

Rep Mobile Sales Current Feature Set

Area	Feature	Description
Devices	Any device	Works on ipad, iphone, desktop etc
Users	Rep Assignment	User can be attached to a single rep code or multiple rep codes Also supports masking of rep codes (e.g. 4% would allow a user to access all customers with rep codes starting with "4")
Users	Password change	Ability for rep to change their password
Customers	Select Customer	Search customers by any field on the customer record. Selection screen can show any data from the customer record.
Customers	Customer Info Page	Show any data from the customer. Examples are <ul style="list-style-type: none"> recent sales data address information google maps outstanding balances territory information marketing flags warning notes debtor follow up notes no of ecommerce logins no of ecommerce sales no of ecommerce custom catalogues
Customers	Customer Sales Data	Show any sales data from customer grouped by any dimension. Examples are: <ul style="list-style-type: none"> sales by group sales by class sales by year
Customers	Customer Sales Graph	Sales Graph last 12 months including comparison to budget
Customers	Filtering	Filter customer selection by any field (e.g. only show open accounts, or only show closed accounts)
Customer	Consignment data	Shows all products on consignment for customer (e.g. Display stock)
Customer Notes	Visit Notes	Allows for recording of visit notes against customer with bidirectional integration to ERP
New Customers	Create customer on the fly	Rep can create a COD customer on the mobile application. This will allow for a sales to be taken on the spot using credit card. Customer record integrates back to ERP as COD account.
Rep Sales	Show rep sales data	Show any rep sales info including: <ul style="list-style-type: none"> sales by customer sales by group sales by class sales by year
Rep Sales	Sales Graph	12 month sales graph with budget comparisons
Rep Info	Quote Analysis	Show quotes taken and converted data by customer
Manager Info	Quote Analysis	Show quotes taken and converted data by rep
Products	Category Browse	Browse products by category. Category structure can come from ERP hierarchy or e-commerce hierarchy
Products	Search	Search products. Search on any field using relevance based search engine (Lucene)
Products	Customer Item History	Automatic generation of list of products customer has been purchasing allowing for easy selection of products customer is purchasing regularly

Products	Product info	<p>Show any info to do with the product including:</p> <ul style="list-style-type: none"> • Item Code • Description • Notes • Customers Price and Discount (calculated using ERP price calculation rules) • Price rule used • Availability in local warehouse • Availability in partner warehouses • Availability nationally • Supplier availability • Next PO due in information • Images • Class • Condition • Any field from stock-master • Any data from supplier information
Product	Cost Info	Hidden box to show cost and GP info. Data can also be masked so customer finds it hard to interpret
Products	Contract Filter	Filter on items that are contracted to the customer
Products	Sorting	Sort product results by any field including warehouse availability
Products	Filtering	Filter product results on and product field
Products	Display	Display results using Tile or Grid view
Products	Stock Security	Obeys all ERP stock security rules
Catalogues	Custom Catalogues	Full support for custom catalogues
Ordering	Single Click	Add to cart with single click - adds in pack quantity
Ordering	Restricted products	Products can be shown but restricted from ordering at a customer or global level
Ordering	Price Override	Allow for price override with controls over variance from original price
Ordering	Alternative Units	Allow for ordering in base or alternative units
Ordering	Discount Override	Allow for discount override with controls over variance from original discount
Ordering	Price Calculation	Calculate price using "G" and "M" functions - e.g. key in "G20" in the price field and auto calculate the price based on 20% GP. "M" is for Markup
Ordering	Warehouse	Override the warehouse at a line level
Ordering	Notes	Allows for notes and memo to be added with product add to cart
Ordering	Template Orders	<p>Allows for full template order (i.e. saved proforma order) functionality including:</p> <ul style="list-style-type: none"> • add item to template • create new template • delete template • order from template • save current order as template • change sequence of products on the template
Ordering	Hold Order	Put order on hold and resume at any time
Ordering	Quotes	Change order from order to quote (and vice versa)
Ordering	Order type default	Change the default order type from normal order to quote
Ordering	Editing order lines	Full in line editing of lines - no need to drill down to line
Ordering	Data Capture	<p>Capture any data on order complete - examples are:</p> <ul style="list-style-type: none"> • Override territory code • Change warehouse code • Part Shipments Flag

Ordering	Order Conclusion Actions	Allows for custom order conclusion actions. Examples are: <ul style="list-style-type: none"> • create contract records from order • put order on hold
Ordering	Force customer reference	Allow customer based rule to force user to enter customer reference
Ordering	Multiple delivery addresses	Select from multiple delivery addresses
Ordering	Freight	Full freight functionality same as e-commerce module
Ordering	Checkout messages	Present dynamically generated checkout messages based on customer or products in cart
Ordering	Minimum order charges	Auto apply minimum order charges
Ordering	Sign on Glass	Allow customer so sign any touch screen device
Ordering	GEO Location Tracking	Track the GEO location and address of each time an order is submitted
Ordering	Payments	Allows for payment by credit card or place on account
Order Search	Order Search	Search all orders entered in ERP (not just mobile orders). Allow filtering by order status or order status groups
Order Search	Invoice reprint	Allow for invoice reprint of completed orders
Order Search	Copy to current order	Allow details of previous order to be copied to current cart
Order Search	Payments	Take payment against existing order
Promotions	Multiple Promotions	Allows for multiple promotions (list of products) to be created in CMS and shown to reps
CRM	Integration	Bi-directional ERP Integration of CRM
CRM	CRM Master	Create new CRM Master data
CRM	CRM Master	Edit current CRM Master data
CRM	CRM Notes	Create and maintain CRM Notes
CRM	CRM Contacts	Create and maintain CRM Contacts
CRM	CRM Transactions	Create and maintain CRM Transactions
CRM	CRM Activities	Create and maintain CRM Activities
CRM	CRM Attributes	Create and maintain CRM Attributes
CRM	HubSpot Integration	Integration of PRONTO CRM data to HubSpot
CRM	MailChimp Integration	Integration of PRONTO CRM data to MailChimp
CRM	Photos	Take photos with CRM transactions. Images can then be viewed using ERP Quicklinks
CRM	Quote Follow ups	Allow for quote follow up date to create a CRM Activity with notes
CRM	My Activities	Shows reps all outstanding activities and when they are due
Rep Call Cycle	Call Cycle Screen	Allow for reps call cycle to be defined. Screen shows all customers to be visited on select day and in which order they are to be visited
Quote Management	Quote Conversion	Allow for quotes to be converted to: <ul style="list-style-type: none"> • Order • Contracts