

Field Sales App Features and Guidelines

Bizual App Features

Sales - This section summarizes daily, weekly, and monthly transactions.

Top Products - Presents an overview of the best-selling products.

Product Catalog - Provides a comprehensive list of products along with their details.

Draft Orders - Displays transactions that are yet to be fulfilled.

Confirmed Orders - Lists transactions that have already been fulfilled or for which payment has been received.

Bad Orders - Highlights transactions involving returned items due to issues from previous transactions.

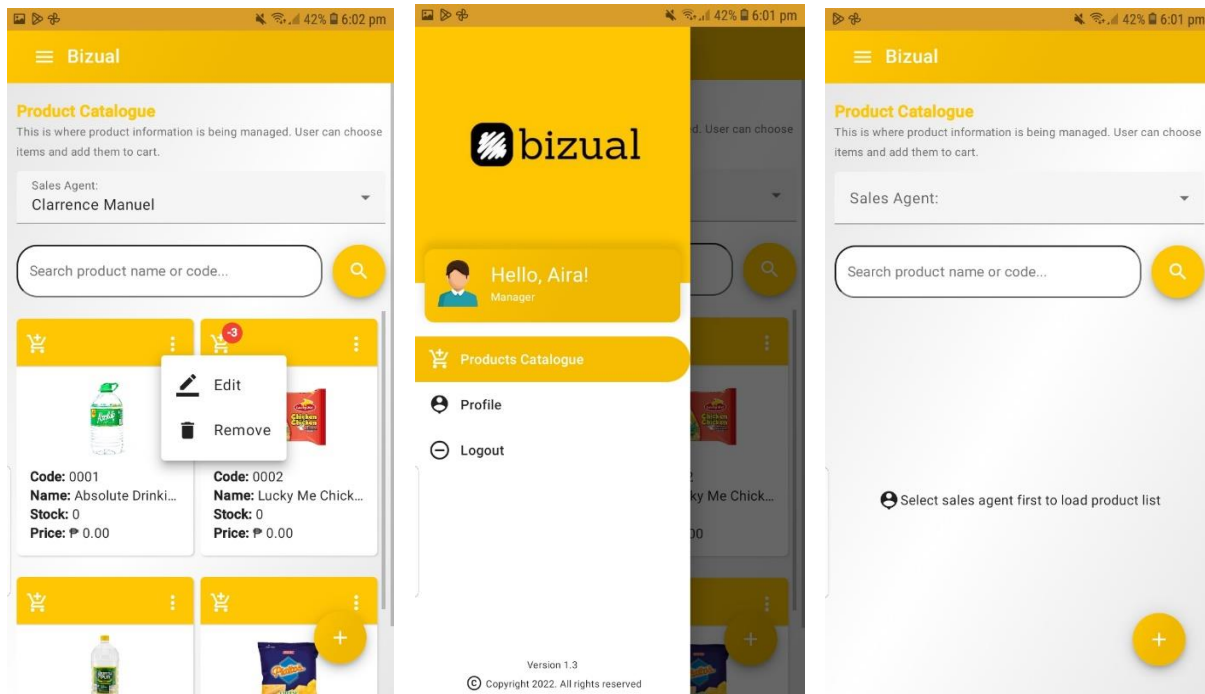
Barangays - Features a list of locations or areas of customers, along with customer accounts categorized under each listed area.

Reports - Enables the easy generation of four types of reports in this section.

Profile - Accesses user account information.

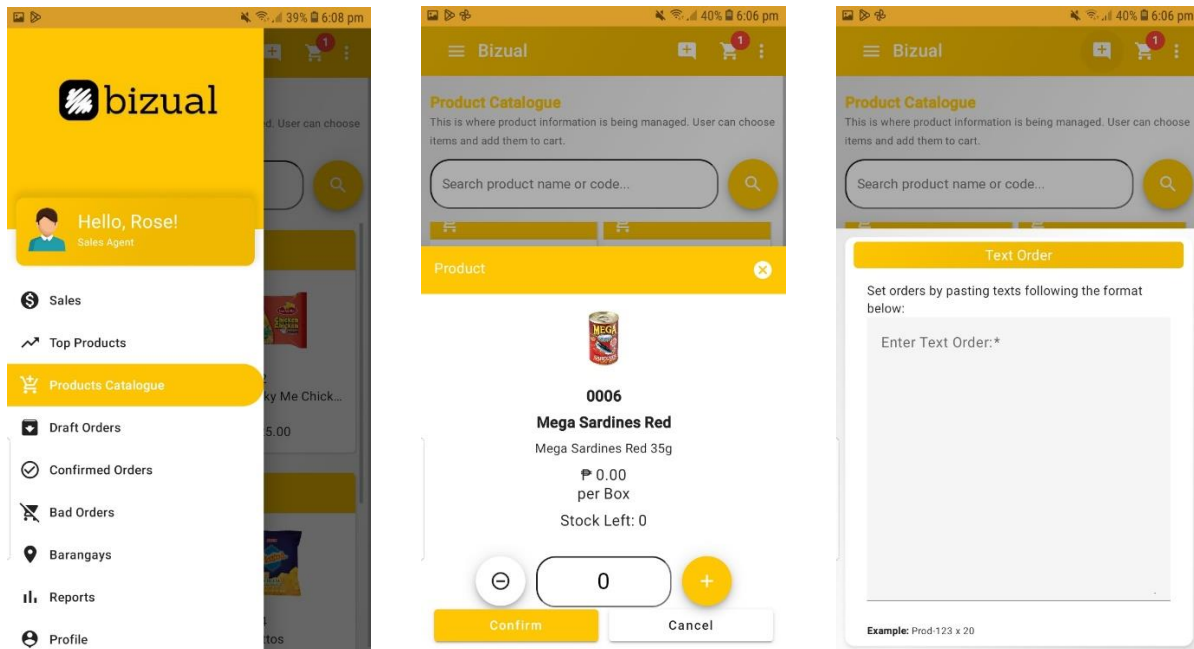
User's Guide to Efficient Field Sales Operation

Updating the Product Catalog in Bizual App



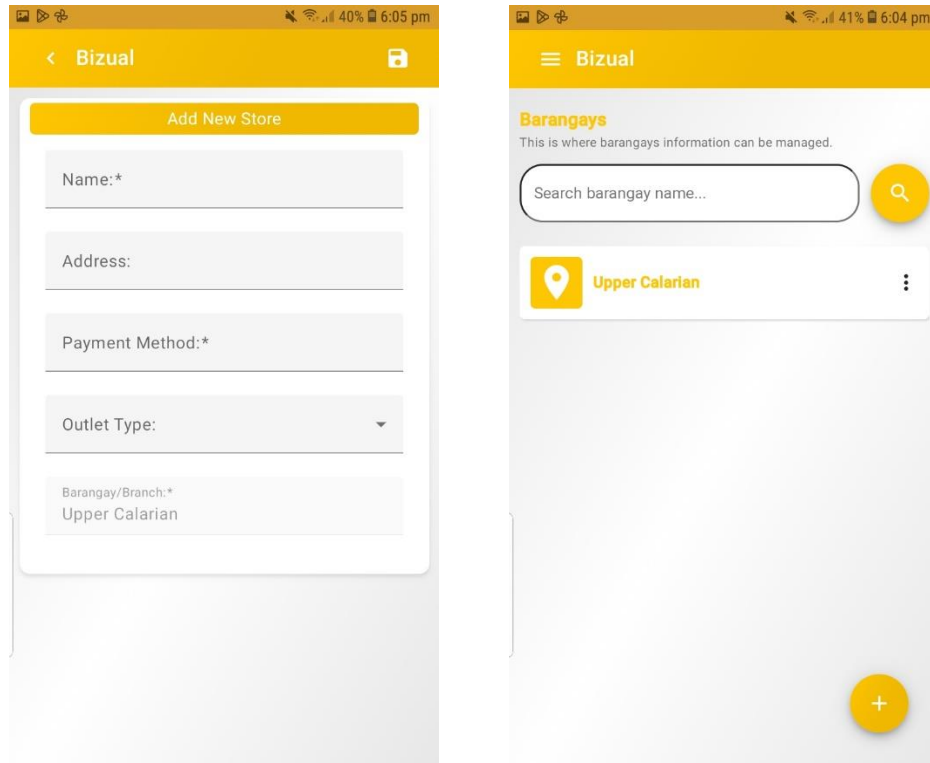
- The *manager's account* possesses the ability to edit, update, and upload products in the inventory.
2. Add new products to the inventory by tapping the (+) icon in the lower right portion of the app.
 3. To update or edit a product, the manager should first select the agent to display the interface of the inventory for the chosen user/sales agent.
 4. To remove a specific product from the inventory, follow the instructions in step 2.

Order Management in the App



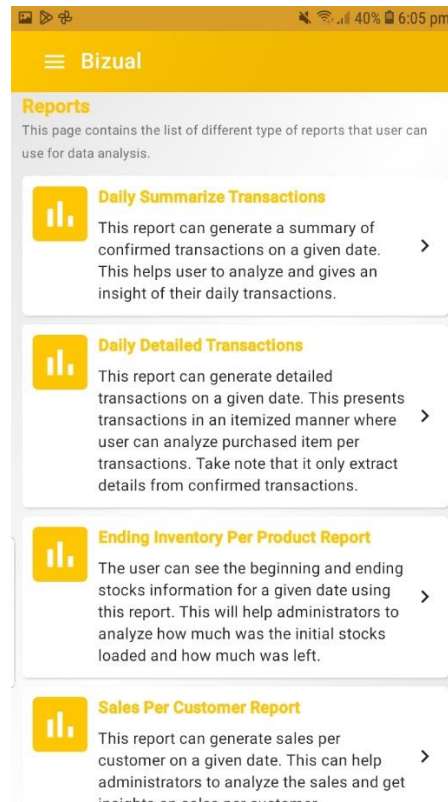
1. For multiple orders or SKUs, acquire orders through the "Text Order" feature by clicking the (+) icon in the upper right corner of the app. Follow a standard format (Product code x Quantity) and tap "Set Order" to confirm the order.
2. Enter details in the text box, including "Transaction No.," "Barangay/Branch," etc. Choose "Confirm" if payment is made, "Bad Order" if the transaction involves return items, or "Draft" if the transaction is completed, and payment is pending.

Creating Customer Accounts in Barangay Feature



1. Begin by establishing a list of customer accounts by creating a barangay account. Tap the (+) icon located at the lower right corner of the app.
2. Once the barangay portfolio is created, select the barangay list where you want to add customer accounts.
3. When adding a customer, input their details, including the preferred payment method.
4. Save the customer's details by tapping the icon located at the top right corner of the app.

Generating Reports



1. Access the reports feature by tapping on the designated option.
2. Select one of the four report types you wish to generate and apply date filters for the specific period you require.
3. Initiate the report generation process by tapping "Generate Report," and the file will be sent to the registered email associated with the app.