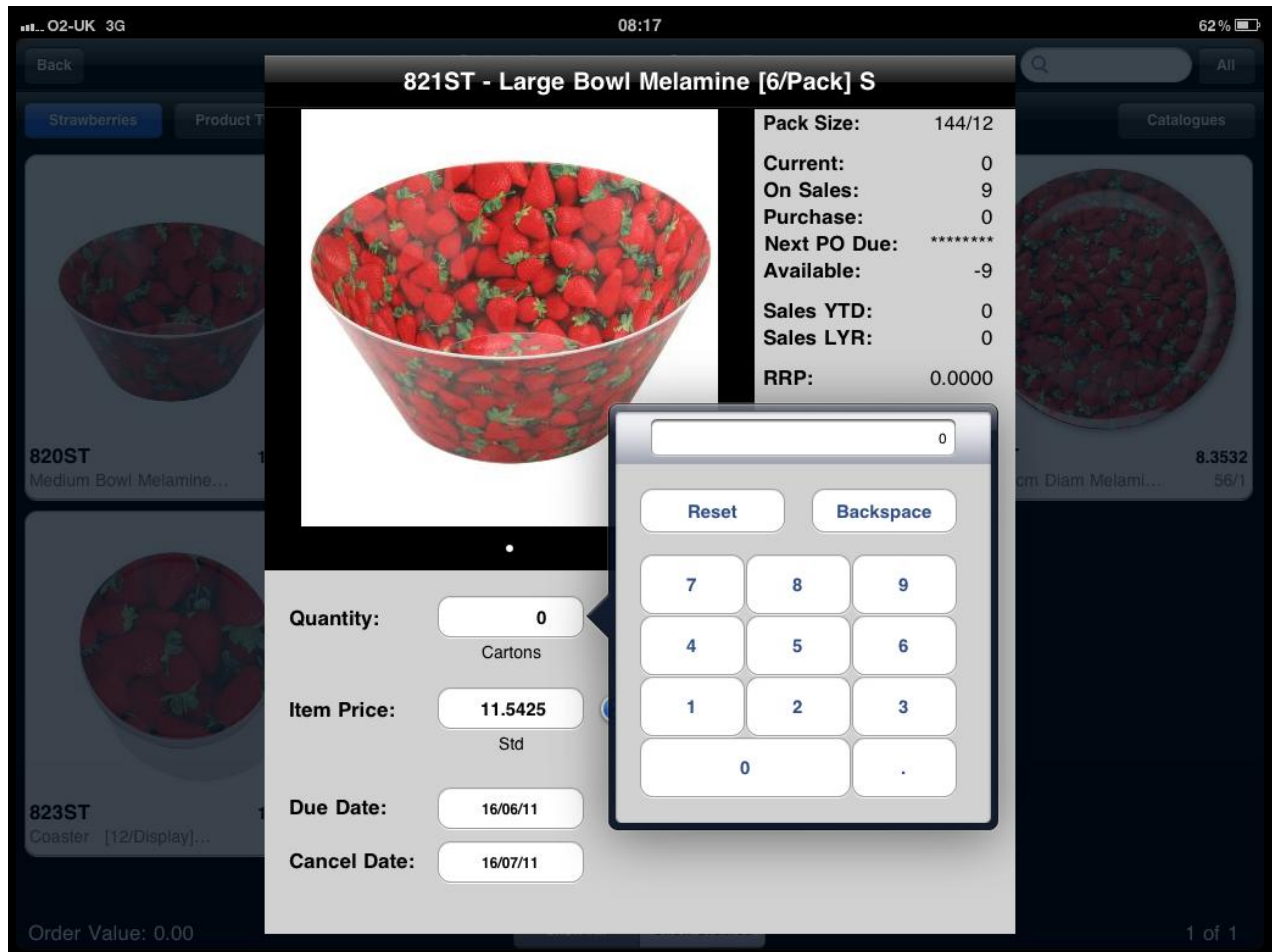
There are also buttons (Professional Edition only) showing Account Balances (aged Debt), Back Orders and Outstanding Ledgers transactions.

The “Order History” button shows orders that have already been taken on the iPad for the customer.

In the top right of the screen is a “Create New Order” button. When this is tapped the App behaves the same as in “Product Catalogue” above except that:

- Pricing/Discounts will be as per the rules for the selected customer (Professional Edition only)
- When a product is tapped you will also be able to enter a quantity and override the price if necessary..

To accept the item, quantity and price – just tap outside the info box. You will see that the item now carries a green tick against it and the current order value is displayed in the bottom, left of the screen.



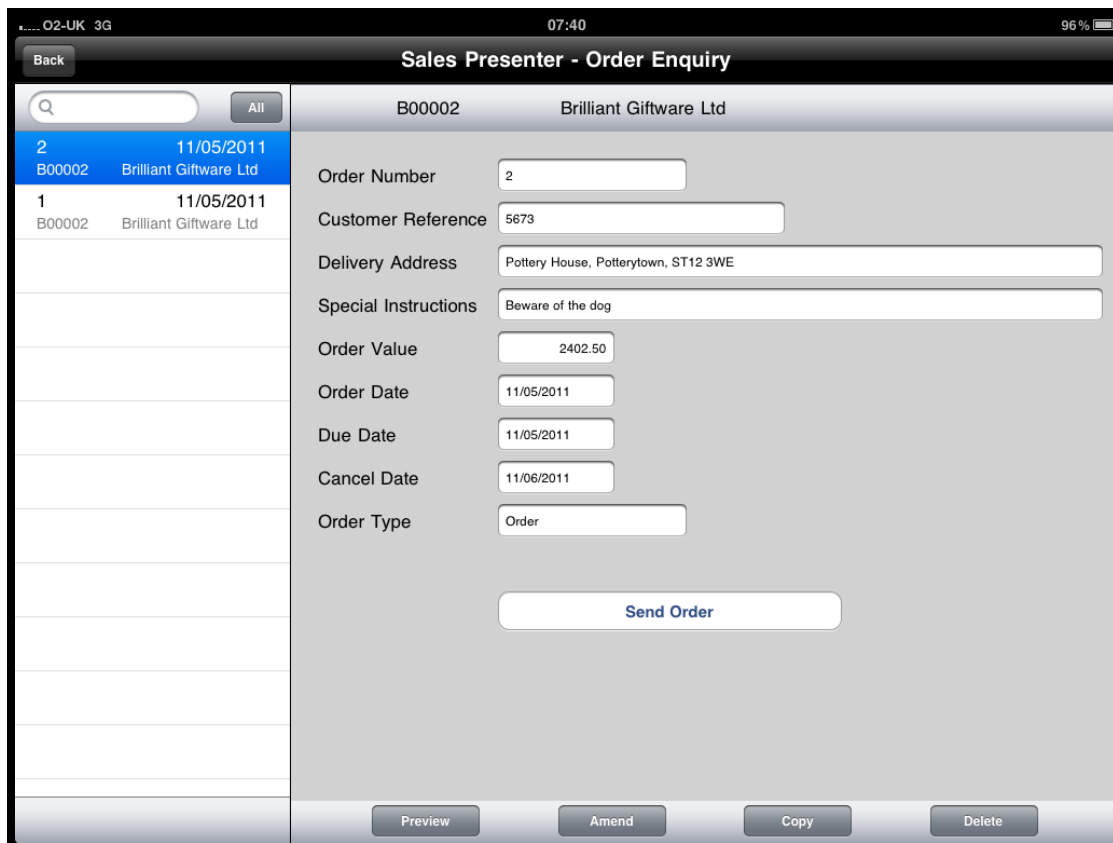
- To filter the screen to include only those items that are on the current order, tap “Show Ordered” at the base of the screen. To return to the full catalogue tap “Show All”.
- To amend an item that has already been selected, just tap it again and change the entries.

To exit the function tap the “Back” button in the top, right of the screen. When exiting the user will be taken back to the Customer screen>Order History tab with the new order highlighted so that the Order Acknowledgement can be Previewed/Emailed (see next section for screen shot examples).

6 Order History (Amendment)

This function is used to enquire on Sales Orders taken by this SP user and to amend the orders if necessary.

On selection of this function the user is presented with a scrolling list of orders, taken by this user, on the left of the screen (if the iPad is in 'landscape' display – if in portrait tap the “Orders” button in the top, left or rotate the screen).



Sales Presenter - Order Enquiry

Back 07:40 96%

Search All

Order Number	Customer Reference	Order Date
2	B00002	11/05/2011
1	B00002	11/05/2011

Order Details:

Order Number: 2

Customer Reference: 5673

Delivery Address: Pottery House, Potterytown, ST12 3WE

Special Instructions: Beware of the dog

Order Value: 2402.50

Order Date: 11/05/2011

Due Date: 11/05/2011

Cancel Date: 11/06/2011

Order Type: Order

Send Order

Preview Amend Copy Delete

A search string may be entered via the on screen keyboard, which appears when the search box is selected. SP will search Customer Code and Order Number for matches and filter the list accordingly. To cancel the filter simply tap the “All” button at the bottom of the list.

To clear the keyboard from the screen, tap the keyboard symbol in the bottom, right corner.

Summary information is displayed for the selected order and details can be viewed/amended by tapping the “Amend Order” button.

The selected order may be copied, either as a repeat or to create an order for another branch/delivery address for the customer (Professional Edition only).

Tapping the “Preview” button shows the Order Acknowledgment that will be sent via email to the customer and HQ.

O2-UK 3G
08:24
61%

Back
Sales Presenter - Order Acknowledgement



Blue Alligator Company Ltd
Grove Ash, Milton Keynes, MK1 1XL

Tel: 01908 368001 Fax: 01908 368001
Email: demokit@blue-alligator.co.uk Web: www.blue-alligator.co.uk

Order Summary - Customer Copy

Invoice To:
Unit7 Lea Ind Est
Leeds Road
Birmingham

B12 4RG

Contact: Sid Jobby
Telephone: 0121 4066578

Deliver To:
Unit7 Lea Ind Est
Leeds Road
Birmingham

B12 4RG

Order Ref: as123
Order No: 4
Order Date: 16/06/11
Account: B00002

Rep: Dave French
Location: On The Road

Item	Description	Qty	Unit	G.Price	G.Value	Due	Latest	Barcode
820TO	Medium Bowl Melamine [12/Pack]	2,750	Pcs	3.6450	10,023.75	16/06/11	16/07/11	5012340000218
822MA	Tray 36cm Diam Melamine [3/Bag]	2,688	Pcs	3.7968	10,205.80	16/06/11	16/07/11	54178095234
822SU	Tray 36cm Diam Melamine [3/Bag]	14	Pcs	8.3532	116.94	16/06/11	16/07/11	541785432

Tapping the Out tray icon in the top right sets up the email to be sent:

02-UK 3G 08:26 61%

Back Cancel Sales Presenter order acknowledgement Send

To:

Cc: demokit@blue-alligator.co.uk

Bcc:

Subject: Sales Presenter order acknowledgement

A PDF acknowledgement of order 4 is attached


 30 years in Business Systems
 Blue Alligator Company Ltd
 Grove Ash, Milton Keynes, MK1 1XL
 Tel: 01908 368001 Fax: 01908 368001
 Email: demokit@blue-alligator.co.uk Web: www.blue-alligator.co.uk

Order Summary - Customer Copy

Invoice To: Unit7 Lea Ind Est Leeds Road Birmingham B12 4RG		Deliver To: Unit7 Lea Ind Est Leeds Road Birmingham B12 4RG	
Contact: Sid Jobby Telephone: 0121 4066578		Rep: Dave French Location: On The Road	
Order Ref: as123 Order No: 4 Order Date: 16/06/11 Account: B00002			

Item	Description	Qty	Unit	G.Price	G.Value	Due	Latest	Barcode
820TO	Medium Bowl Melamine [12/Pack]	2,750	Pcs	3.6450	10,023.75	16/06/11	16/07/11	5012340000218
822MA	Tray 36cm Diam Melamine (3/Bag)	2,688	Pcs	3.7968	10,205.80	16/06/11	16/07/11	54178095234
822SU	Tray 36cm Diam Melamine (3/Bag)	14	Pcs	8.3532	116.94	16/06/11	16/07/11	541785432

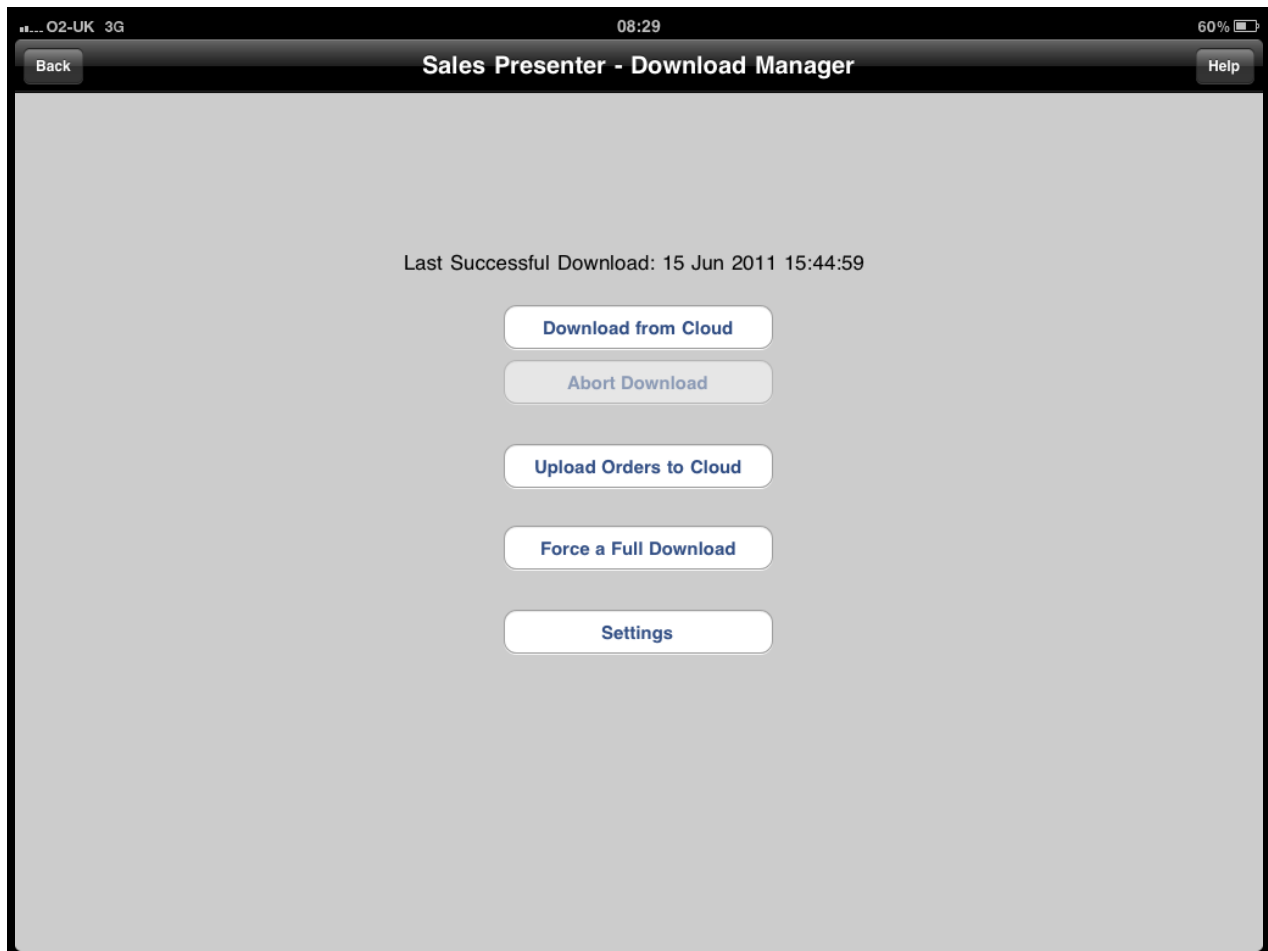
Item
820TO
822MA
822SU

le
0000218
095234
5432

To exit this function, tap the “Back” button in the top, left corner.

Professional Edition users will also have the option to print the order acknowledgement to an AirPrint compatible printer – there are currently no suitable portable/battery powered AirPrint compatible printers for use on-the-road so printing is only a viable option when at exhibitions.

7 Download Manager



Before you can use these options you must set up an account on the Blue Alligator Cloud at www.bacapps.co.uk

Your Sales Presenter App has been preconfigured to download the Blue Alligator demonstration data – so you can get to know its look and feel right away.

7.1 Download from Cloud

This function will get any data updates of your data from the Blue Alligator Cloud. You will have managed your data refreshes via your cloud account (see section 2).

The data that is downloaded to the iPad is minimised by restricting it to that which has changed only i.e. individual data field changes and new products etc only. This makes it economical and fast to do regular updates e.g. to show current stock figures.

On each iPad, before you start to download your own data, you will need to go to the Download Manager>Settings screen and Reset your database – this removes the demonstration data

7.2 Upload Orders to Cloud (Professional Edition only)

This function is only available in the Professional Edition and will send orders that you have taken on the iPad back to your Blue Alligator cloud account. If you are a premium cloud account user these orders can be downloaded from the cloud account to your own HQ order processing server.

Orders on the iPad will be marked as “exported” (so that they are not duplicated by subsequent transmissions) and may no longer be amended on the iPad.

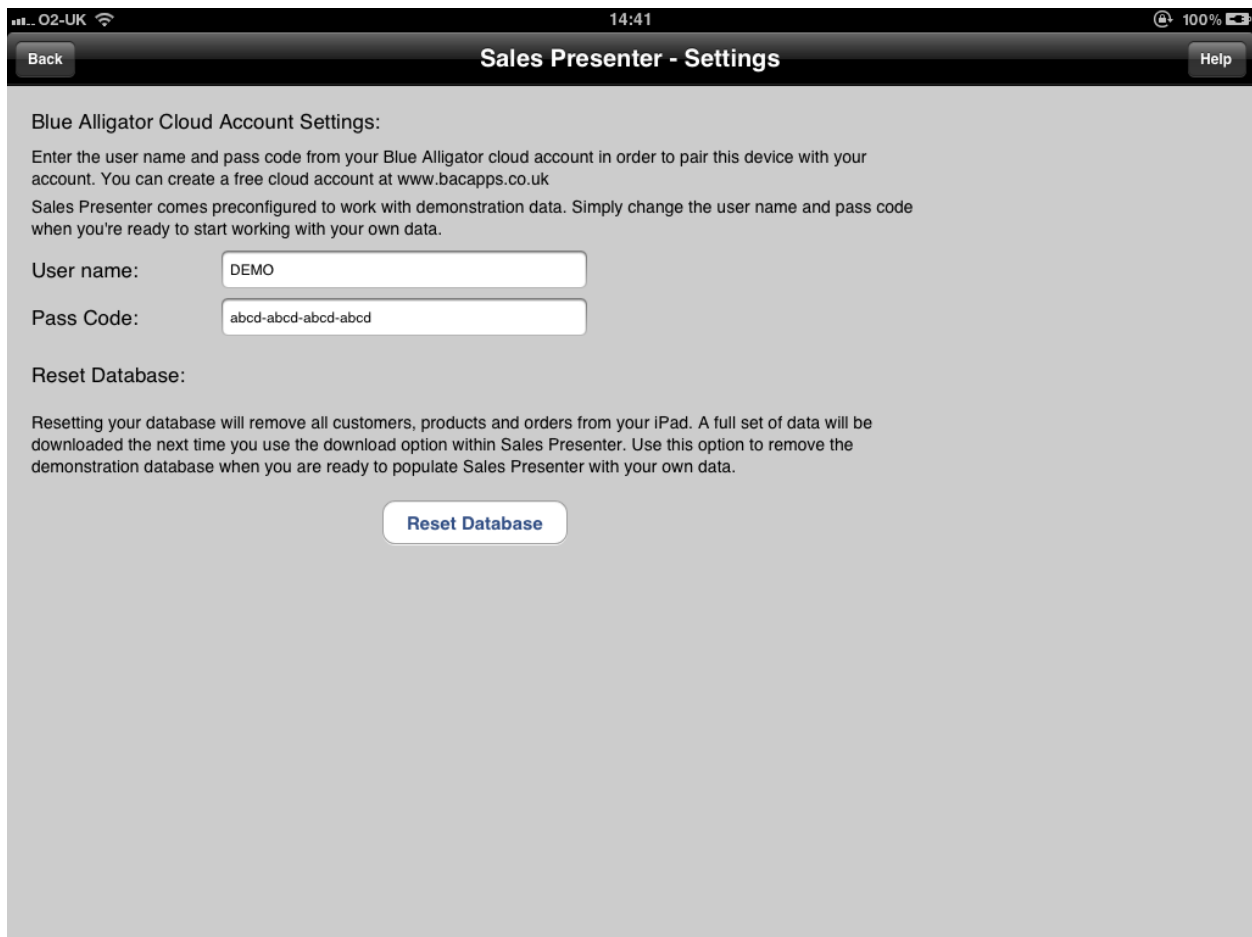
The Sales Presenter app icon on the iPad home screen will indicate the number of orders on the iPad that haven’t yet been exported back to the cloud account.

7.3 Force Full Download

This will reset the date of last update on the iPad so that the next ‘Download from Cloud’ connection gets the whole of your data i.e. not just the data that has changed since the last update. This is likely to be a large amount of data so you should ensure that you are communicating via Wi-Fi not via your SIM card. This is primarily used after the sales rep restriction has been changed in the cloud account for an individual iPad.

8 Settings

This screen (see below) is used to activate your Cloud Synchronisation and Reset (Delete) your database – you will probably only do this when you want to remove the demonstration data that comes with Sales Presenter.



Sales Presenter - Settings

Blue Alligator Cloud Account Settings:

Enter the user name and pass code from your Blue Alligator cloud account in order to pair this device with your account. You can create a free cloud account at www.bacapps.co.uk

Sales Presenter comes preconfigured to work with demonstration data. Simply change the user name and pass code when you're ready to start working with your own data.

User name:

Pass Code:

Reset Database:

Resetting your database will remove all customers, products and orders from your iPad. A full set of data will be downloaded the next time you use the download option within Sales Presenter. Use this option to remove the demonstration database when you are ready to populate Sales Presenter with your own data.

[Reset Database](#)

The user name and pass code shown in the screenshot are used when you wish to download the demonstration data. Sales Presenter is pre-configured with these details when you install the app for the first time.

9 Product Support

Support for Sales Presenter is handled via the support forums at www.bacapps.co.uk. By posting on the forum, we can respond to your queries or issues in an efficient manner.

You will need to register on the support forum before you can post any messages.

In addition to the support forum there is a “downloads” section on the website that contains various pieces of documentation (in PDF format) that you may find useful.