Simple Starter Steps

Document History

Date	Issue	Notes
6 November 2013	1	Initial issue
9 November 2013	1.1	Corrections
24th January 2014	1.2	Change to introduction
16th May 2014	1.3	Updated pictures with new Cloud layout

Introduction

This is a simplified version of the full Getting Started with Your Data. We would recommend only using this guide if you intend to use our templates and want to set up quickly, there are many options available to you which we will not cover in this guide.

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.

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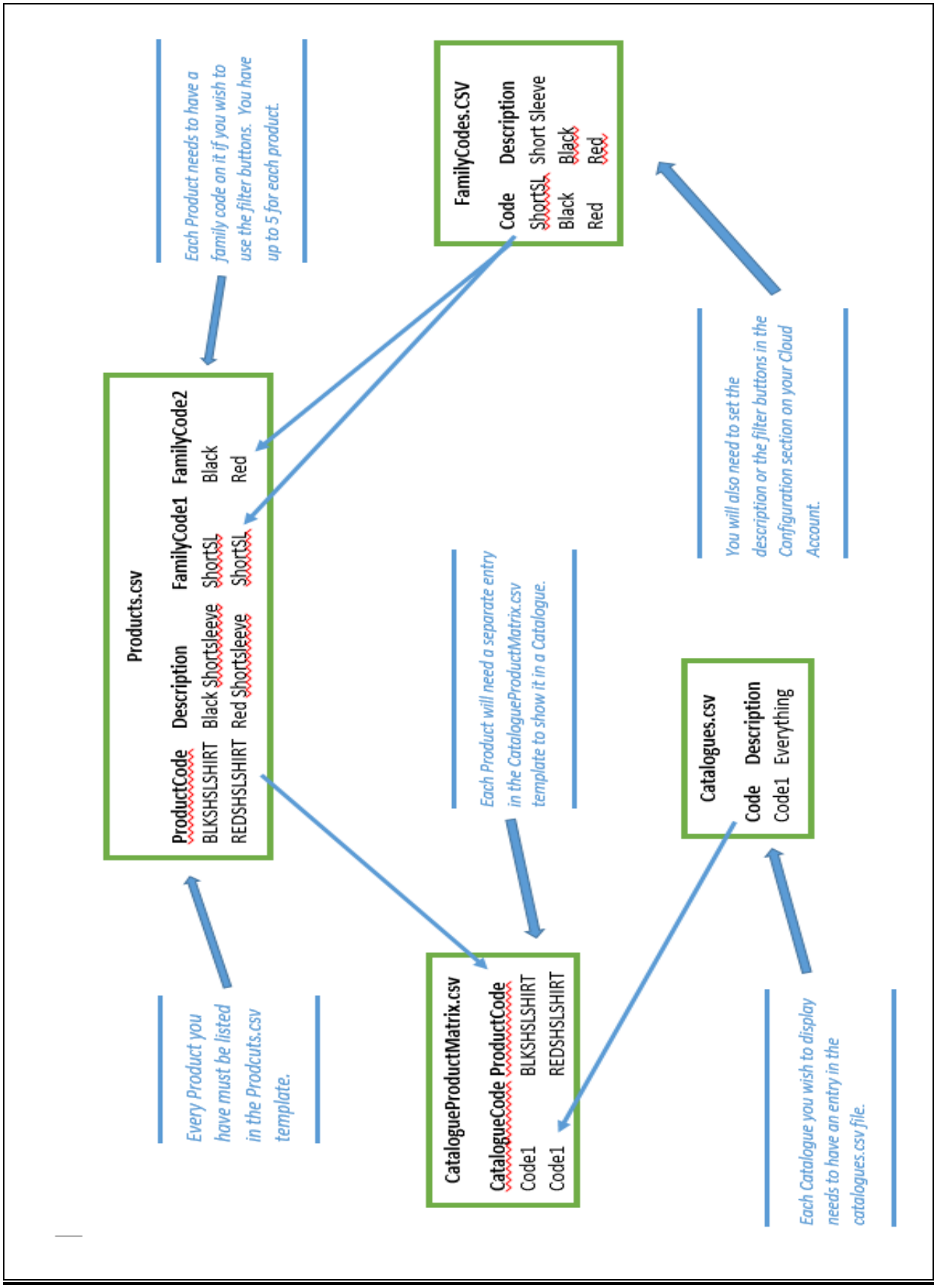
PLEASE NOTE
Steps 1, 2, 3 and 6 are one-off exercises to perform the first time you're preparing your data.
Steps 4, 5, 7 and 8 should be repeated each time you wish to refresh the data in SalesPresenter.

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, there is a diagram on the next page to assist. There is also a section on the Forum which explains this - Blue Alligator Cloud, the first section on the forum, which might also be beneficial.


Each Product needs to have a family code on it if you wish to use the filter buttons. You have up to 5 for each product.
FamilyCodes.CSV
Code Description
ShortSL Short Sleeve
Black Black
Red Red
Products.csv
ProductCode Description FamilyCode1 FamilyCode2
BLKSHSLSHIRT Black Shortsleeve ShortSL Black
REDSHSLSHIRT Red Shortsleeve ShortSL Red
You will also need to set the description or the filter buttons in the Configuration section on your Cloud Account.
Each Product will need a separate entry in the CatalogueProductMatrix.csv template to show it in a Catalogue.
Catalogues.csv
Code Description
Code1 Everything
CatalogueProductMatrix.csv
CatalogueCode ProductCode
Code1 BLKSHSLSHIRT
Code1 REDSHSLSHIRT
Every Product you have must be listed in the Prodcuts.csv template.
Each Catalogue you wish to display needs to have an entry in the catalogues.csv file.

Step 1 – Create your Blue Alligator Cloud Account

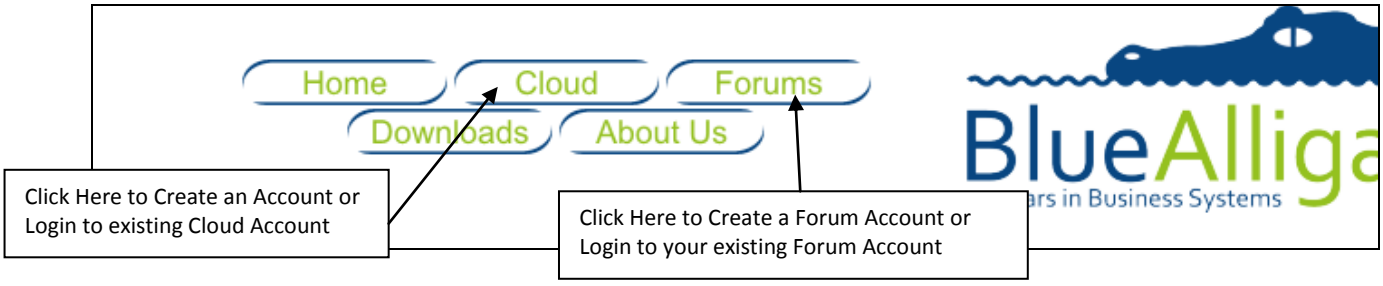
Data and images are transferred to your iPad via the Blue Alligator cloud website at www.bacapps.co.uk

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.

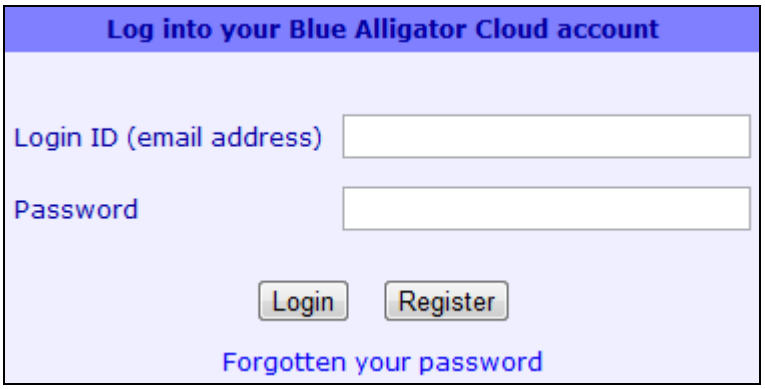
There is also a support forum on the website. You will need to register separately for this. We decided to keep the registration processes for the cloud account and the support forum separate because there may be any number of forum users for a single company (each sales rep or agent may wish to have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

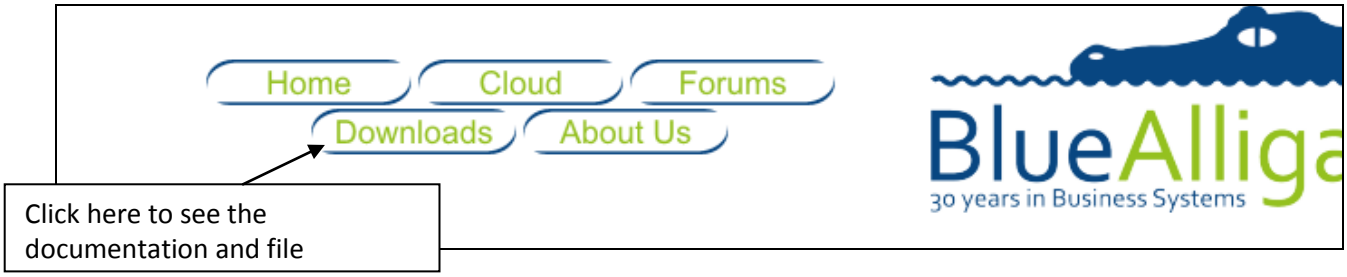
You have successfully set up a New Cloud Account

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

You will need to download a file called SalesPresenterCSVTemplates.zip. This is located at the main Blue Alligator website at www.blue-alligator.co.uk/simple-setup.

There is also 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

You should download the fourth option – SalesPresenterCSVTemplates.zip. This is the file you require for getting your data imported quickly using Simple Setup.

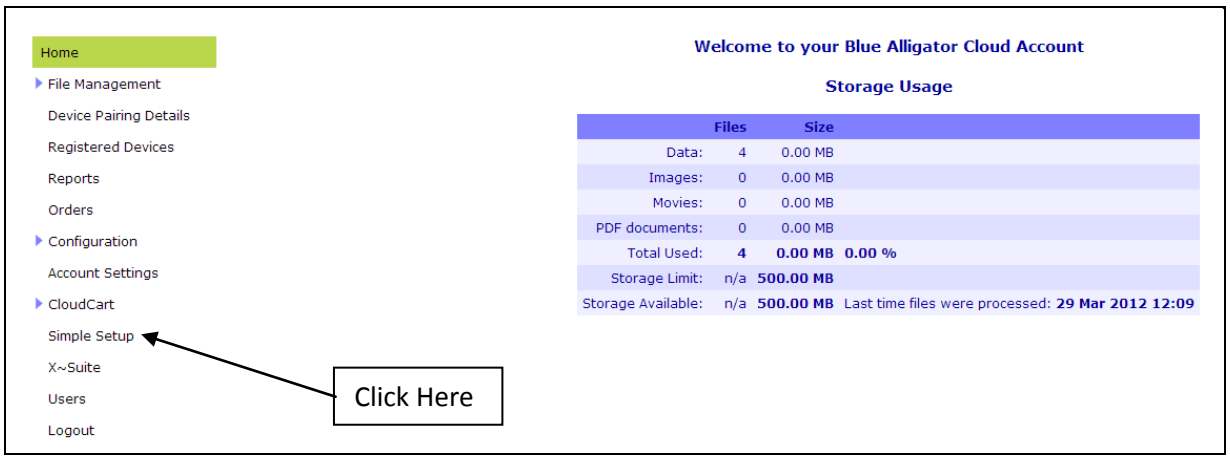
Action 3 To download the documents you want just click on the document name. When you are downloading the documents make sure you make a note of where you are saving them to so you can find them later!

You have successfully Downloaded the File format Files

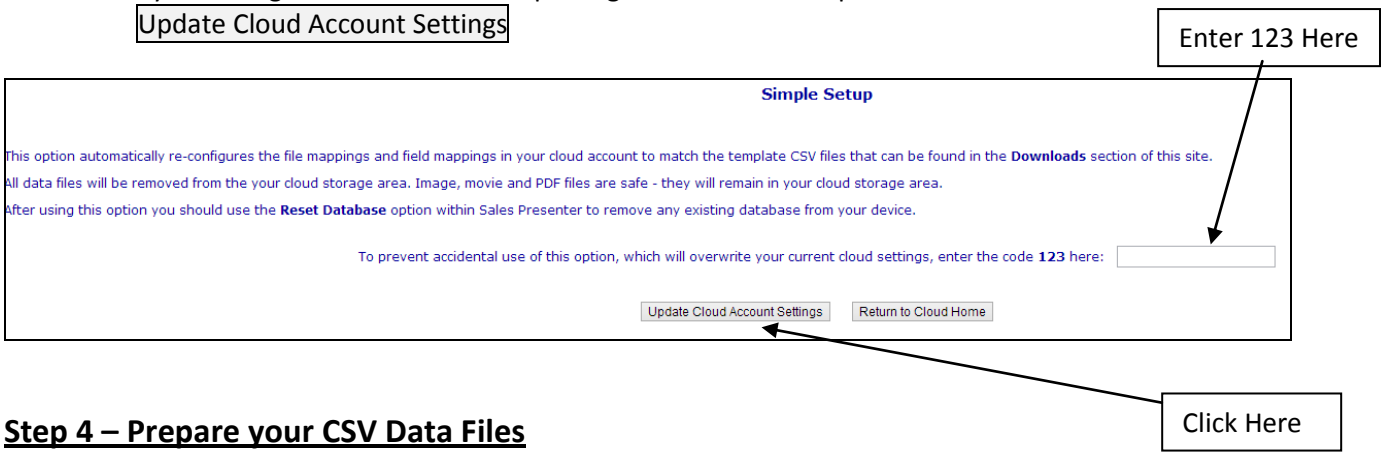
Step 3 – File and Field Mappings

We have simplified this part of the set up by providing you with a menu option on your Cloud account called 'Simple Setup'. This will do the mapping of all your files and fields to our standard and saves you manually doing this.

Action 1 On the Home Page of your Cloud account click on the menu option Simple Setup.



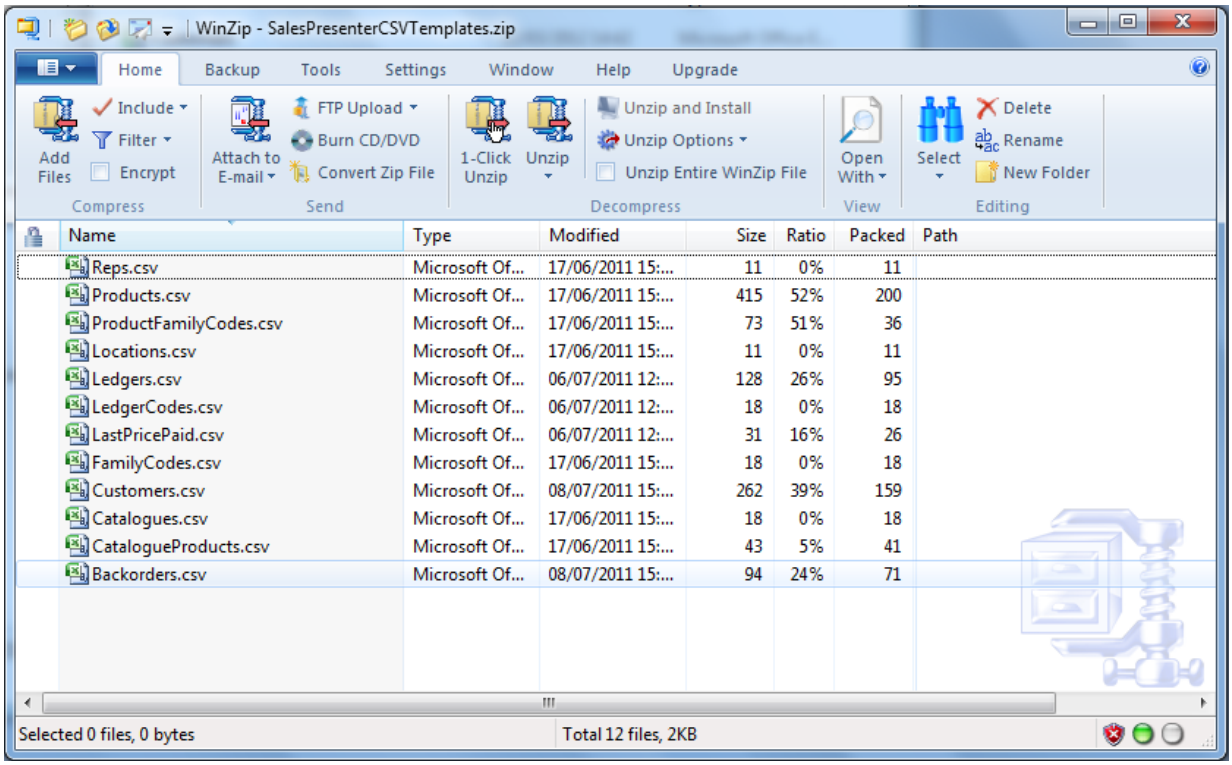
Action 2 You will get the following screen – please read this and confirm that you are happy to continue by following the instructions and putting 123 into the field provided and click Update Cloud Account Settings



Step 4 – Prepare your CSV Data Files

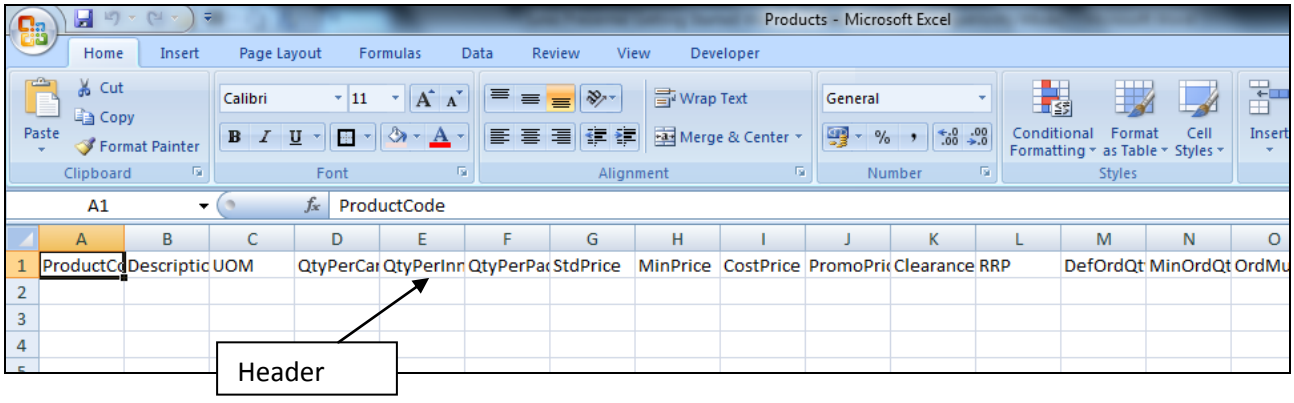
Our templates include every possible field you can upload to your cloud account. Simply ignore the fields that you don't need. Whilst you are working on these templates they are stored on your system and only go to the Cloud account when you Upload them for processing (covered in Step 5).

Action 1 To download the template you want, just click on the document name SalesPresenterCSVTemplates.zip which you downloaded in Step 2, you will get the following screen which shows you which CSV templates are in the download.



Action 2 To open the csv template you want just double click on the document name, in our example below we have chosen the Products.csv template. When the template opens it will open in your spreadsheet application (probably Microsoft Excel). It will look something like the picture below:

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



This csv template has a header row as standard.

Action 3 You can now add your Product Data into these fields. When you have finished adding all your Product Data save the file. You can copy and paste from another spreadsheet to this, which saves you rekeying the information – please ensure that you paste into the correct column.

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

Action 4 Repeat Actions 2 and 3 choosing the different CSV templates to hold your specific data – the template 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, e.g: Teddy Bear, Cub would be "Teddy Bear, Cub". This ensures that the symbol does not get treated as the field separator.

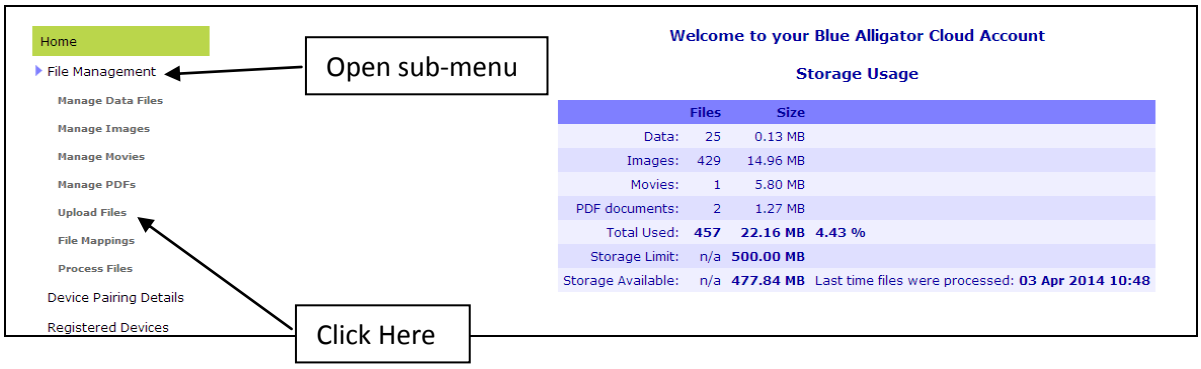
You have successfully set up your Data Files

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.

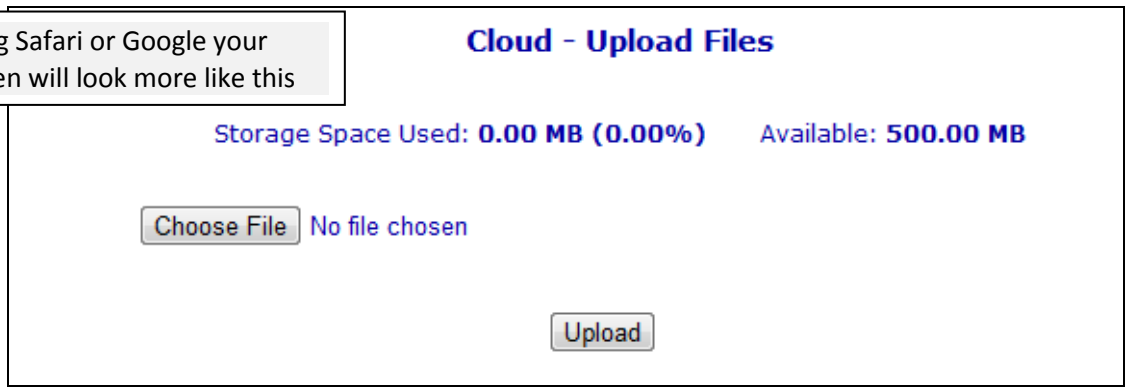
Special Note To assist with the bulk upload of files it is possible to use a compressed file containing your data and image files (i.e. ZIP format). The process will automatically uncompress each of the files within your ZIP file and store them in your cloud storage area, the compressed file can contain 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

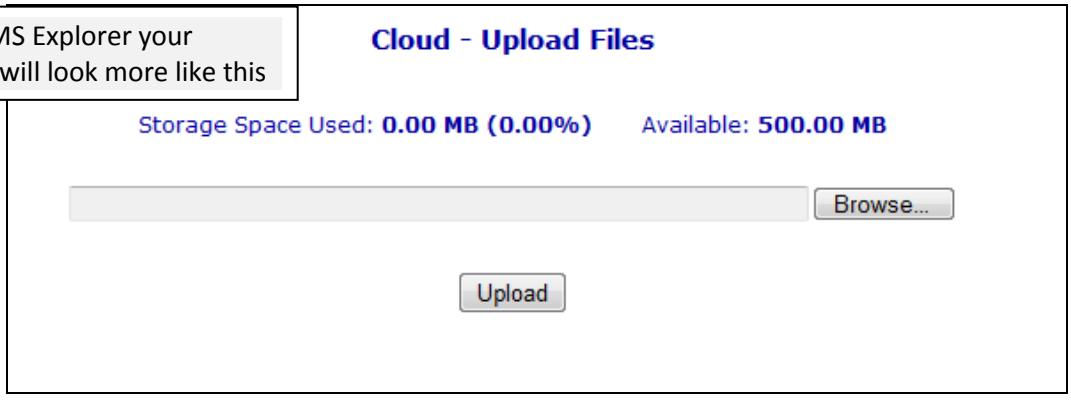


Action 2 Select Choose File

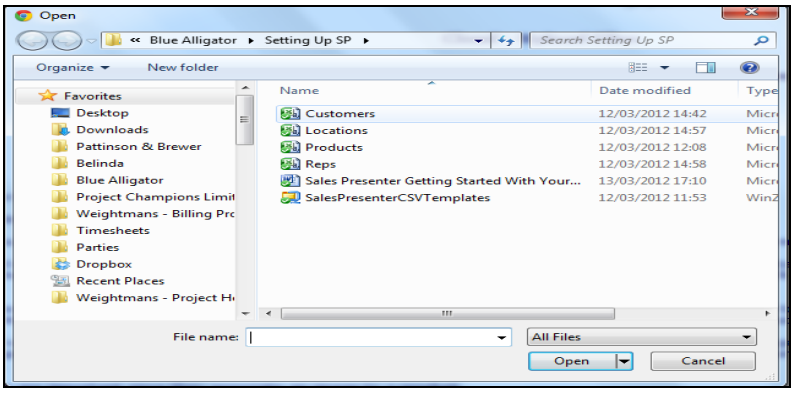
Using Safari or Google your screen will look more like this



Using MS Explorer your screen will look more like this

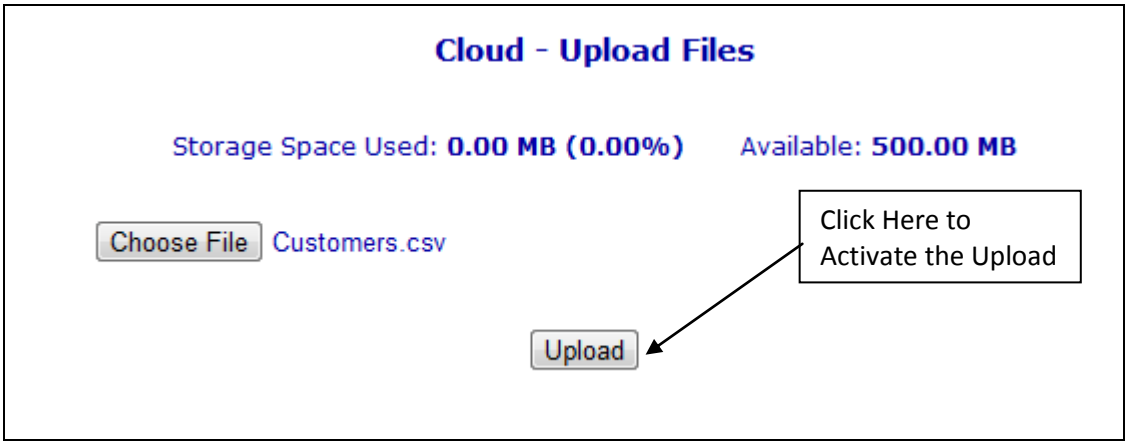


Action 3 Select Choose File or Browse this will open the Browser window on your computer for you to navigate to the folder where you have saved your Data and Image files.

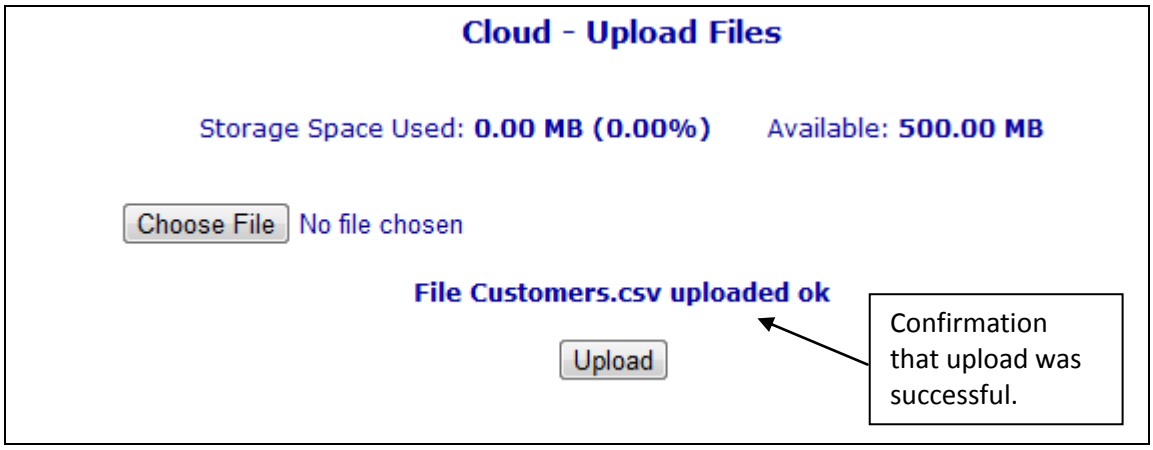


Action 4 To select the file to upload just double click on the file name, this will then appear next to the Choose File or Browse button (below shows that we have chosen our Customers.csv file).

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.



Action 6 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 7 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 could be 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**>

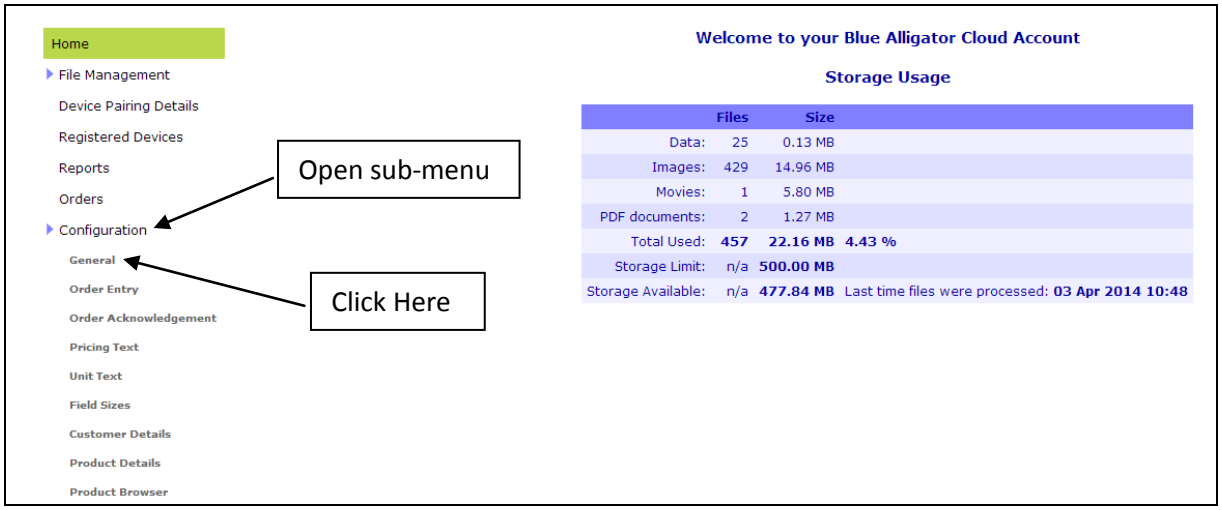
Where: <**product code**> is the product code
<**separator**> is a symbol such as a dash or underscore
<**suffix**> is any number of alphanumeric characters
<**format**> is the image format (such as JPG, BMP, GIF, PNG)

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

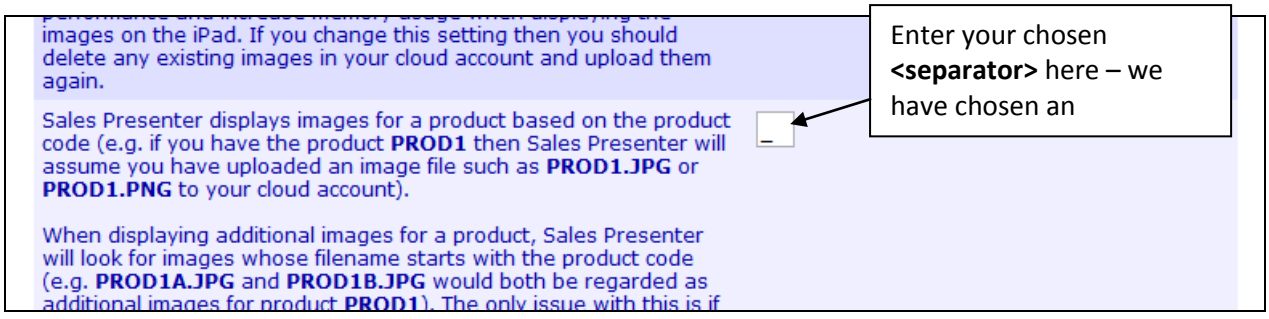
If your product codes are a standard length i.e. all 6 digits long, they you do not need to use a **<separator>**, however if they are variable lengths it is important that you use a **<separator>** to distinguish the difference between the products **PROD1** and **PROD11.** By using a separator, an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

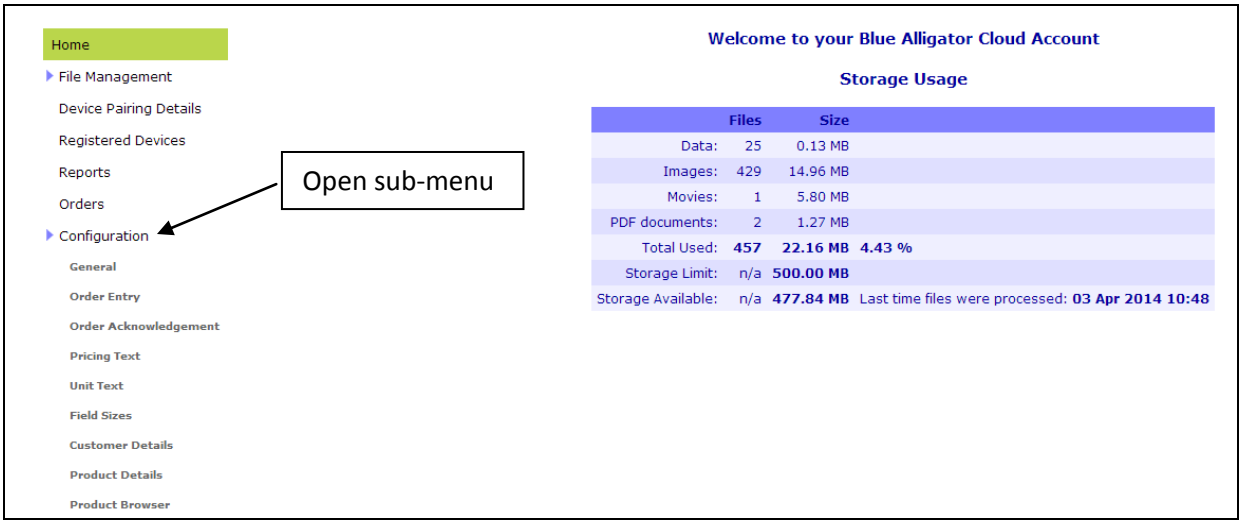
For Sales Presenter Professional Edition users ONLY Please Note : There are some options available from Blue Alligator to assist with the automatic uploading of data and images to your cloud account. Please contact our sales team to discuss these options.

You have Successfully Uploaded your Data and Image Files

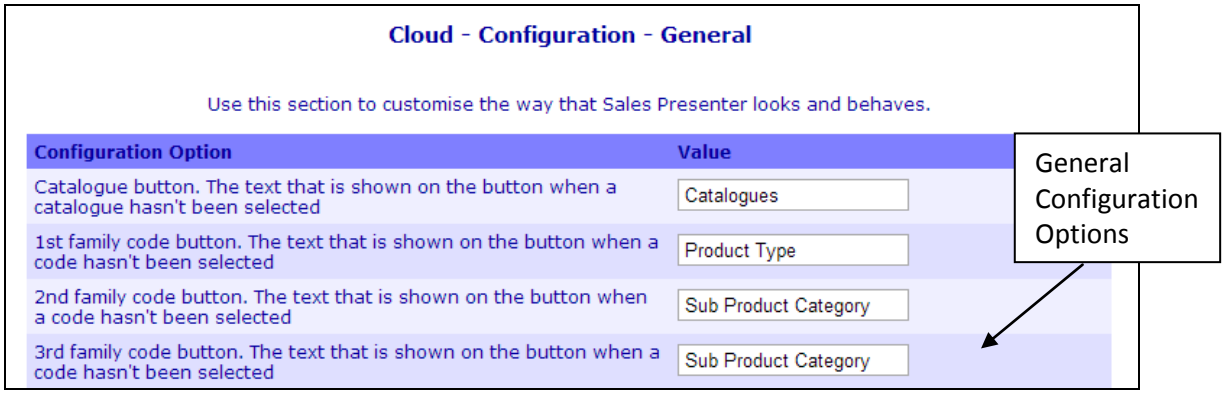
Step 6 – Customising your Configuration Options

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.

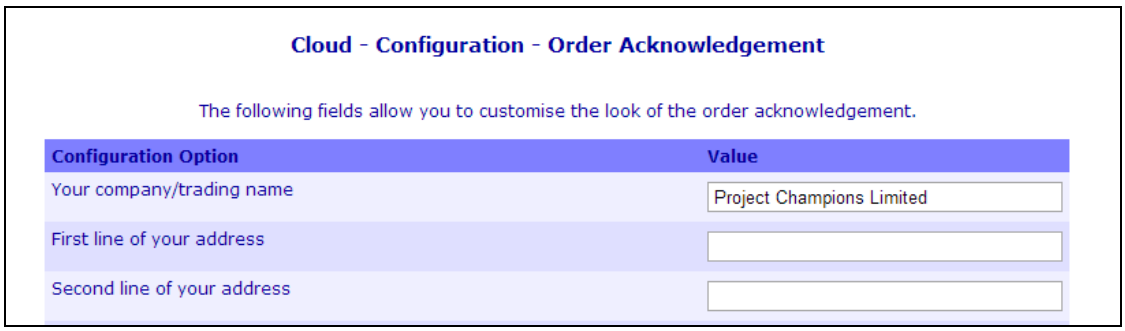
Once logged into your Cloud Account choose Configuration from the menu list on the Cloud Home screen.



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.

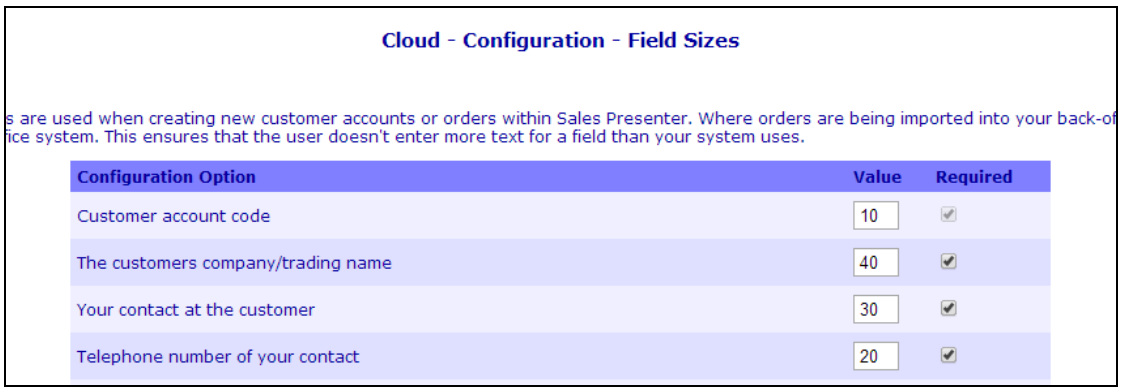


- General configuration – allows you to change various options that don't specifically fall into one of the sub-sections below, such as the wording shown on the family code and catalogue buttons, the unit of quantity that will be entered by the rep during order entry and the format of any date fields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



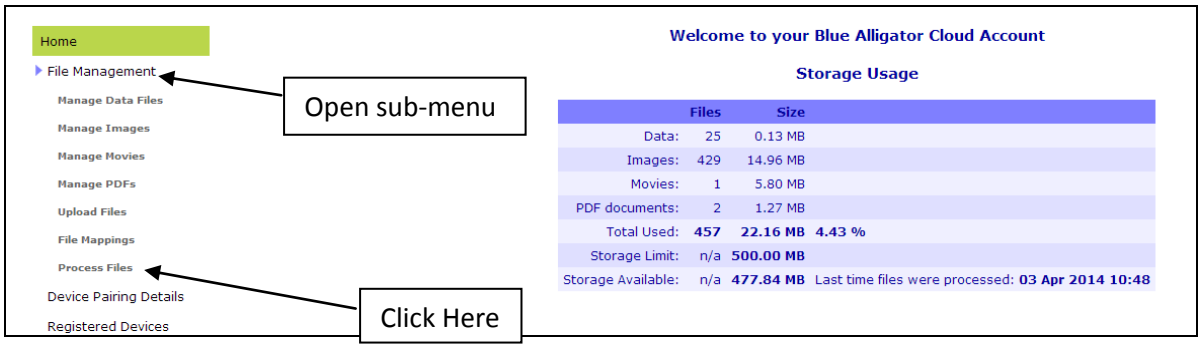
- Field sizes – allows maximum input field sizes to be used when creating new customer accounts or orders within Sales Presenter. Where orders are being imported into your back-office system you should set the field sizes to match your back-office system. This ensures that the user doesn't enter more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

You have Successfully Customised Sales Presenter

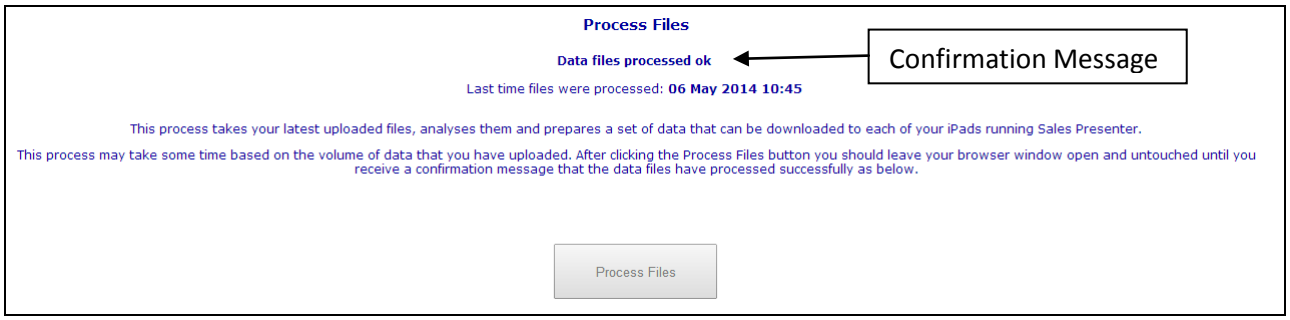
Step 7 – Prepare your uploaded data for Sales Presenter

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 File Management sub-menu.



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.



You can refresh your data by performing steps 4, 5 (Actions 6 and 7) and 7 as often as you wish.

You can refresh or change your product images simply by performing step 5 (Actions 6 and 7).

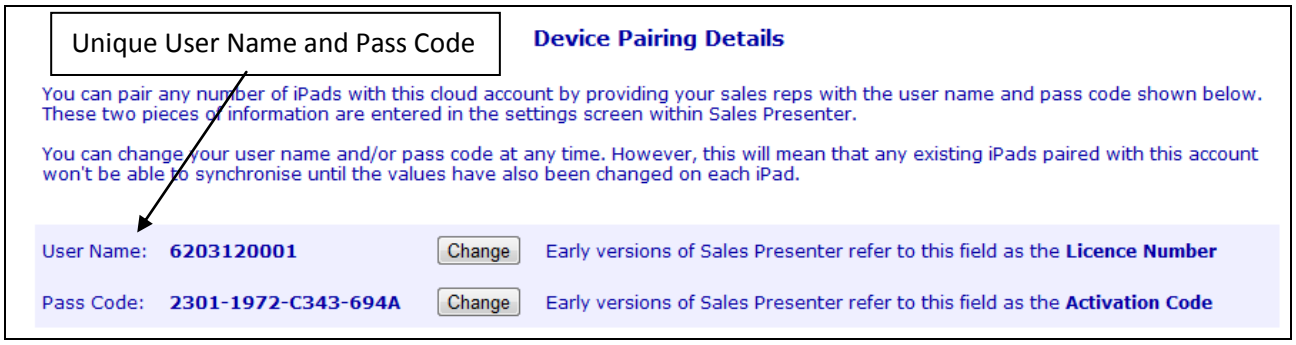
Once any changes are made to the Data or Images files it will be necessary to repeat Step 8 as well in order to get the new information down onto the iPads themselves.

You have Successfully Processed Your Data and Images

Step 8 – 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 on 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.

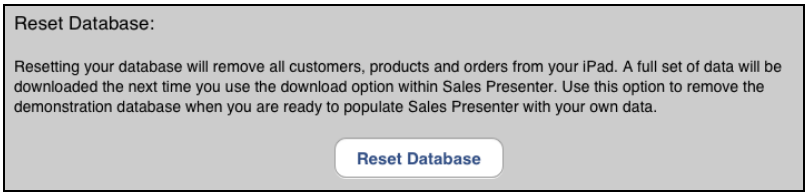
Action 2 Make a note of the User Name and Pass Code and give this to your Sales Reps and Agents who have installed Sales Presenter on their iPads.

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

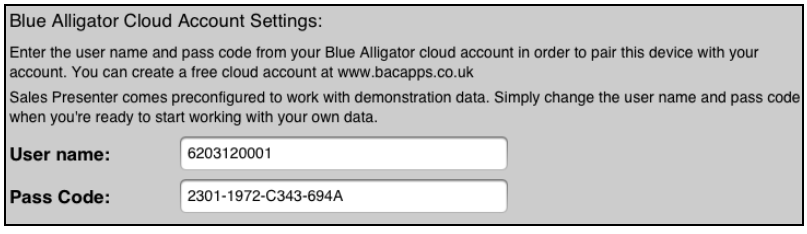
Action 4 Select Download Manager from the iPad's front screen.

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.

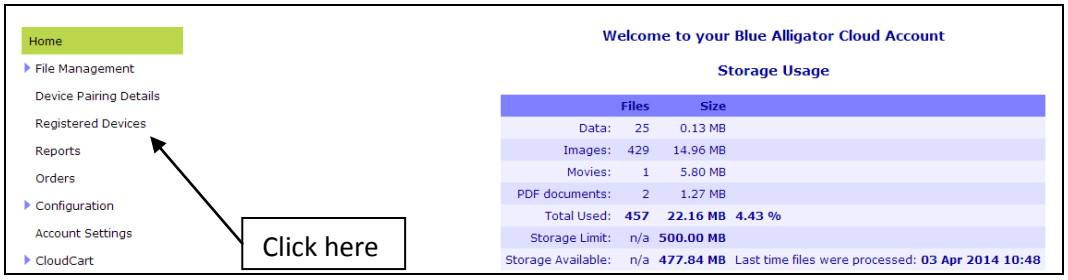


Action 8 Select **Back** in the top left hand corner of the screen to exist the settings screen.

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)



At the bottom of the Cloud Home screen you will see the reps iPad listed in 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	Disable / Edit Restrictions

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

Cloud - Manage Device

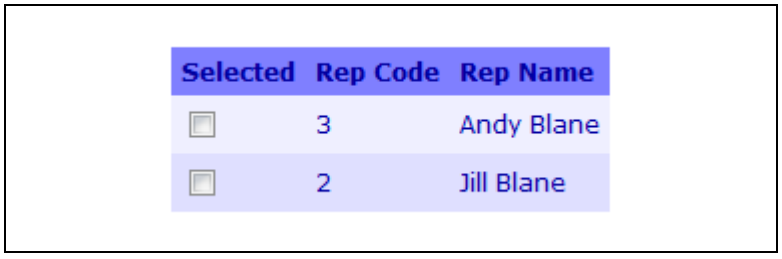
Device Name	Status	Action	Product	Version	Last Synchronised	Current Sales Rep Restriction (see below)	Apply Group/Rep Exclusions To This Device?
BAC Demo 01 iPad	Authorised	Disable	SP Professional	1.1.1	12/03/2012 15:00:37		No / Change

Return to Cloud Home

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 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