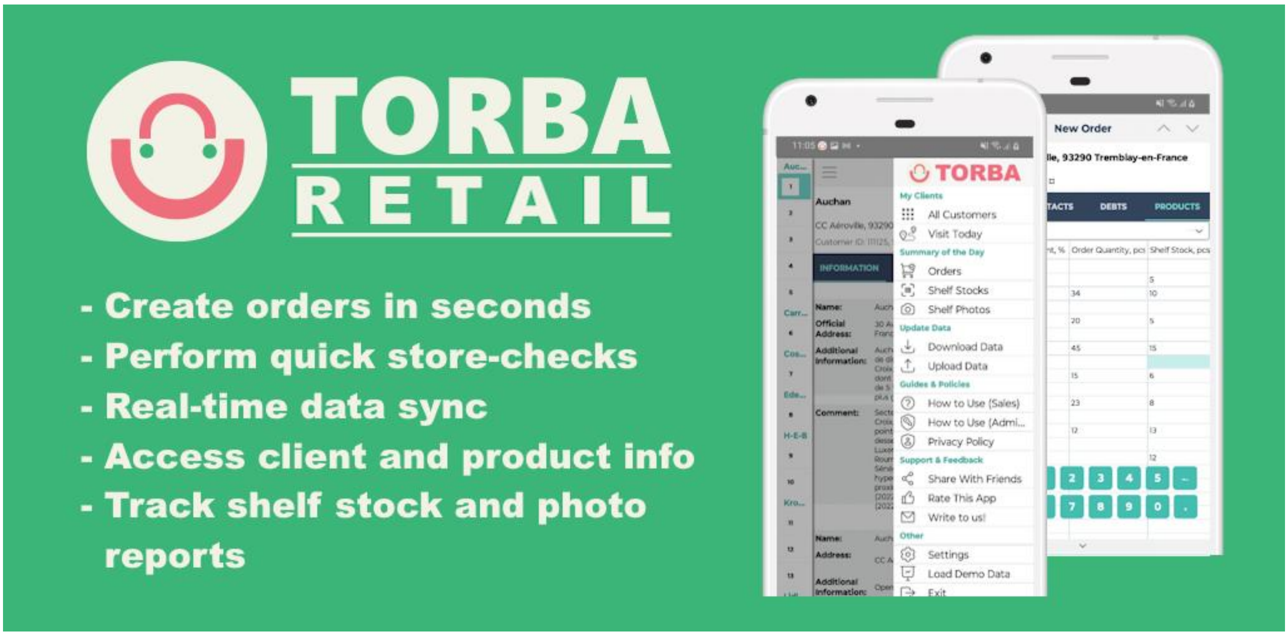
# How to use TORBA Retail

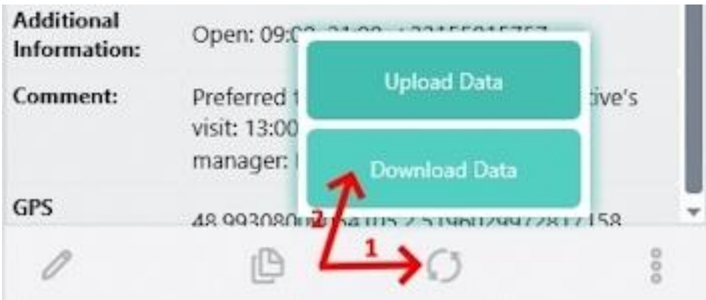



## TORBA Retail Trade Assistant is a free app designed for mobile trade and field sales agents

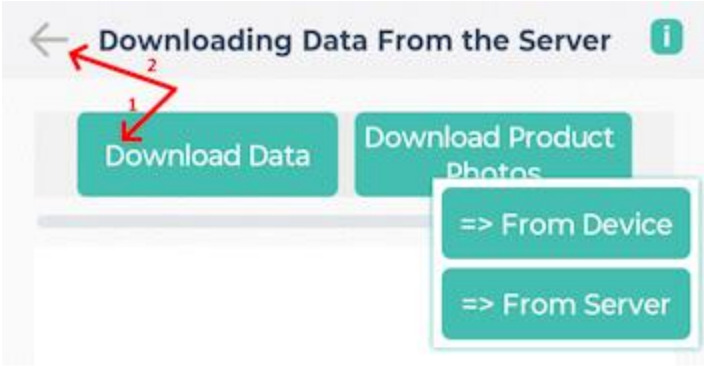
The **<TORBA Retail>** mobile application simplifies the work of a sales representative with their clients. The app enables the sales representative to view the schedule of client visits, the company's product range with photos of items, create orders at points of sale, save GPS coordinates when placing an order, record the company's product stock on store shelves, create photo reports at points of sale, and synchronize data with the company's server in real-time. To create an order or record shelf product stock at a point of sale, follow next steps.

### 1. Synchronize data before you start

To do this, select **<Main Menu>=><Download Data>** in the main menu on the right, or click the sync button on the bottom bar and choose **<Download Data>** from the pop-up menu:

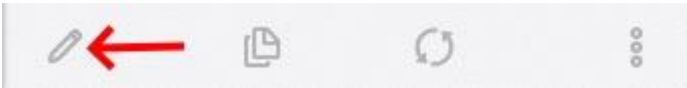



Then, the **<Downloading Data From the Server>** form will open, where you should press the **<Download Data>** button again. The synchronization process will begin immediately. Wait for it to complete, then press the **<Back>** button to return to the main form. If you need to update product photos, press the **<Download Product Photos>** button. After that you need to choose whether to download the ProductPhotos.csv file from your server or import photos from your mobile device (you will need to select a folder containing the photos). Downloading photos from your server may involve large data volumes - using Wi-Fi is recommended. When importing photos, all existing photos in your local database will be deleted.

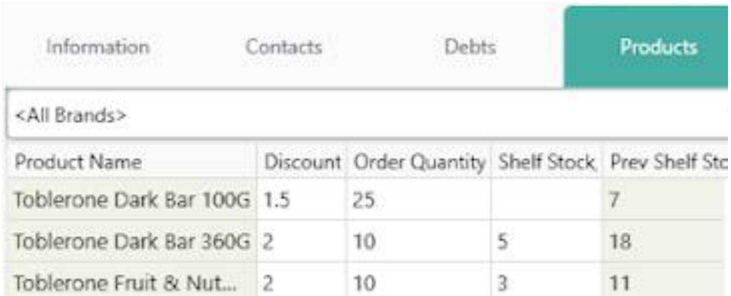



## 2. Creating orders and checking shelf stock

On the main form, select your client and the store address from the pop-up menu on the left, then press the **<Create New..>** button on the bottom bar. When you select a client from the general list, the **<Information>**, **<Contacts>**, and **<Documents>** tabs are automatically filled with relevant information, providing the sales representative with general client details, specific contact information (such as store manager, accountant, director, etc.), and the client's document history (outstanding debt information).



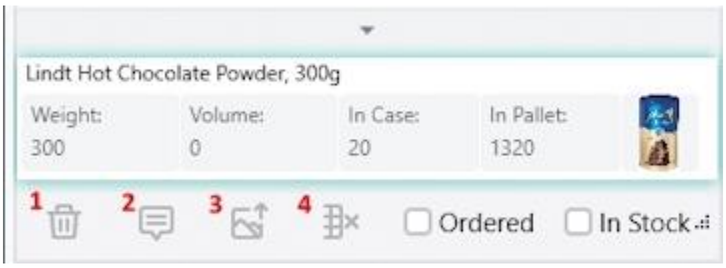
The document creation form will open immediately, where you'll see all product items and can create a new order, record product stock on store shelves, and add photos of store shelves. To create an order, enter the required quantity for each product item in the **<Order Quantity>** column, the discount in the **<Discount>** column, and the stock of your product on store shelves in the **<Shelf Stock>** column. When creating a new order, pay attention to the **<Prev Shelf Stock>** column, which shows the previous stock of the product on store shelves. This can help you better understand how well your products are selling.


Information | Contacts | Debts | Products

<All Brands>

| Product Name | Discount | Order Quantity | Shelf Stock | Prev Shelf Sto |
|---|---|---|---|---|
| Toblerone Dark Bar 100G | 1.5 | 25 | | 7 |
| Toblerone Dark Bar 360G | 2 | 10 | 5 | 18 |
| Toblerone Fruit & Nut... | 2 | 10 | 3 | 11 |

Please note that on the document creation form, there are several useful buttons on the bottom bar. Button **(1)** allows you to clear the ordered quantity from the **<Order Quantity>** column. Button **(2)** lets you add a comment to the order (if needed) to help your accounting system operator process it correctly. Button **(3)** opens the photo report creation form for the point of sale. Button **(4)** allows you to hide/show columns in the table to make it easier to create the order.



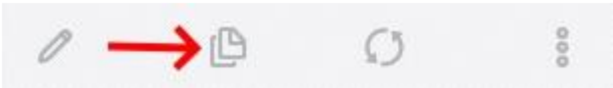

When you edit the product quantity or discount in the **<Order Quantity>**, **<Discount>**, or **<Shelf Stock>** columns, the app automatically saves this data. Therefore, when you exit this form (by pressing the **<Back>** arrow on the top left bar), your order or stock record will not be lost.

## 3. Creating Photo Reports

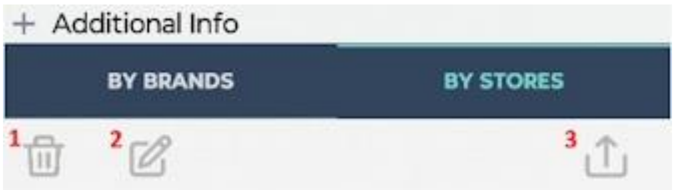
To create a photo report, press button **(3)** (see the previous image). A new form will open immediately, allowing you to add several photos of store shelves so that your supervisor can assess your work at the store. On this new form, there are two buttons on the top bar. The first button **(1)** activates the camera on your mobile device to take a new photo, and the second button **(2)** allows you to upload a photo from your mobile device's gallery.


## 4. View daily work summary

After creating several new documents (orders, shelf stock records, photo reports), you can view the results of your work on the **<Summary: Today's Documents>** form. You can open it from the main menu **(<Main Menu>=><Orders> or <Shelf Stocks> or <Shelf Photos>)** or by clicking the **<Documents>** button on the bottom bar of the main form.

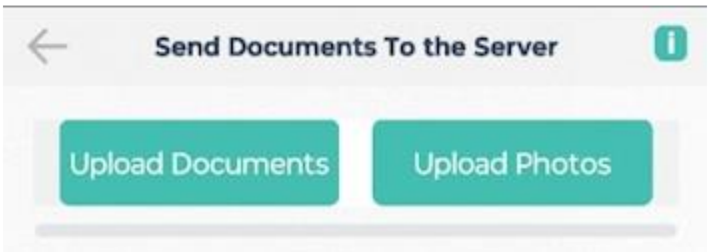


A new form will open, displaying all documents created today (tabs **<Orders>**, **<Shelf Stocks>**, **<Photos>**) along with overall statistics. The sales representative can delete or edit specific documents if needed. Data can also be sent to the company server from this form. To delete a document, select it in the table and press the **<Delete>** button **(1)** on the bottom bar. To edit a document, press the **<Edit>** button **(2)**, and the app will redirect you to the order creation form, where you can edit the existing document. You cannot edit a previously sent document. To send documents, press the **<Upload>** button **(3)**, and the app will redirect you to the <Send Documents to the Server> form.




## 5. Sending data to the company server

After creating documents, you need to send them to your company's server. You can upload this data **(<Orders>**, **<Shelf Stocks>**, **<Photos>**) after each document is created; documents on your company's server will not be duplicated. To send data, select **<Main Menu>=><Upload Data>** from the main menu or press the **<Upload>** button **(3)** (see the previous image) on the **<Summary: Today's Documents>** form. The **<Send Documents to the Server>** form will open, where you should press the **<Upload Documents>** button to send Orders and Shelf Stocks documents. To send photo reports, press the **<Upload Photos>** button. It is recommended to send photo reports over Wi-Fi due to the potentially large data size.



**Quick Summary:** Every day before starting work, download data to refresh directories (clients, visit schedule, contacts, products, pricing, receivables, previous stock). Throughout the day, create new orders, record stock levels on store shelves, and take photo reports of shelves. Send data to your company server several times a day.

**Note:** All unsent data from today will be unavailable tomorrow, so make sure all data is sent to the server by the end of your workday. Also, keep in mind that GPS coordinates are recorded for each new document based on the location where it is created. Finally, avoid editing data in the settings **(<Main Menu> => <Settings>**); this form is managed by your system administrator.

For any questions or suggestions regarding the TORBA Retail mobile application, please contact us at **torba.retail@gmail.com**.