# Remote Order

# Capture Program

# for

# Sales Representatives
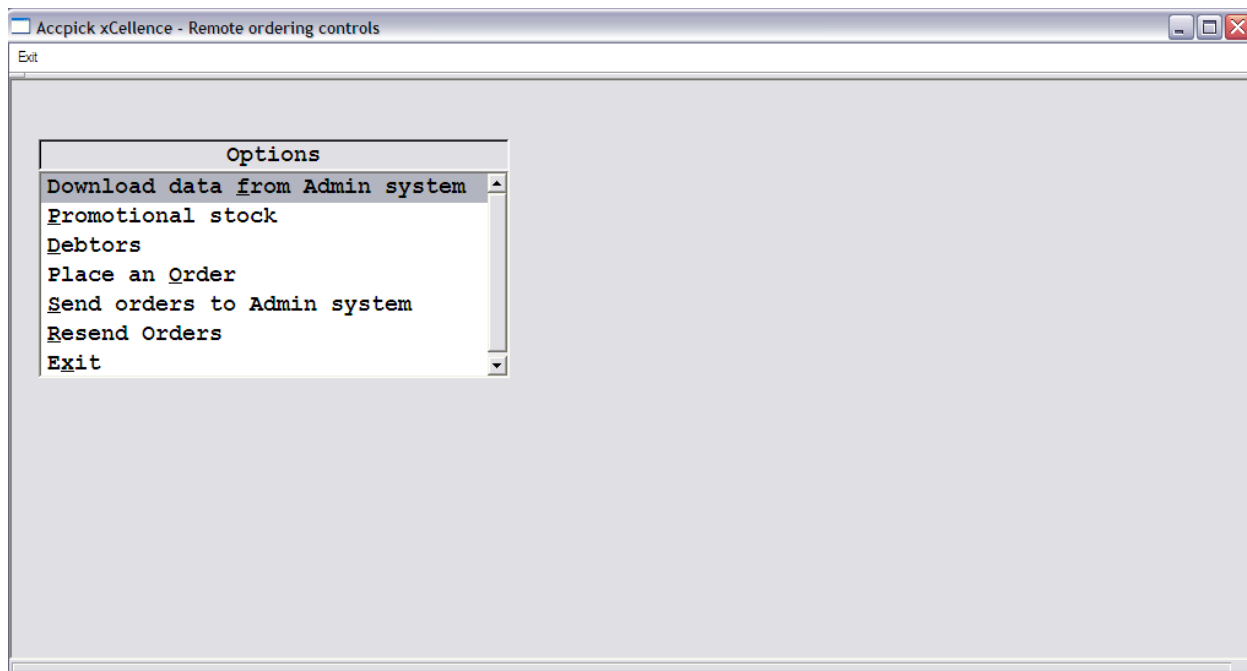
# Contents

# Remote Order Capture Program Overview

**This program is for the Sales Representative to capture orders onto their computers for Debtors, whilst in the field. Orders that are captured are then sent via an in built 3G Internet connection to the Head Office server.**

The Order Capture program has the following options:



**Download data from Admin system:** Will collect the latest data for Debtors and Stock information from the Head Office server, and needs to be done during office hours / whilst the Head Office server is switched on. The data that is viewed via the promotional stock, stock and debtors options are as up to date as the last download from head office.

**Promotional Stock:** Shows items that are on promotion with an option to print.

**Debtors:** Shows Debtors Age Analysis and contact details.

**Place an order:** Allows an order to be captured and saved.

**Send orders to Admin system:** This will send orders to the Head Office for processing.

**Resend Orders:** This allows orders to resend orders. Orders are automatically deleted when they are 7 days old.
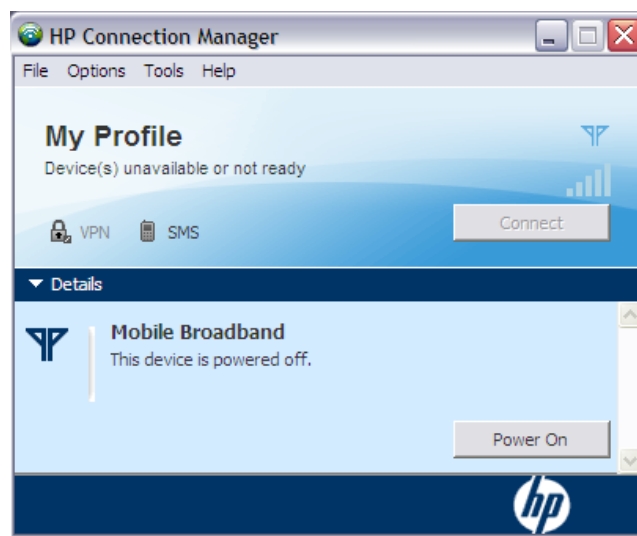
# Connecting to the Internet using the 3G Connection

