Getting Started With Your Data

Document History

Date	Issue	Notes
6 October 2026	13	Updated the instructions and pictures to align with the re-designed home buttons and recently updated Cloud Manager screens within the File Management section
30 June 2026	12	Updated the instructions and pictures to align with version 2.1.2 of SalesPresenter
18 February 2026	11	Updated the instructions and pictures to align with the recently updated Cloud Manager screens that replace the File Mappings and Field Mappings screens
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). We always recommend ensuring that you use iPads that are capable of running the latest available version of iOS.
- From your iPad, go to the AppStore, search for SalesPresenter 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 SalesPresenter on your iPad are:

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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.

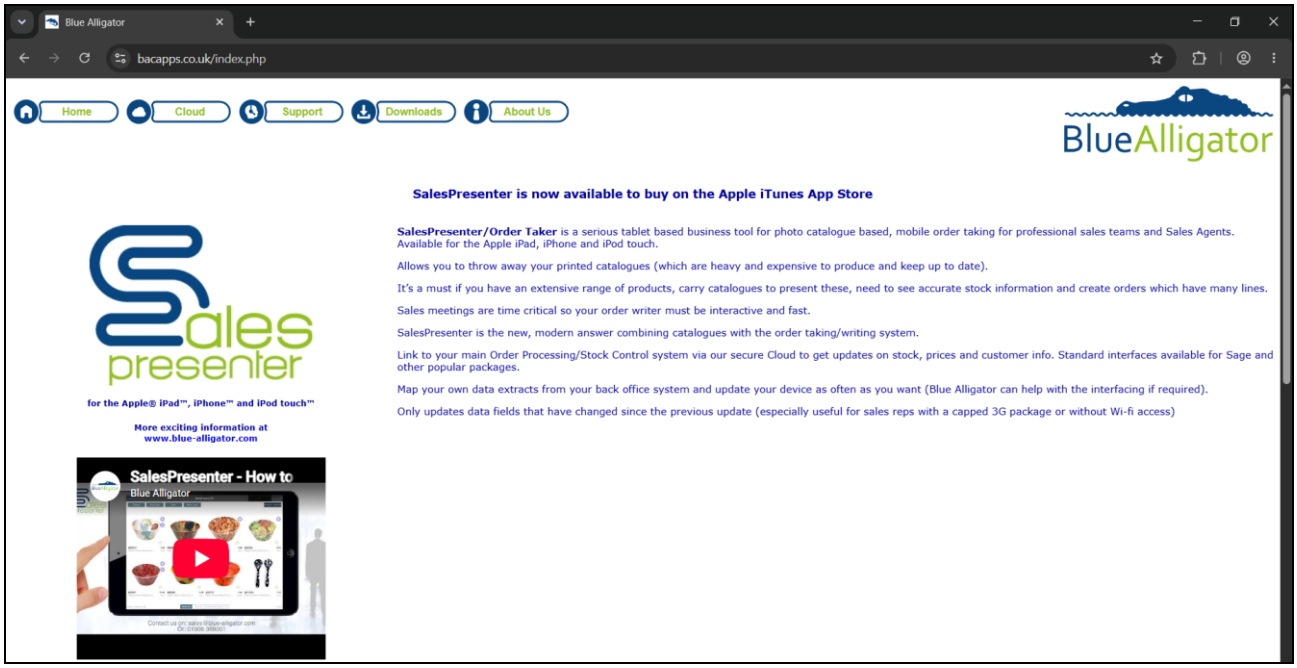
Steps 3, 5, 8 and 9 should be repeated each time you wish to refresh the data in SalesPresenter.

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

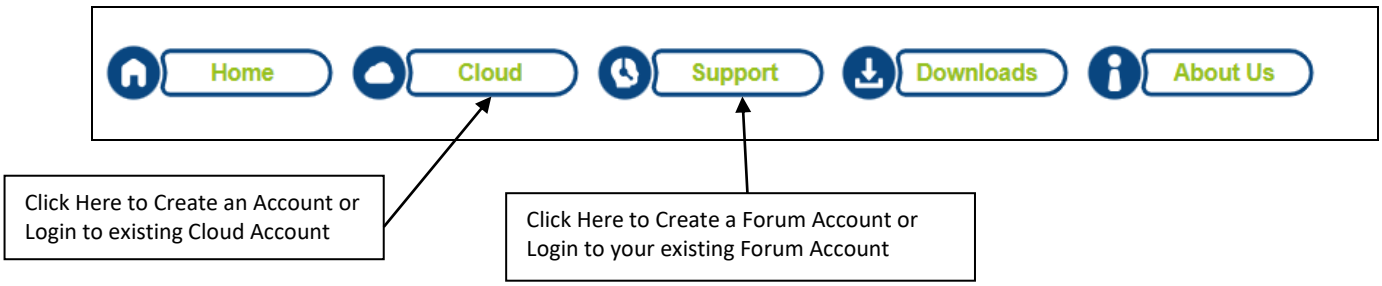


The registration process on the website is simple, free and gives you dedicated storage space (initially 500MB) within the cloud to store the data and image files that you wish to use for SalesPresenter. This should be enough to store up to 25,000 products.

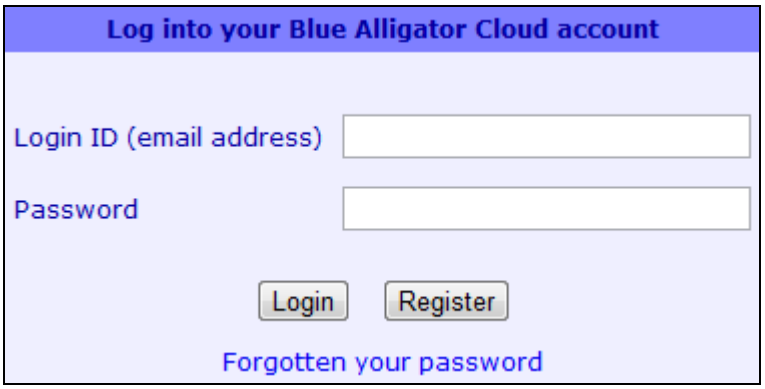
There is also a support forum on the website. You will need to register separately for this. We decided to keep the registration processes for the cloud account and the support forum separate because there may be any number of forum users for a single company (each sales rep or agent may wish to have 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 SalesPresenter 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

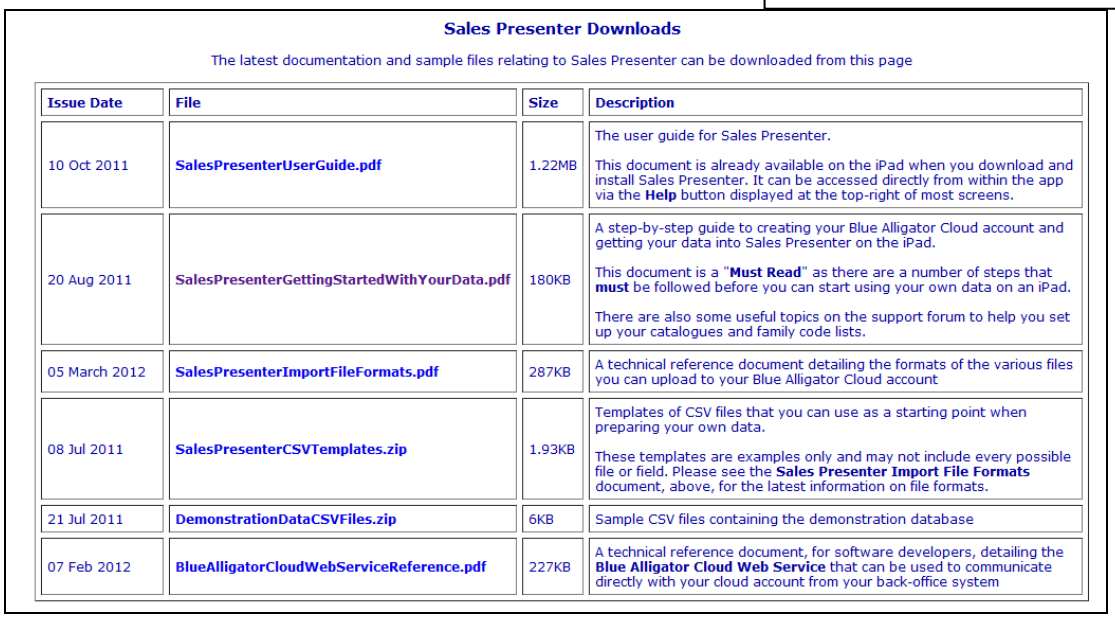
Step 2 – Download the File Format Documentation and CSV File Templates

Within the **Downloads** section of the cloud website at www.bacapps.co.uk 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.

Click here to see the documentation and file templates available

Action 2



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

You should download the 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!

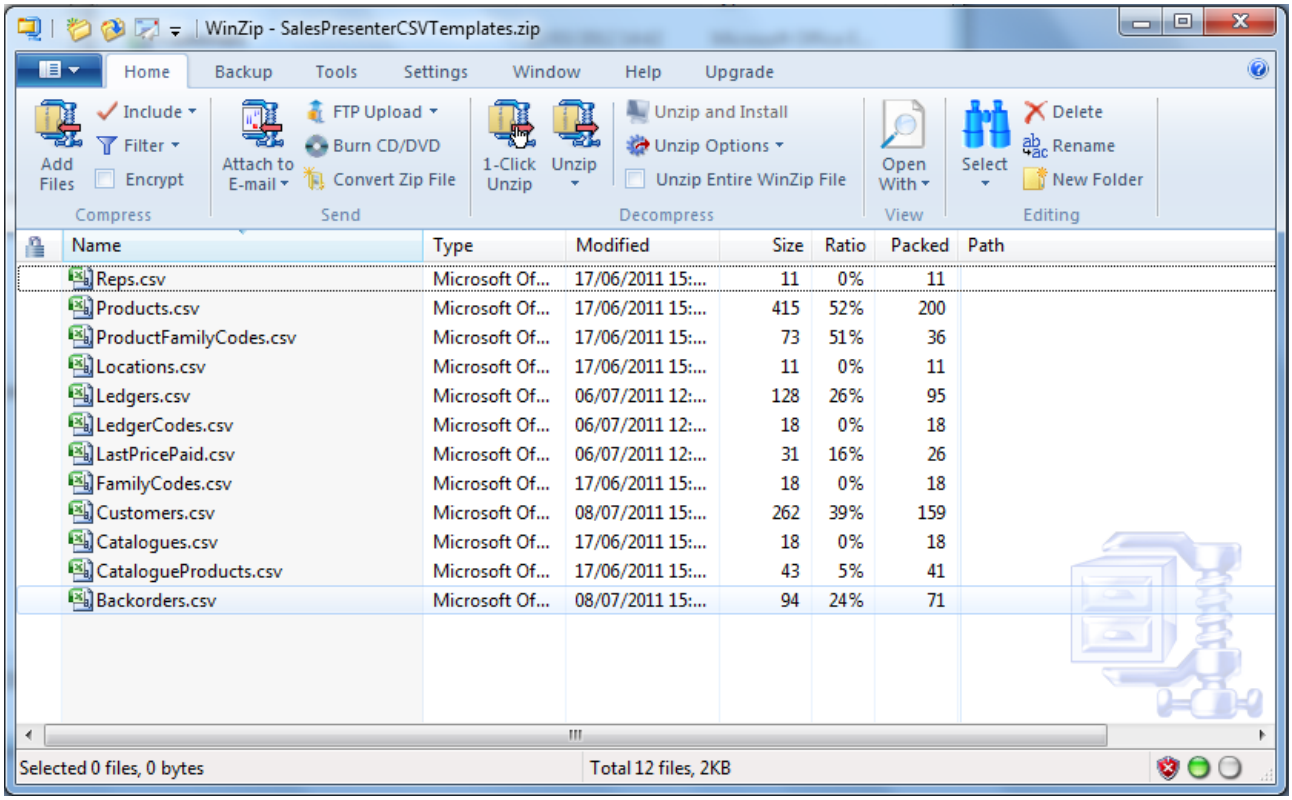
You have successfully Downloaded the File format Files

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

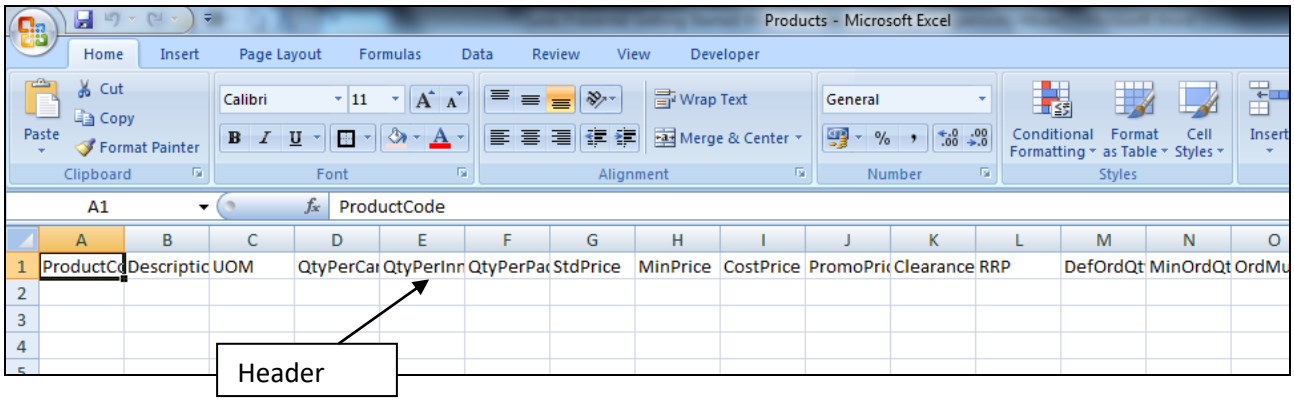
Action 1 To download the template you want, just click on the document name SalesPresenterCSVTemplates.zip which you downloaded in the last step. If you are using our templates then when you double click on the downloaded file you will get the following screen which shows you which CSV templates are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

Special Note: 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.

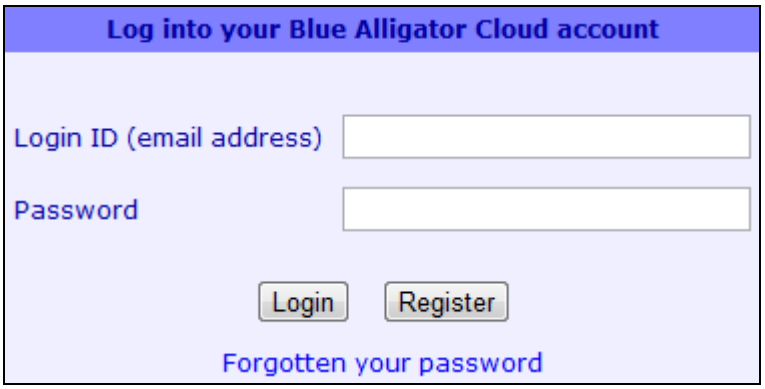
You have successfully set up your Data Files

Step 4 – Configure the File Mappings within your Cloud Account

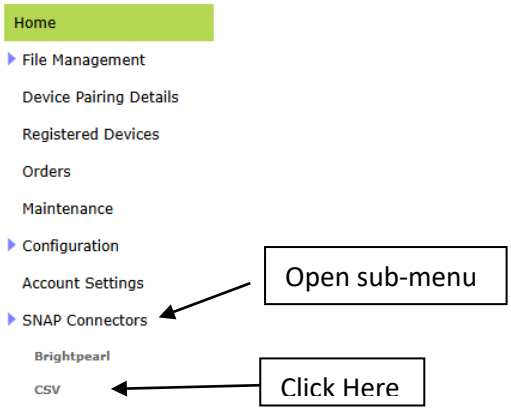
This step is about informing your Cloud Account the name of your various data files and must be completed before you Upload your data.

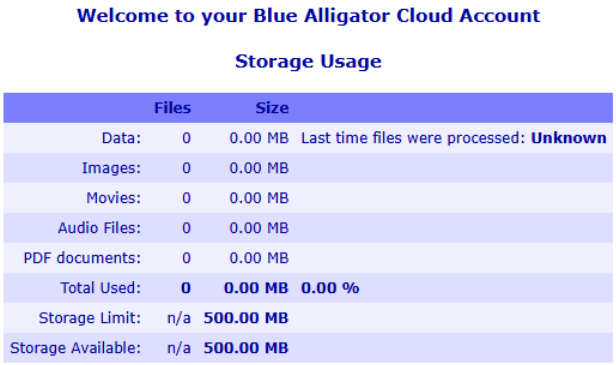
Action 1 Log into your Cloud Account.

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

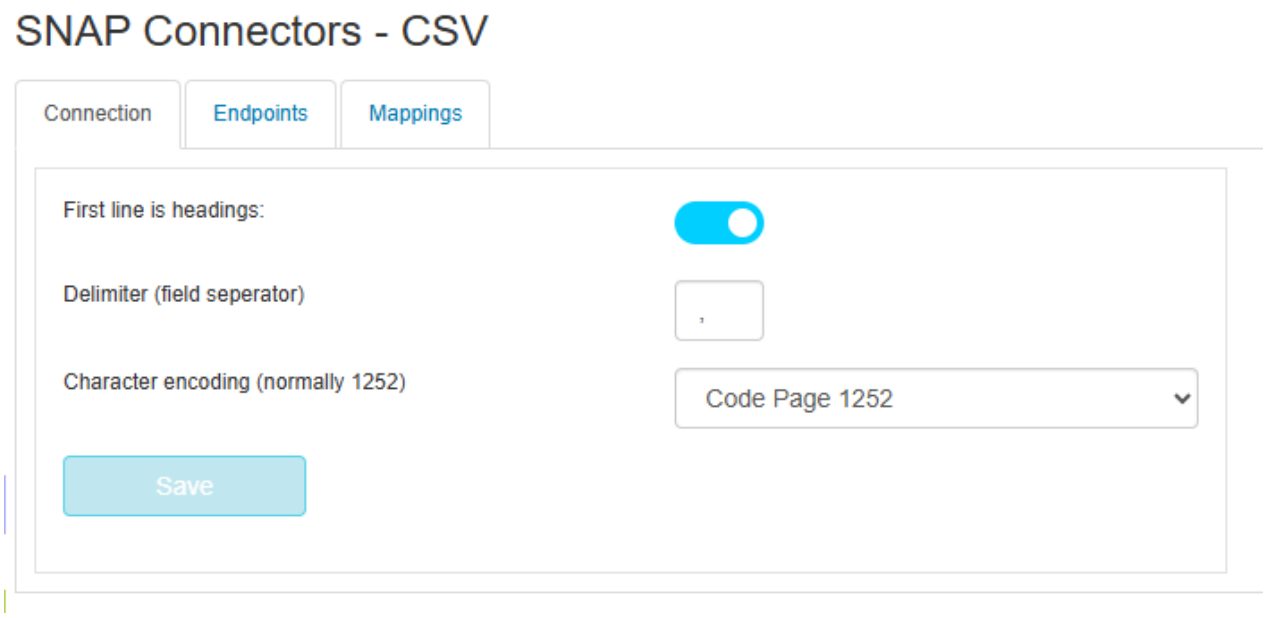


Action 3 Click SNAP Connectors and then CSV.

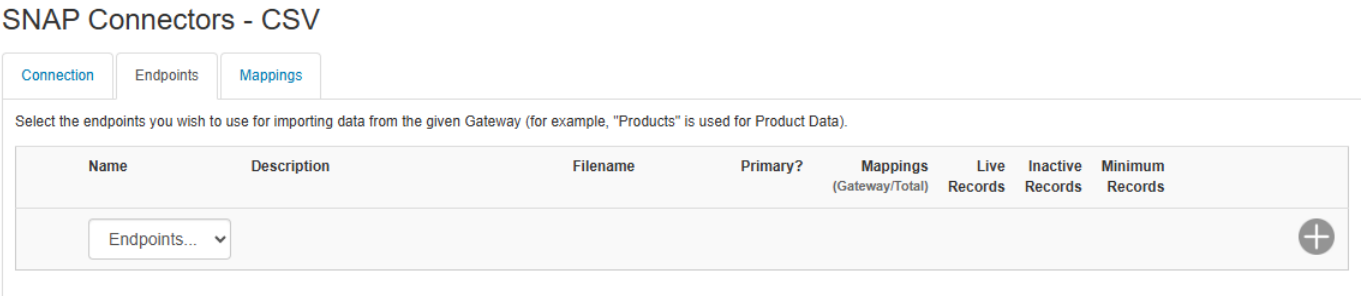




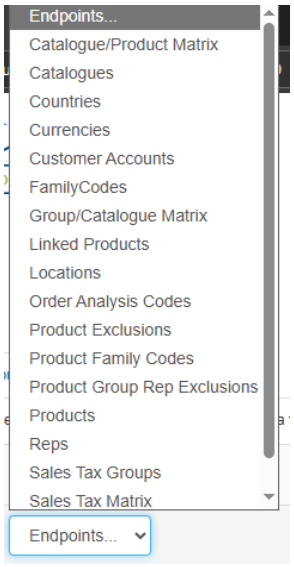
Action 4 This screen has multiple tabs, first check the Connection Tab settings. If you have used our CSV Templates then the defaults entered in the General File Settings will be correct, if however, you have created your own data files you might need to amend these settings. If you do change the settings ensure you click on the Save button to save your changes.



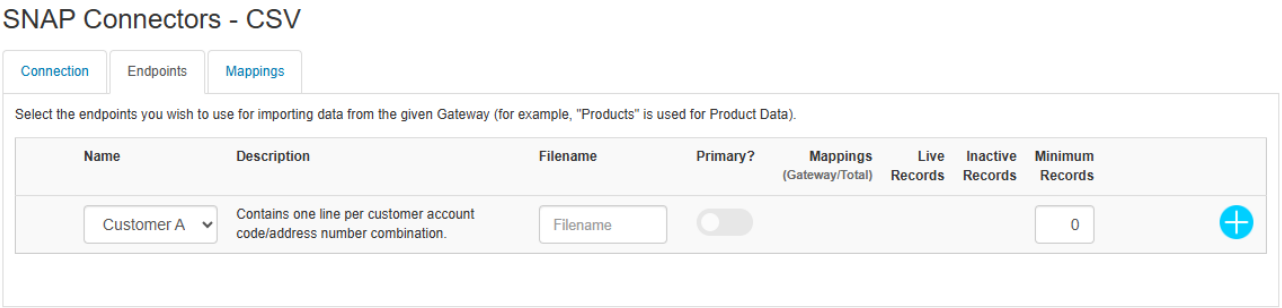
Action 5 Click the Endpoints tab, this allows you to enter the filenames of your data files – everyone must complete this section.



Action 6 Click the Endpoints dropdown menu and select the type of file you wish to add.



Action 7 Enter the File name including the extension e.g. Customers.CSV into the Filename Field then Press the Plus Button on the right, Repeat Actions six and seven until you have added all required Filenames.



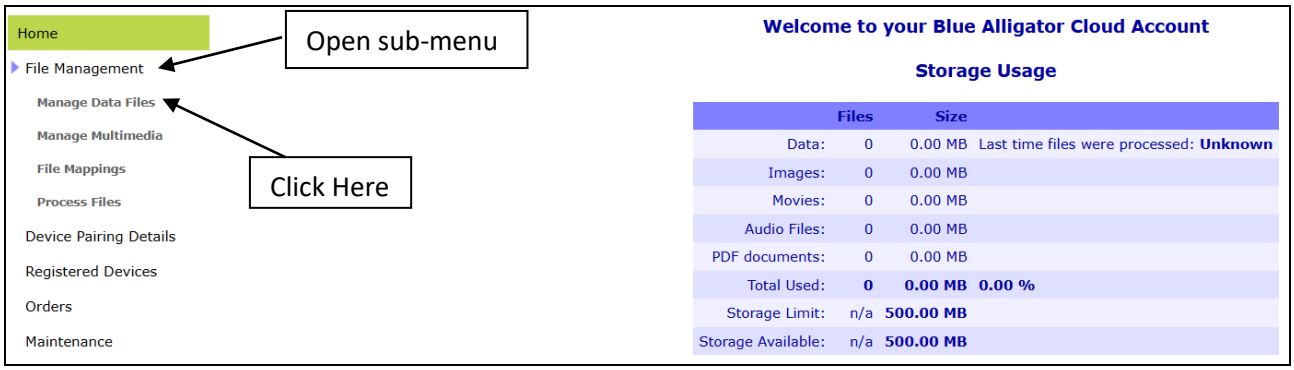
You have Successfully Mapped Your Data Files

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

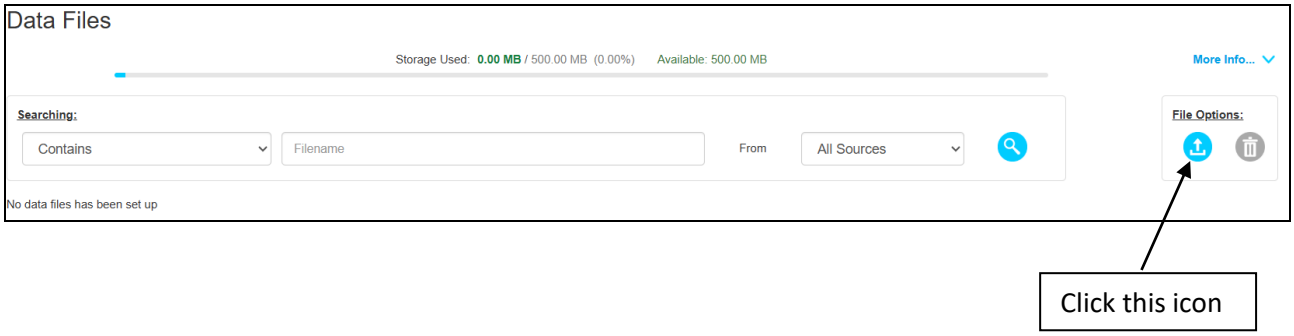
This step allows you to browse to, and select, the files on your computer that you wish to upload.

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.

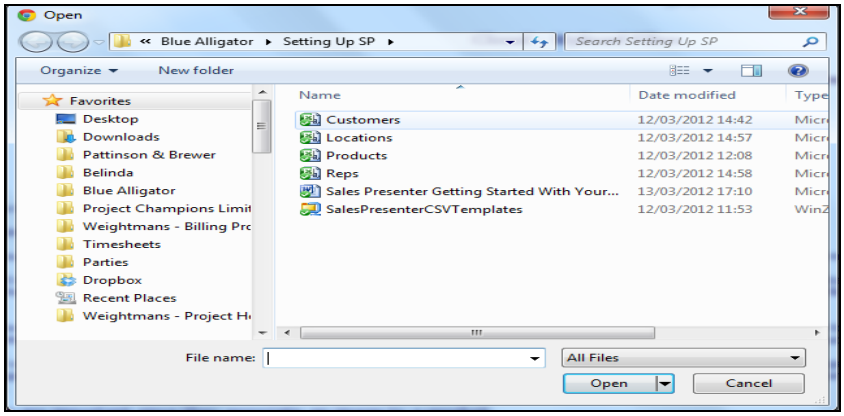
Action 1 Select File Management and then Manage Data Files for data files or Manage Multimedia for multimedia.



Action 2 Select the Upload Files icon in the File Options section.

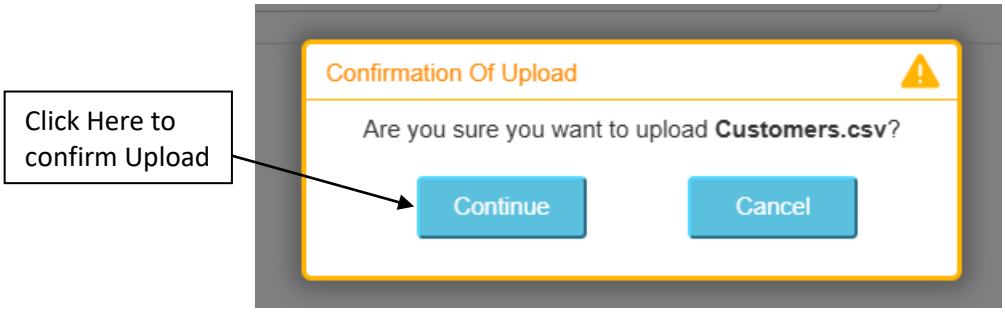


Action 3 This will open the Browser window on your computer for you to navigate to the folder where you have saved your Data and Image files.



Action 4 To select the file to upload just double click on the file name.

Action 5 A pop-over will appear to confirm your action. If you are happy with the file to be uploaded, select "**Continue**", else select "**Cancel**" and upload another file. 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 confirming the action, you should leave your browser window open untouched with the loading data animation onscreen until the file has been fully uploaded. The animation will disappear upon successful upload returning you to the main screen.

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 SalesPresenter.

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.

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**>

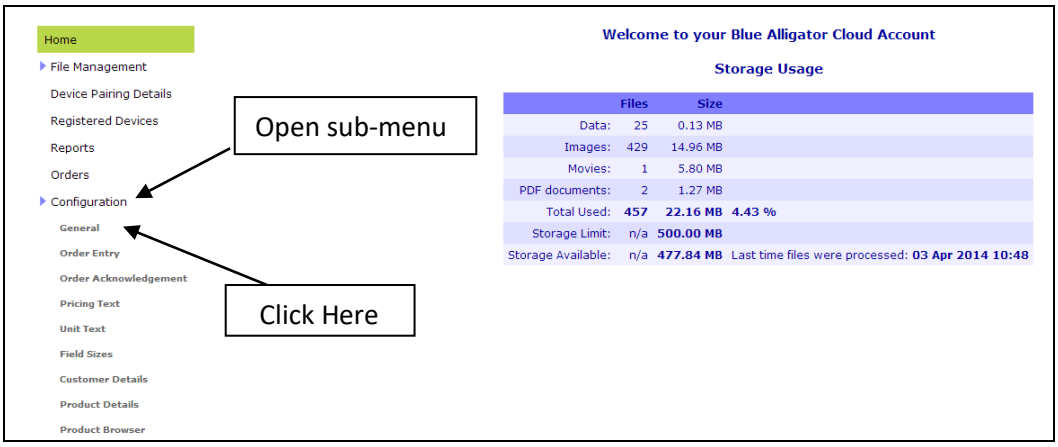
Where: <**product code**> is the product code
<**separator**> is a symbol such as a dash or underscore
<**suffix**> is any number of alphanumeric characters
<**format**> is the image format (such as JPG, BMP, GIF, PNG)

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

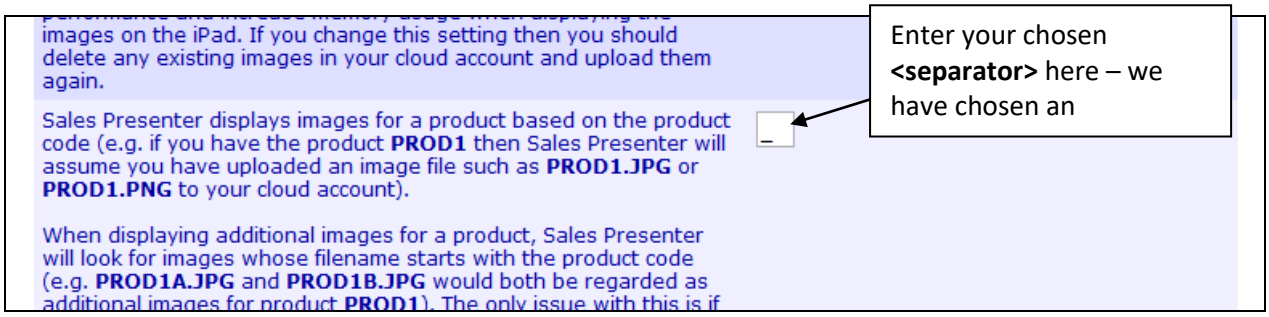
If your product codes are a standard length i.e. all 6 digits long, they you do not need to use a **<separator>**, however if they are variable lengths it is important that you use a **<separator>** to distinguish the difference between the products **PROD1** and **PROD11.** By using a separator, an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



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.



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

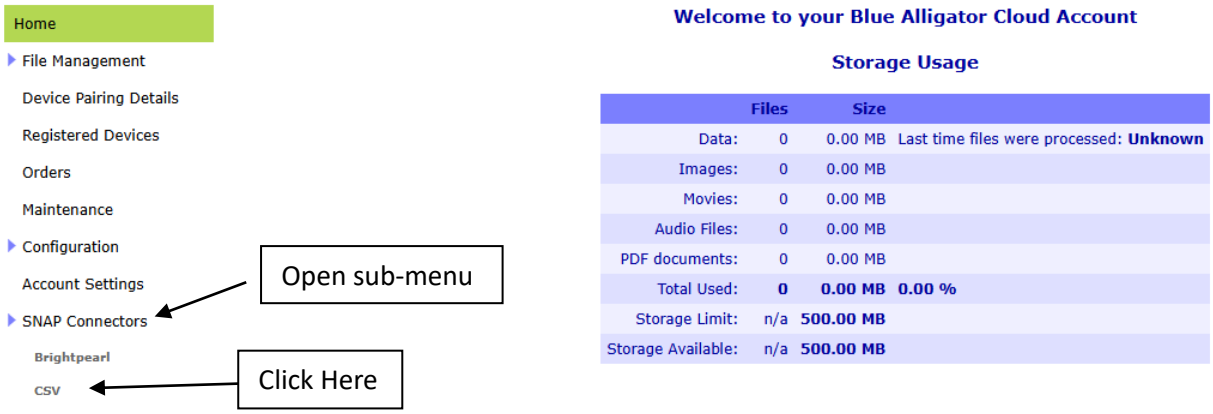
Special Note : There are some options available from Blue Alligator to assist with the automatic uploading of data and images to your cloud account. Please contact our sales team to discuss these options.

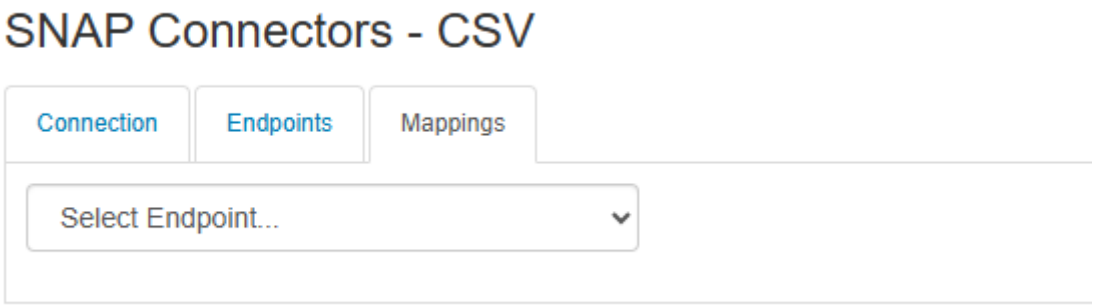
You have Successfully Uploaded your Data and Image Files

Step 6 – Configure the Field Mappings within your Cloud Account

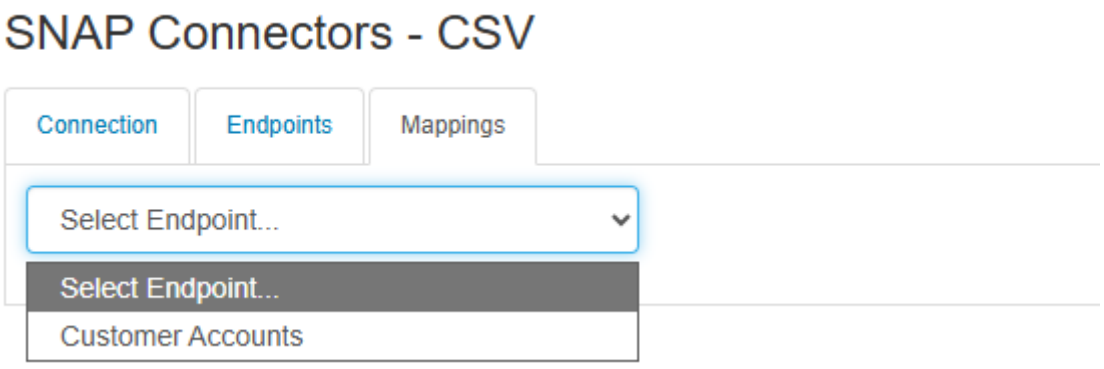
Action 1 Once you have configured your file mappings and uploaded your first set of data files you can configure the field mappings for each of the types of data file.

You should log into your cloud account then click SNAP Connectors and then CSV Then click the Mappings tab.

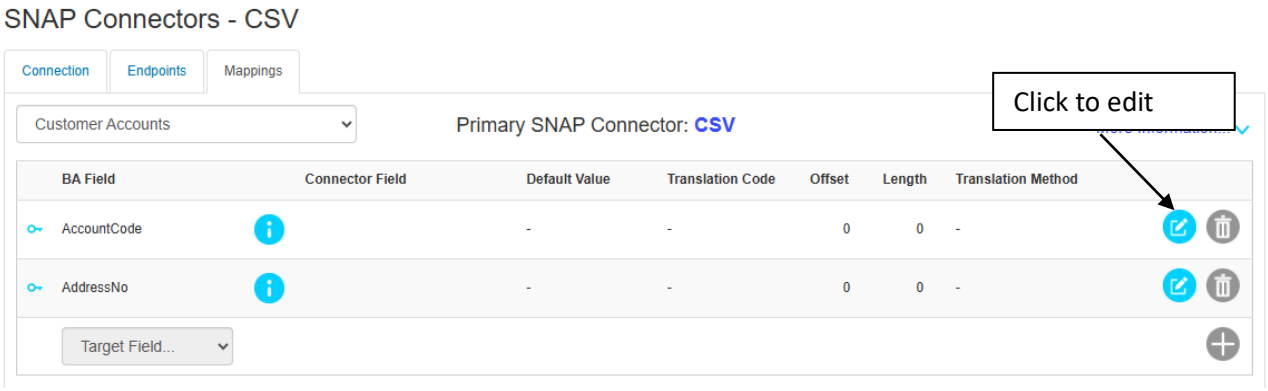




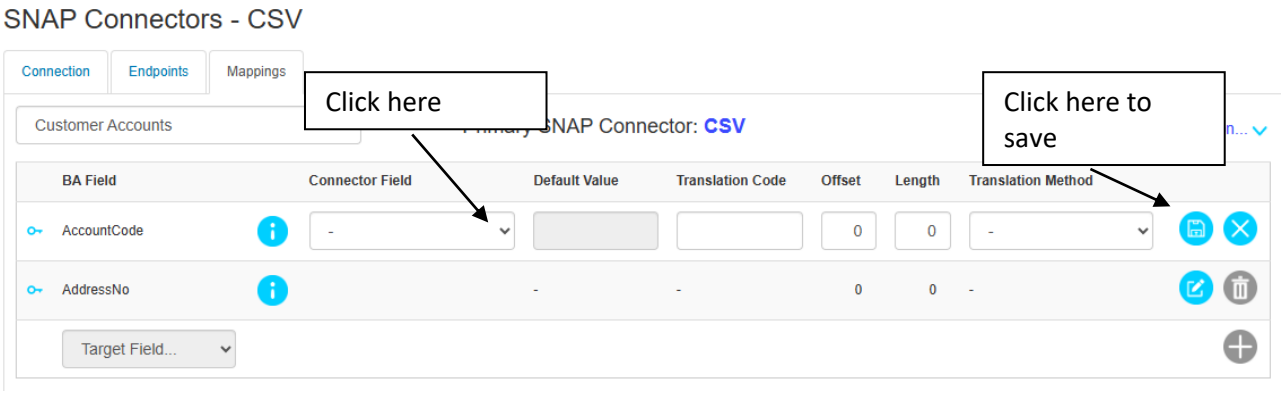
Action 2 Click the Select Endpoints dropdown then select the file you wish to map fields for. You will see in this list all of the Endpoints that you set up in Step 4.



Action 3 Once selected it will open the following menu, this menu will have several fields automatically shown, these are key fields (fields that are required to be mapped), press the edit button on the right-hand side.

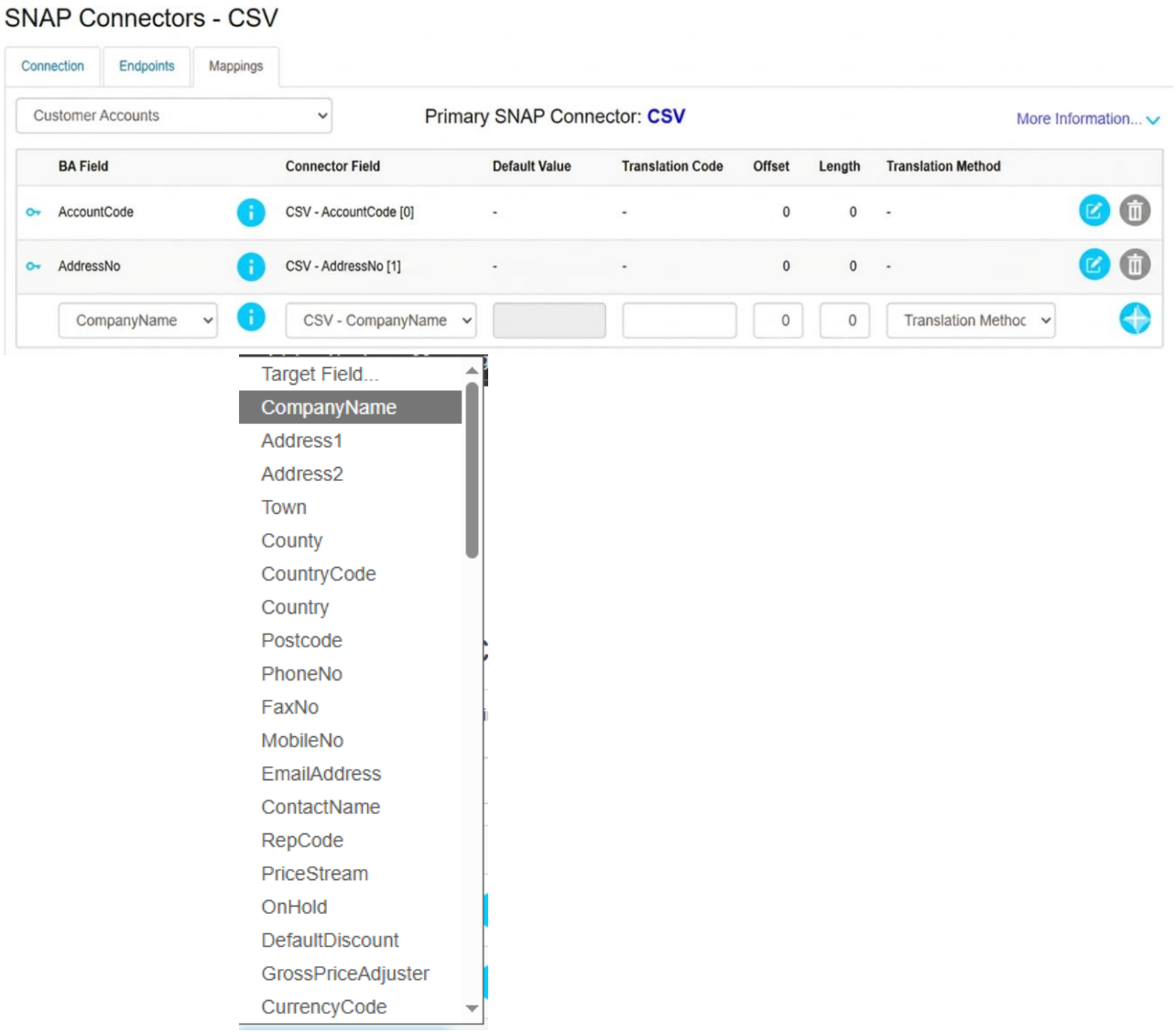


Action 4 Click on the Connector Field drop down and map the relevant field from your file then click the Save icon, a popup will appear to confirm the changes, press continue to Save.



Repeat Actions 3 and 4 for each of the key fields in this Endpoint.

Action 5 Now that the key fields have been taken care of, you can now map any other fields from your file by clicking the BA Field dropdown and subsequently selecting the Connector Field (from the list of headings in your CSV file) clicking the Plus sign on the right to add the mapping after each one.

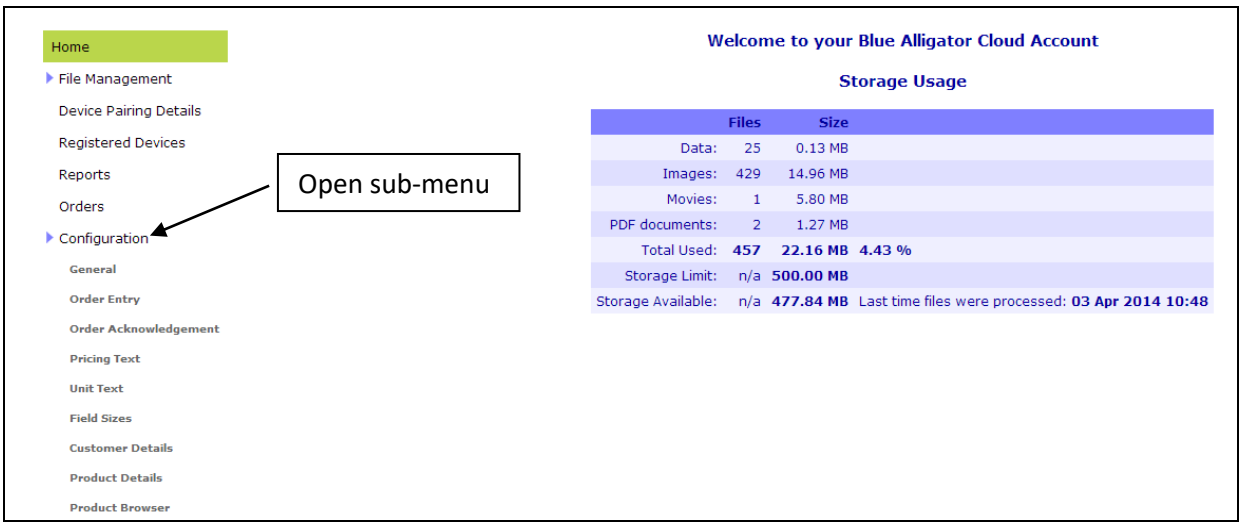


You have Successfully Mapped your Data Fields

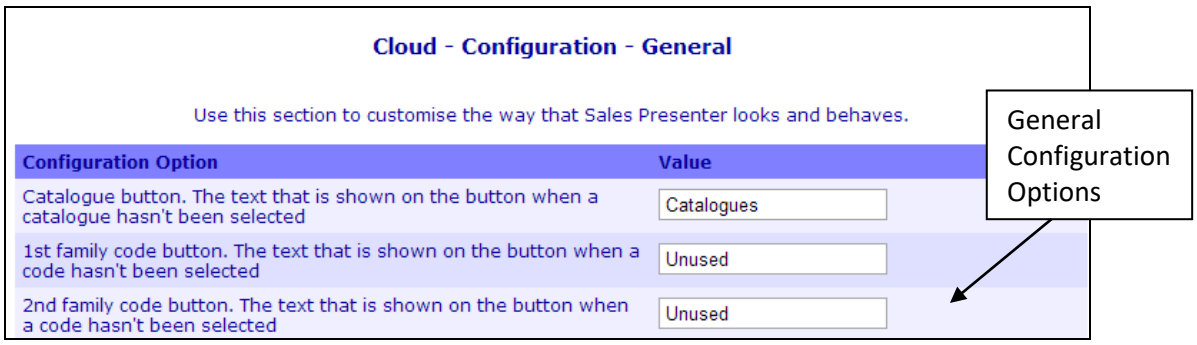
Step 7 – Customising your Configuration Options

In the configuration section of your cloud account, you can customise the way in which certain features in SalesPresenter 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 SalesPresenter.

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

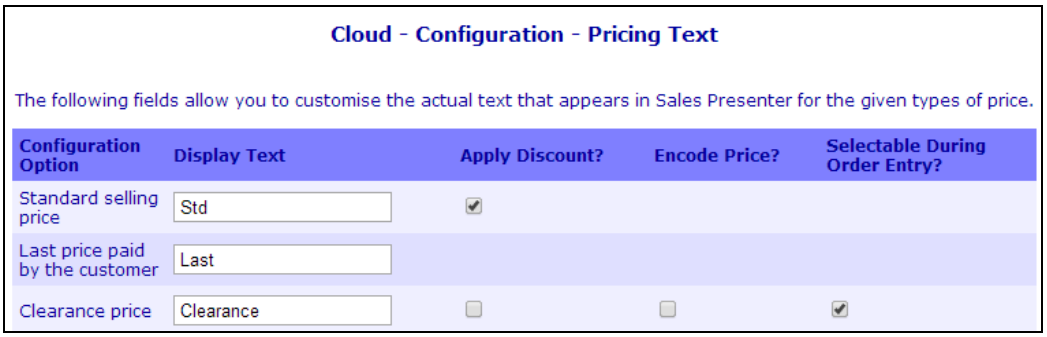


By selecting Configuration, the sub-menu will open with a variety of different configuration options. Each menu option includes a variety of different configurable options.

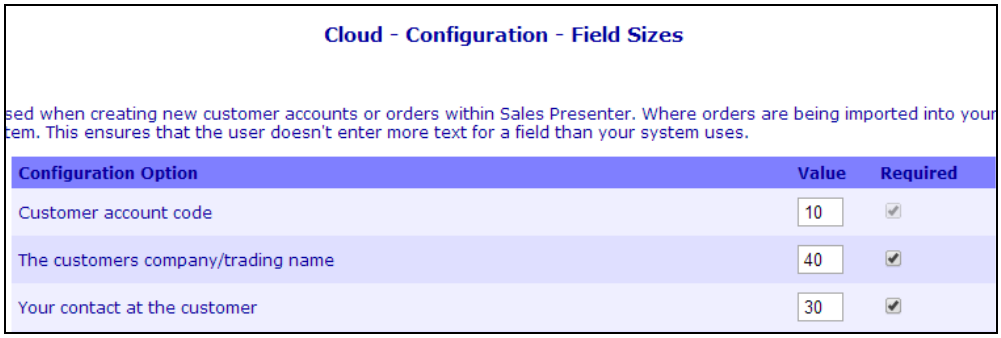


- General configuration – allows you to change various options that don't specifically fall into one of the sub-sections below, such as the wording shown on the family code and catalogue buttons, the unit of quantity that will be entered by the rep during order entry and the format of any date fields 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.

- 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.



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



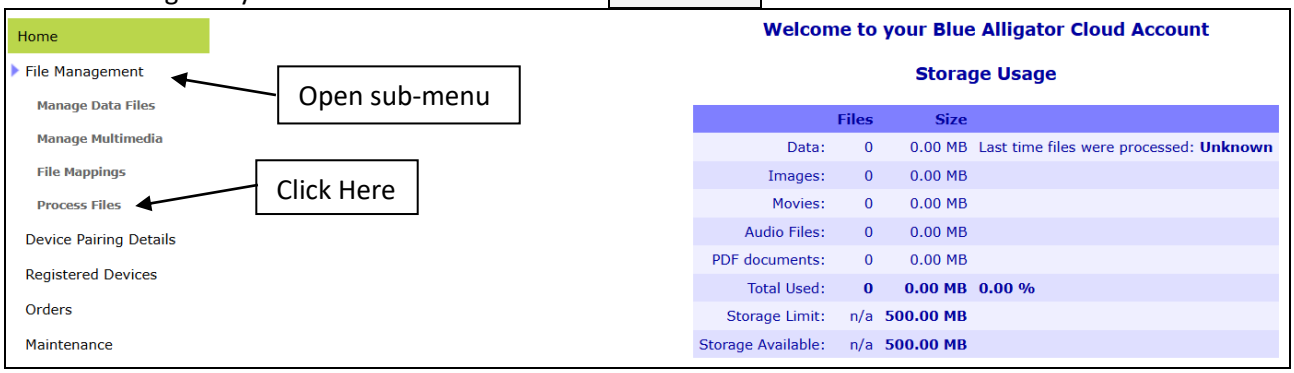
- Field sizes – allows maximum input field sizes to be used when creating new customer accounts or orders within SalesPresenter. Where orders are being imported into your back-office system you should set the field sizes to match your back-office system. This ensures that the user doesn't enter more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

You have Successfully Customised SalesPresenter

Step 8 – Prepare your uploaded data for SalesPresenter

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 SalesPresenter.

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



This process may take some time based on the volume of data that you have uploaded. After clicking the **Process Files** button you will be transitioned to the Tasks page of your Cloud account, where a one-off task to process your CSV files will have been created. This task will run automatically shortly thereafter.

Back on the Home screen, the "Last time files were processed" timestamp will be updated once the task has completed.

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.

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.

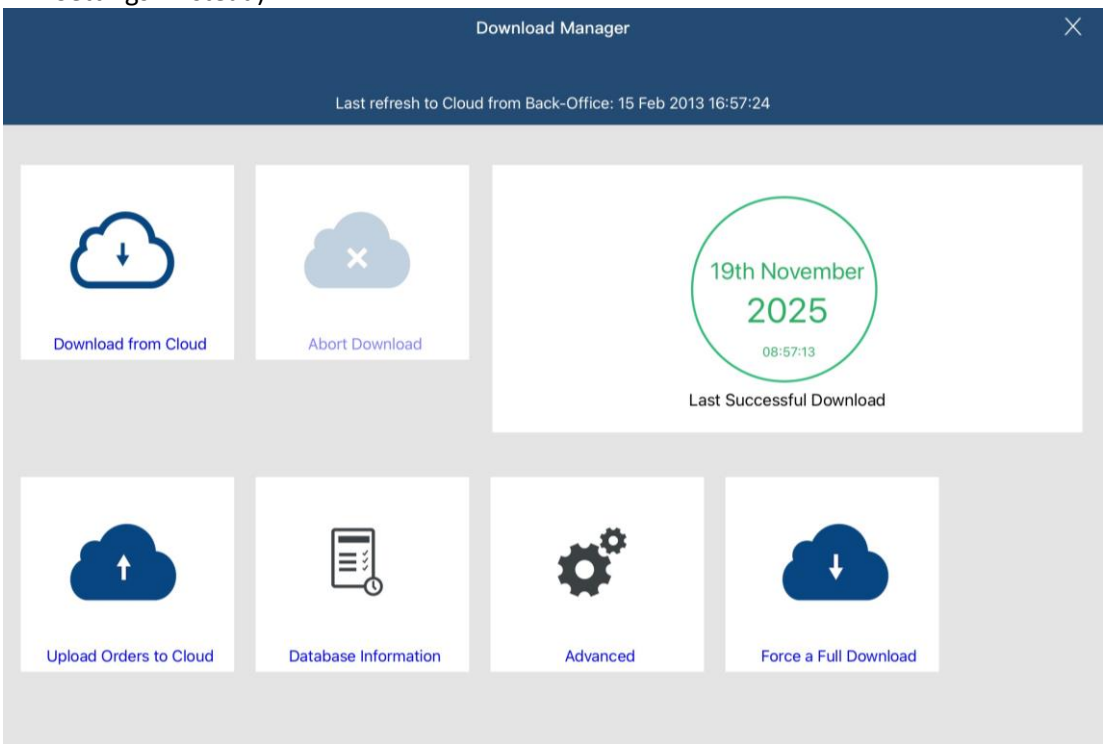
Action 2 Make a note of the User Name and Pass Code and give this to your Sales Reps and Agents who have installed SalesPresenter on their iPads.

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

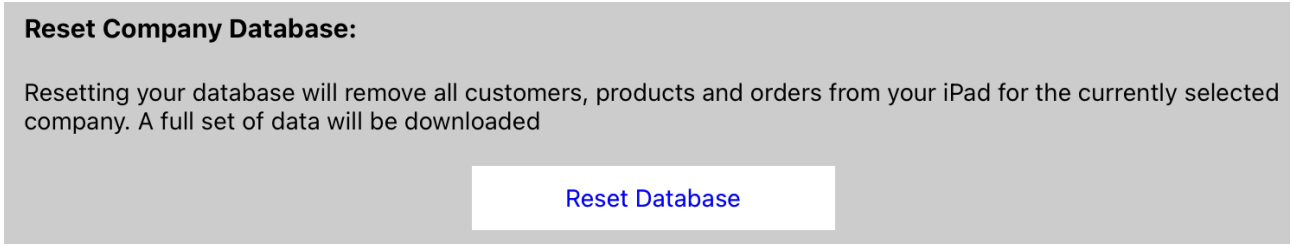
Action 4 Select Download Manager from the iPad's front screen.

Special Note If the Sales Rep or Agent already uses SalesPresenter for another principal, they should first create a new Company via the Companies button on the main screen, by pressing the "+" button in that popup. Within that new Company, the user would then press the Download Manager button and continue on to the next actions.

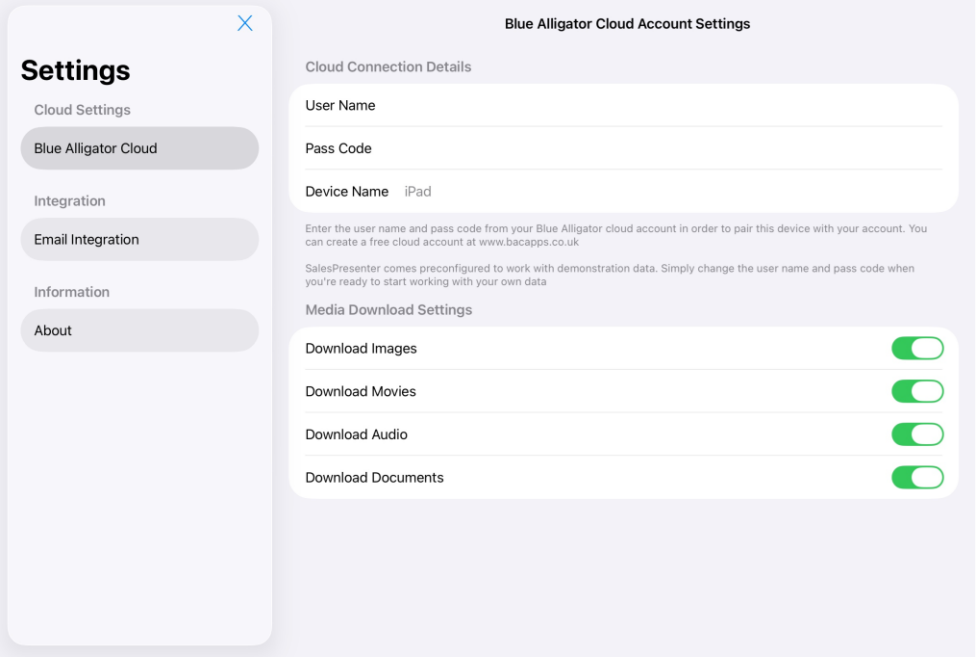
Action 5 Select Advanced (Note that users running version 2.1.1 or earlier will see this option titled as "Settings" instead).



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



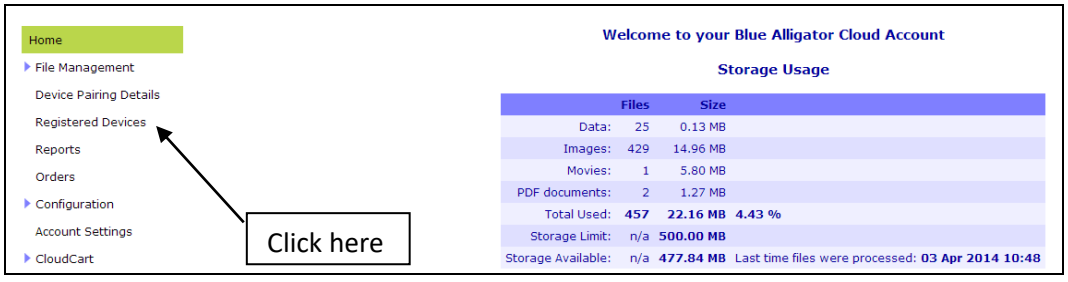
Action 7 Now go back to the front screen of SalesPresenter and select the Settings option (users running version 2.1.1 or earlier can remain within the current screen for this action). The user should now enter the User Name and Pass Code in the fields provided and set a relevant device Name.



Action 8 Return to the **Download Manager** screen, and select **Download from Cloud** option. If the correct User Name and Pass Code combination have been entered, the user will receive the following Message:

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

Action 9 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 10 The new iPad will now need to be authorised. To do this click on the Authorise button next to the iPad.

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	Disable Edit Restrictions

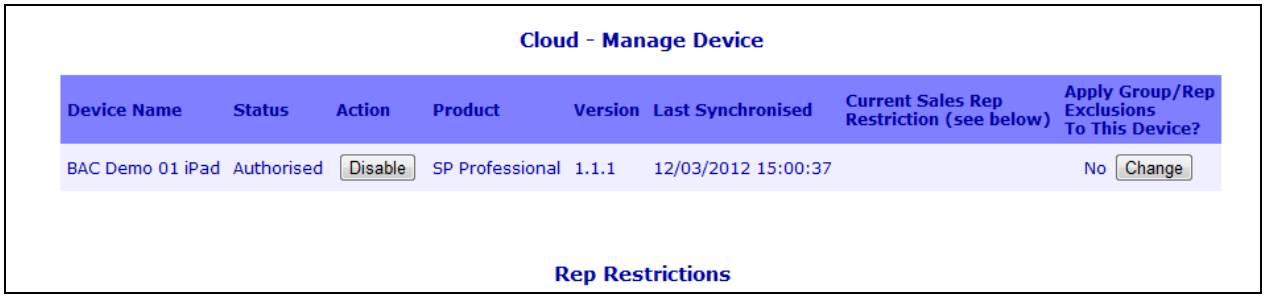
It is possible to restrict the information the Sales Rep or Agent can see in particular the customers they can view.

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	Disable Edit Restrictions

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



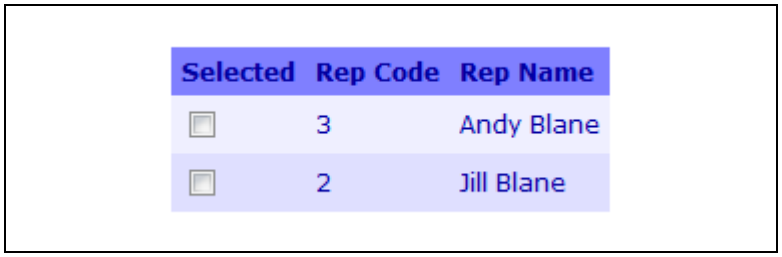
Cloud - Manage Device

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	Disable	SP Professional	1.1.1	12/03/2012 15:00:37		No 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
☐	3	Andy Blane
☐	2	Jill Blane

Action 11 On the iPad itself the Sales Rep or Agent now needs to select **Force a Full Download** 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 5G connection whilst the Rep/Agent is on the road.

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