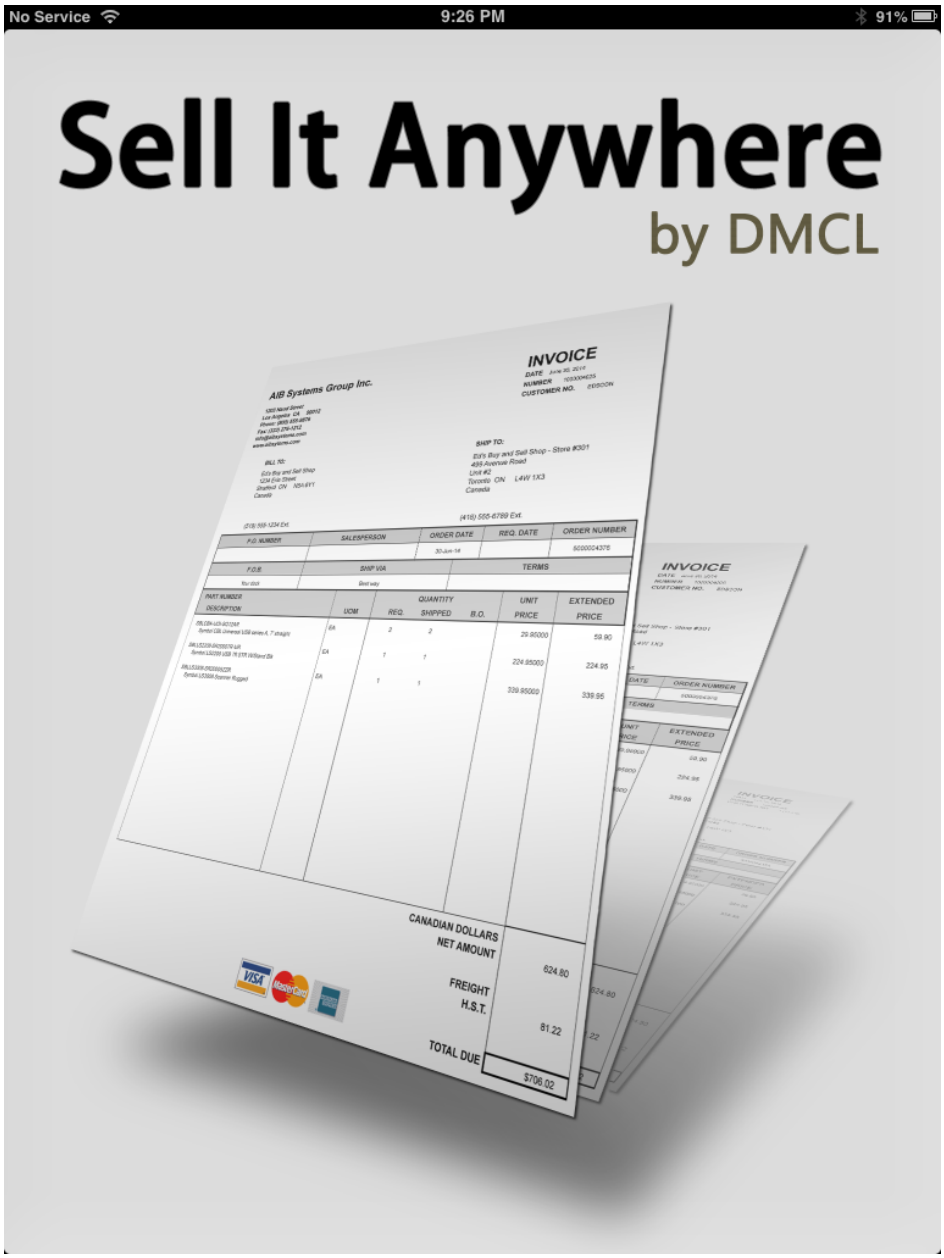

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Table of Contents

Apple Store Description of “Sell It Anywhere” 3

Quick Start - Sample Database 4

Quick Start - Your Accounting Software 15
- from Sample Database Install 16
- from fresh Install 19

Reference 21
- Adding new Bill To customer or Ship To address 21
- Using Inventory/Order Entry screen 26
- Using Order Details screen 28
- Using Email/Print option screen 31
- Other Options and Features 32
    - Downloading images 32
    - Displaying orders on main screen 33
    - Deleting specific order 34
    - Operating with no WiFi or Cellular 35
    - Forcing orders to upload 36

Contact Us
- Support 37
- Placing order for server components 38

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Apple Store Description of “Sell It Anywhere”

Welcome to Sell It Anywhere! The mobile app for salespeople on the go.

ALWAYS CONNECTED
Create orders on your iPad and upload them to your server and directly into your business accounting package. All in real time! If you have a WiFi or cellular data connection, your orders will be entered into your accounting package in seconds! Your database is also kept up to date with changes generated on the server, such as new products and customers, price changes, promotions, etc.

The current version works with Sage BusinessVision, with more accounting packages coming soon! *** Server licensing required.

EASILY CREATE YOUR ORDERS
Easily search by name, product code, category, or barcode number. Don't like searching for products? No problem! Just connect any Bluetooth, iPad compatible barcode scanner, scan your barcode and the item is automatically added to the current order.

IMMEDIATE CONFIRMATIONS
Send email confirmations to your customers, generate quotes, print to any AirPrint printer, save standing orders for quick access, and create new customers on the road, all with Sell It Anywhere's fast and fluid interface.

FLEXIBLE
Product prices are completely flexible. Sell It Anywhere supports retail prices, promotions, customer specific pricing, quantity breaks, and multi currency conversions. If the salesperson overrides any price, the server keeps track.

SECURE
Be confident that your confidential informations remains private. Communication with the server and the on-device database are both encrypted with industry tested encryption algorithms. Yours and your customers' information is protected with Sell It Anywhere.

***
The Sell It Anywhere iPad app is only half the story. Give it a try with the included sample database but you'll need the server component to download your data and really let Sell It Anywhere shine for you. The server component must be purchased separately though DMCL.

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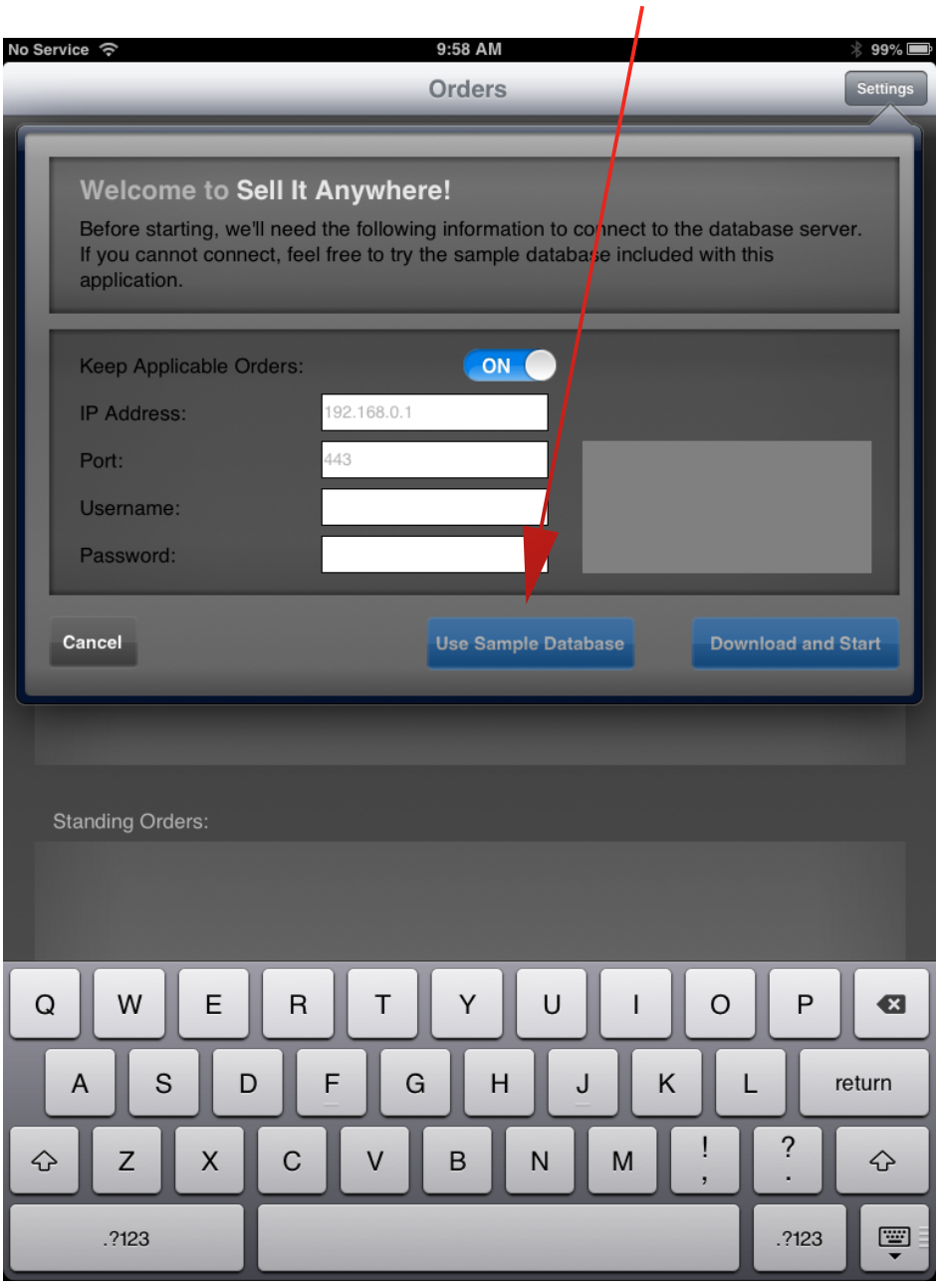
Quick Start - Sample Database

After starting Sell It Anywhere for the first time, you will be presented with the set up screen. Touch the <Use Sample Database> button:



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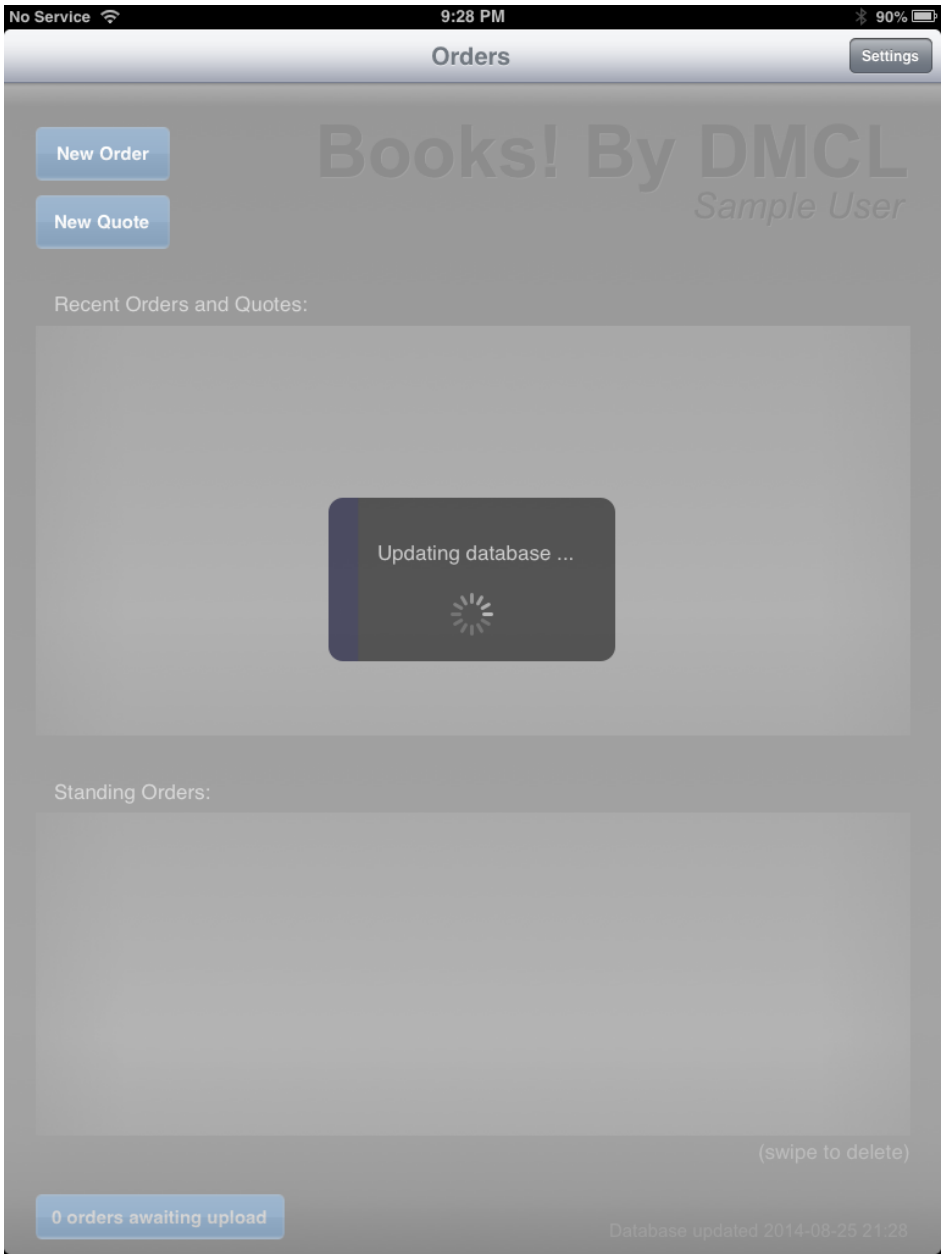
The Sample Database will load:



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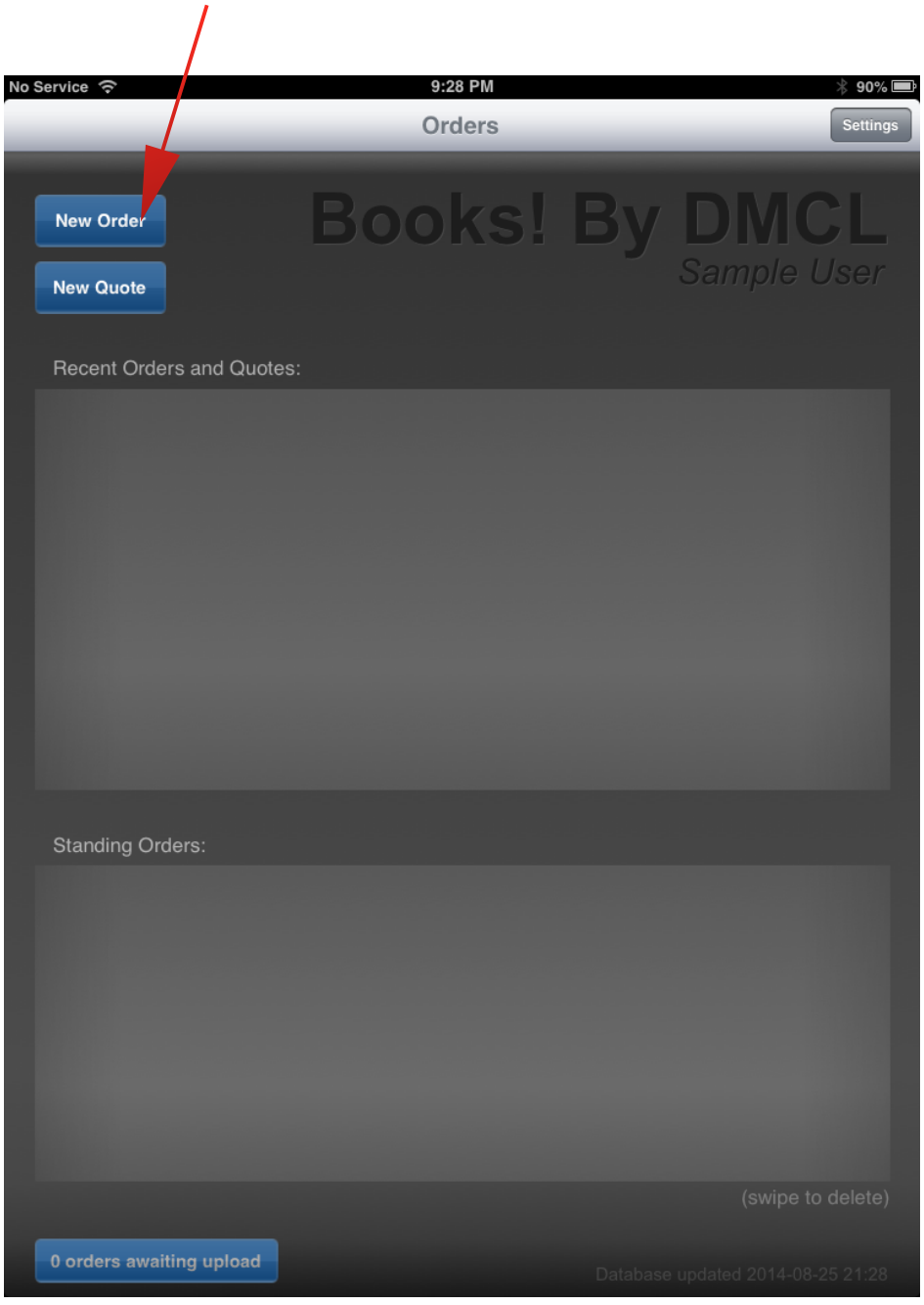
Start Screen will appear and you are ready to start your first order:

Touch <New Order> button



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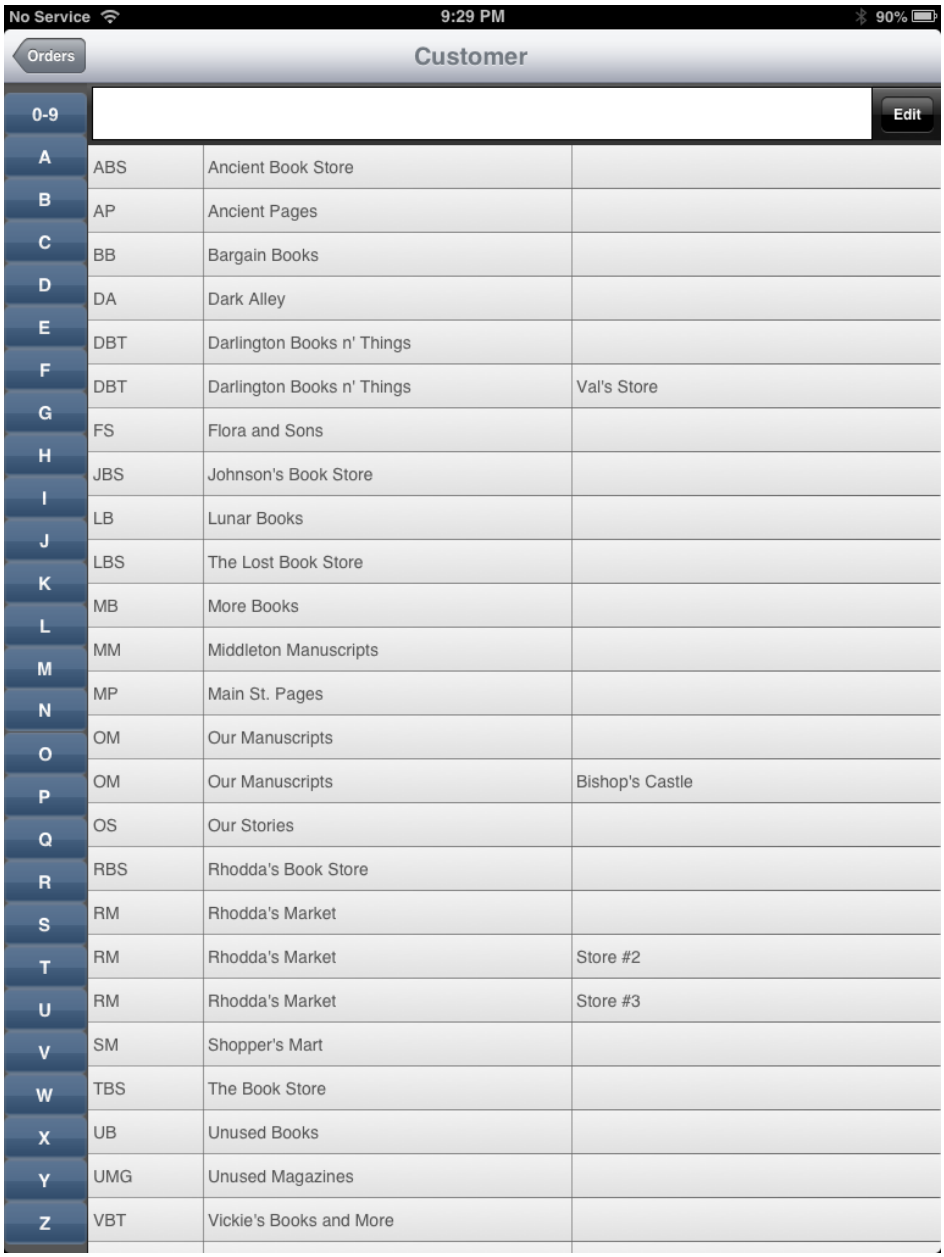
Select a customer (Left column is Bill To Customers, Right column is Ship To, if any):

Notes: Filter your search by:
- Selecting 0-9, A-Z
- Typing some or all of your customers name or code in search window



ABS	Ancient Book Store	
AP	Ancient Pages	
BB	Bargain Books	
DA	Dark Alley	
DBT	Darlington Books n' Things	
DBT	Darlington Books n' Things	Val's Store
FS	Flora and Sons	
JBS	Johnson's Book Store	
LB	Lunar Books	
LBS	The Lost Book Store	
MB	More Books	
MM	Middleton Manuscripts	
MP	Main St. Pages	
OM	Our Manuscripts	
OM	Our Manuscripts	Bishop's Castle
OS	Our Stories	
RBS	Rhodda's Book Store	
RM	Rhodda's Market	
RM	Rhodda's Market	Store #2
RM	Rhodda's Market	Store #3
SM	Shopper's Mart	
TBS	The Book Store	
UB	Unused Books	
UMG	Unused Magazines	
VBT	Vickie's Books and More	

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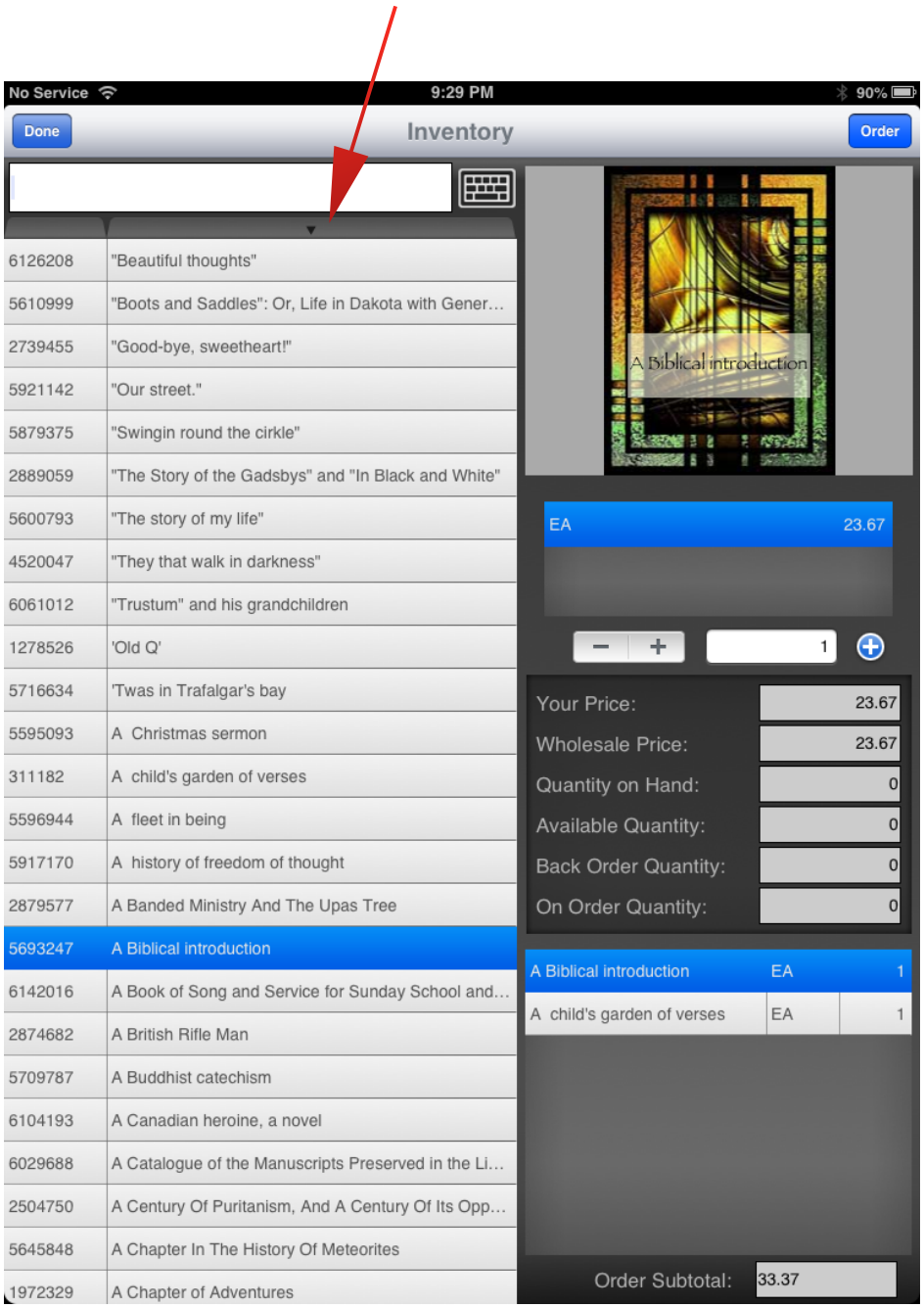
Select product to add to order:

Note: - Search window will locate product by SKU (part number), Description, or barcode
- There are 10,000 SKUs in the sample database - performance is amazing!!!!!
- Sort columns by part number or description by touching column header



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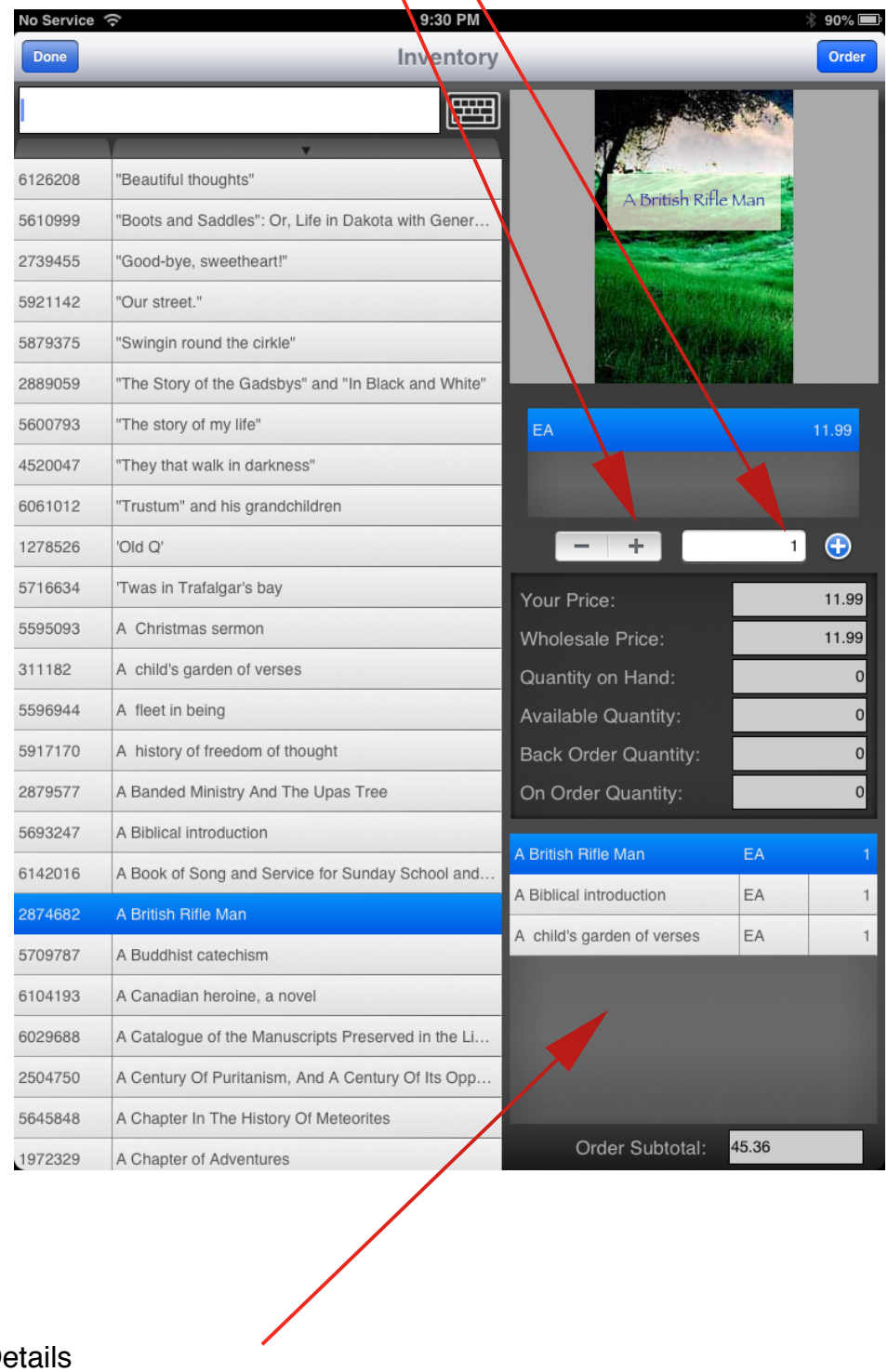
Add quantity desired to the order



Order Details

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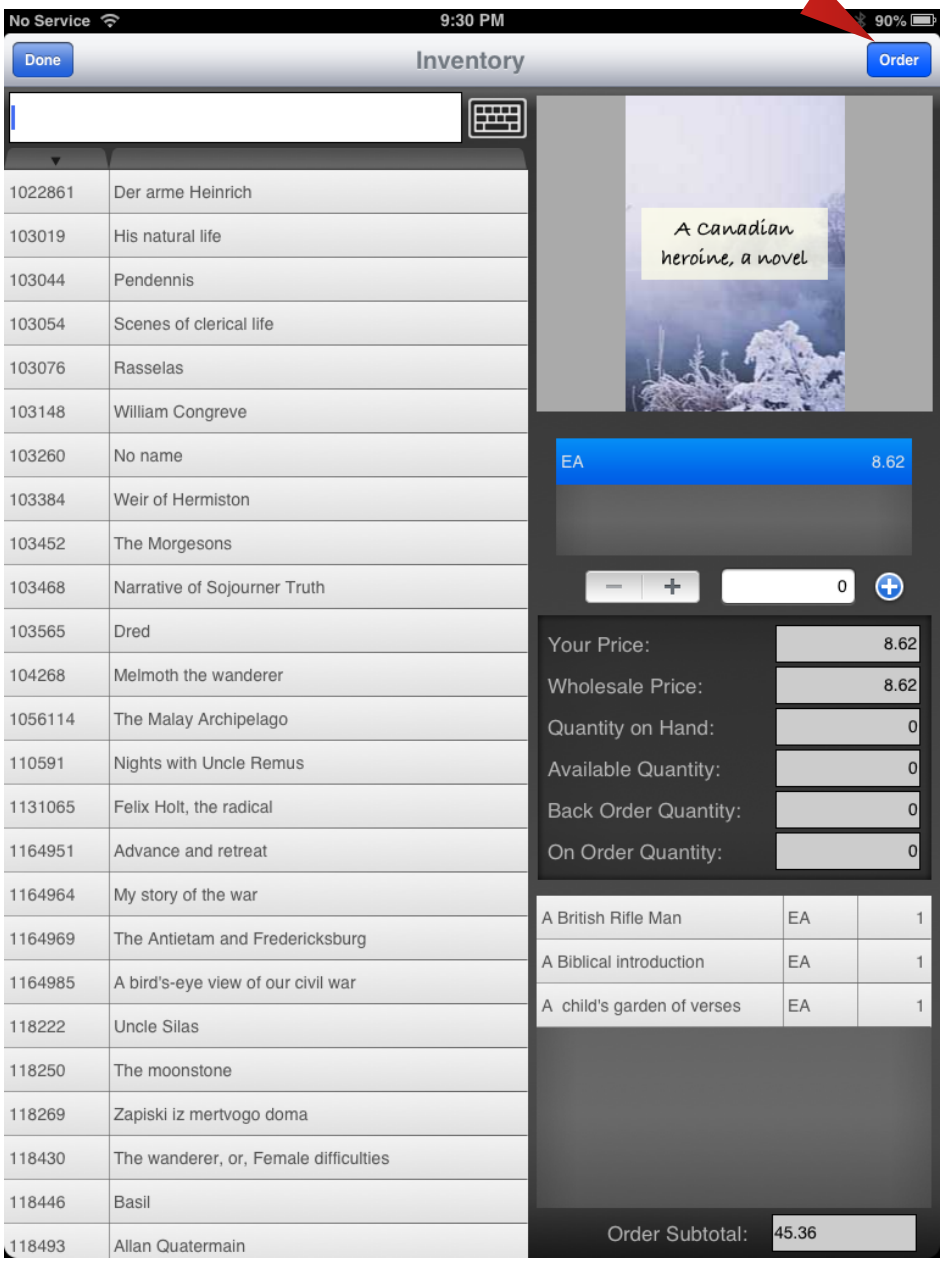
Ready to submit orders, touch <Order> button:



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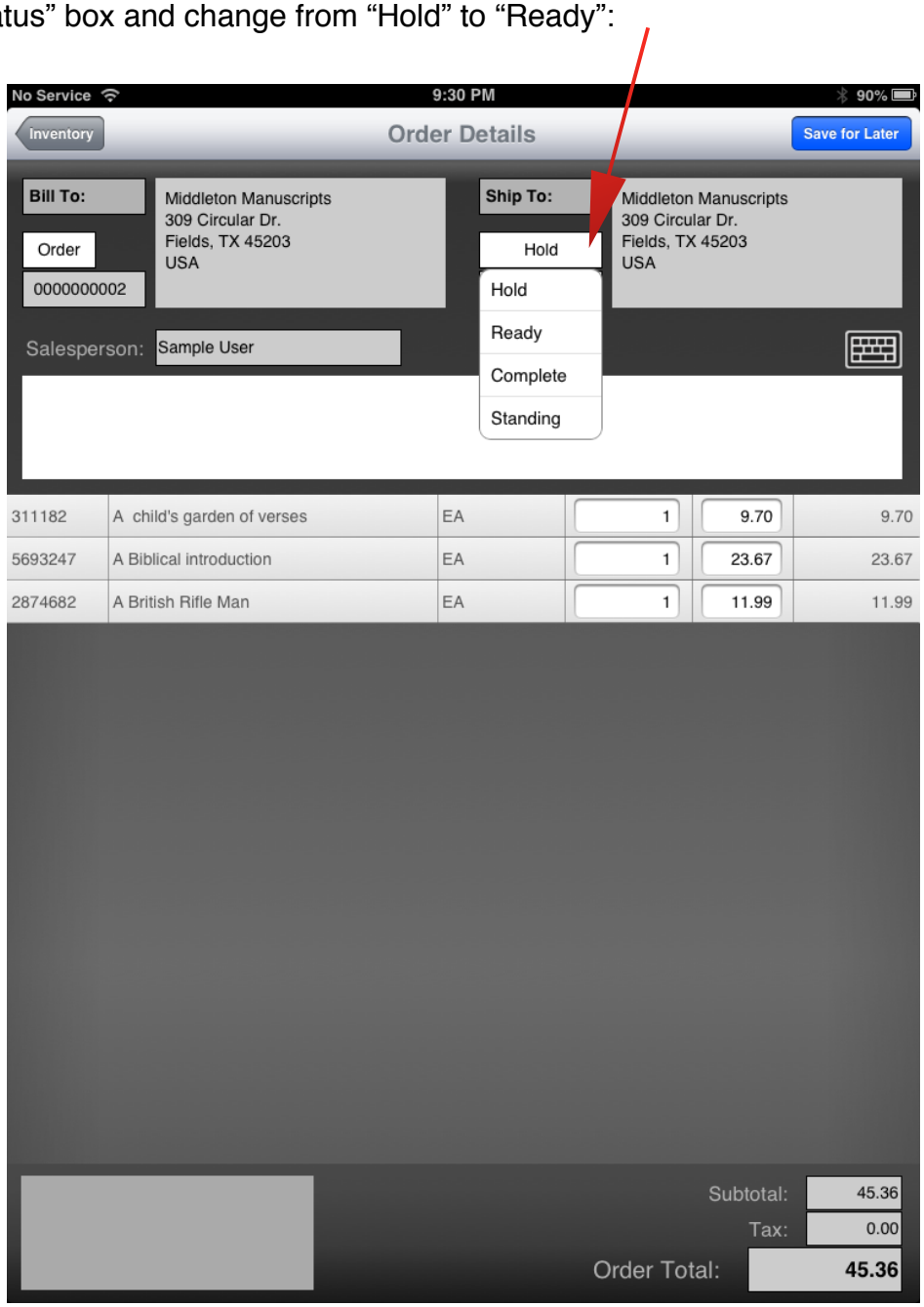
Touch “Status” box and change from “Hold” to “Ready”:



Notes: Status definitions:

- Hold - saves order for future completion
- Ready - activates signature window and starts submission to server as open order (customer to receive goods at later date)
- Complete - activates signature window and starts submission to server as complete invoice (customer has goods)
- Standing - creates template order which stays on iPad to easily create similar orders in the future.

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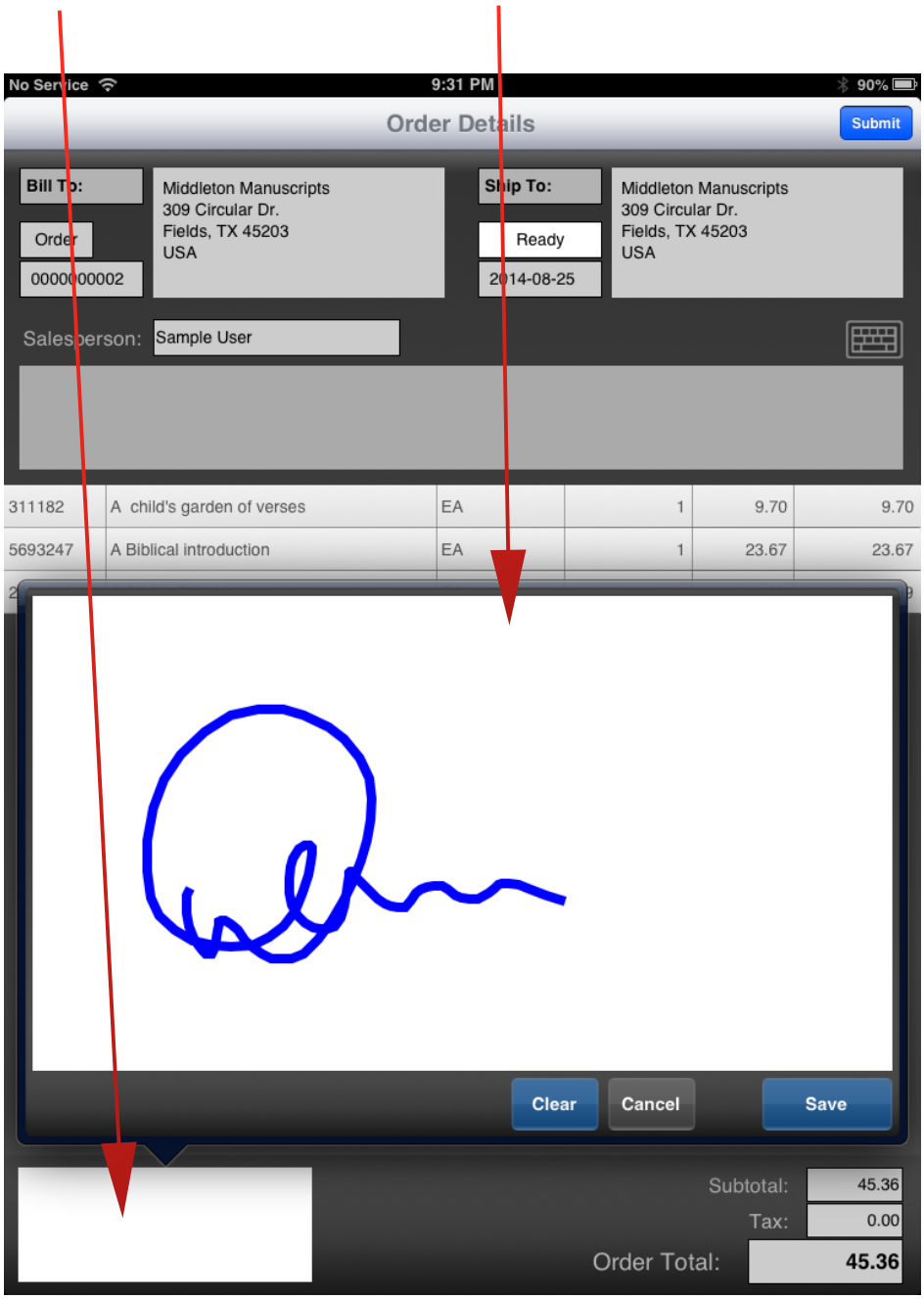
Touch signature window and signature screen appears:



Touch <Save> button

Touch <Submit> button

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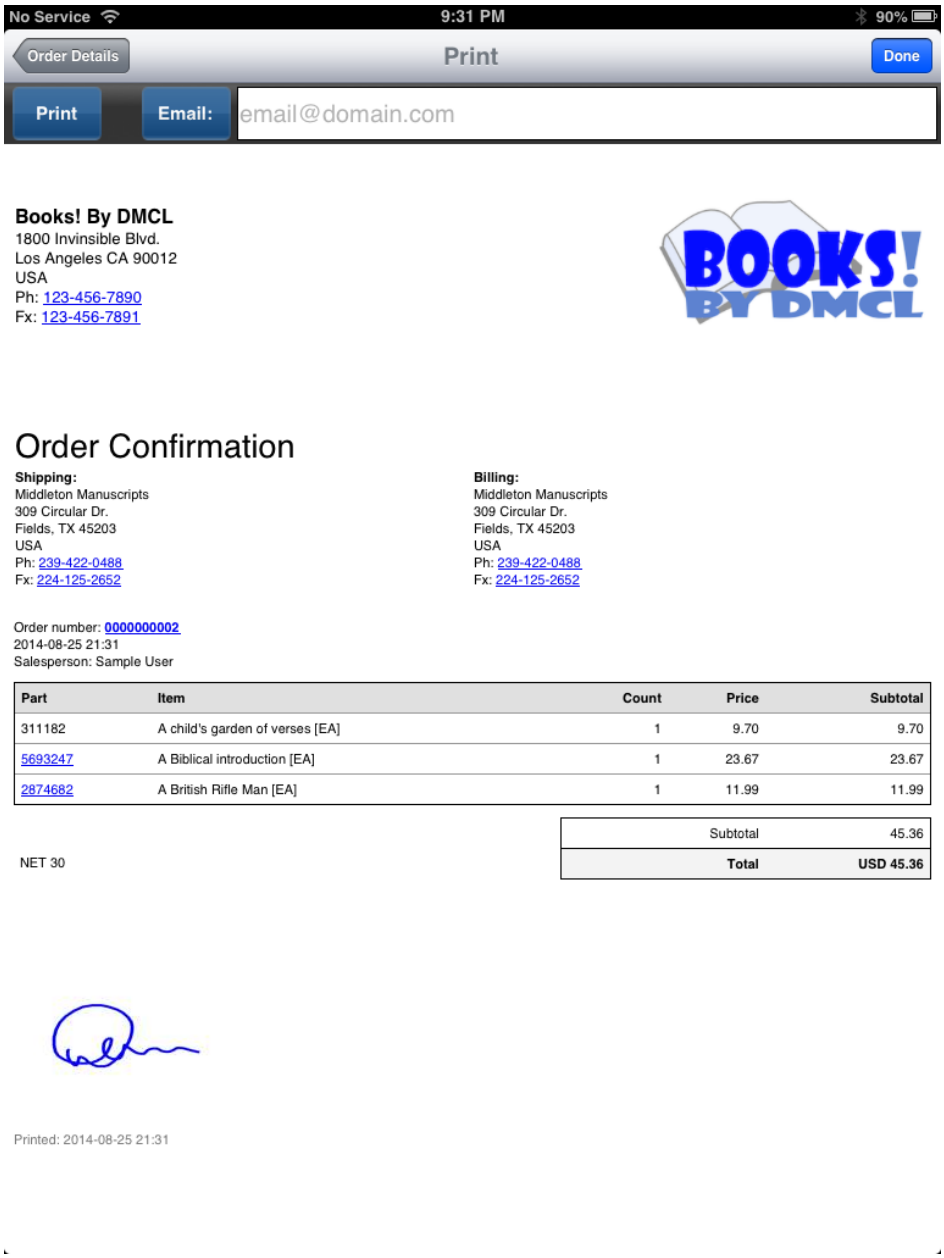
You may print and/or email order confirmation/invoice:



Touch <Done> button when finished.

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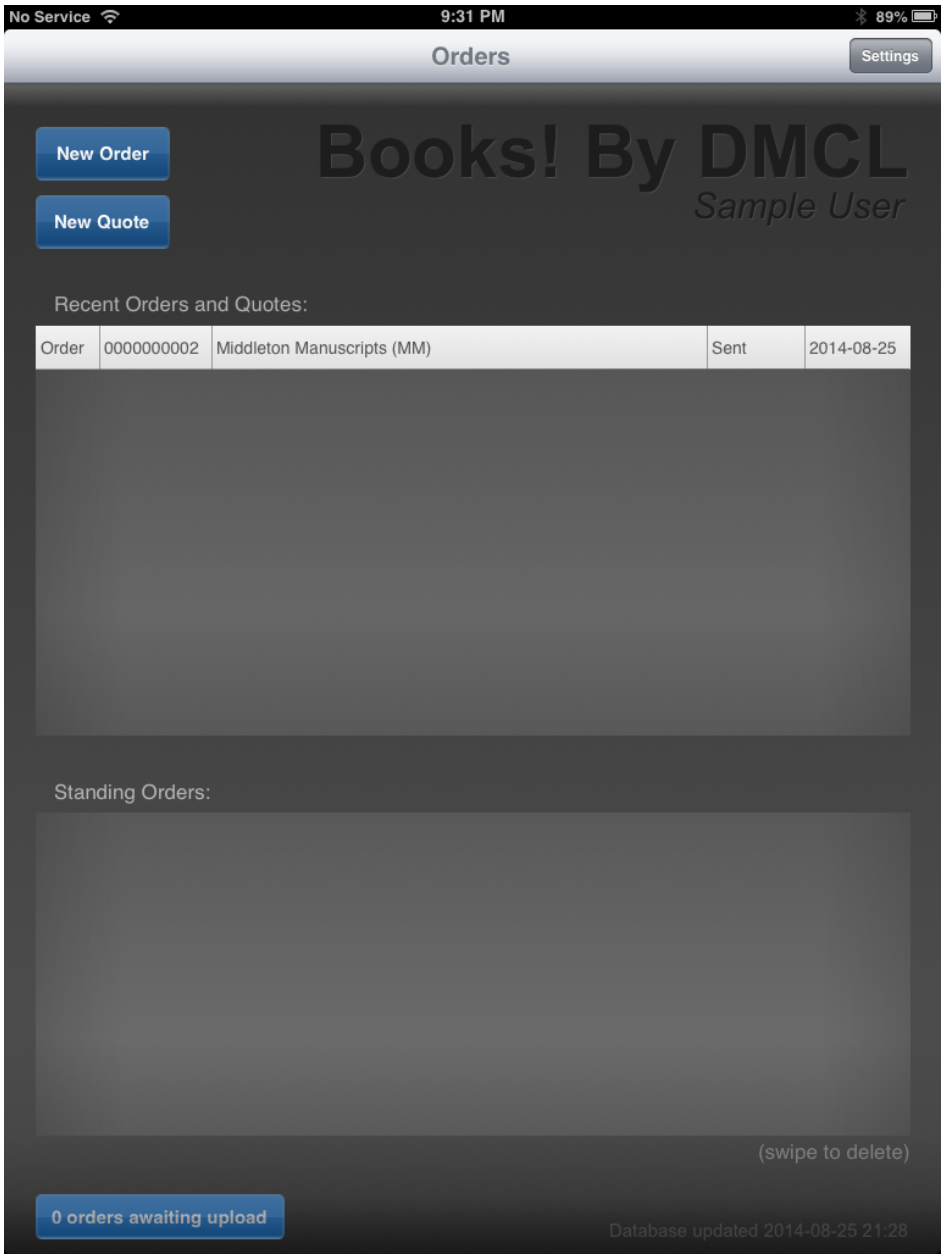
You are returned to the start page.



Congratulations, you have completed your first order.

Now, try a Quote on your own, - then a Complete order (Invoice), - then a Standing Order, - then an Order on Hold…….

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Quick Start - Your Accounting Software

Prerequisites:

1) Window's REST application and service must have been purchased from DMCL and installed (see separate Window's REST application and service manual)

2) iPad User must be set up with a minimum of user name and password in iPad Maintenance application (see separate iPad Maintenance manual). iPad Maintenance application is available for Windows or Mac OS X. It is also recommended that each user's access to specific customers, inventory, etc. be established in the iPad Maintenance application as well.

Please Note: Sell It Anywhere was designed around the feature set of an Enterprise accounting package. The intent is that it is usable by any accounting package with just the Window's Service being the only variable from one accounting package to the next. Other than the space availability of the iPad in use, there is no restriction to the number of price levels, quantity breaks, customer specific prices, currencies per price level, etc. The Beta testers for this project had database tables with 80,000 records for customers, inventory, and other support tables - performance was lightning fast.

This does not mean if your accounting package does not have multi-currency capability, that Sell It Anywhere will still use multi-currency - it will not. Sell It Anywhere determines the capabilities of your accounting package and only allows the same "Business Rules".

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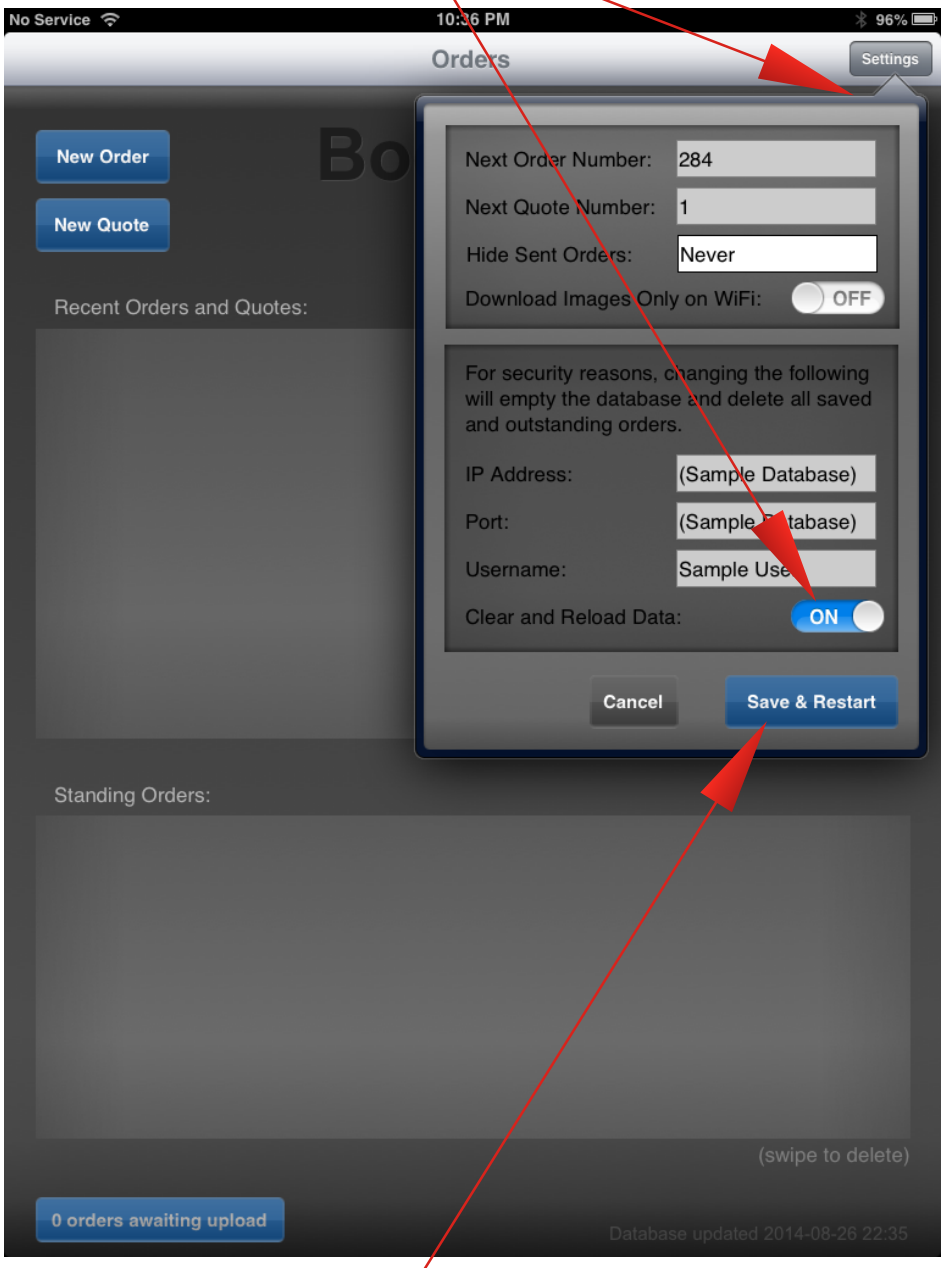
Changing to Your Accounting Package with Sample Database Loaded

Touch <Settings> button

Clear and Reload Data: Turn ON



Touch <Save & Restart> button

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The same window will show up that you saw the first time you started Sell It Anywhere:

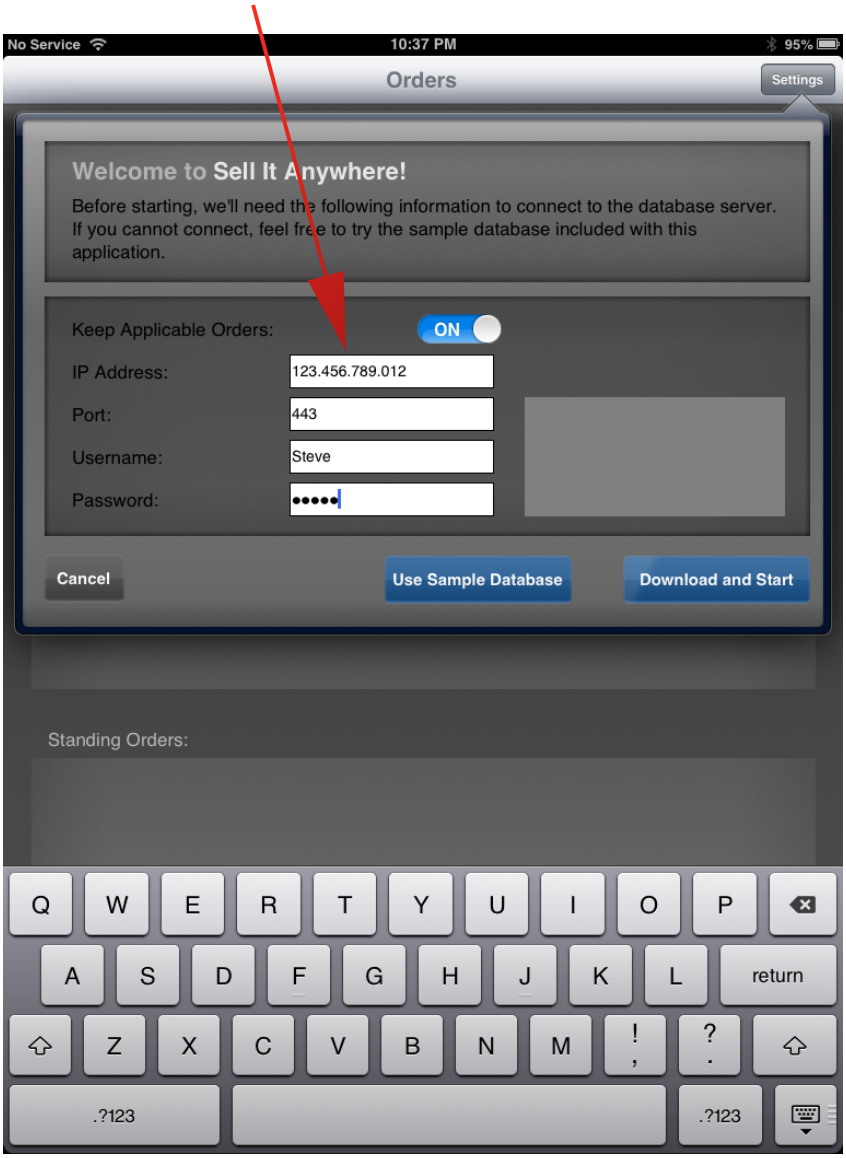
However, this time you will fill in the information used to set up your account in the iPad Maintenance application:

IP Address: IP address for the server where the REST application is located - available from your administrator.

Port: usually 443 (managed by IIS on your server)

Username: as assigned in iPad Maintenance application (it is case sensitive)

Password: as assigned in iPad Maintenance application (it is case sensitive)



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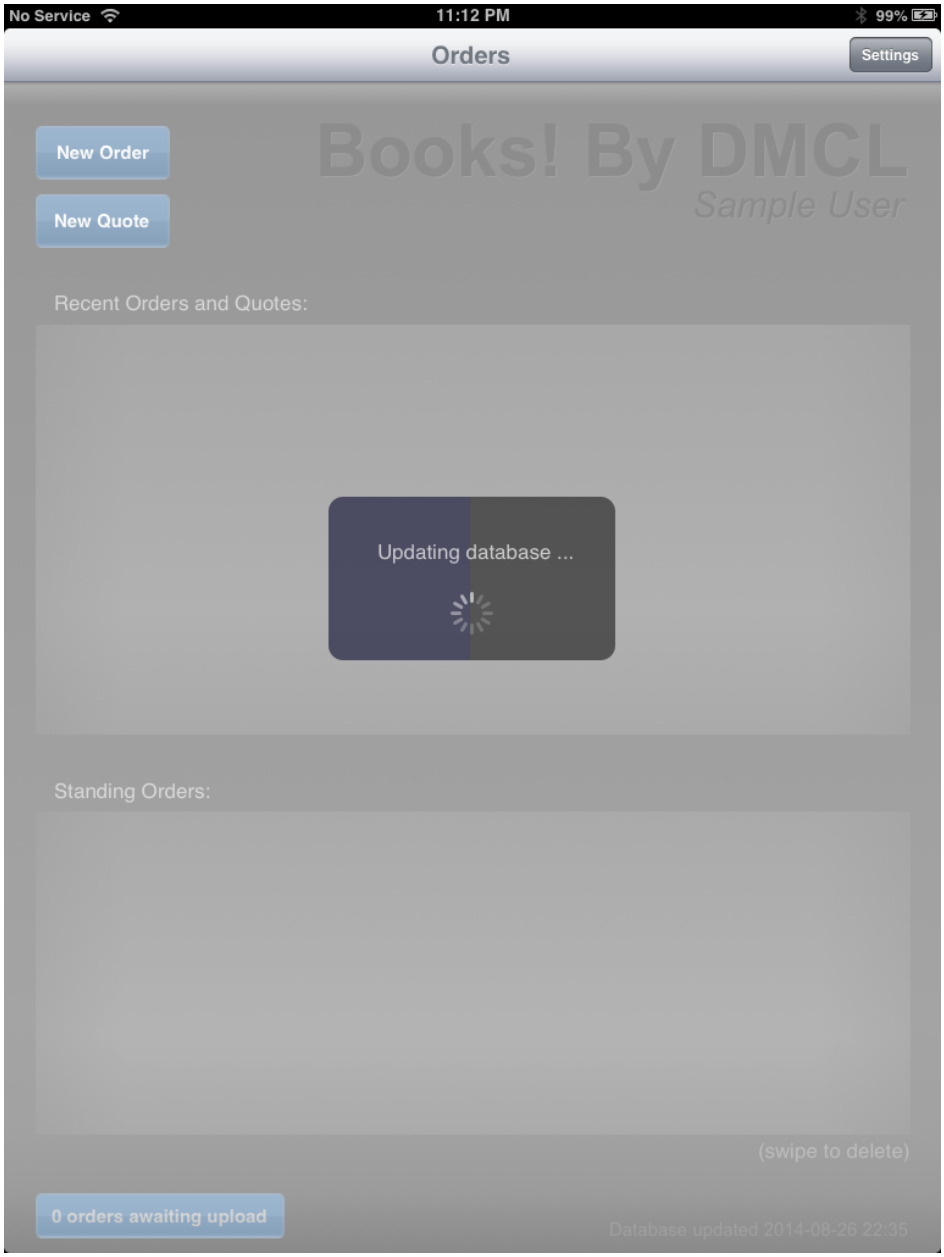
Your live data is now loading:



Go to page 6 (Sample Database) and start entering orders - you are live and submitting orders will go into your accounting package.

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Loading the iPad from a fresh install of Sell It Anywhere

After starting Sell It Anywhere for the first time, you will be presented with the set up screen:

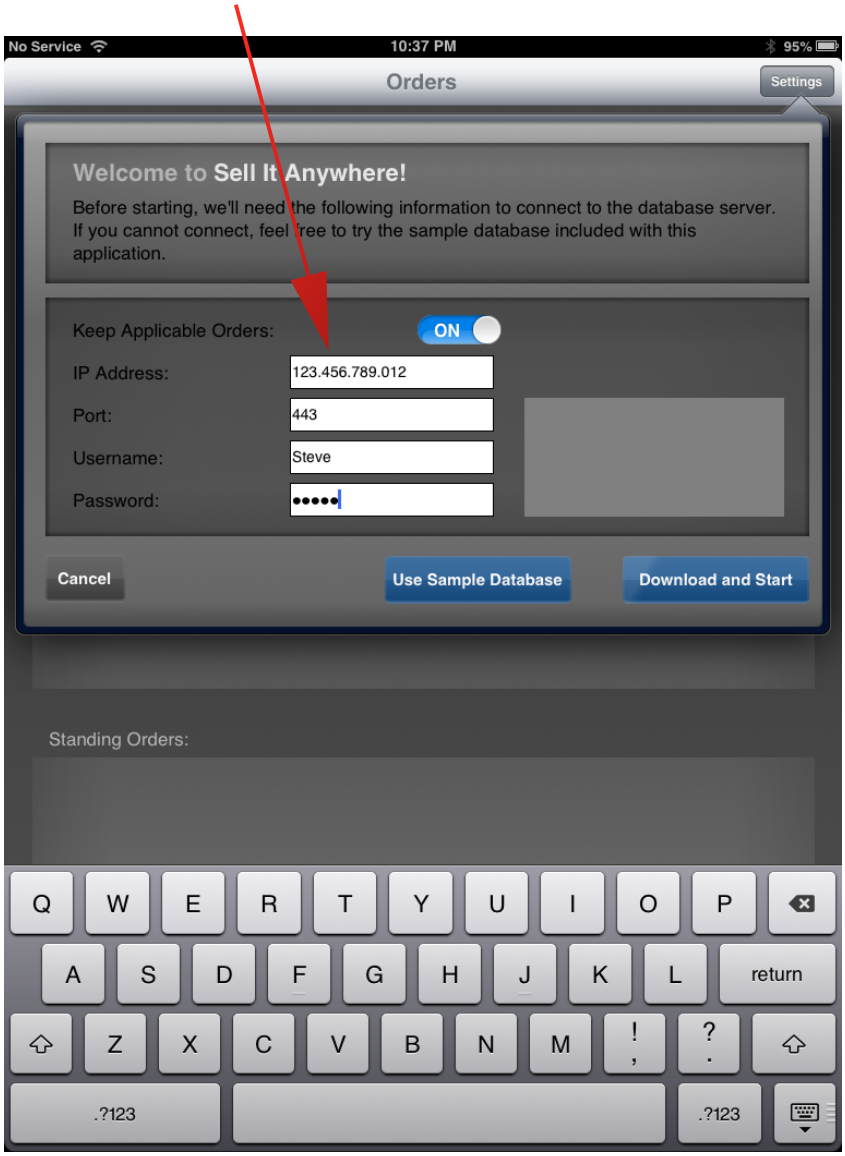
Fill in the information used to set up your account in the iPad Maintenance application:

IP Address: IP address for the server where the REST application is located - available from your administrator.

Port: usually 443 (managed by IIS on your server)

Username: as assigned in iPad Maintenance application (it is case sensitive)

Password: as assigned in iPad Maintenance application (it is case sensitive)



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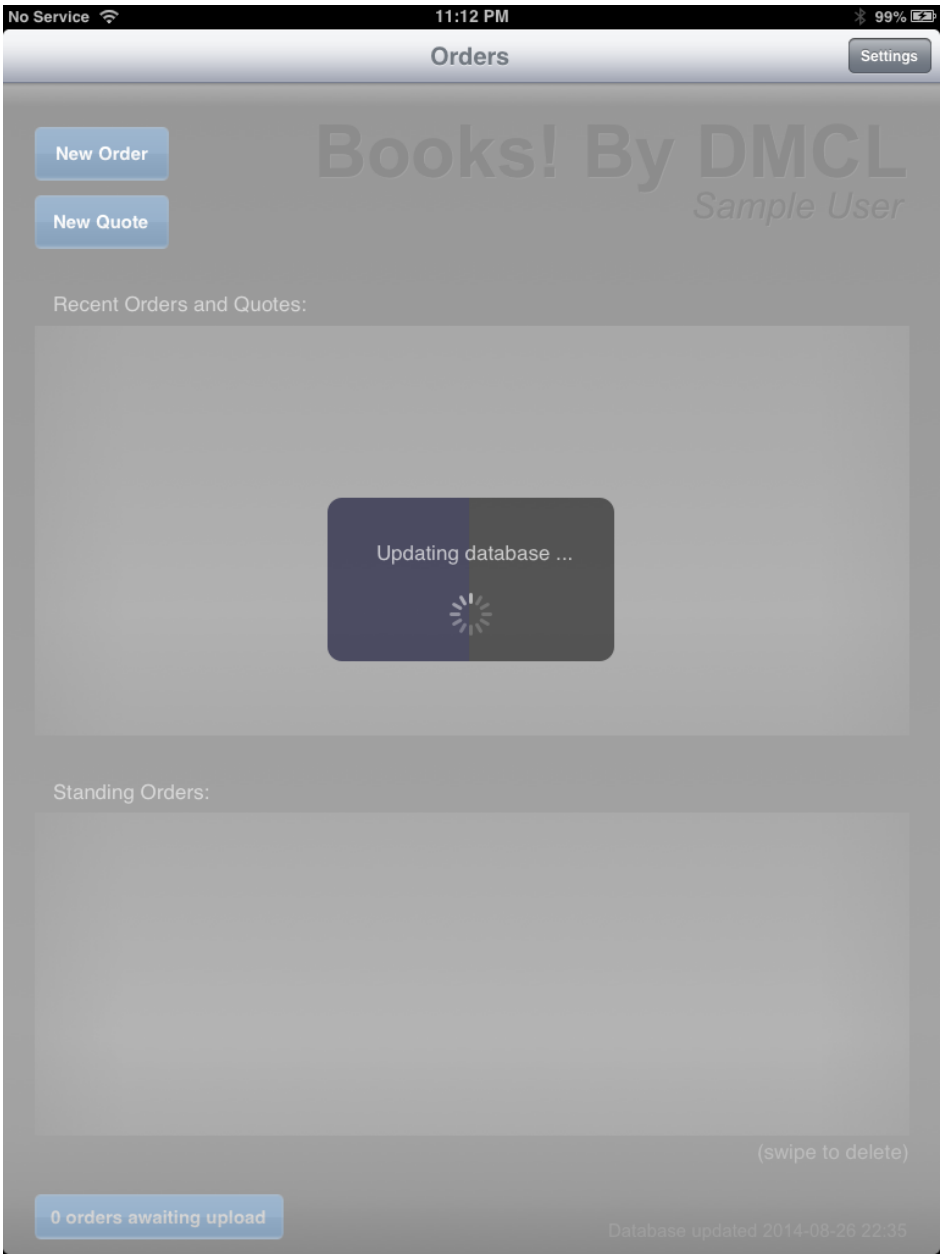
Your live data is now loading:



Go to page 6 (Sample Database) and start entering orders - you are live and submitting orders will go into your accounting package.

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Reference

Note: Not all features are available on all accounting packages. Also, your administrator can turn some features on or off for your user name depending on your companies preferences. Please see your administrator before contacting technical support if a feature is unavailable to you, to make sure you have access to it.

Add New Customer - Bill To or Ship To Address

Touch <Edit> button:

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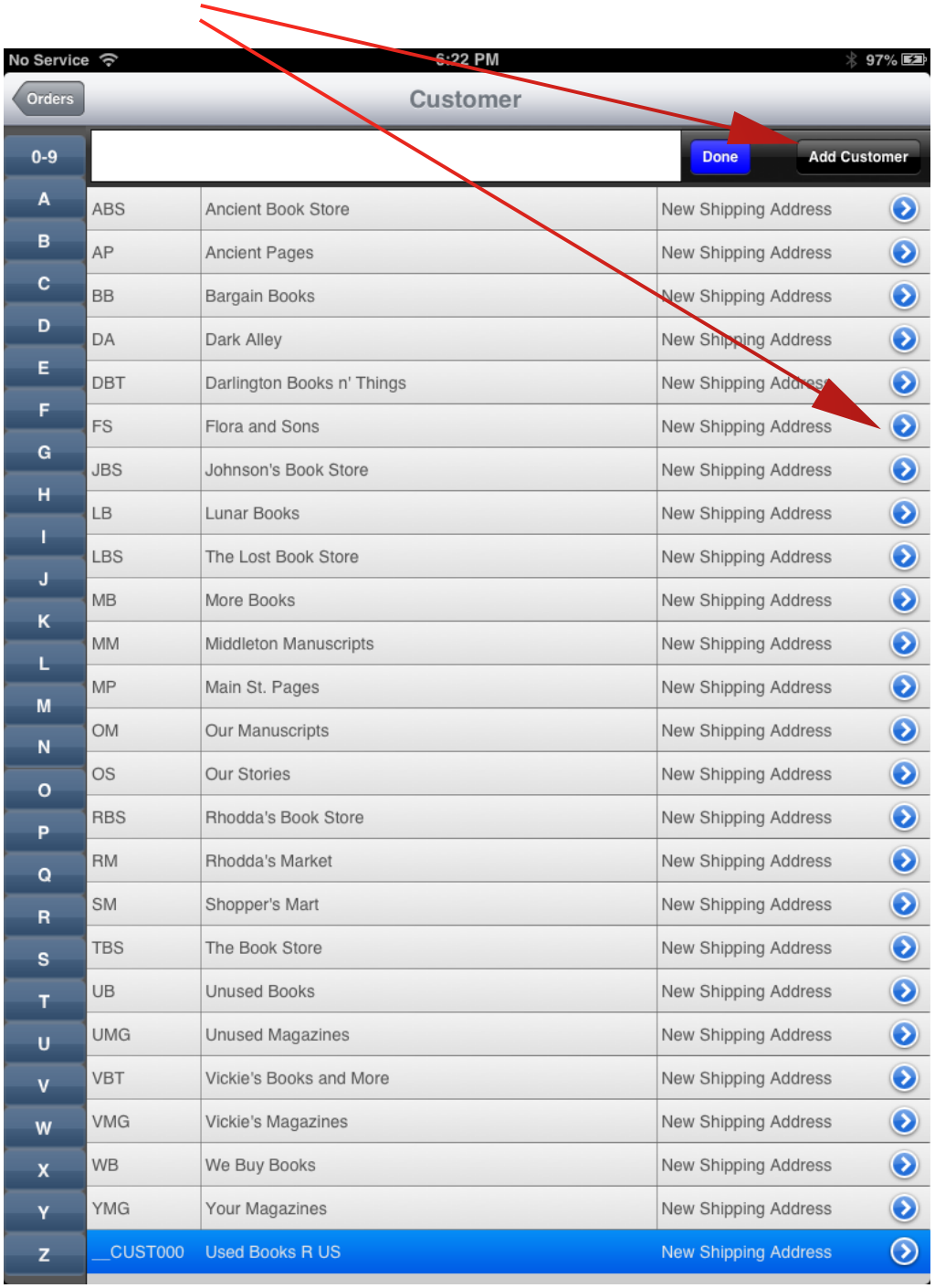
To add new Bill To customer, touch <Add Customer> button
To add new Ship To address, touch blue right arrow associated with Bill To customer



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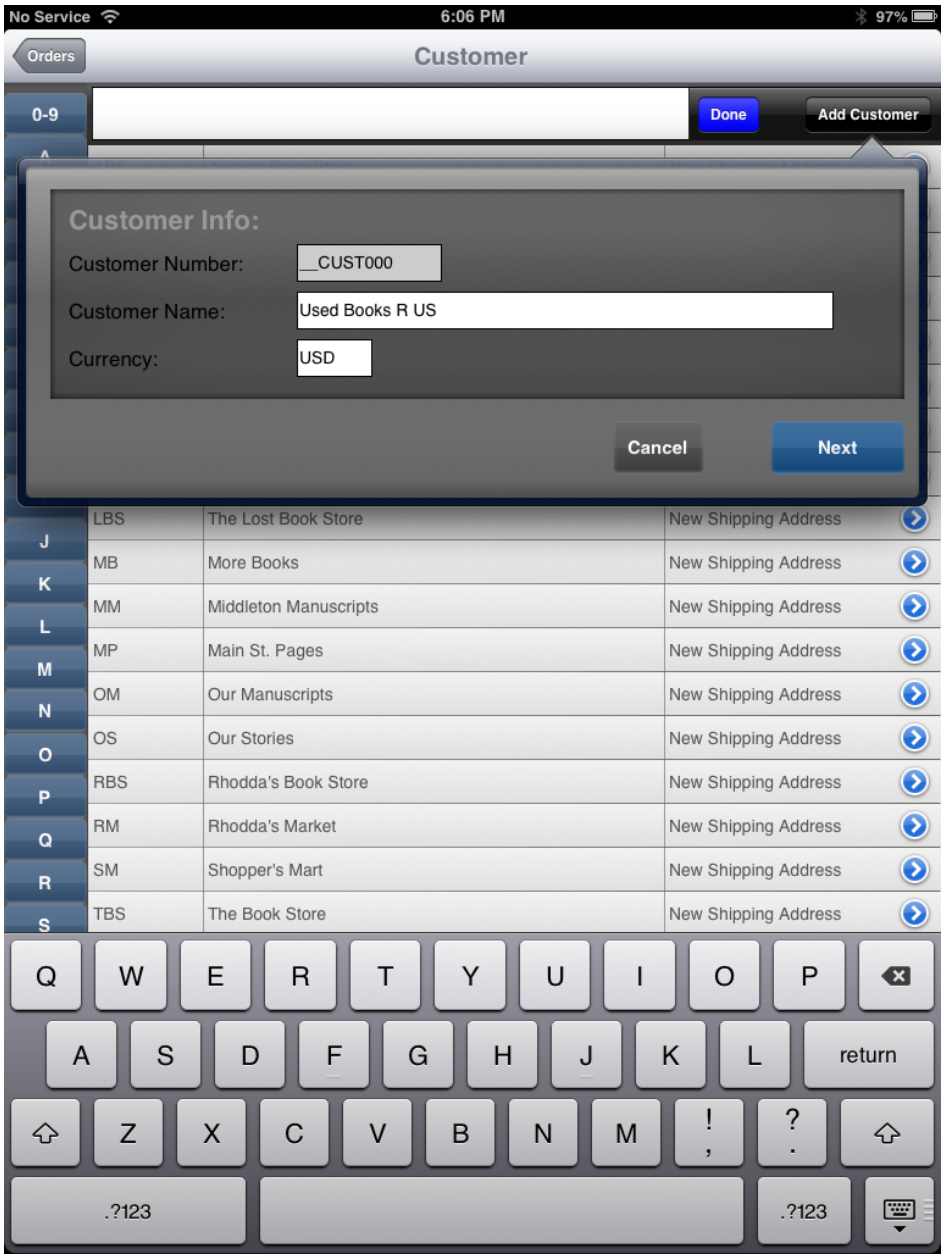
For new Bill To, a window will appear:
Customer Number is supplied automatically. It is a temporary number that will be replaced at a future sync with the server with the actual number used in the accounting software.
Customer Name should be name used for billing purposes.
Currency, is either selectable from drop down list, or accounting package default, depending on accounting package having multi-currency capability.
Touch <Next> button



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For New Bill To or New Ship To, the details window will appear:
Fill in all relevant details. The tax code is derived from the accounting package and is usually in the format: “Country - 3 characters”, “Province/State - 2 characters”, and tax IDs relevant for the location entered above (zeros indicate exempt).

Touch <Save> button
Touch <Done> button when finished adding all Bill To and Ship To information.

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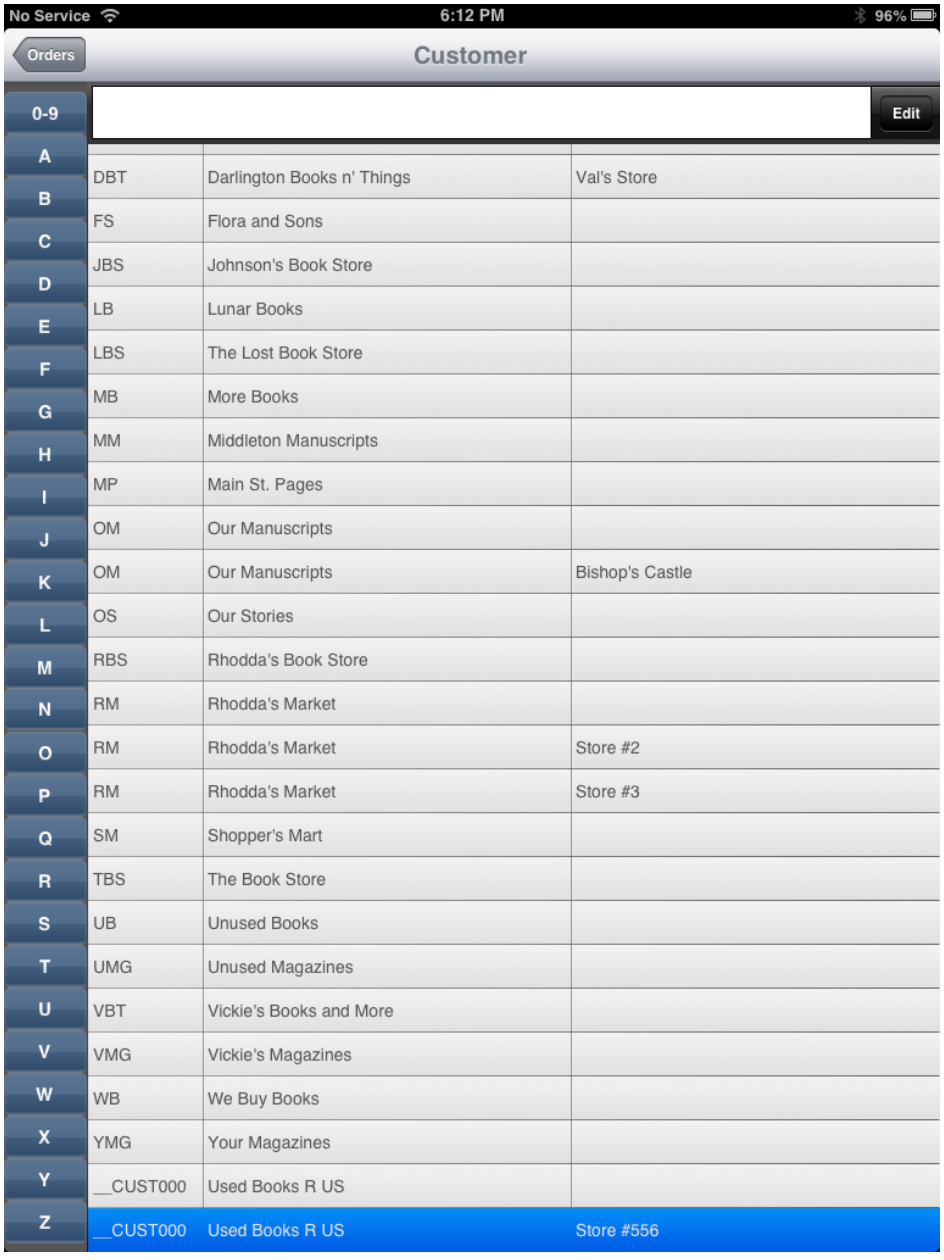
New Bill To and/or Ship To are now available to select.



Note: New orders for new Bill To or Ship To go into the accounting package with a status of “Hold”. Your company administrator will determine new customer code, credit availability, etc. and will be responsible for removing the “Hold” status.

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Using Inventory/Order Entry Screen

A - search box
B - show/hide keyboard

C - sort

D - image

E - unit of measure

F - add/remove quantity

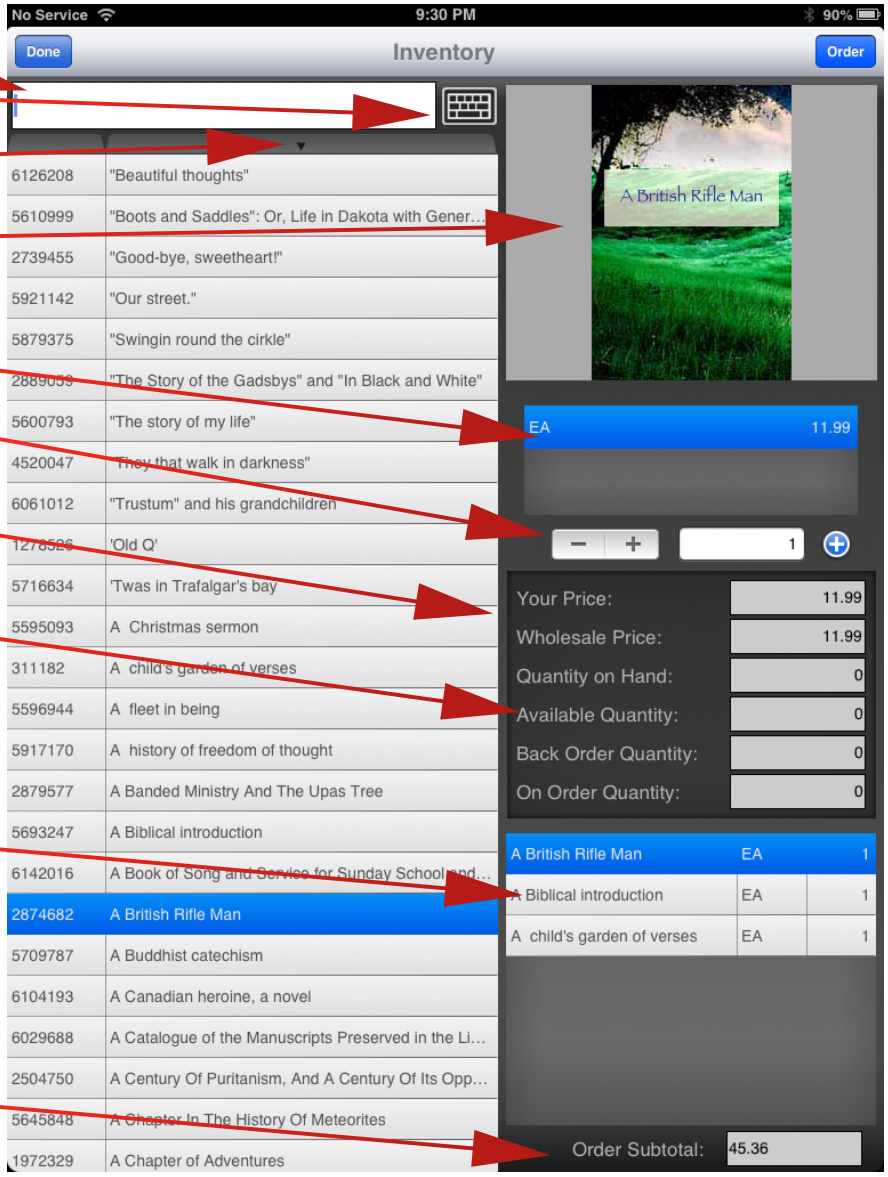
G - your price
H - wholesale price

I - quantities

J - order details

K - order sub-total

L - <Done> button
M - <Order> button



A - search box: Sell It Anywhere searches the part number, description, and barcodes fields for any characters entered in this box. Filtered results are displayed in inventory list. As soon as the box is in edit mode, the keyboard appears unless a barcode reader is synced with the iPad.

B - show/hide keyboard: Normally, the keyboard appears on its own. However, with a barcode reader synced with the iPad, the keyboard is suppressed. Touching this button will toggle the keyboard between visible and invisible.

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C - sort: Touching the column header will sort the inventory table by that field (small black arrow head indicates the column that is currently being sorted)

D - image: If an image is associated with the part number, it is displayed whenever the part number/description is selected. Images are downloaded in the background whenever the iPad detects no activity. By default, this is only when a WiFi connection is being used, but you can change this behaviour to work with cellular in the settings. Note: the images for the Sample Database are not downloaded but randomly selected from a small image folder.

E - unit of measure: Part numbers with multiple units of measure, are displayed in this box and can be selected - the pricing below is the pricing associated with the part number / unit of measure combination. (i.e. part number COKE, might be sold as CAN - by the can, CASE - case of 24, 6P - six pack, etc.)

F - add/remove quantity: The default quantity can be set to any valid positive number. The plus and minus buttons do exactly as expected (quantity left at zero will remove part number from order automatically). The blue circular plus sign adds the part number to the order again so that the price on the next screen can be changed for the selected quantity. For example - Buy 10, get 1 free ….. or Buy 1, get 1 half price.

G - your price: the selling price that would be calculated by the accounting software, taking into consideration customer specific (contract) prices, quantity breaks, selling levels, promotions, etc.

H - wholesale price: Usually highest price in accounting packages pricing tables (Retail).

I - quantities: On Hand = quantity in stock for location/warehouse assigned to iPad/ salesperson. Available = On Hand less quantities already assigned on orders. Back ordered = zero in stock, quantities already on other orders waiting for stock. On Order = quantity on existing issued Purchase Orders.

J - order details: part numbers and quantities already selected. Can be selected here and edited or removed by changing quantity ordered to zero.

K - order sub-total: Net amount of order before taxes and other charges or discounts.

L - <Done> button: If nothing selected for the order, cancels the order and returns to main screen. If items are selected, saves the order for completion later.

M - <Order> button: Advances to Order Details screen.

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Using Order Details Screen

A - order type

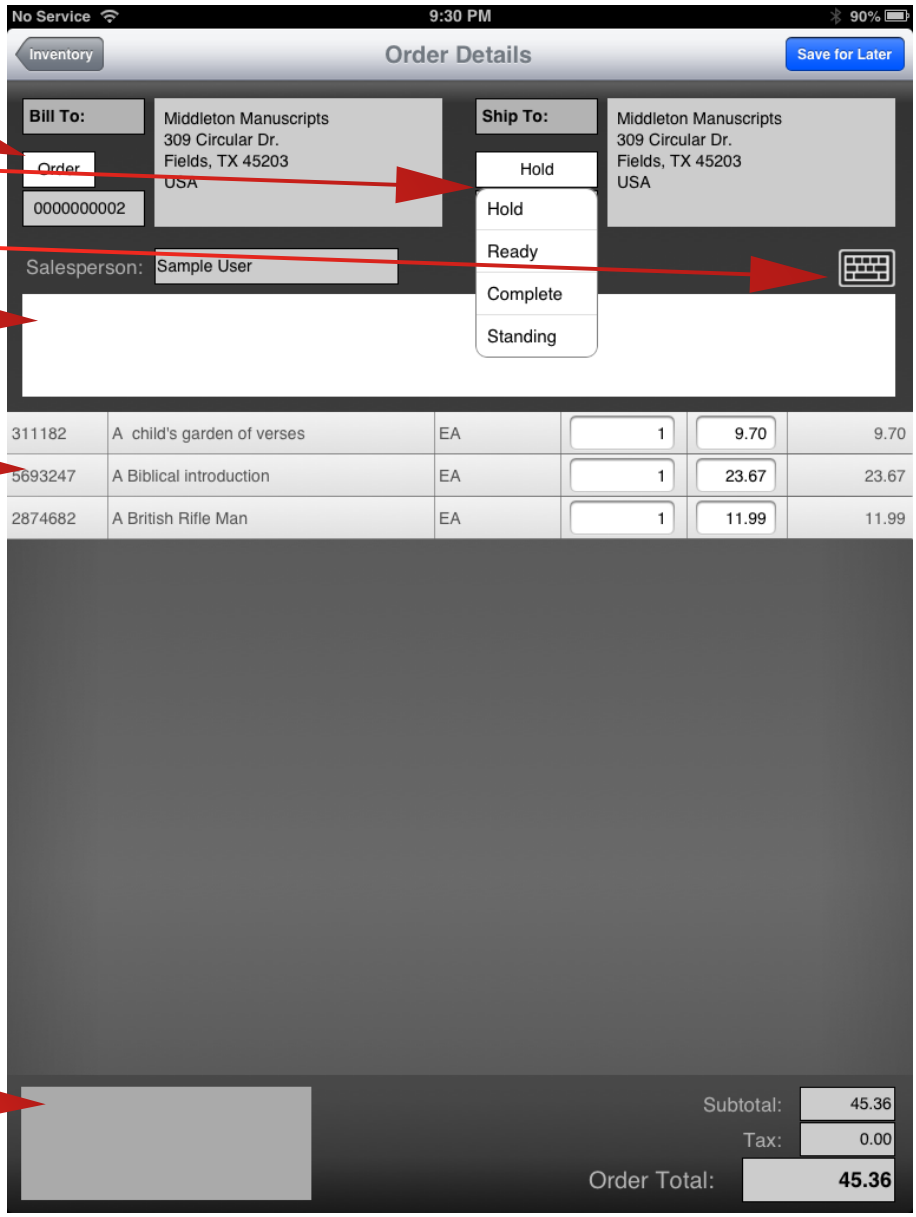
B - order status

C - show/hide keyboard

D - notes

E - details grid

F - signature



G - <Inventory> button

H - <Save for Later> button

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A - order type: drop down selection box with “Order” and “Quote” options

B - order status: drop down selection box with the following options:
- Hold - saves order for future completion
- Ready - activates signature window and starts submission to server as open order (customer to receive goods at later date)
- Complete - activates signature window and starts submission to server as complete invoice (customer has goods)
- Standing - creates template order which stays on iPad to easily create similar orders in the future.

C - show/hide keyboard: Normally, the keyboard appears on its own. However, with a barcode reader synced with the iPad, the keyboard is suppressed. Touching this button will toggle the keyboard between visible and invisible.

D - notes: Add notes to your order - only active in “Hold” and “Standing” status, so enter before changing status to “Ready” or “Complete”. Prints on email copy as well as being submitted to accounting package.

E - details grid: Quantities and prices may be edited. Swiping “Left to Right” or “Right to Left” will display a <Delete> button which will allow you to delete the selected line.

F - signature: If you require customer’s signature, touching this box when status is “Ready” or “Complete” will open a large box where they can sign authorizing order/ purchase. Touch <Save> button to save signature with order, or <Clear> button to clear signature and start over. See image next page.

G - <Inventory> button: Return to inventory screen to add more product to order.

H - <Save for Later> button: Saves order and returns to main screen. Can be opened to complete at later time.

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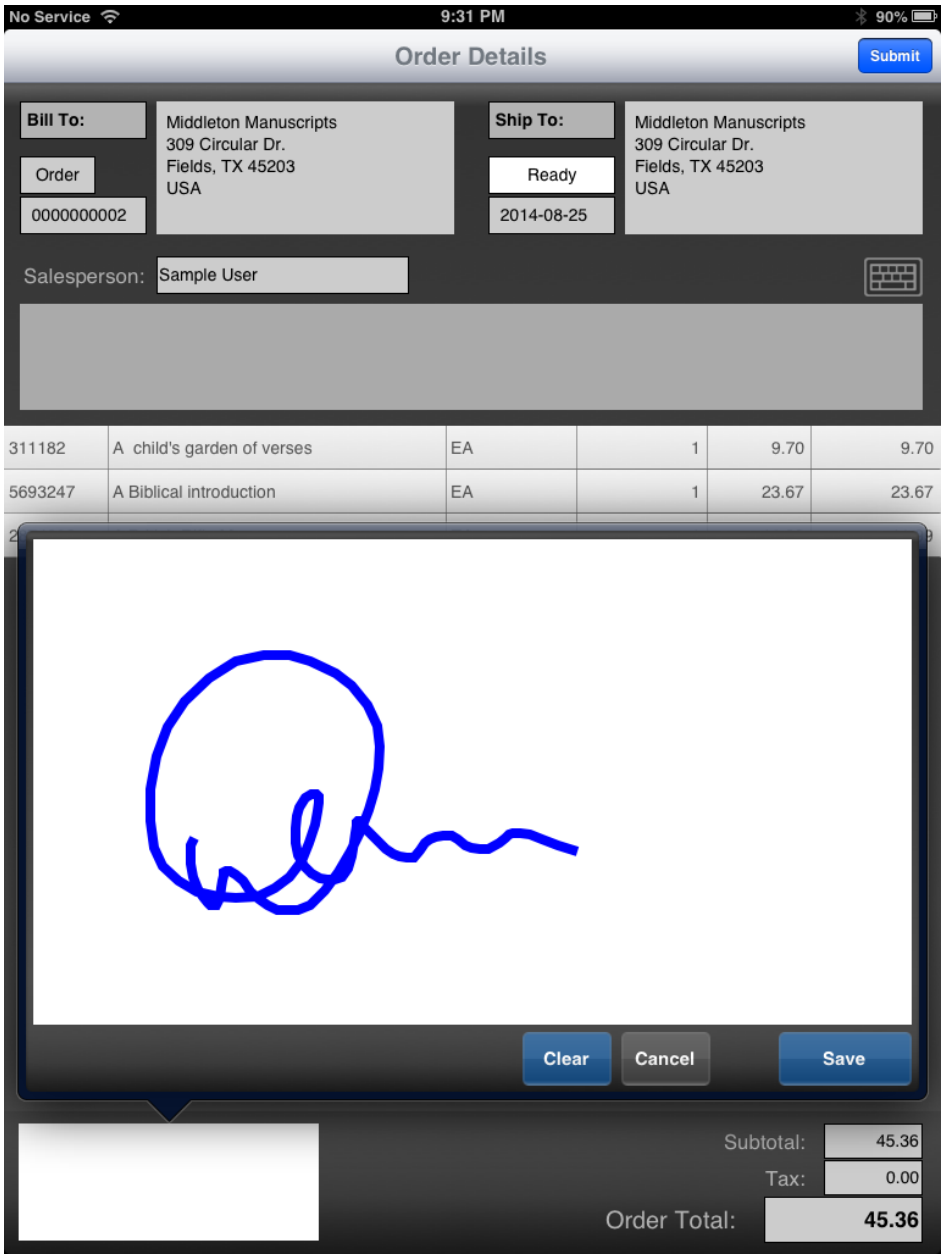
Signature screen:



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Using Email/Print option screen

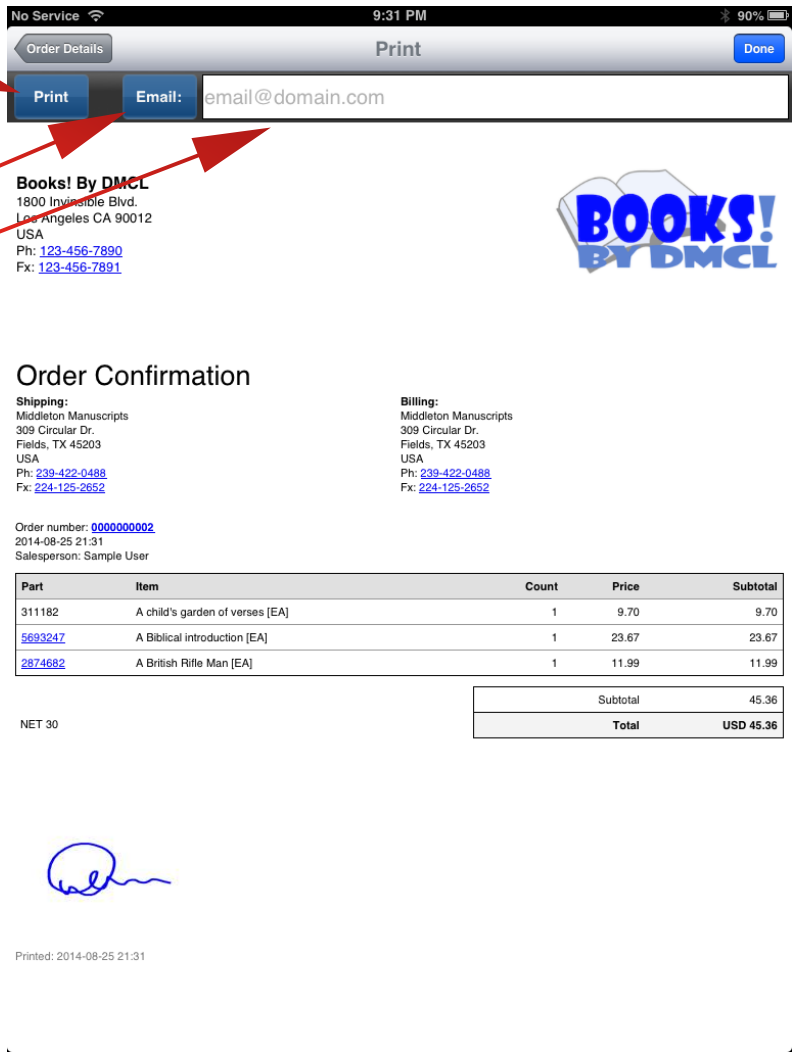
A - <Print> button

B - <Email> button

C - Address box

D - <Order Details> button

E - <Done> button



A - <Print> button: Order Confirmation/Invoice will print to any AirPrint printer installed on iPad

B - <Email> button: Email Order Confirmation/Invoice to any recipient(s).

C - Addresses will be remembered and filled in automatically for selected customer next time.

D - <Order Details> button: Returns to “Read Only” Order Details screen (at this point order is already prepared for transmission.

E - <Done> button: Returns to main screen where current order is added to list with it’s status displayed.

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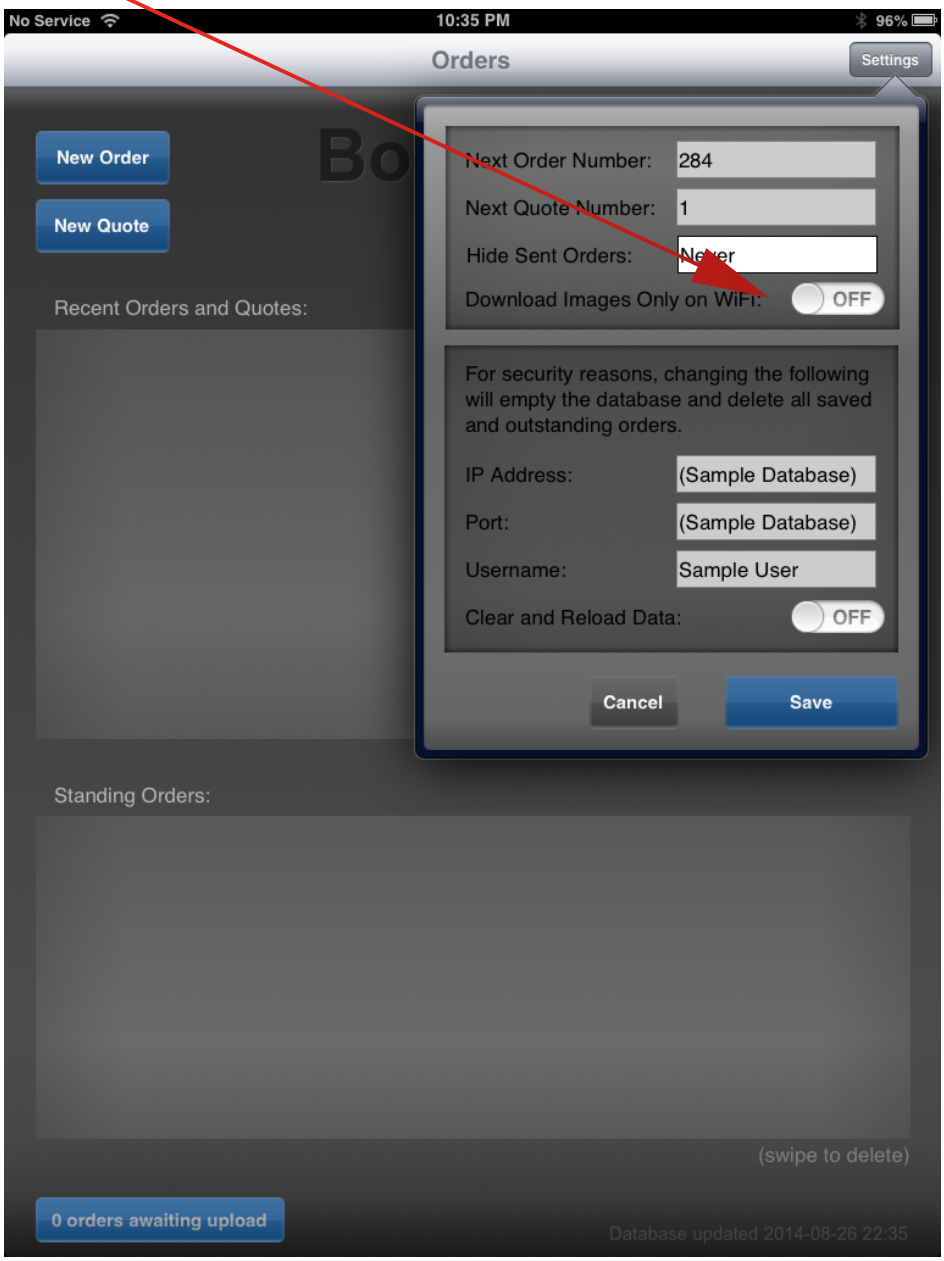
Other Options and Features

Downloading images on just WiFi or WiFi and cellular can be selected in the settings menu.



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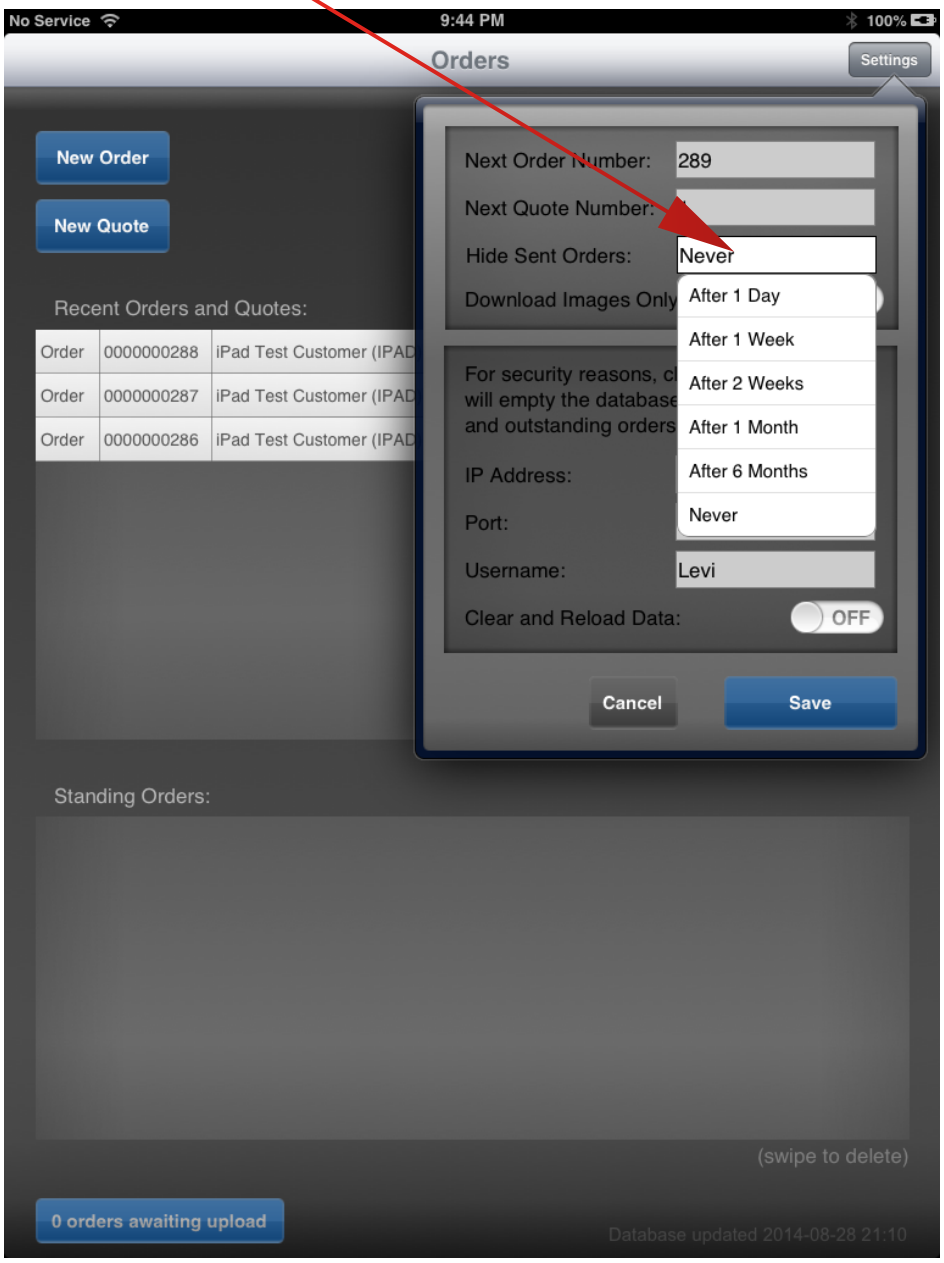
Orders are not deleted from the iPad database, unless specifically selected and deleted. Orders can be hidden after a specific time period using any of the available options in the settings menu:



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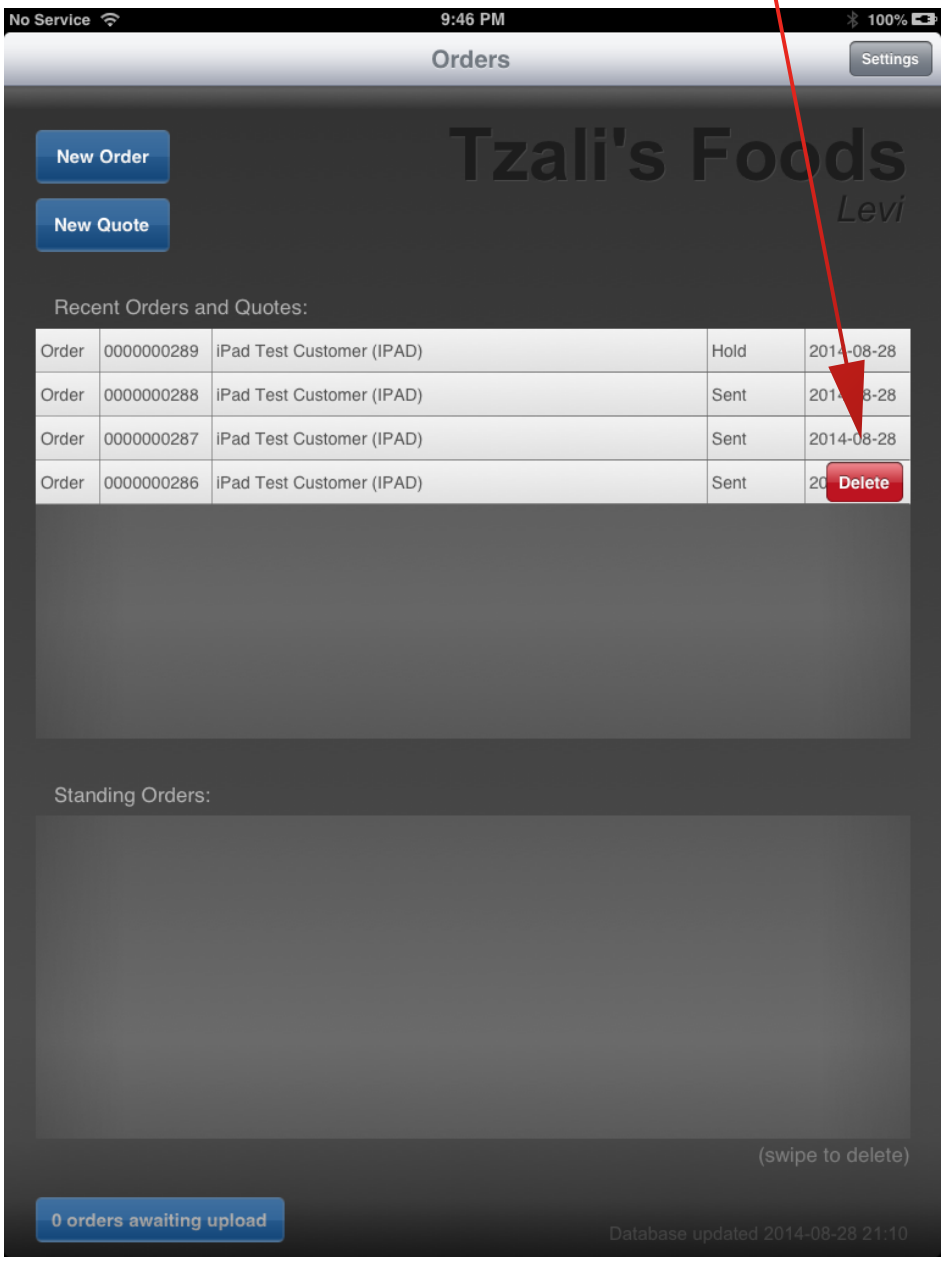
Deleting a specific order can be accomplished by “Swiping” order header record either “Left to Right” or “Right to Left”. A <Delete> button will appear.



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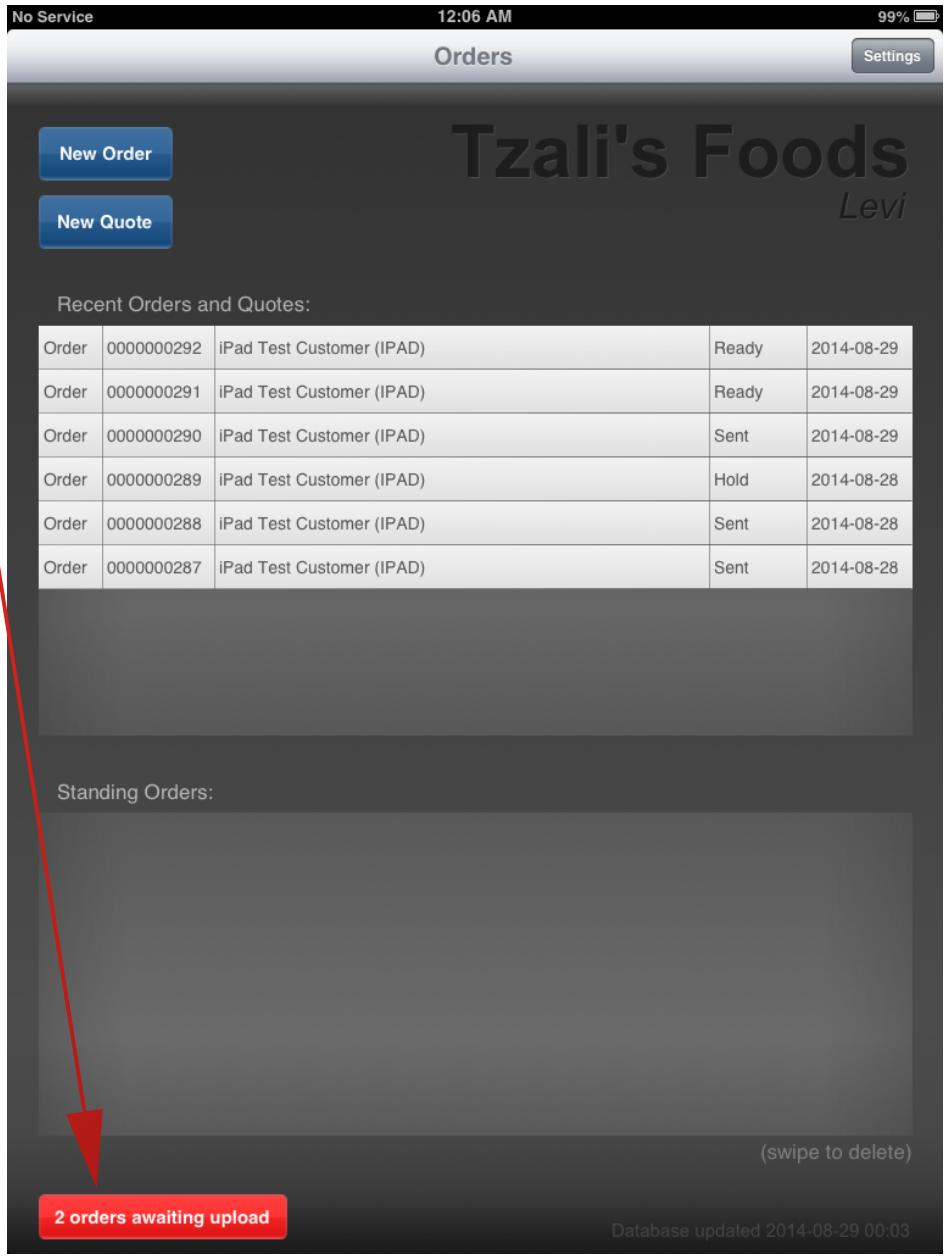
Using Sell It Anywhere with no connection to server. When there is no WiFi or cellular connectivity, you may continue to use Sell It Anywhere. When the orders are submitted, the main screen will inform you that the orders have not been transmitted.



When the connection is re-established, the orders will upload automatically. Clicking on the <orders awaiting upload> button will display the following screen:

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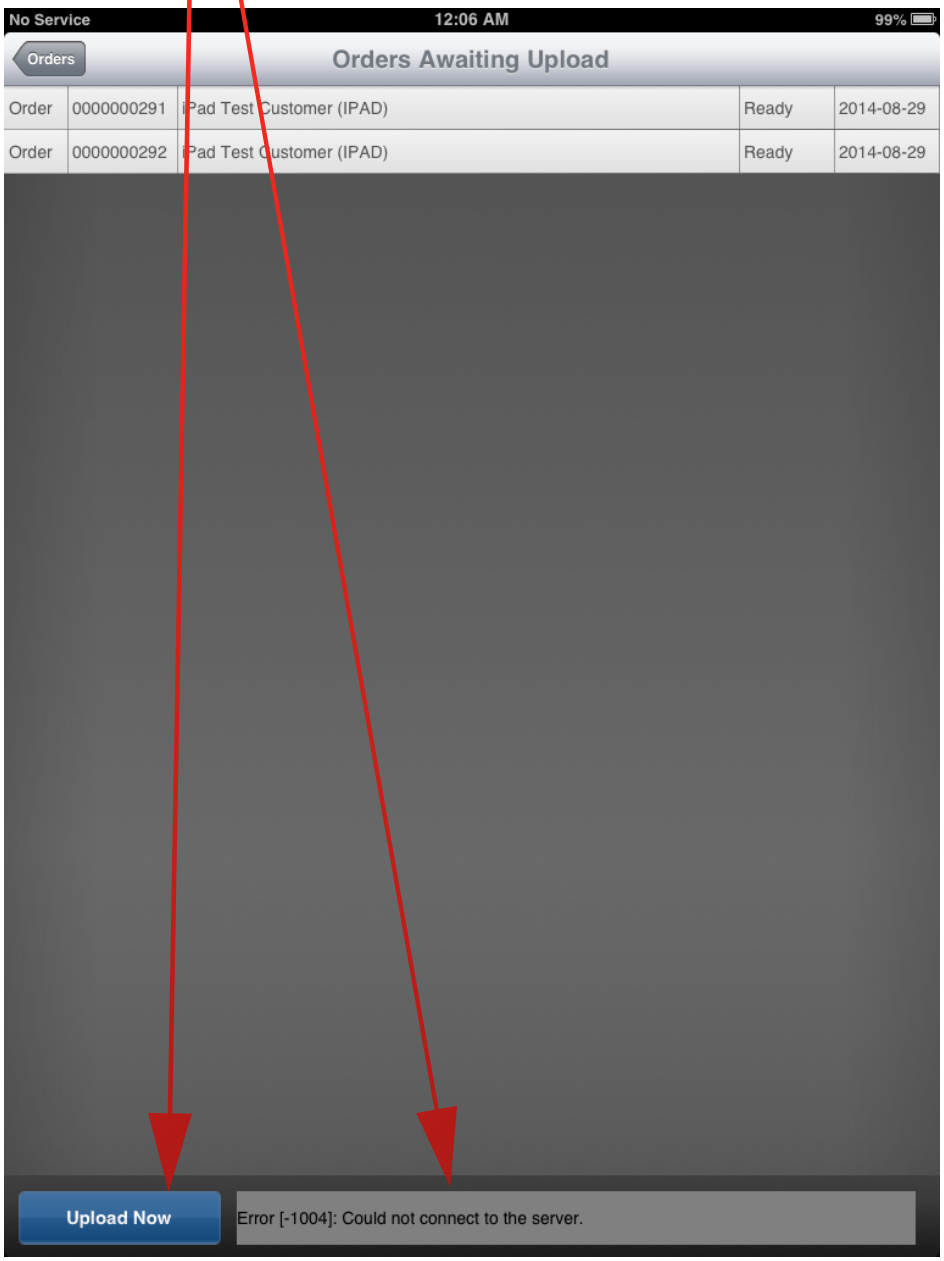
The orders waiting to be uploaded will be displayed. Touching the <Upload Now> button will force an attempted upload and will display the status of that attempt in the box beside the button.



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Contact Us

Support:

Support for free download from Apple's iTunes store is available only by email:

dmcl@icloud.com

Normal response time is within one business day.

Support for paid subscriptions for server components is via telephone (phone number supplied at time of server components installation). Email support is also available for paid subscriptions.

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Placing Order for Server Components:

At the time this manual was written, only Sage BusinessVision accounting software is supported with Sell It Anywhere. More accounting packages are added as quickly as we receive the Software Development Kit (SDK) for them. Apple's iTunes store has the most up to date listing.

Please request a quote for the server components at:

dmcl@icloud.com

Please specify:

Your company name and billing address
Contact information including telephone number

Accounting package
Accounting package version
Window's version:
- Windows 2008 server or above recommended
- Windows 7 or 8 with IIS enabled should work but not tested by DMCL

No. of users
No. of iPads (if different than No. of users)

User/iPad maintenance program is available for Windows or Mac OS X - please indicate your preference.

Thank you for your interest in "Sell It Anywhere"

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