**This needs to be done before a download of data can be done and before an order can be sent to the Head Office Server.**

To connect the 3G connection:
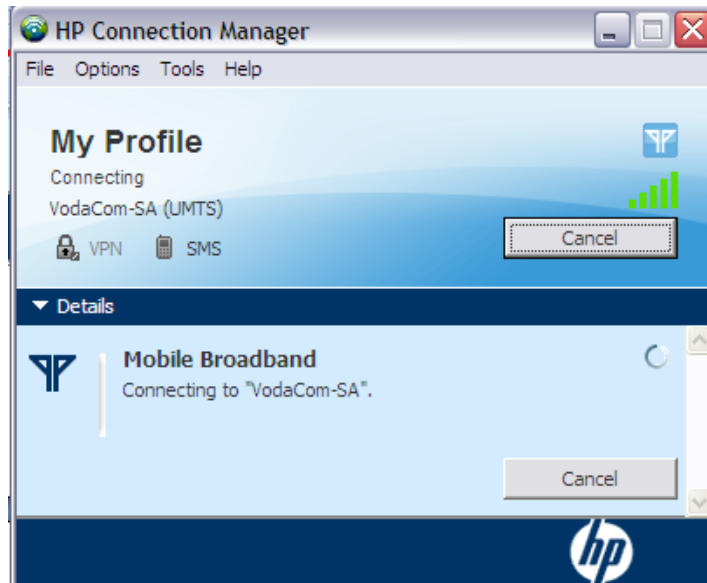1.  Double click on the HP Connection Manager icon on the desktop.



2.  If the Connect button is disabled, click on the Power On button to power up the device.



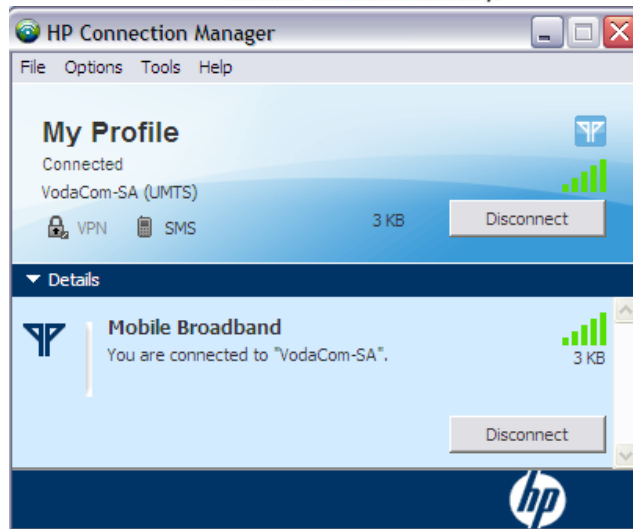3.  Click on the Connect button.

4. The device will then attempt to connect:



5. Once connected, the screen will look like:



6. Click on Disconnect to close the session. Once disconnected, your screen will look like this:

# Download Data from Head Office

*** Before running this procedure, ensure that your Internet connection is available by following the steps under the section: "**Connecting to the Internet using the 3G Connection**". ***

Click on the 'Download data from Admin system' option from the menu:
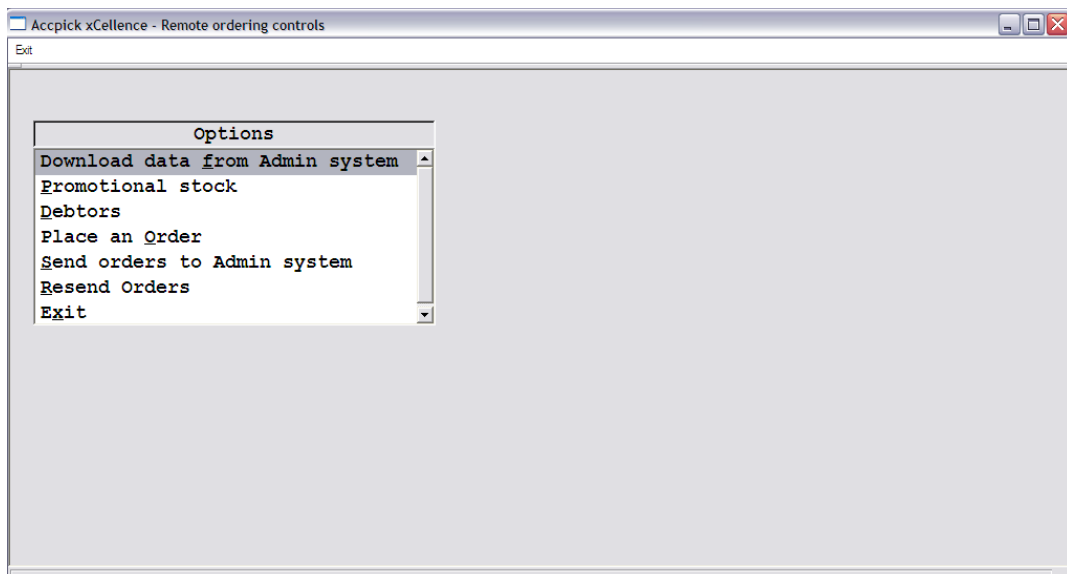


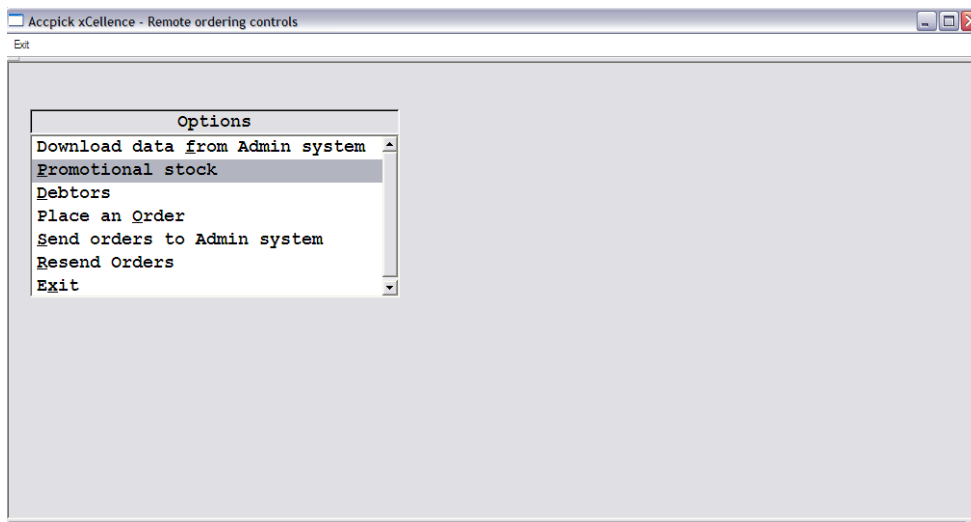Progress screens will display the download and extraction of data:

**[\*] - Status Notification**

    extracting debtors_age_*.dbf
    C:\inmans
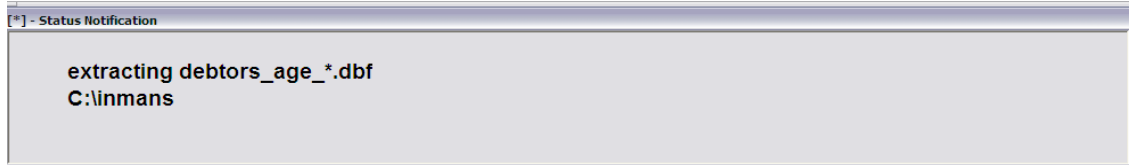
Once this screen has gone away, the data has been downloaded and the system is up to date and ready to process orders.
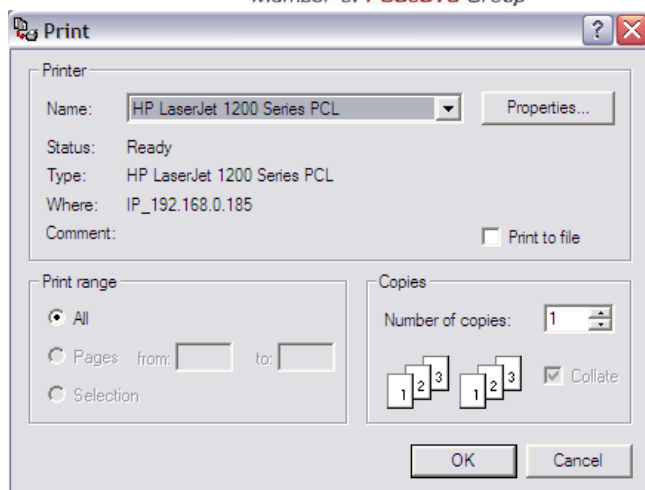
# To View and Print Stock on Promotion

Click on the Promotional Stock option:



This option shows all the stock items on promotion and their selling prices with an option to print:
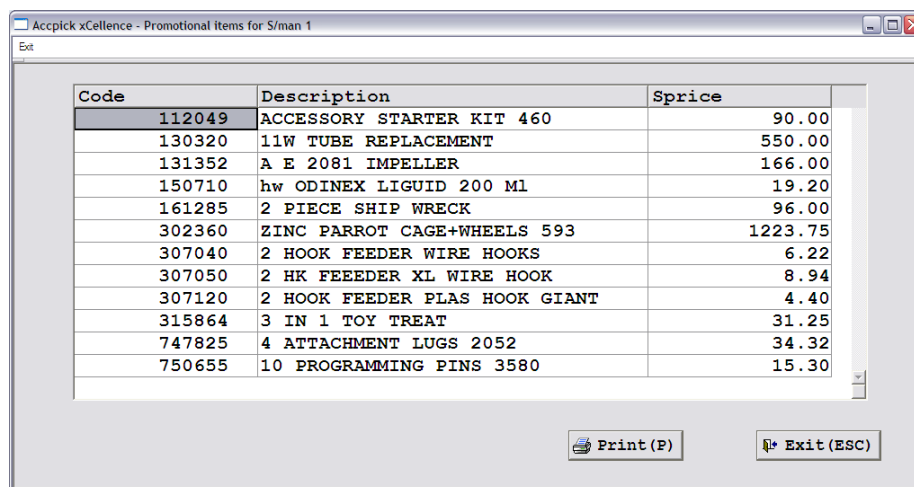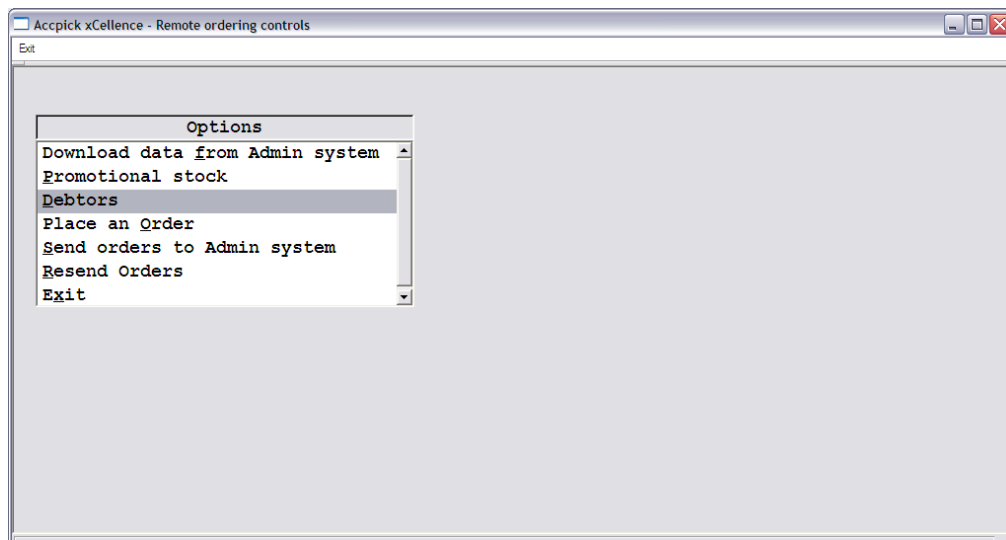


When clicking on Print, you will need to select a printer to print to. Only printers installed on the Netbook will be available as an option:

# To View Debtors' Information

This option will display the Debtors list with their aging and contact details.



The screen below shows the Debtor aging for Current to 90 days:

```
[*] - Debtor lookup

Account No  Name                      Current        D30
       860  AGRICULTURAL HARDWARE         1.44           0.
       759  NOAHS ARK - PMB            2523.93           0.
       338  PETS INC                    551.47           0.
       841  PETS WORLD & AQUATICS-PMB  12835.61           0.
        36  PIC A PET - ACC 2             0.00           0.
        34  PIC-A-PET - PMB            1067.06           0.
       733  RAMSONS                    1510.94           0.
       892  SNAZI PETS                    0.00           0.
         4  WHOLESALE                   153.98         154.
       328  YOUR PET SHOP                 0.00           0.

      [ Toggle Order(!) ]  [ Info.(+) ]  [ Exit(ESC) ]
```

Pressing the + key will display Contact and Addressing details for the selected Debtor:
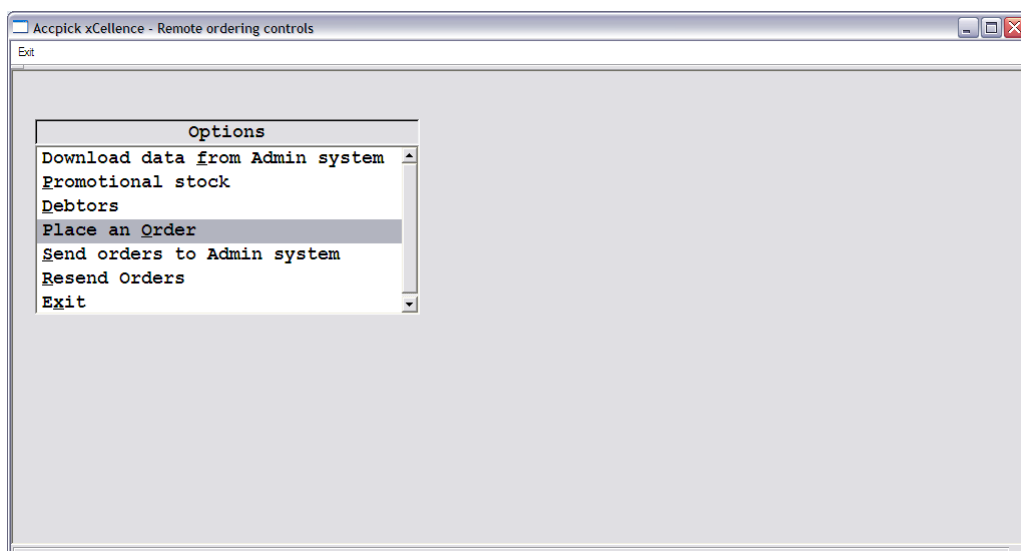
**[*] - AGRICULTURAL HARDWARE**

Delivery Details : 215 GREYLING STR
PIETERMARITZBURG

Contact Person : JAN DE GOEDE
Tel : 033-394 20   Tel2 :    082 877 04
Fax : KAREN
Email :

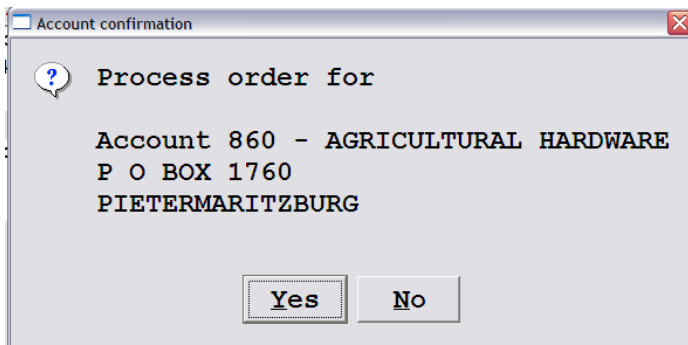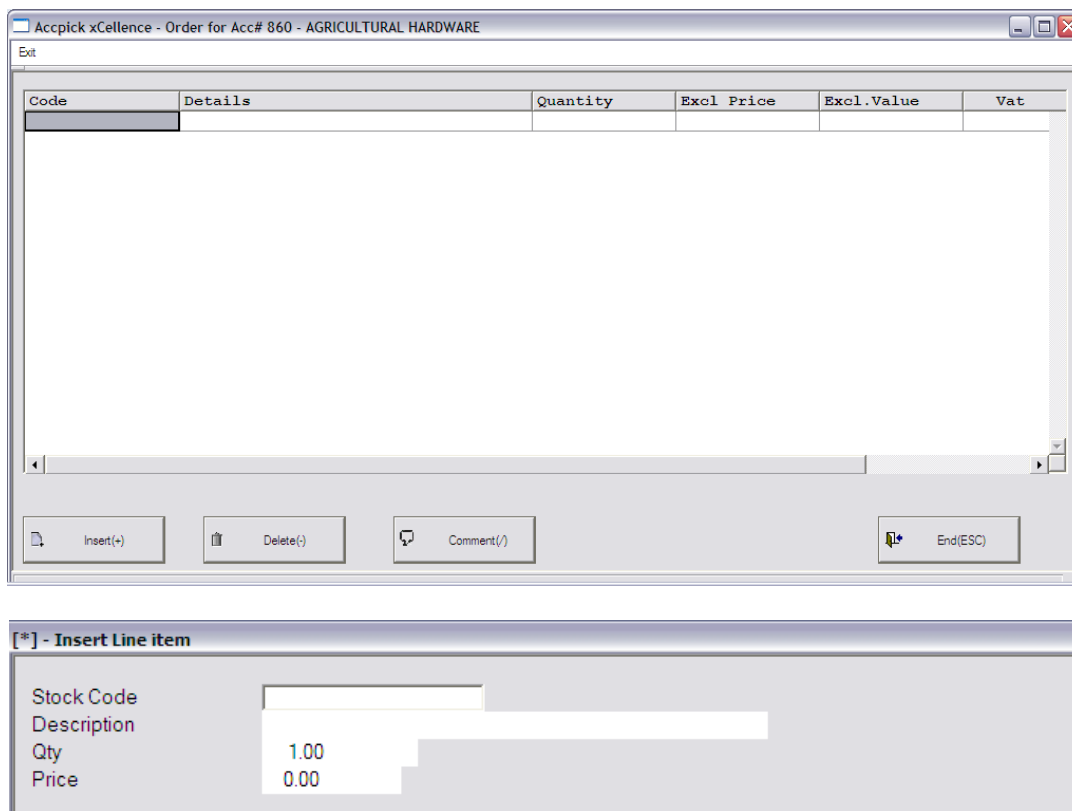# To Capture an Order

Choose the Place an Order option:



Select the Debtor who the order is for:

Confirmation will be required before the order can be processed:

**Account confirmation**

? Process order for

Account 860 - AGRICULTURAL HARDWARE
P O BOX 1760
PIETERMARITZBURG

[ Yes ] [ No ]

Enter items for the order by pressing the + key or clicking on the Insert button:

Accpick xCellence - Order for Acc# 860 - AGRICULTURAL HARDWARE

Exit

| Code | Details | Quantity | Excl Price | Excl.Value | Vat |
|------|---------|----------|-----------|-----------|-----|
|      |         |          |           |           |     |

Insert(+)    Delete(-)    Comment(/)    End(ESC)

**[*] - Insert Line item**

Stock Code
Description
Qty          1.00
Price        0.00

You can look for stock through a stock lookup screen:

Press the ESC button or click on End to save the order:



Certain information can be entered for that order:



You will receive confirmation that the order has been saved:
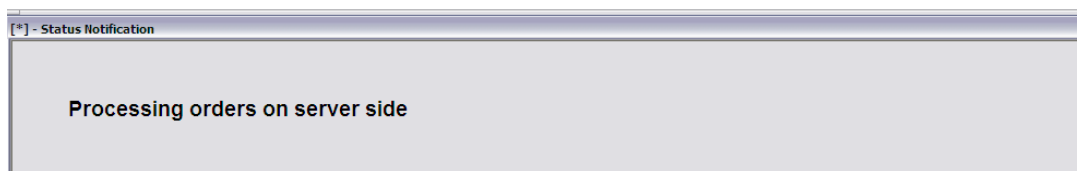
# To Send an Order to Head Office

**\*\*\*** Before running this procedure, ensure that your Internet connection is available by following the steps under the section: "**Connecting to the Internet using the 3G Connection**". **\*\*\***

All saved orders will need to be sent to head office for processing. The Internet connection will need to be active before the orders can be sent.
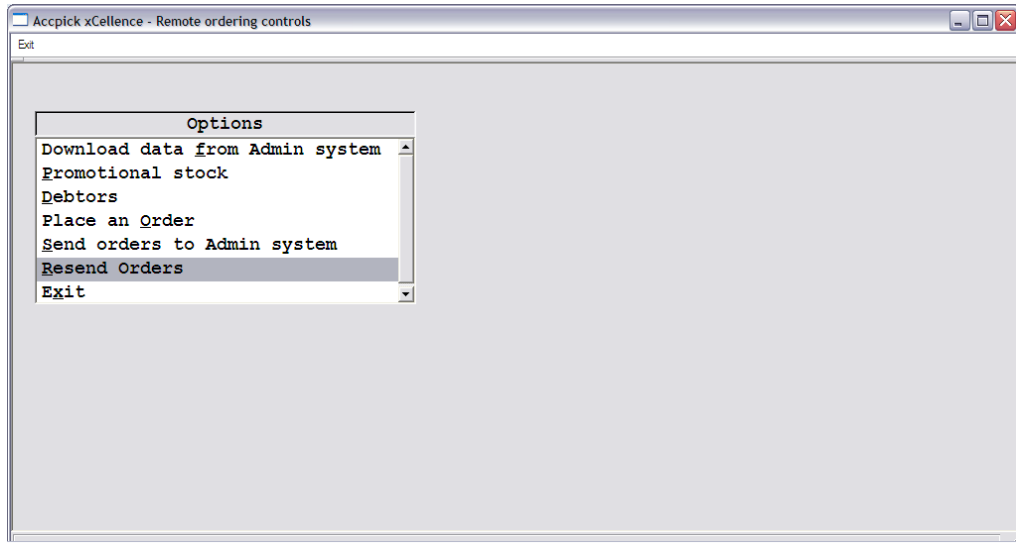
Choose the Send Order to Admin System option:
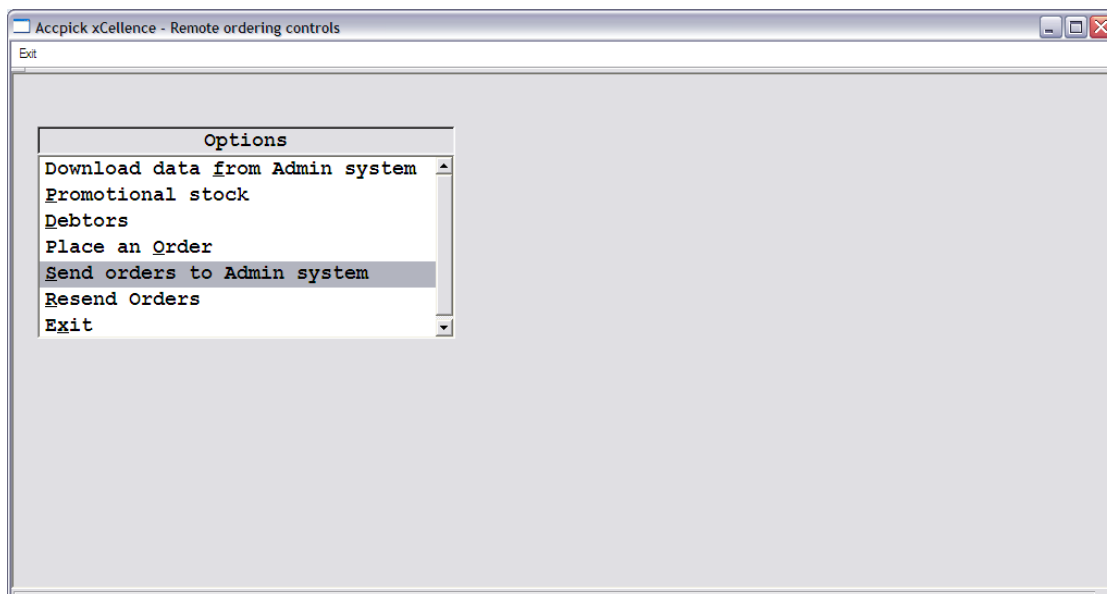


A progress bar will display the progress of the send:



Once the progress bar has gone, the order has been sent.

# To Resend Orders to Head Office

**\*\*\*** Before running this procedure, ensure that your Internet connection is available by following the steps under the section: "**Connecting to the Internet using the 3G Connection**". **\*\*\***
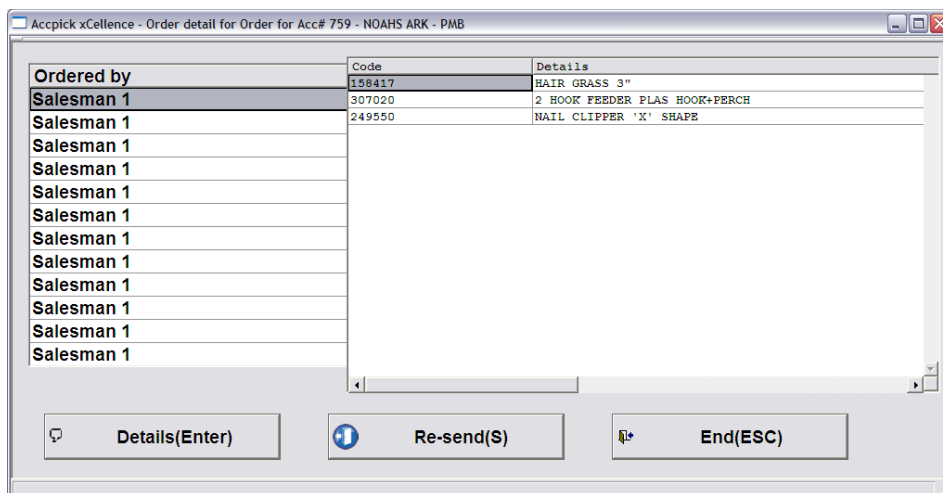


When selecting this option, a confirmation box prompt to confirm a resend, if any orders are found on the Netbook:
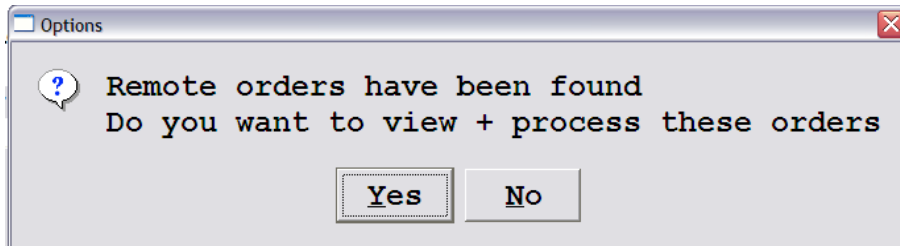


A list of available orders that can be sent is displayed:
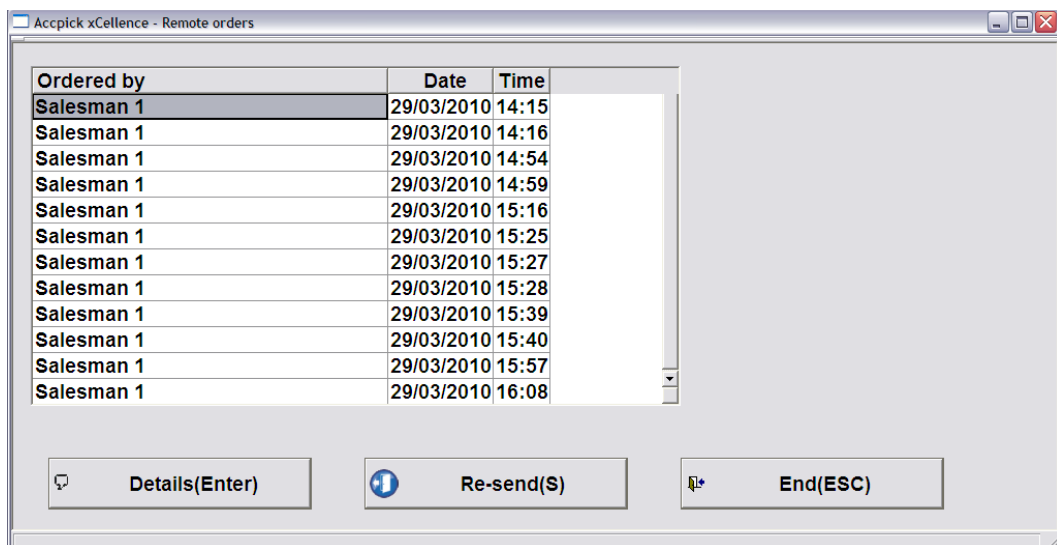


Click on the Details button to view the details of the highlighted order:

The Resend button will send the highlighted order to the head office server: