

AFS
AA Factor Supplies Ltd
Unit 6
Maple Court

Departments Branch <ALL> Operator <ALL> Source <ALL>
To Date Specific Text

MAM SalesRep

Developments

February 2016

Operator	Department	Date	Comment	Branch	Source
		15/02/15	Off Feb invoices but th	HO	Notes
SAL		17/02/15	and the latest range of f	HO	Rep Call
SAL		17/02/15	Steve has asked for me to send him an updated price	HO	Notes
ENG		17/02/15	Can someone call John please and let him know the fi	HO	Notes
SAL		15/02/15	Steve has asked if the accounts staff would be able t	HO	Notes
SAL		15/02/15	Had a long discussion relating to the new range of filt	HO	Notes
SAL		10/09/14	Visited Steve. Not available, asked me to call next we	HO	Rep Call
SAL		10/09/14	Visited Steve. We have discussed the latest range of f	HO	Rep Call
SAL		15/09/14	Steve has asked me to send him an updated price list	HO	Notes
SAL		11/09/14	Had a long discussion with on the new range o	HO	Rep Call
SAL		11/09/14	Steve has asked if the s on reissue the i	HO	Notes
ENG		11/09/14	Can someone call John to see how the fi	HO	Notes

115 note(s) being
120 note(s) in tot

Mar 15

Help/1 Update/2 Cancel



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Driving Business Performance

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Introduction

The February 2016 release of the SalesRep App has several enhancements: It is now possible to amend the description against a part in the app before the order is passed through to the MAM BMS system. A new feature has also been added that will allow operators to add lines to an impress or managed stock order. Unit prices, where price overrides are enabled will now be transmitted to the MAM BMS by default for all lines on orders raised via the app. A further development is to cater for selection of customers where a forward slash (/) has been used as part of the code.

Benefits

More accurate part descriptions - Option to overkey descriptions on 'generic' part numbers, and for that description to be transmitted to the MAM BMS.

Easier impress/managed stock management - it is now possible to add lines to impress/managed stock orders

More accurate prices - Unit price sent to the MAM BMS on all order lines, allowing for FOC sales to be raised by the user

Implementation

Whereas all the necessary coding for these developments is included in the app itself, some of the new features require parameters setting in the MAM BMS system in order for them to work. Please speak to MAM support Services if you require any features implementing.

C[baX. '\$%&&* ' ') &- \$' ' .

9` T\ Fhccbeg4 ` T` fbYg"Vb"h^''

New features

Overkey description

It is now possible to amend the description of a part number on the device prior to sending an order to the MAM BMS. The amended description would be read by the MAM BMS and used on the subsequent transaction created.

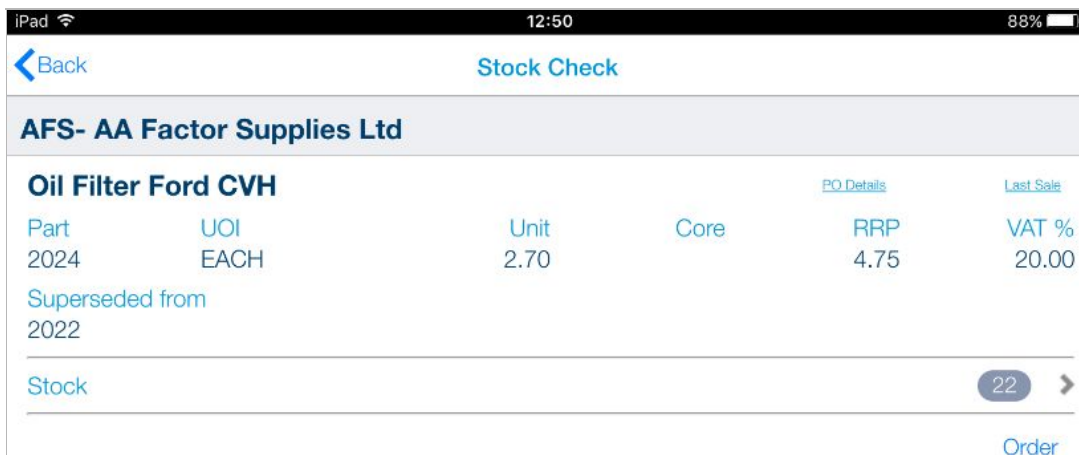
A bgX. This feature requires a parameter setting in MAM BMS, please speak to MAM Support Services if you would like to use it.

Purchase History/Product Enquiries - 'Add to Basket from Stock Check' NOT set

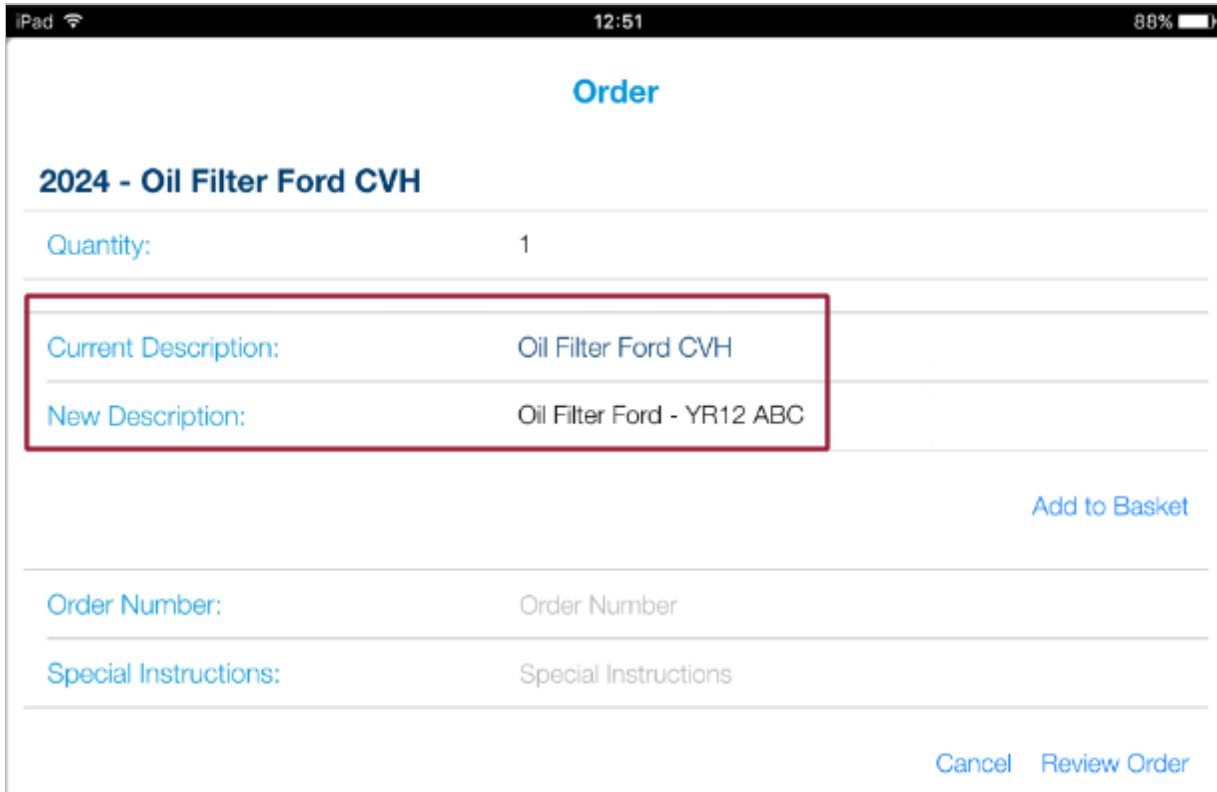
This is the process for when the 'Add to Basket' option on the 'Settings' tab of the app is not set:



Enquire on a part number from either Purchase History and Orders / Product Enquiries and Orders.



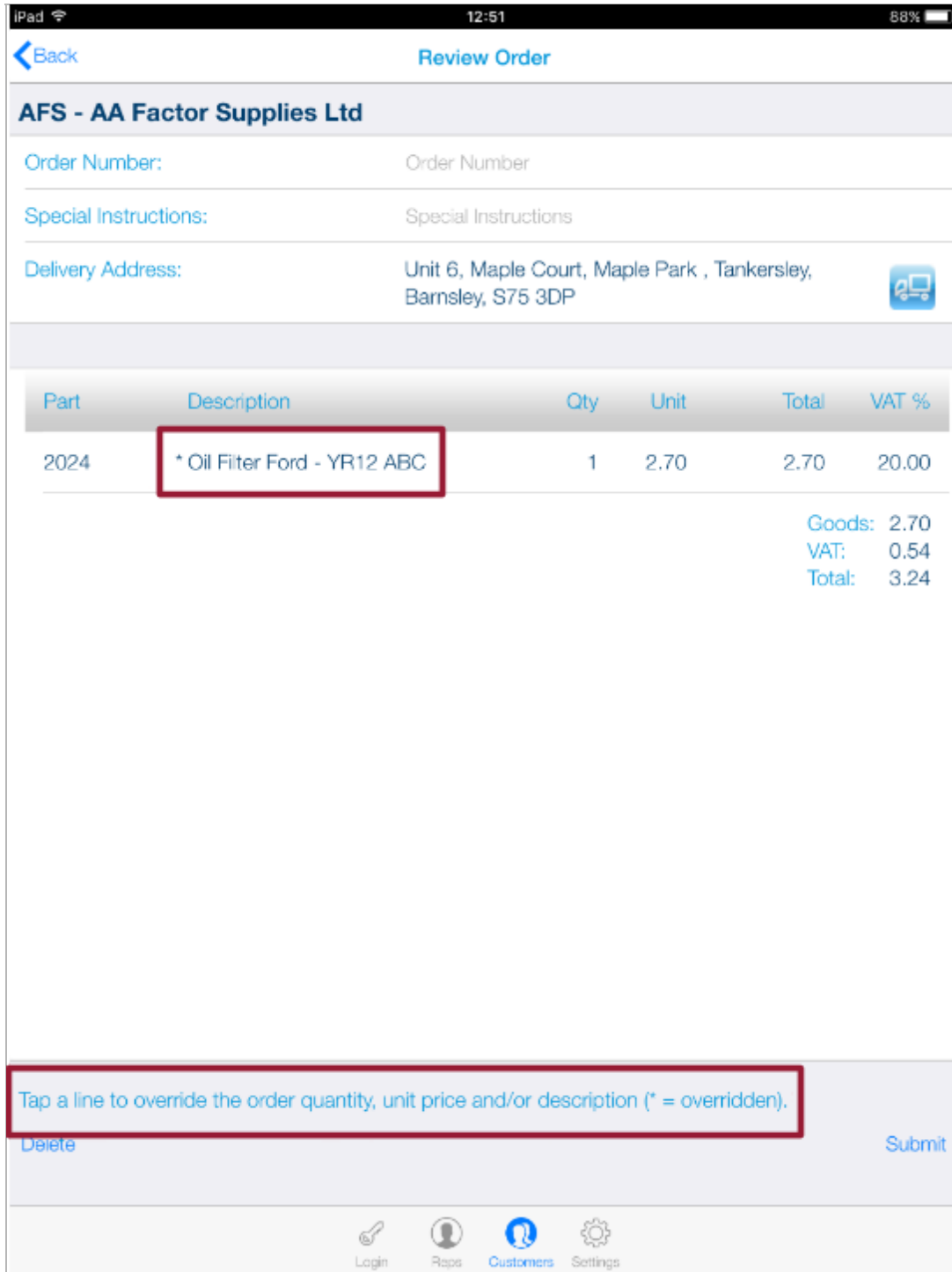
Tap the BeWKe button, the option to override the description will be available. Amend as required



The screenshot shows an iPad interface for an order form. At the top, the status bar displays 'iPad', signal strength, time '12:51', and battery level '88%'. The main title is 'Order'. Below it, the item name is '2024 - Oil Filter Ford CVH'. The form contains several fields: 'Quantity' with the value '1', 'Current Description' with 'Oil Filter Ford CVH', and 'New Description' with 'Oil Filter Ford - YR12 ABC'. The 'New Description' field is highlighted with a red border. Below these are 'Order Number' and 'Special Instructions' fields, both currently empty. At the bottom right, there are three buttons: 'Add to Basket', 'Cancel', and 'Review Order'.

Tap the 5WWgb 6Tf^Xg or EXi Xj 'BeWKe button. In this example EXi Xj 'BeWKe has been used. The amended description will be passed through, the description will be preceded with an asterisk (*) to indicate that the description has been changed.

At the foot of the screen there will be text to explain to the rep that they can tap on a line to further amend the description (and price as well if the relevant parameter has been set).



Review Order

AFS - AA Factor Supplies Ltd

Order Number: Order Number

Special Instructions: Special Instructions

Delivery Address: Unit 6, Maple Court, Maple Park , Tankersley, Barnsley, S75 3DP

Part	Description	Qty	Unit	Total	VAT %
2024	* Oil Filter Ford - YR12 ABC	1	2.70	2.70	20.00

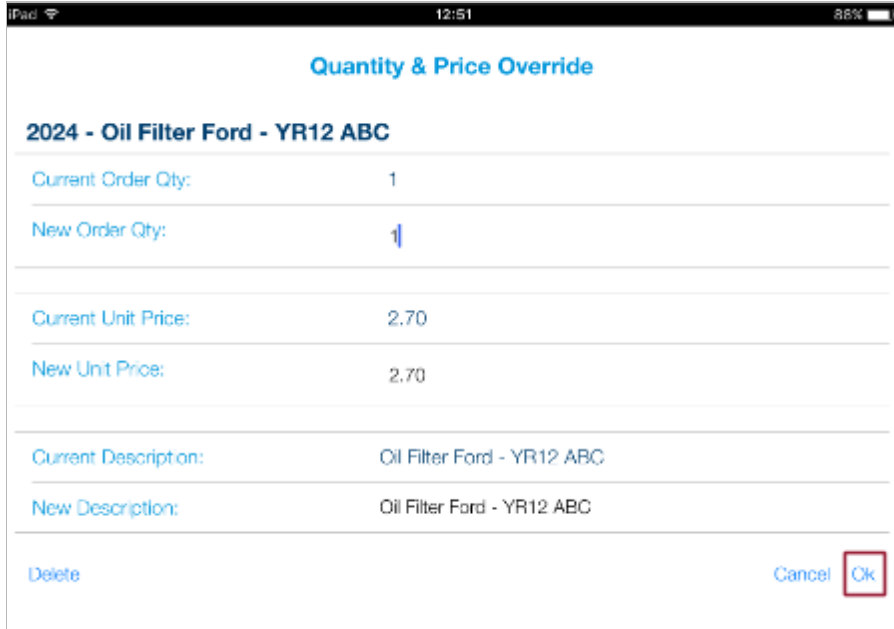
Goods: 2.70
VAT: 0.54
Total: 3.24

Tap a line to override the order quantity, unit price and/or description (* = overridden).

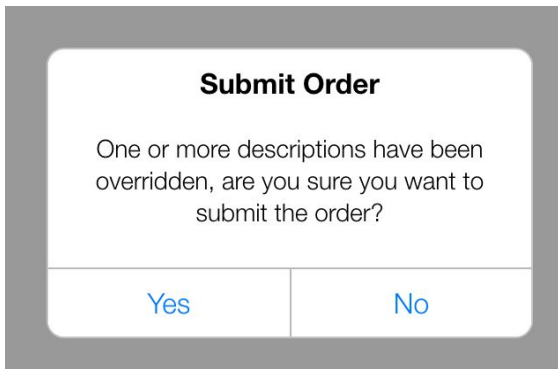
Delete Submit

Login Reps Customers Settings

Tapping on the line will bring up the following screen. Amend as required and tap the B > button.



When the order is ready to submit, tap the Submit button. A message will display as below to indicate to the rep that a change has been made, if OK tap the Submit button, if not, tap the Amend button, amend as required and re-submit.



When the order is received into the MAM BMS there will be text displayed to indicate the person processing it that a description has been amended.



Click the B > button, and the part will be passed to the Product Details tab with the amended description being used. The transaction can then be completed as normal.

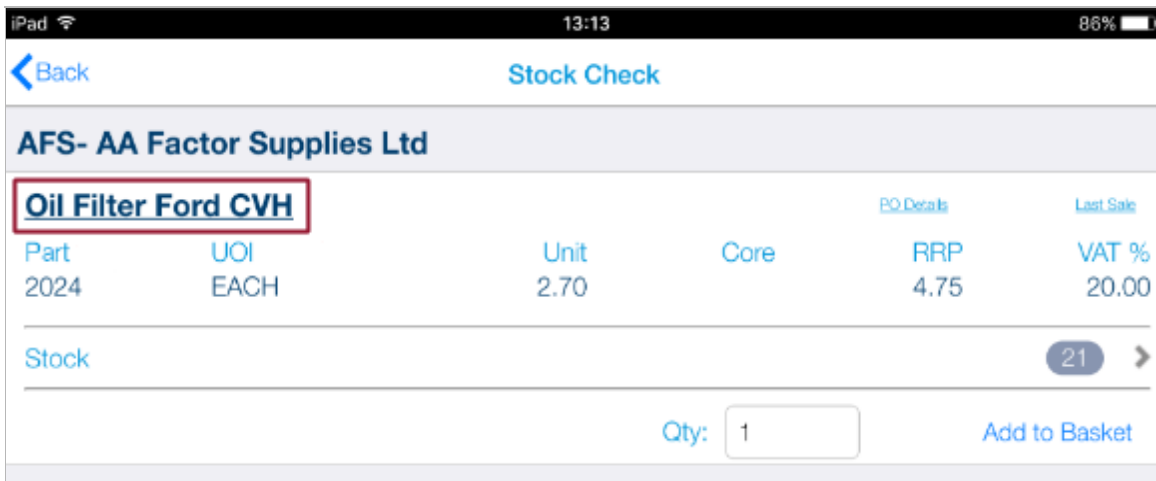
Point of Sale											
Customer Detail			Product Details					End of Transaction			
Customer AFS - AA Factor Supplies Ltd (STG)			Selling Level			1 Trade					
Ln	Part Number	Description	Qty	Unit (STG)	Extra 2	Disc%	Ext	Core Act	Surch Act	Vat Cde	S
1	2024	Oil Filter Ford - YR12 ABC	1	2.70		0.00	2.70	0.00			1 I
2											

Purchase History/Product Enquiries - 'Add to Basket from Stock Check' set

This is the process for when the 'Add to Basket' option on the 'Settings' tab of the app is set:



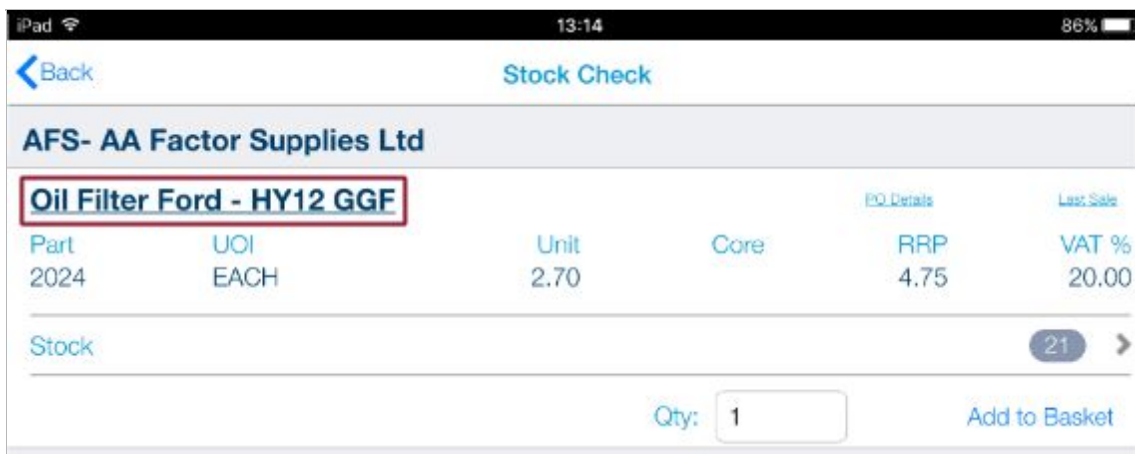
Following a part number enquiry from either Purchase History and Orders / Product Enquiries and Orders, the part number description will be displayed on the app and will be underlined. Tap on the description.



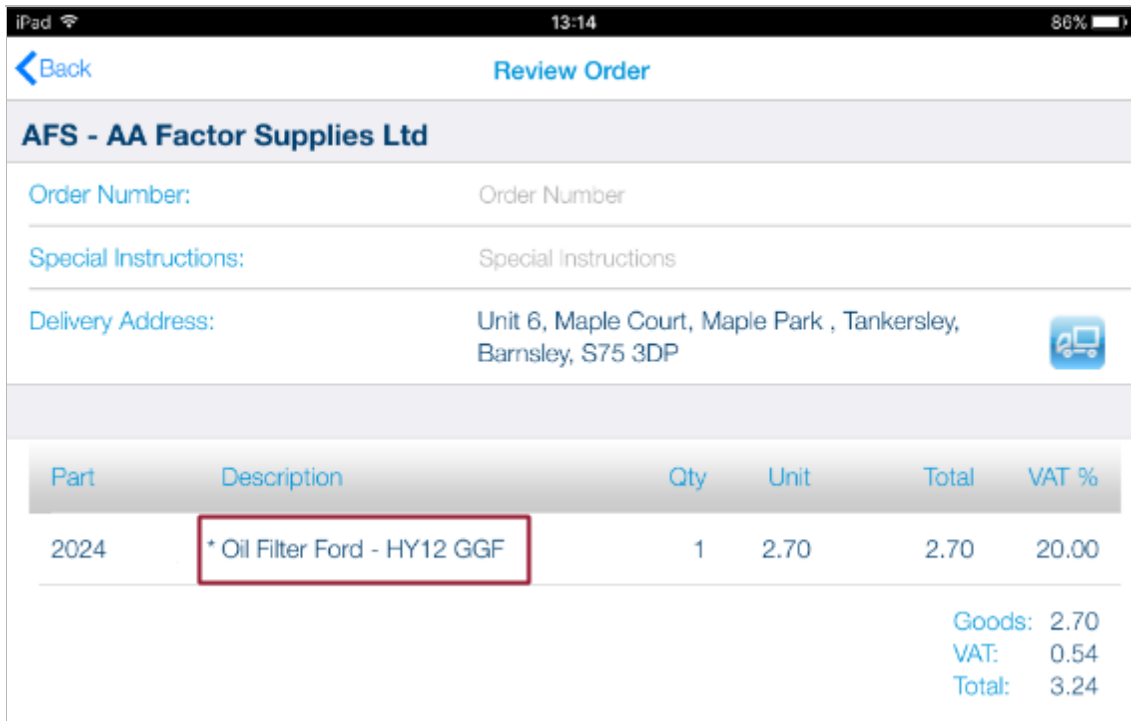
The following screen will display:



Amend the description as required and tap the B > button. The amended description will be passed back to the Stock Check screen.



Tap the Add to Basket button to add the part to the basket. When reviewing the order, the amended description will be signified by the preceding asterisk as explained earlier.




Review Order

AFS - AA Factor Supplies Ltd

Order Number: Order Number

Special Instructions: Special Instructions

Delivery Address: Unit 6, Maple Court, Maple Park , Tankersley, Barnsley, S75 3DP 

Part	Description	Qty	Unit	Total	VAT %
2024	* Oil Filter Ford - HY12 GGF	1	2.70	2.70	20.00

Goods: 2.70
VAT: 0.54
Total: 3.24

The same functionality for further amendment, subsequent submission of the order and processing in the MAM BMS is the same as detailed in the earlier example.

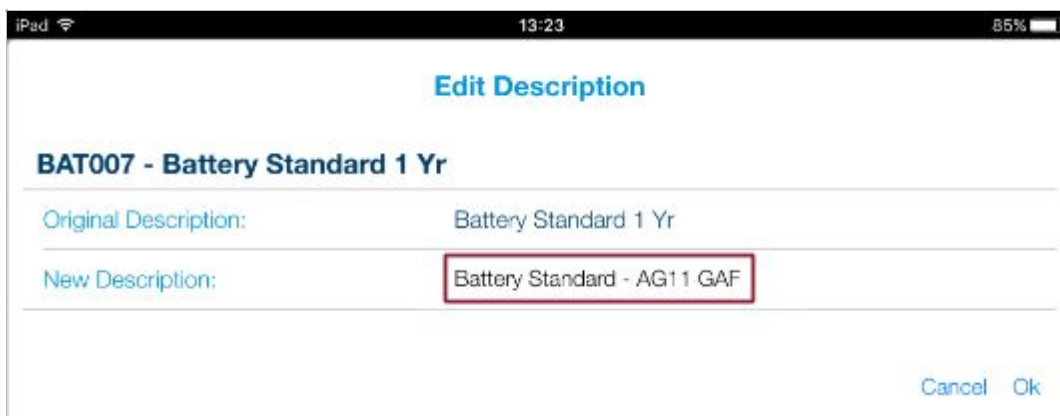
Quick Parts

When using the Quick Parts screen to carry out an enquiry for multiple parts the returned data will display as below. The parts descriptions will be underlined, allowing the user to tap on the description and to make the amendments, where applicable.



Part	RRP	Unit	Core	UOI	Stock	Qty	
2024 <u>Oil Filter Ford CVH</u>	4.75	2.70		EACH	21	1	
				PD Details	Last Sale	Stock	
PAD801 <u>APEC BRAKE PADS</u>	0.00	9.02		EACH	4	1	
				Last Sale	Stock	Qty Breaks	
> BAT007 <u>Battery Standard 1 Yr</u>	28.99	25.42		EACH	299	1	
				Last Sale	Stock	Qty Breaks	

For example:



Edit Description

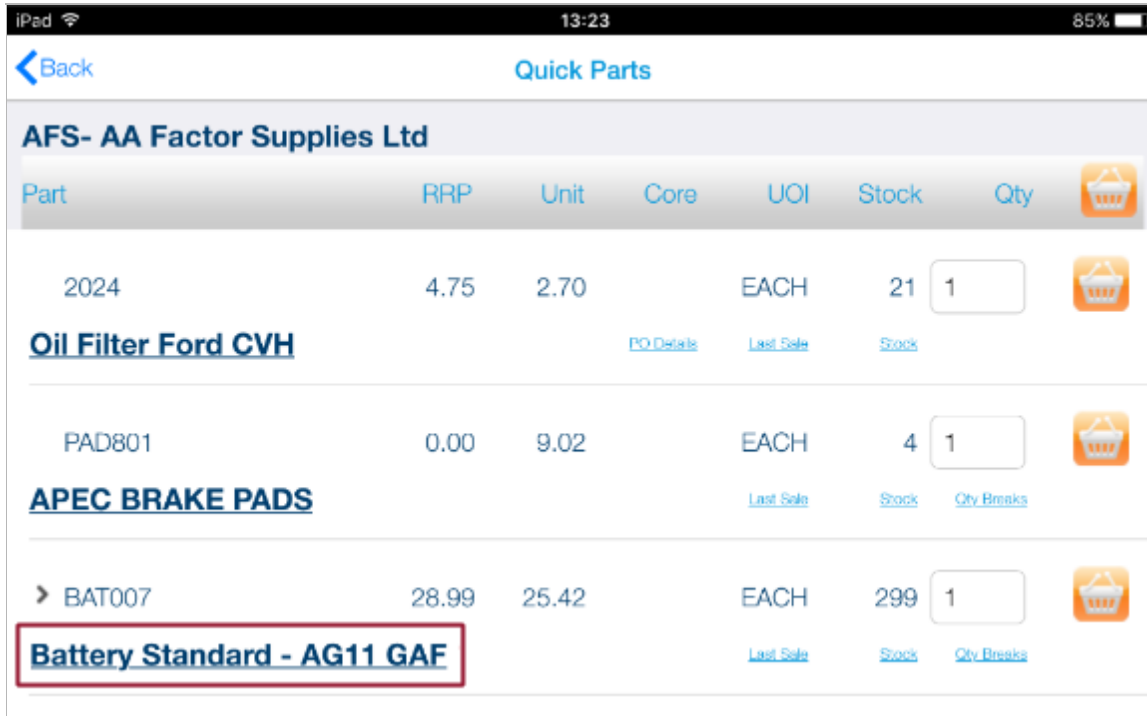
BAT007 - Battery Standard 1 Yr




Original Description: Battery Standard 1 Yr

New Description: Battery Standard - AG11 GAF

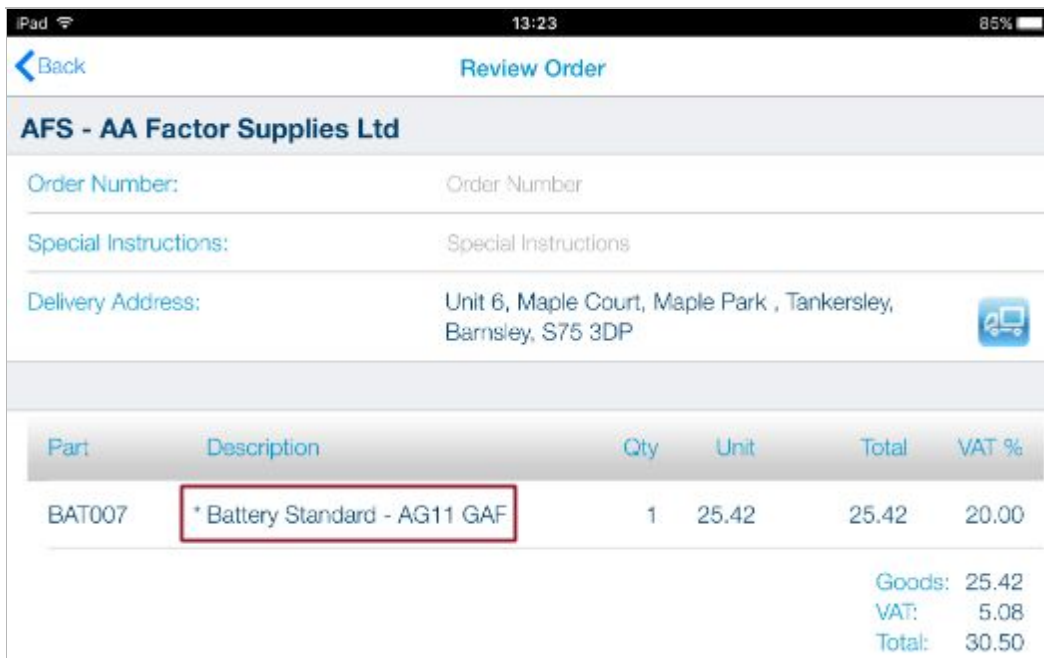
[Cancel](#) [Ok](#)

Tap on the B > and the amended description will be passed back to Quick Parts.



Part	RRP	Unit	Core	UOI	Stock	Qty	
2024	4.75	2.70		EACH	21	1	
Oil Filter Ford CVH							
PO Details Last Sale Stock							
PAD801	0.00	9.02		EACH	4	1	
APEC BRAKE PADS							
Last Sale Stock Qty Breaks							
> BAT007	28.99	25.42		EACH	299	1	
Battery Standard - AG11 GAF							
Last Sale Stock Qty Breaks							

Add to the basket. When reviewing the order, the amended description will be signified by the preceding asterisk as explained earlier.



Part	Description	Qty	Unit	Total	VAT %
BAT007	* Battery Standard - AG11 GAF	1	25.42	25.42	20.00

Goods: 25.42
 VAT: 5.08
 Total: 30.50

The same functionality for further amendment, subsequent submission of the order and processing in the MAM BMS is the same as detailed in the earlier example.

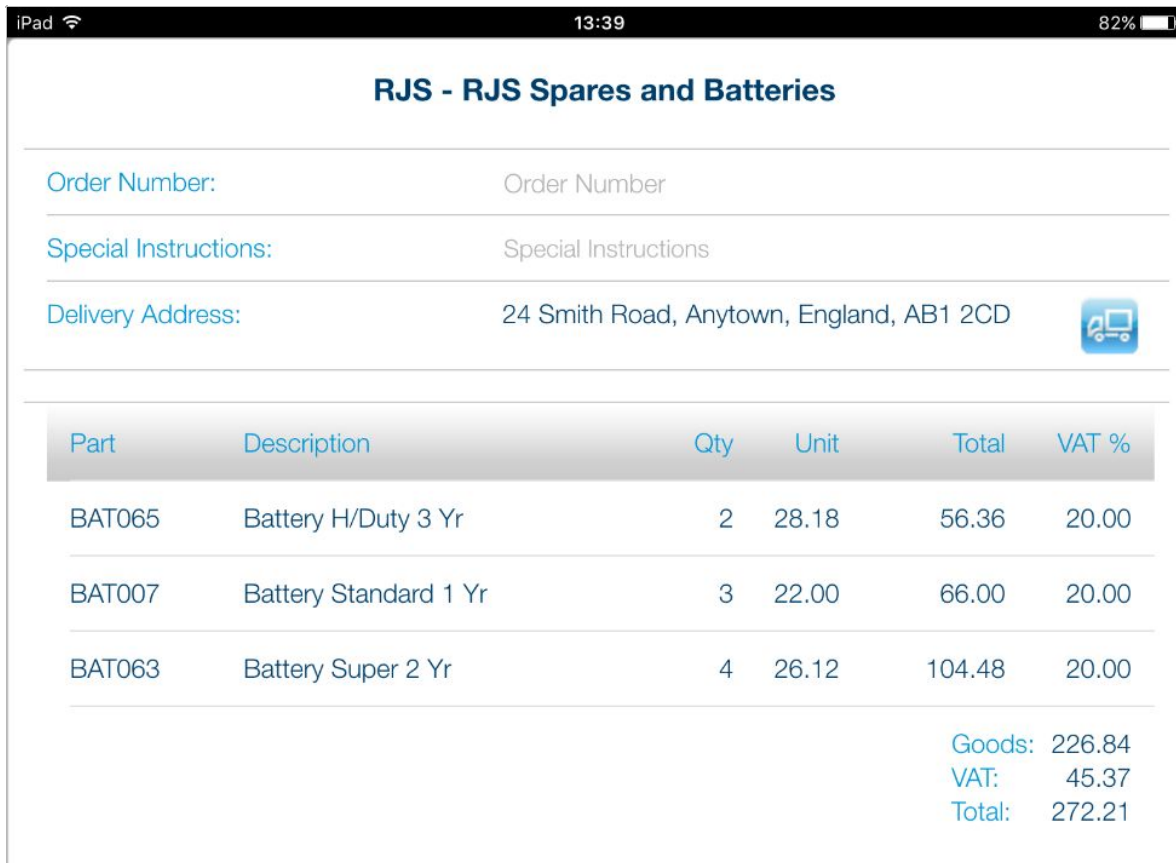
Impress and Managed Stock

After carrying out an impress / managed stock count and tapping the EXi Wj 'B eWKe button.



Part	Description	Current	Unit	Stock	Order
BAT065	Battery H/Duty 3 Yr	10	28.18	288	<input type="text" value="2"/>
BAT007	Battery Standard 1 Yr	10	25.42	299	<input type="text" value="3"/>
BAT063	Battery Super 2 Yr	8	26.12	187	<input type="text" value="4"/>


The order to be transmitted will display.



Part	Description	Qty	Unit	Total	VAT %
BAT065	Battery H/Duty 3 Yr	2	28.18	56.36	20.00
BAT007	Battery Standard 1 Yr	3	22.00	66.00	20.00
BAT063	Battery Super 2 Yr	4	26.12	104.48	20.00
				Goods:	226.84
				VAT:	45.37
				Total:	272.21

Order Number: Order Number

Special Instructions: Special Instructions

Delivery Address: 24 Smith Road, Anytown, England, AB1 2CD 

Tapping on a line will give the user access to the screen where the line (and / or description, if configured) can be amended.



Once the amendments have been made the order can be submitted and processed in the MAM BMS as detailed on the earlier example.

Example: If a parts description has been amended and added to the basket, and the same part is then added again, the rep will be prompted as to whether they want to add to, overwrite or cancel.

Example: will just increase the on order quantity of that part

Example: will just overwrite the on order quantity with that of the line being added.

The description of the line already on the pending order will be updated. If the user wants to further update an order line they would need to do that from the Edit Line screen prior to submitting the order.

Save and 'add to' Impress / managed stock orders

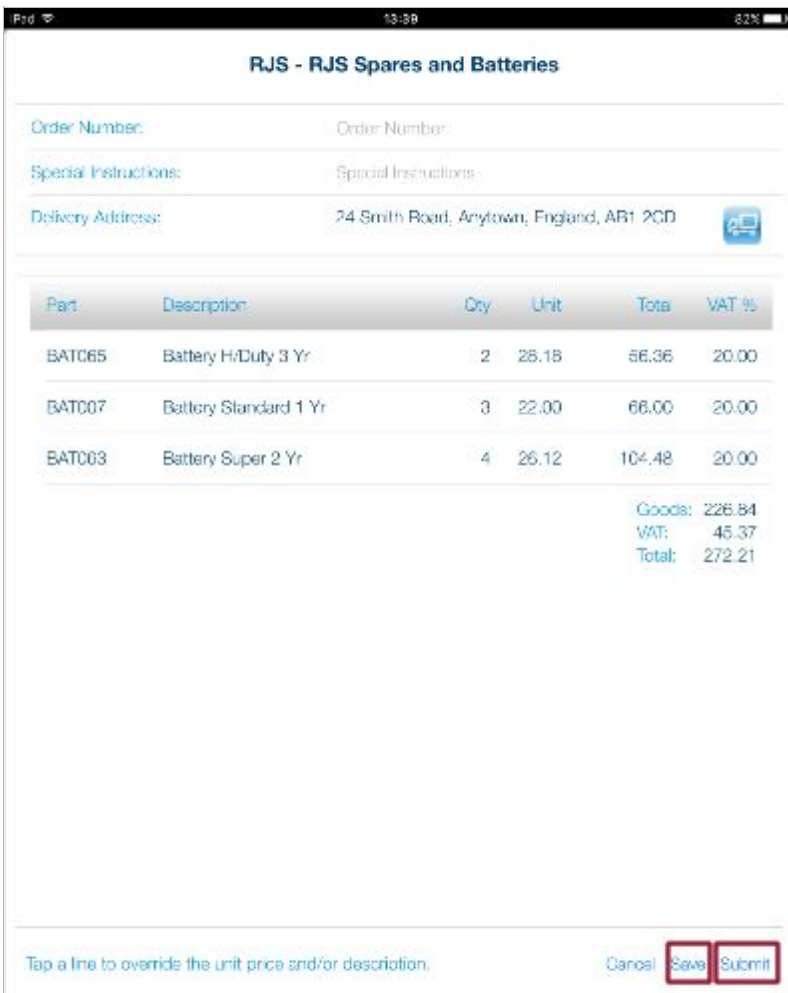
The original development to allow for impress / managed orders to be raised did not offer the user the chance to add to that order, or to be able to add the impress / managed order to another pending order for the customer on the same device. That issue has now been resolved with the addition of a FTi X button on the Review Order screen for impress / managed orders.

C_XTFX`abgX, this is now a default setting, the FTi X button will be available to all users running the new release of the app.



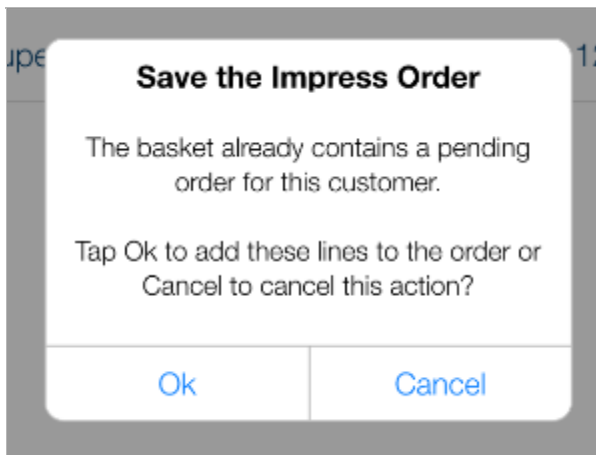
Adding an Impress / managed order to a pending order

Parts have been added to the basket from the Purchase History and Orders or Product Enquiries and Orders or Quick Parts screen for a customer. Those lines are essentially a pending order on the device and just need to be submitted. However, the specific customer also holds impress and / or managed stock. The user carries out the stock count and is in the Review Order screen.

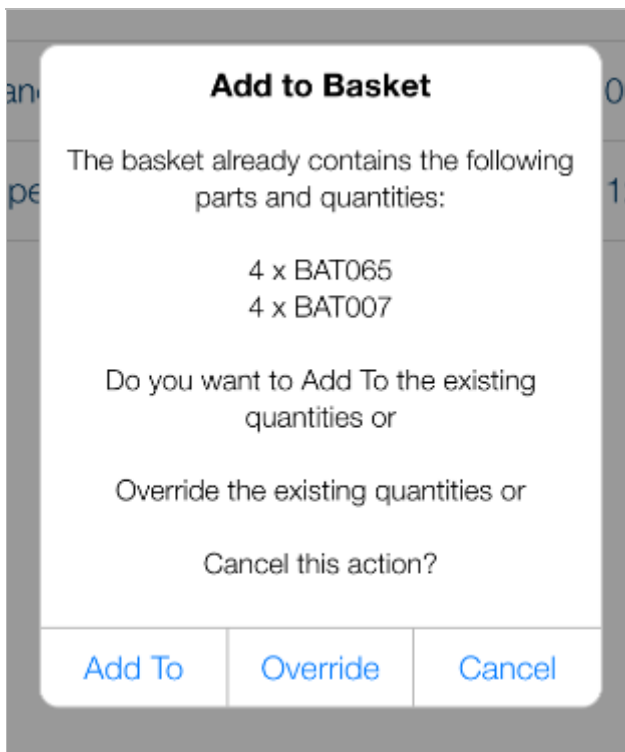


If the user taps on the **Finish** button, this order will be sent to the MAM BMS, i.e., the pending order for the other lines will be ignored.

If the user taps on the **Finish** button, they will be prompted as below, because there is already an order on the device for this customer. Tap the **Finish** button to revert to the Review Order screen where the user may want to submit the impress / managed order separately, or tap the **Next** button to add the lines to those already pending.



If the user is adding lines which are already on the pending order a further prompt will display.

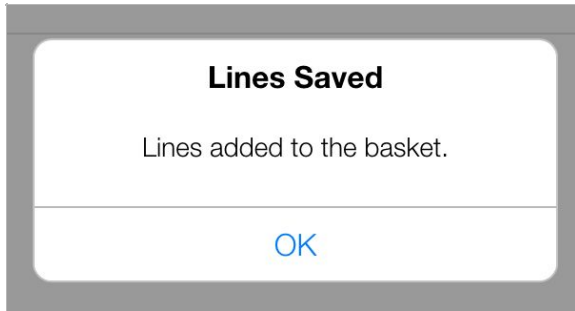


Respond accordingly. If **Finish** or **Next** are selected the final message will display to confirm the addition of the lines. The consolidated order can then be accessed via the Review Order screen and checked prior to submission.

Saving an Impress / managed order

It may be that the user will carry out the impress / managed stock count first and want to save that replenishment order with a view to adding some ad-hoc lines prior to submission.

If this is the case the user should just tap the FTi X button from the Impress / Managed Review Order screen. Once that is done because there is no pending order for the customer on the device the user will just receive a confirmation message.



Once the order has been saved it can be added in exactly the same way as any other pending order, lines can be added to the basket (and therefore to the pending order) from the Purchase History and Orders or Product Enquiries and Orders or Quick Parts screen

Send unit price on all lines on an order transmitted to the MAM BMS

Previously if a user had the option to override prices on the app, and then submitted an order from the device to the MAM BMS, the unit price would only be passed through where a line had been overridden. This could then cause an issue in the MAM BMS especially if the user had agreed that the part was to be sold free of charge, and had overridden on the app accordingly. In the MAM BMS if an incoming XML order has a price of 0.00 it is assumed to be incorrect and the current on-file price for the Customer/Part combination is used instead. This behaviour can be changed by setting a parameter within MAM BMS, which will mean that the price of 0.00 will be used instead.

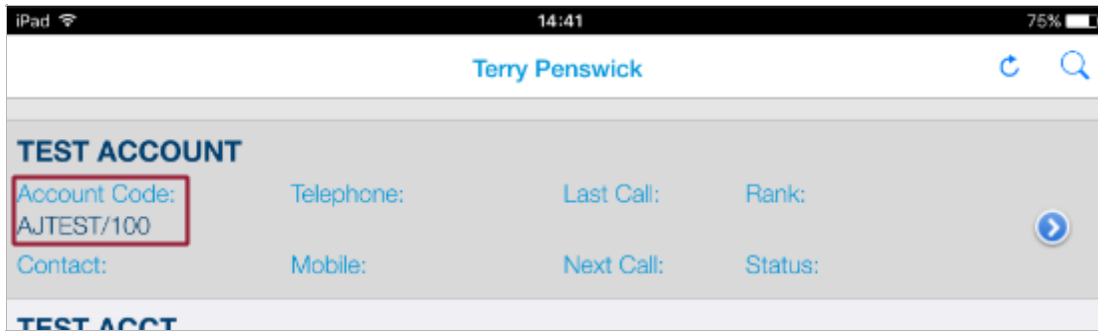
Similarly, previously if a user was to carry out an enquiry today on the app and the price returned is £10, customer is happy so the part is added to the basket. Order is then submitted the following day by the rep. In the interim there has been an update on the MAM BMS and the price is now £11. Previously the part would have been sold at £11 because the price on the app had not been overridden, therefore no price sent. Again, a parameter setting can be changed which means that the correct price of £10 would be sent.

C XTfX'fcXT^'gp'@5@'Fhccbeg\Yl bh j bh W \^X'gf XfX'cTeT` XgXef'XaTU \aZ''

Cater for customer account codes where a / has been included in the code

A user reported that they had an issue selecting a customer from the list of returned customers, where the account code included a '/. If they tried to tap on that account to access the Customer Details screen the app did not respond. That issue has now been resolved.

E.g., Account AJTEST/100



Tap on the arrow, and the customer details screen can now be accessed:

