

Your complete guide to use
iPPOS version 3.4



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SECTION 1

INTRODUCTION

Thank you for using **iPPOS**! The app enables you to manage, track and communicate through all phases of the sales cycle. Moreover, all the information regarding your customers can be quickly and easily accessed and modified.

The application offers the opportunity to increase sales, save time and provide excellent quality, in terms of service, to every customer. Most importantly, **iPPOS** seamlessly blends all of these capabilities into an intuitive and friendly interface.

More specifically, **iPPOS** includes the following features:

- 📋 registration of new customers.
- 📋 detailed history, information, consultation of registered customers.
- 📋 product recommendation.
- 📋 rapid and easy entries for sales and returns (products, GWP, samples), appointments, instant services, store transactions (orders, inventory etc.) discounts and price collection.
- 📋 user profile that displays the user's recorded transactions, services, customers as well as the targets, statistics and schedule.
- 📋 loyalty schemes that include point exchanges as rewards.
- 📋 campaign creation and management, e.g. reward selected clients or notify them for a new product/service.
- 📋 agenda, with full information regarding scheduled appointments, to do lists and contact lists.
- 📋 access to all sales data, through easy to handle reports.

The instructions in this guide will introduce you to the functionalities of **iPPOS** and help you familiarize with the use of the application.

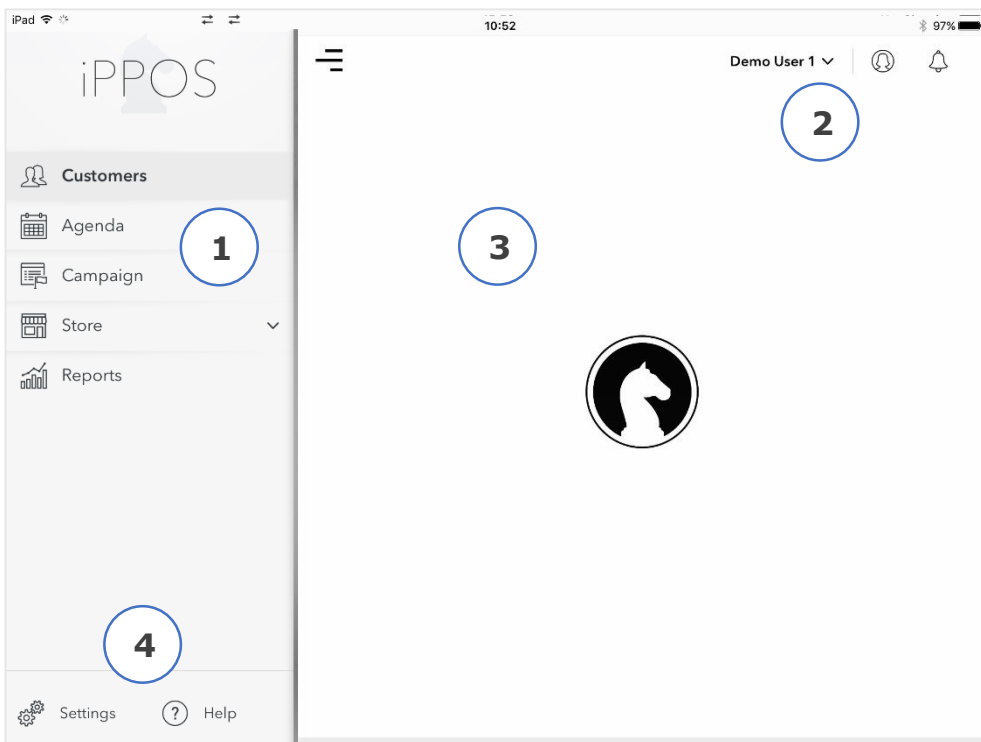
SECTION 2




NAVIGATION BASICS

This section provides an overview of the navigation elements in iPPoS v.3.4.

The key elements of the iPPoS Home screen layout are highlighted on the below figure, as follows:

- 1 Main Menu:** Allows the user to quickly access all the basic modules e.g. customers, agenda.
- 2 User Menu:** It provides a fast way to access the user profile, the logged in user/users screen and the notifications.
- 3 Main Screen:** Displays each functionality's screen, allowing the user to proceed with the required actions.
- 4 Tools:** Grants access to the settings menu and the user's guide



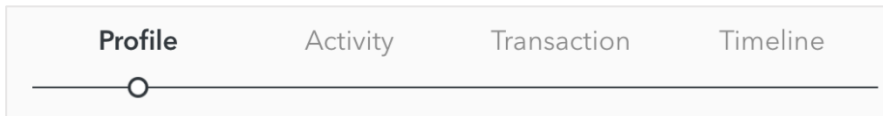
To ensure maximum functionality, the application requires stable connection! The  icon (upper left side of the screen) indicates that the connection is successful, while the  icon, indicates that it is unsuccessful. The  icon indicates that initialization is being performed. Once the icon disappears, the initialization has been completed.

SECTION 2

NAVIGATION BASICS

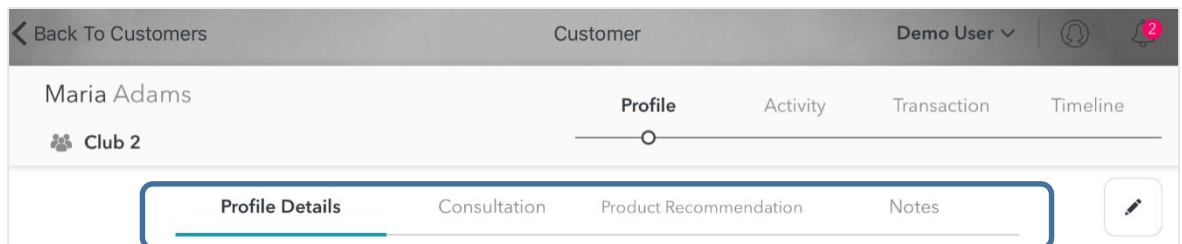
Tab Bar

The Tab Bar gives access to the functionalities of a module. For example, on the Customer screen it allows navigation, through the customer's profile, activities, transactions and timeline tabs.



Segment Bar

The segment bar gives access to the sections (segments) of each tab. For example, the segment bar in a customer's Profile includes: Profile Details, Consultation, Product Recommendation and Notes.



Flash messages

Flash messages are used by iPPoS to notify you about something important or irreversible. For example, a flash message will appear if the mandatory fields have not been filled in or if the user's confirmation is necessary.

EXAMPLE

Close Shift Do you want to close last shift?	
YES	NO

error No Records Found!
OK

SECTION 2

NAVIGATION BASICS

Below you can find the description of the icons and buttons that are used in iPPOS. Certain icons transfer the user to a new screen. To close the new screen tap on the same icon again.



Open/Close the Main Menu.



Do not forget to maximize the Main Screen, in order to access all iPPOS functions (search, add customer, transactions, etc.).



Opens a list in the direction of the arrow.

The list may appear either as a new screen or as a drop down list. To close the list tap on the arrow with the opposite direction.



Gives access to the available functions of a record e.g. editing or adding notes.



Add/view notes.



Open/Close the more information section of a record.



Add a record e.g.: new customer, appointment or a new sales transaction.

SECTION 2

NAVIGATION BASICS



Displays the edit screen of the record.



Clear/cancel.



Search records.



Clear search criteria



Displays the advanced search screen that includes additional filters.



Scan barcodes with the iPad's camera.



Just Me



Store

Select to view results from store or from the user.



Search for records on a list.




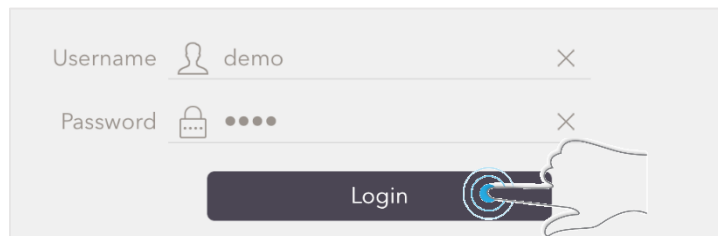
Monthly view of the calendar.

SECTION 3

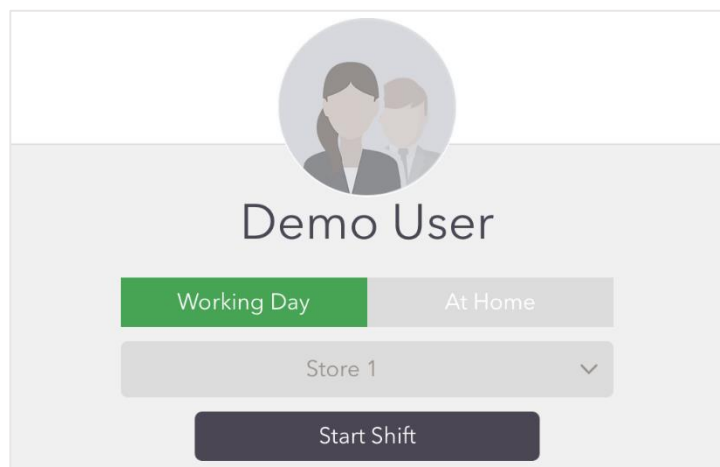
LOGIN

Follow the below steps in order to log in to iPPOS:

- 1 Open the iPad.
- 2 Tap on the  iPPOS icon.
- 3 Type your user name in the Username field.
- 4 Type your password in the Password field.
- 5 Tap on the Login button.



After successful login, the Start Shift screen is displayed.



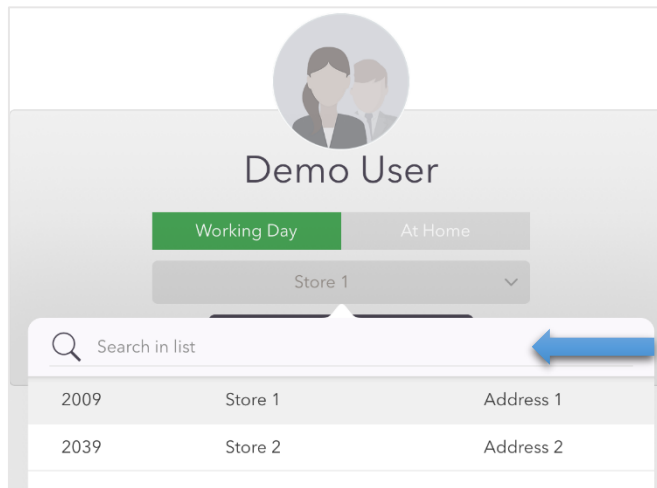
The username and the password are unique for each user and are provided by the user's Brand/ Company. If necessary, contact your supervisor to acquire them.

SECTION 4

START SHIFT: One user

Follow the below steps to Start Shift:

- 1 In order to display the list with the available stores, tap on the Store Field.
- 2 Select a store from the list or type part of the store's name or address in the search bar.



Search for a store or select it from the list





The user's Company can decide to associate the user with one or more stores. In this case, the store field will display ONLY the associated stores.

- 3 Tap on the required store. The selected store line is highlighted with grey color.
- 4 Tap on the field Start Shift.



On the Start Shift screen, there are 2 additional buttons, related to the shift's type:

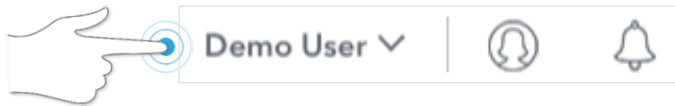
-  **Working Day:** gives access to all the necessary functions for a working day at the store. Default option.
-  **At Home:** allows the user to view data (e.g. reports, sales, appointments) when they are not at the store.

SECTION 5

START SHIFT: Multiple users

After the 1st user has started a shift, subsequent users should follow the below steps in order to start their shift:

- 1 Tap on the connected user field (top right corner of the screen).

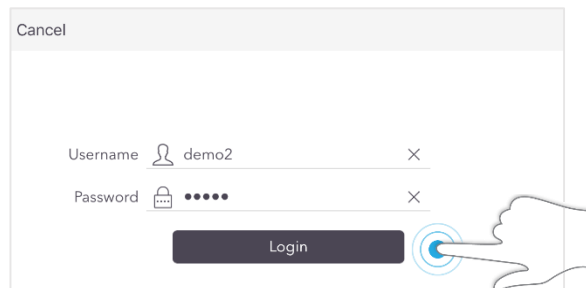


- 2 On the new screen tap on the **+** button next to the connected user/users.

- 3 Type the Username.

- 4 Type the Password.

- 5 Tap on Login.



- 6 On the new screen, tap on Start Shift. Note that the Store field is deactivated, since the 1st user has already selected the store.



Before registering a transaction, select the correct user! Tap on the user field (top right corner of the screen). On the new screen, tap on the required user to select it.

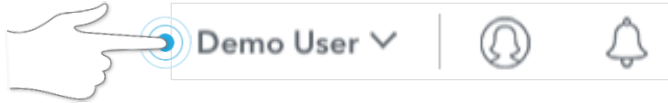
SECTION 6

END SHIFT

When a user has finished their working shift, they should always end their shift by following the below steps:

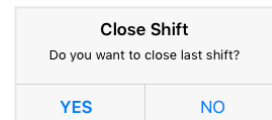
One User

- 1 Tap on the user name field (top right corner of the screen)



- 2 On the new screen, tap on the **End Shift** field.

- 3 On the flash message that appears, tap YES.

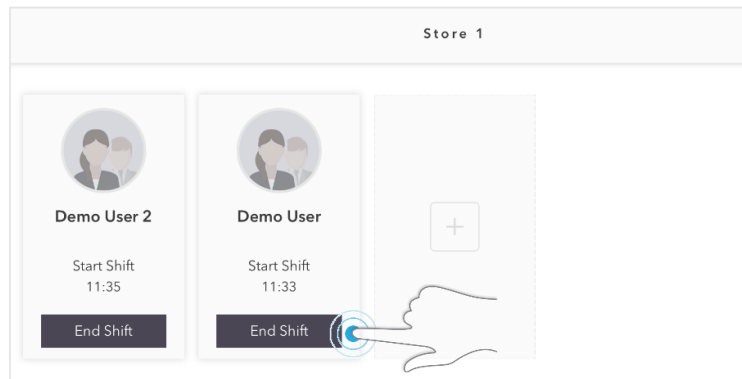


After ending your shift the application will close automatically.

Multiple Users

- 1 Tap on the user name field (top right corner of the screen).

- 2 Select the corresponding user and tap End Shift.



- 3 On the flash message that appears, type the password and then tap on Done.



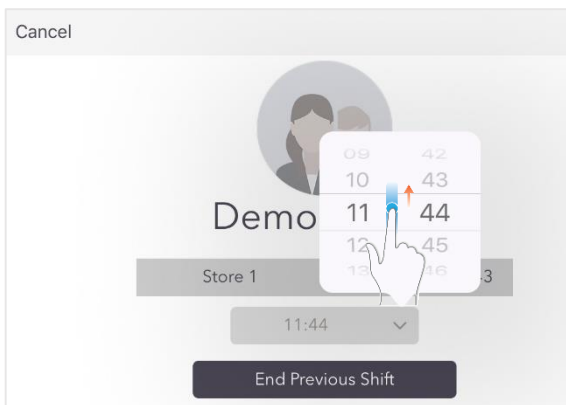
The user that remains logged-in can continue to use iPPoS.

SECTION 7

END PREVIOUS SHIFT

If the user forgot to end their shift, on the next login, a message for ending their shift will appear. Follow the below steps in order to end the previous shift:

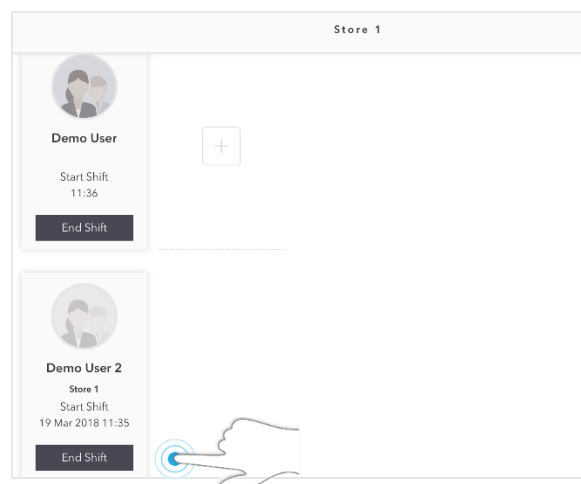
- 1 On the message screen, tap on the hour 16:15 field.
- 2 On the screen that appears, scroll to set the correct hour and minutes that the shift ended.



! Tap on an empty space of the screen to close the time selection screen.

- 3 Tap on the End Previous Shift button.

! After tapping the user Demo User field, if an image of an old user appears (that forgot to end shift), tap on the corresponding user field, adjust the hour and then tap Done.



SECTION 8

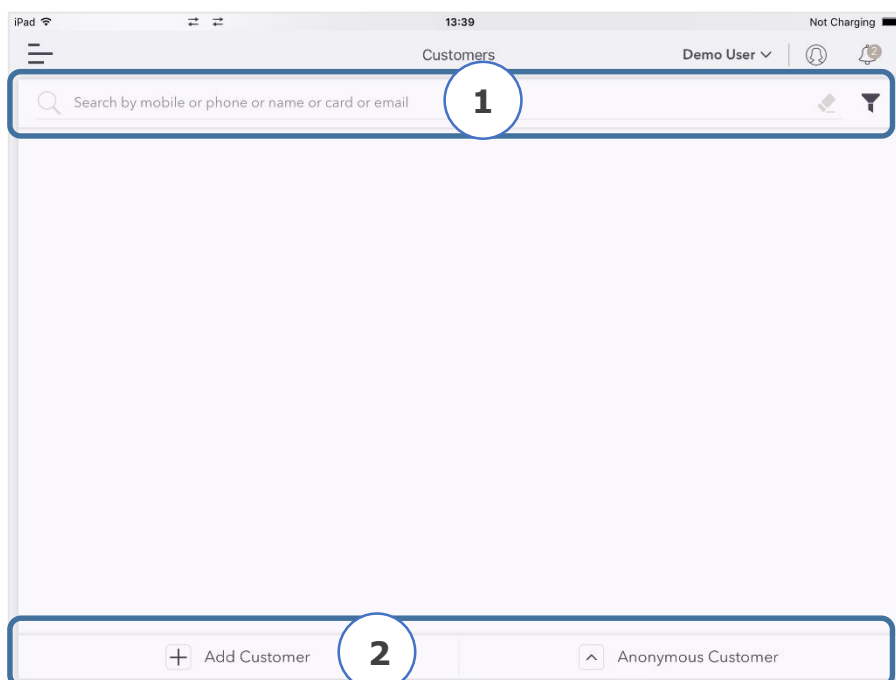
CUSTOMERS

The Customers module allows to:

- ➊ add a new customer
- ➋ search an already registered customer
- ➌ view and/ or edit customer's personal details, consultation and recommended products
- ➍ add and edit notes
- ➎ view the customer's history of transactions and activities
- ➏ add a transaction (sales, returns, customer order, loyalty point exchange)
- ➐ add and/ or edit an activity
- ➑ view the customer's timeline.

The key elements of the screen are the following:

- 1** Search Bar: allows the quick or advanced search of an already registered customer.
- 2** Bottom Bar: allows to add a customer, register a transaction or an activity to an anonymous customer.



SECTION 9

ADD A NEW CUSTOMER



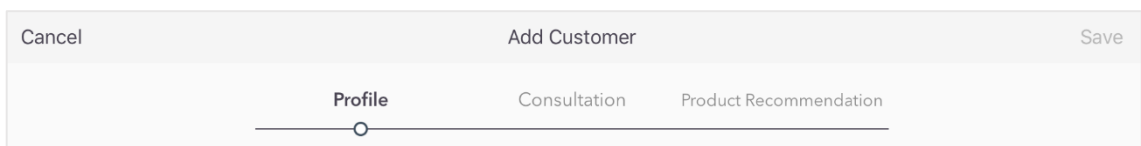
MANDATORY: Search for the customer before starting the registration process, in order to verify that they are not already registered! See page 30 on searching for registered customers.

Follow the steps below, in order to add a new customer:

- 1 On the Main Menu tap on the Customers field.
- 2 On the bottom bar, tap on the field Add Customer.
- 3 Tap on the corresponding Club, in order to select it (if club functionality is available).



- 4 On the tab bar, tap on the section from which you prefer to start the registration process (profile, consultation or product recommendation).



- 5 After adding all the required information tap Save to register the new customer.



See further details about the available tabs:

→ [Profile: page 17](#)

→ [Consultation: page 25](#)

→ [Product Recommendation: page 27](#)

SECTION 9

ADD A NEW CUSTOMER

Profile:

On the Profile Screen, the user can add the customer's personal details (name, mobile, address, etc.) and notes about the customer.

Follow the below steps:

- 1 Fill in the fields under the Personal Details section

The screenshot shows the 'Add Customer' screen with three tabs: 'Profile', 'Consultation', and 'Product Recommendation'. The 'Profile' tab is active, showing a progress indicator. Under the 'Personal Details' section, there are five input fields: 'Title' (with a dropdown arrow), 'First Name', 'Last Name', 'Email', and 'Signature' (with a dropdown arrow). Each field has a small icon to its left: a person for Title, First Name, and Last Name; an envelope for Email; and a signature line for Signature.



The fields that are displayed, are determined by the Brand/Company.

- 2

Tap on the More Details or Notes section, to add further information.

- 3

After adding all the required information, tap Save (top right corner of the screen).



Some fields are mandatory (e.g. First & Last Name, one contact channel, Terms and Signature). If the mandatory fields are not filled in, a message appears, indicating the fields that the user has to fill in before saving. The mandatory fields are determined by the Brand/Company.

The screenshot shows a 'Required Fields' dialog box with 'Close' and 'Save' buttons. It lists the mandatory fields: 'Title' (with a dropdown arrow), 'First Name', and 'Last Name'. Each field has a small icon to its left: a person for Title, First Name, and Last Name.

SECTION 9

ADD A NEW CUSTOMER

Profile: field management

The types of the fields, that the user has to fill in, are the following:

📄 Free Text Fields: e.g. first & last name, email.

Tap on the field in order to type the required information.

EXAMPLE

First Name  First Name Type the customer's First Name



Note that in case the e-mail address is not in the correct form (e.g. demo@demo.com), a message is displayed, warning you that the email address is invalid.

 Invalid email address!

📄 Fields with arrow icon

Tap on it to display:

- a new screen where the user can select from a list, e.g. title, communication language, etc.


EXAMPLE

Title  Mrs  >



< Title

Q Search

Mrs	
Miss	
Mr	

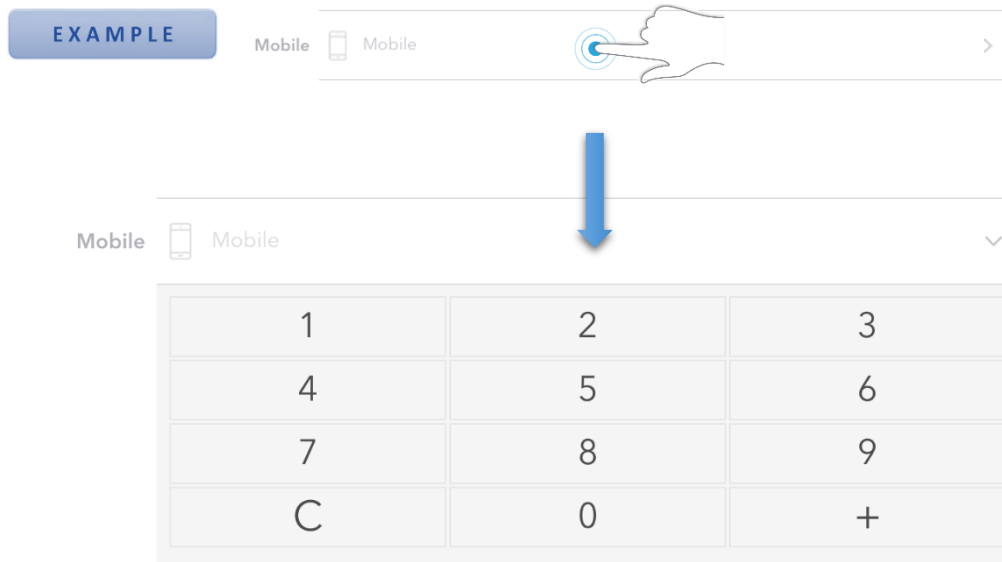


On the Preferred Store Field the user can select multiple stores based on the customer's preferences.

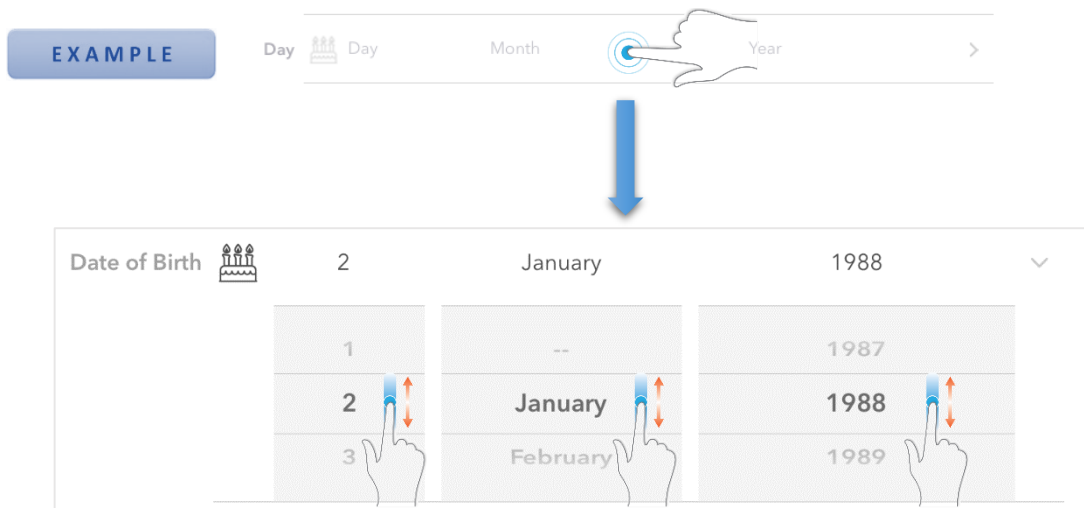
SECTION 9

ADD A NEW CUSTOMER

- a calculator screen in order to type numbers e.g. mobile, phone number etc. Tap on the on the C button to correct an entry.



- a date selection list where the user can scroll up or down to select the required date e.g. date of birth.



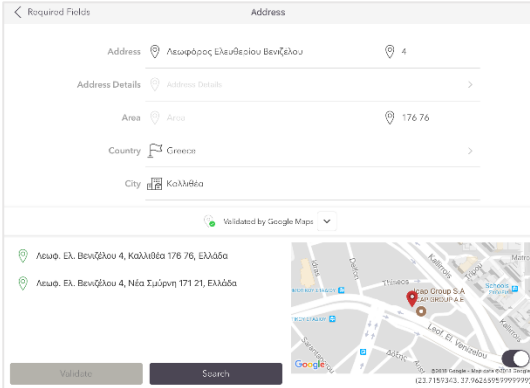
Fill in the field Year ONLY if the customers give this information by themselves! DO NOT ask for this specific information!


SECTION 9

ADD A NEW CUSTOMER

Address:

Tap on the address field, in order to add and validate the customer's address by following the below steps:



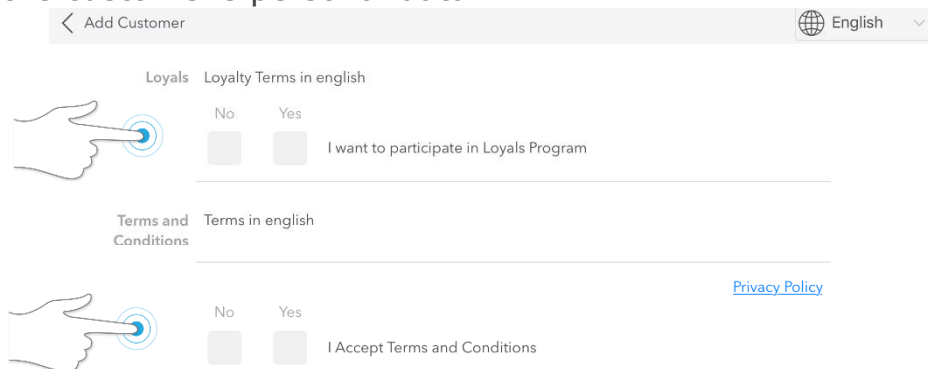
- 1 Type the address details.
- 2 Tap on Search on the iPad's keyboard.
- 3 Select the correct address from the displayed list.
- 4 Tap on the  icon to return to the previous screen.



On the country field, the user's country is set as the default country. If necessary, tap on the field and select the required country from the displayed list. In case the specified address is not found, but the user and customer are certain that it is the correct one, tap on the Validate button.

Terms and Signature

- 1 Tap on the field, and guide the customer in order to read and accept or decline the company's Terms and Conditions regarding the customer's personal data.




The field can be set to be displayed as the initial step in the customer registration process based on the Company/Brand's preferences. The available terms and fields in the Terms and Signature screen are determined by the Company/Brand.

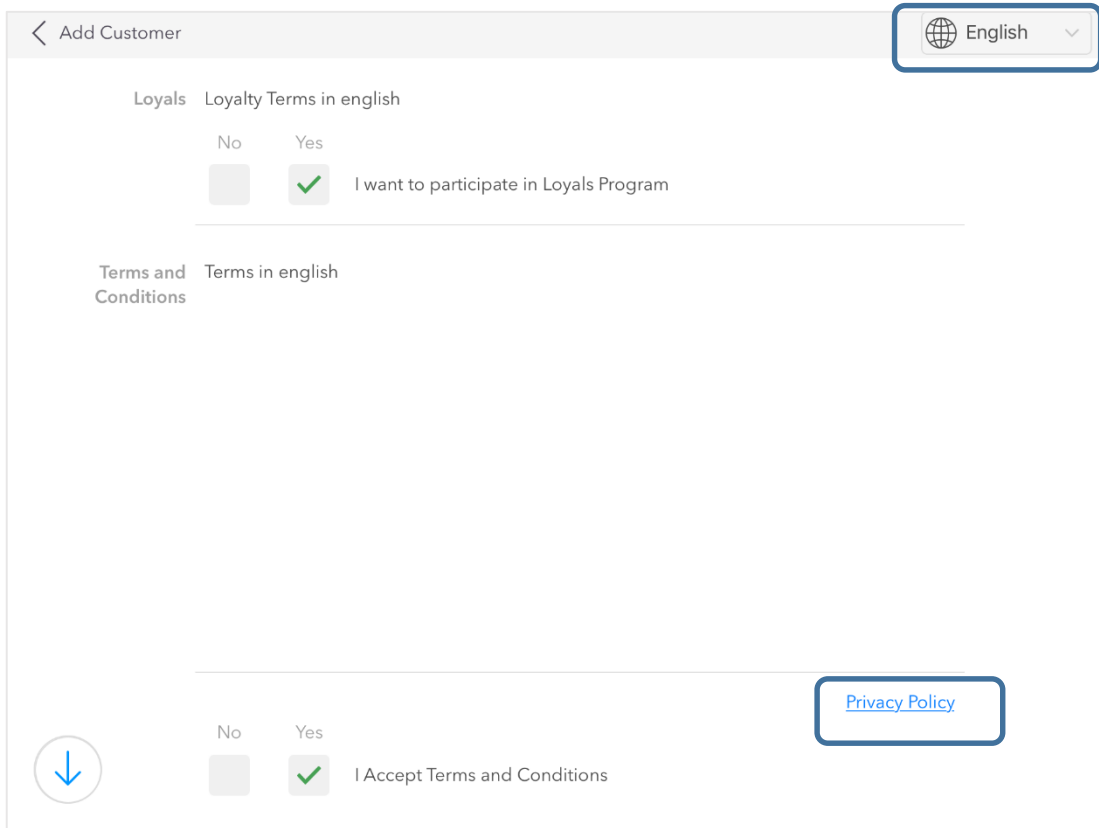
SECTION 9


ADD A NEW CUSTOMER



→ Tap on the Language field  in order to change the language of the Terms and Signature screen.

→ Tap on the Privacy Policy link [Privacy Policy](#) in order to view the company's Privacy Policy.



- 2 Tap on the  icon. If the customer has accepted the Terms and Conditions, Guide the customer to read the contact channel terms.

Privacy Policy.' Below the text is a horizontal line." data-bbox="111 805 916 910"/>

SECTION 9

ADD A NEW CUSTOMER

Afterwards, guide or ask the customer in order to select all/none of the below contact channels or specify the preferred contact channels.



In order for the contact channels to be available, they must be already filled in, on the customer registration form.

Add Customer English

Contact Channels By marking any of the following boxes, I agree that the Company (and/or its affiliates) may send me tailored information about products and services, events, client programmes and other activities based on my interests. I agree that my overall electronic interaction with the Company's content will be analysed using cookies and similar technologies. To find out more about cookies and data processing activities, please consult our [Privacy Policy](#).

☐ None of the below

☒ All of the below

Select one or more contact channels:

☒ E-Mail


☐ Post

☒ Mobile

☒ Other Electronic Communication

If the customer has declined the Terms and Conditions proceed to step 3, since the contact channel options will not appear.

3

Tap on the  icon and guide the customer to submit their digital signature.

Add Customer English

I hereby confirm the following information I provided is accurate, , Email : demo@demo.gr, Address : Address No: Zip:City Mobile : 6999999999, Phone : .

Signature Please draw your signature in the box below: Clear

Or capture the signature using the camera

SECTION 9

ADD A NEW CUSTOMER



→If the customer is not satisfied with their signature, before Saving, tap on the Clear button and afterwards, the customer can submit a new signature.

→In order to return to the Add Customer screen, tap on the < Add Customer button. If the customer has not submitted their signature but certain selections have already been recorded, a confirmation message will appear. Tap on continue in order to delete all selections in the Consent & Signature screen.

→The fields can be set as mandatory. As a result, if the customer does not agree on these fields the registration cannot be completed.

4

After the customer has submitted their digital signature, tap on the < Add Customer button on the top left corner to save the selections in the Consent & Signature screen and return to the customer registration form.



The Terms and Signature field displays whether the customer has given consent, signed, as well as the contact channels for which they have given their consent.

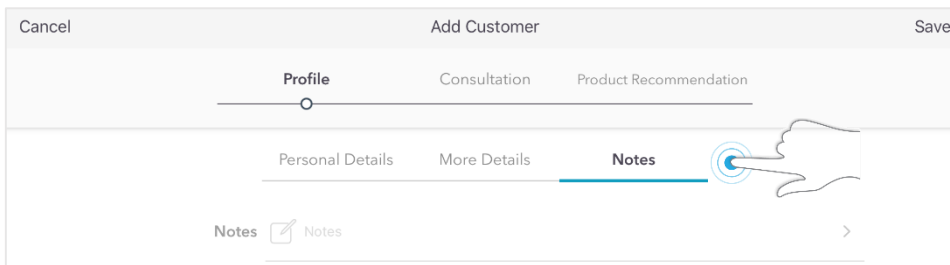
SECTION 9

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Notes:

Follow the below steps in order to add notes about the customer:

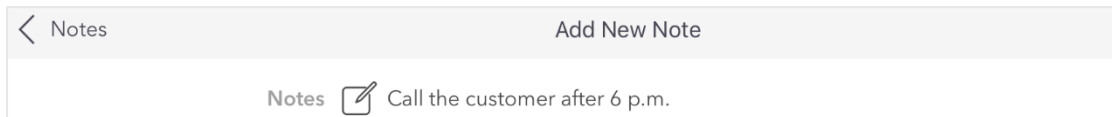
- 1 Tap on the notes section.



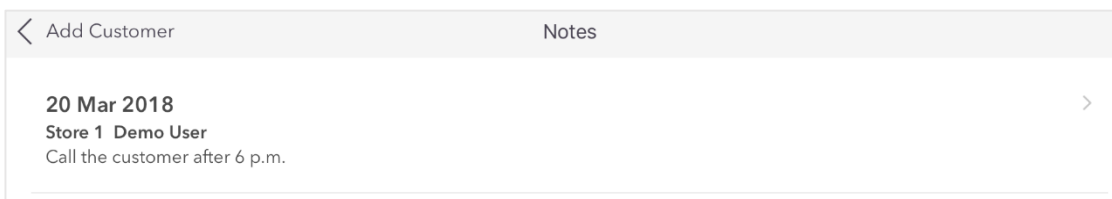
- 2 On the new screen that appears, tap on the Notes Field.

- 3 On the next screen, tap on the **+** button.

- 4 Tap on the Notes field and type the note.



- 5 Tap on the **<** icon to return to the Notes screen. The note is displayed on the screen.



On the above screen, to delete a note swipe from right to left and tap on Delete. To edit a note, tap on it. Users are able to delete/edit ONLY the notes they have created.

SECTION 9

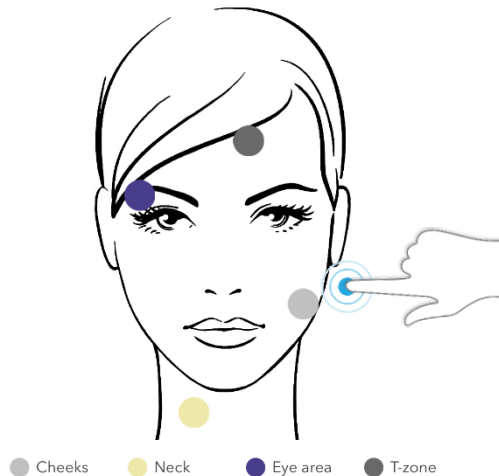
ADD A NEW CUSTOMER

Consultation

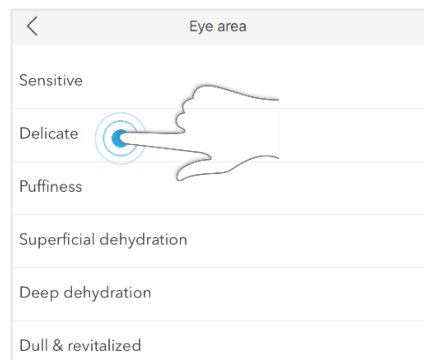
The Consultation screen allows to add customer characteristics (e.g.: skin type, skin needs, priorities, preferences etc.).

Follow the steps below, in order to add a new customer:

- 1 On the Add Customer tab bar, tap on the Consultation field.
- 2 On the Image section, tap on the corresponding area, e.g. eyes, cheeks, neck etc., in order to add the customer's skin type, skin condition etc.



- 3 On the displayed list, tap on the suitable field, in order to select the corresponding values.






- 4 Tap on the arrow < icon to return to the Image section. If necessary, repeat steps 2 and 3 in order to specify the customer's characteristics for a different area.

SECTION 9

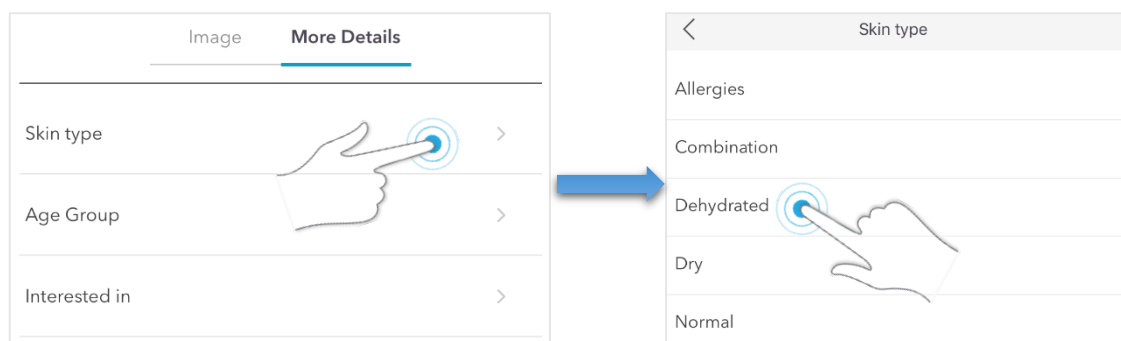
ADD A NEW CUSTOMER



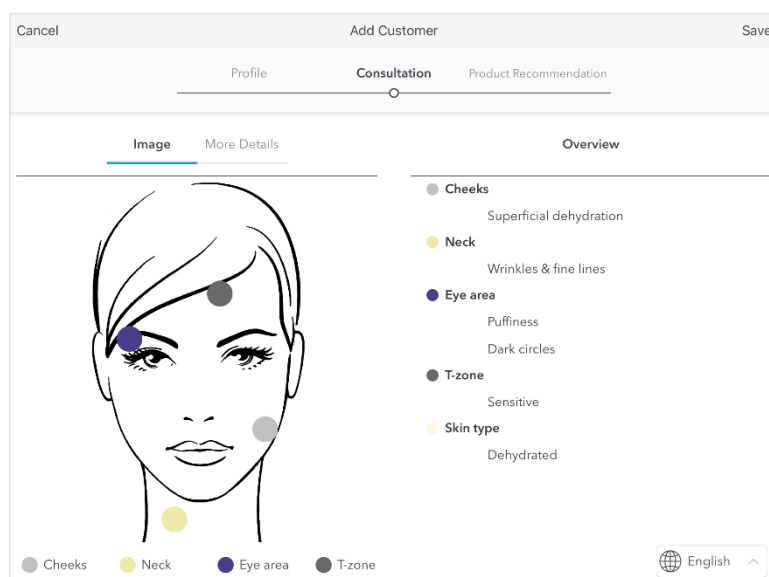
Tap on the  icon to add more details. Type the necessary information and then tap the arrow  icon to return to the previous screen. The note icon is displayed on the consultation overview. Tap on the  icon to view the notes.

5

Tap on the More Details section, to add more information (e.g. age, preferences, needs etc.). Tap on the corresponding field and select the required values.



After adding all the required characteristics, the overview of all selections is displayed, on the right side of the screen.



Note that some of the displayed lists allow multiple selection.

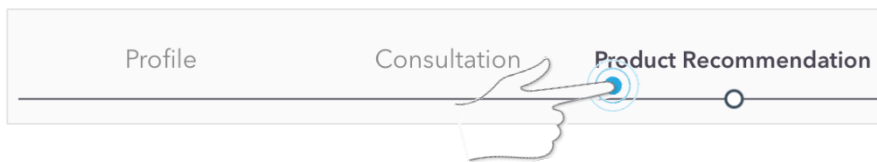
SECTION 9

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Product Recommendation

Product Recommendation (PR) gives the possibility to recommend products to a registered customer by adding them on a list. In addition, iPPoS allows the user to send the selected products to the customer via e-mail. Follow the steps below, in order to manage product recommendation:

- 1 On the tab bar, tap on the Product Recommendation field.



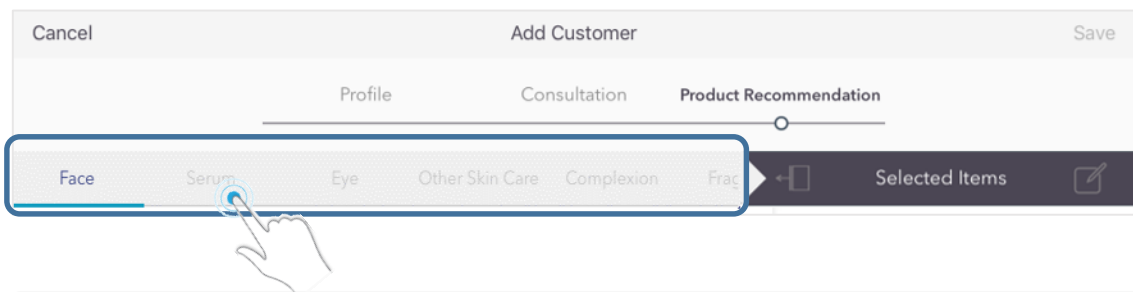
- 2 On the new screen that appears, select the suitable group (if group functionality is available).

EXAMPLE



! The groups that are displayed are determined by the Brand

- 3 Select the suitable category of products from the tab bar.



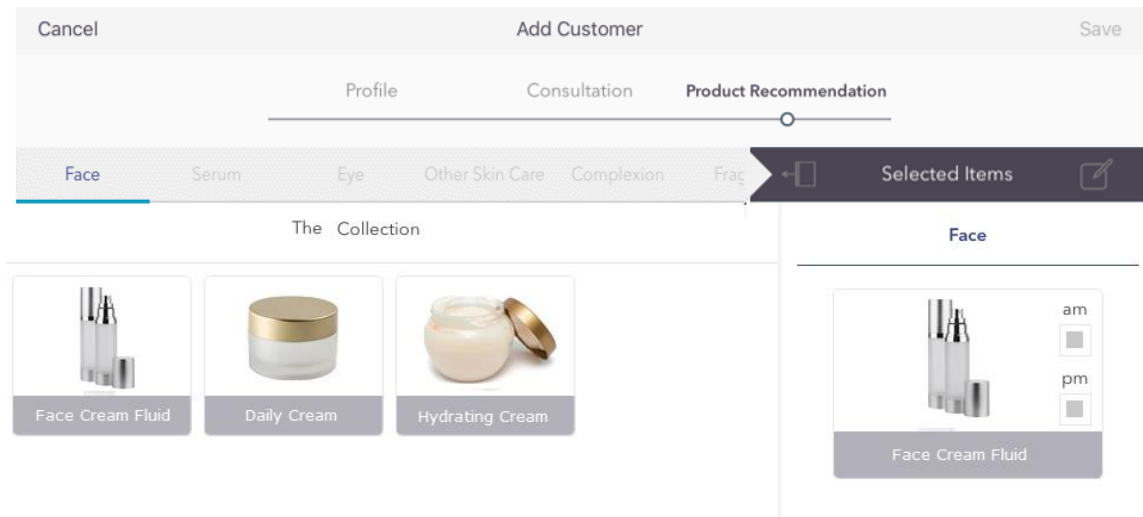
! Swipe on the line to access all the available categories.

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ADD A NEW CUSTOMER

4

Tap on the required products. The selected products will be added on the right side of the screen, under the Selected Items section.



If needed, deselect the am or pm option by tapping on the corresponding field.

In order to view the full description, tap on the product's description line.



The user can change the product category, during the products selection (e.g. select a product from Serum category and then tap on Eye category to select another product).



1) Tap on the or icon to maximize or minimize respectively the screen.

2) Tap the icon, to add notes.

3) In order to deselect the product, tap again on the product image that is located under the Selected Items field.

SECTION 9

ADD A NEW CUSTOMER

E-mail the product recommendation to the customer:

After filling in all the required fields in Profile, Consultation and Product Recommendation tabs, tap on Save to complete the customer's registration. The below message will appear:

Customer Registration
Do you want to send an email with the recommended products?

NO	YES
----	-----

Tap Yes in order to send to the customer an e-mail with the recommended products. Note that the e-mail address is required in order to send the PR.

Cancel

Product Recommendation

Send

To: support@futuresoft.gr

Cc/Bcc:


Subject: Product Recommendation


Dear Charlotte Kennedy,
E-mail text, determined by the Brand/ Company

a.m.

p.m.

serum





Tap to send the e-mail

After reviewing the contents of the e-mail tap on Send.

SECTION 10

SEARCH FOR A REGISTERED CUSTOMER

Quick Search

- 1 On the Main Menu tap on the Customers field.
- 2 On the Search box type the search criteria (first or last name, mobile, phone number etc.).



Use the customer's phone or mobile number, in order to limit the results! Note that this requires the number to be already registered during the customer's registration process.

- 3 On the iPad's keyboard tap on the Search button, in order to receive the result list.

Customers				Demo User ▾		
<input type="text" value="maria"/>						
Maria Adams 6938986971 support@futuresoft.gr England				Club 2	VIP	5.867 Loyals
Maria Dirk mdirk@abc.com England				Club 2	Prospect	0 Loyals
Maria Katsarou				Club 2	Loyal	0 Loyals


On a customer's line the following information is available:

- Basic contact information.
- Address.
- Club.
- Segmentation level (e.g. VIP).
- Points gathered through purchases (if point functionality is available).
- The icon appears if it's the customer's birthday.
- The icon appears on the left of the line if one of the mandatory fields (determined by the Brand/Company) has not been filled in.
- The icon appears when the customer's consent is invalid.

SECTION 10

SEARCH FOR A REGISTERED CUSTOMER

Advanced Search

- 1 On the Main Menu, tap on the Customers field.
- 2 Tap on the  icon, to display the search criteria.
- 3 Fill in the required criteria (address, first name, phone etc.) or scan the customer code (if applicable).




Combine the search criteria in order to limit the results, e.g. type part of the customer's first name and address.

- 4 Tap on the Search field, in order to receive the result list.




→ Scroll up/down to view more search criteria.

→ In order to close the advanced search screen tap again on the  icon.

→ From User/Store button: turn on the switch in order to search for customers registered by the selected user / in the selected store.



The application, according to the Brand/Company's preferences, can hide customers' contact details if they have been registered on a different store than the user's. The details will be displayed with asterisks (***) to protect the data. The contact details of customers for which they have not given communication consent, will appear with asterisks regardless of registration store. The  icon indicates the lack of consent.

SECTION 10

SEARCH FOR A REGISTERED CUSTOMER

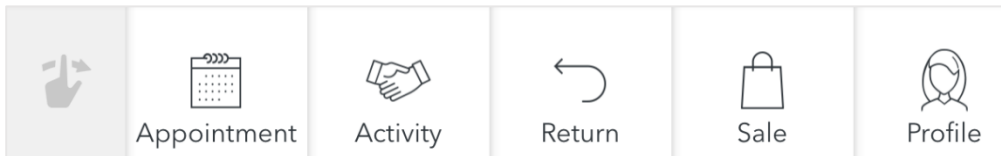
After receiving the results (through quick search or advanced search) tap on a customer's line. The application offers two options:

- Swipe the customer's line to the left to quickly access the Appointment, Activity, Sale or Profile sections.
- Automatically open the customer's Profile.

The user can select their preferred option from the application's Settings menu. To activate the automatic redirection to the customer's Profile by tapping on the customer's line see page 89. The Brand/Company can select which option should be set as the default.



The Quick Access Menu facilitates the quick registration of appointments, activities and sales.



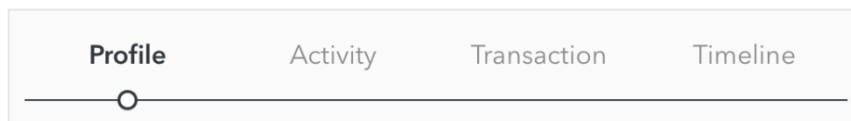
Through the automatic redirection to the customer's profile by tapping on their line, the user can access quickly the customer's details and have an overview of their history.

SECTION 11

CUSTOMER OVERVIEW

The Customer's overview allows the user to:


- access the customer's profile (personal details, consultation etc.),
- view/edit the customer's activities and view their transaction history.
- add a new activity or transaction.
- view the customer's timeline.



Profile: Personal Details

Tap on this section to access the customer's personal details. Note that the email field of a customer that has given consent to communication via e-mail, as well as the field of a valid address, will be highlighted in green font.



Tap on the pencil  icon in order to edit the corresponding section and/or add more information.

SECTION 11


CUSTOMER OVERVIEW






The displayed information is determined and can be hidden based on the Company’s policy.


if data protection is activated, the user can view and edit the contact details, only if they are logged in to the customer’s preferred store. The contact information will be displayed with asterisks (***) to users logged in to different stores than the customer’s preferred store.

If data protection is deactivated, the user can view and edit the contact details of the customer while logged in to any store.



The Terms and Signature field displays a brief summary of the customer’s selections. Tap on the  icon to view the registration history of the consent and signature.

Consent & Signature   Has given consent  Signed  Mobile, Email 



Close


GDPR History

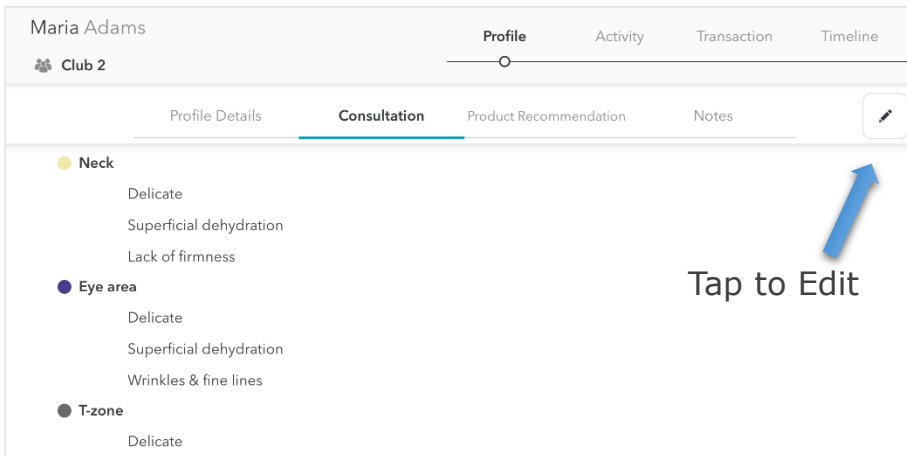
Date	Store	User	Terms and Conditions	Preferred Communication	Signed
20 Apr 2018 11:42	Store 1	Demo User	Terms in english	Email	Yes

SECTION 11

CUSTOMER OVERVIEW

Profile: Consultation

Tap on the Consultation section to review and/ or edit the details about the customer's needs, preferences etc. In order to edit or add information, tap on the pencil  icon and follow the steps described at page 25.



Maria Adams
Club 2

Profile Activity Transaction Timeline

Profile Details Consultation Product Recommendation Notes


Neck
Delicate
Superficial dehydration
Lack of firmness

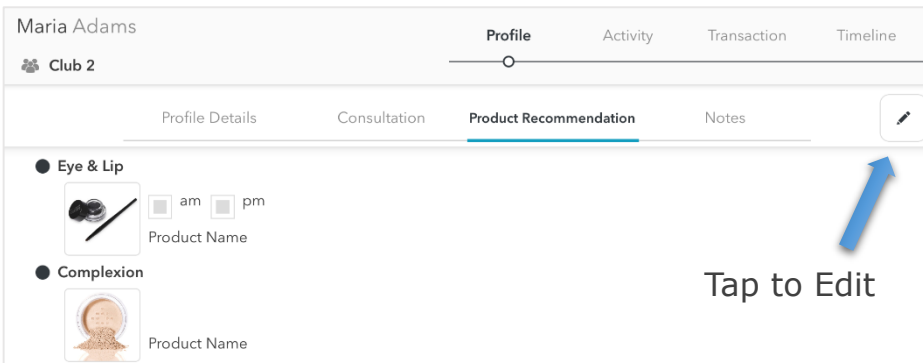
Eye area
Delicate
Superficial dehydration
Wrinkles & fine lines

T-zone
Delicate

Tap to Edit

Profile: Product Recommendation

Tap on the Product Recommendation section to review and/ or edit the recommended products. Tap on the pencil  icon and follow the steps described at page 27.



Maria Adams
Club 2

Profile Activity Transaction Timeline


Profile Details Consultation Product Recommendation Notes

Eye & Lip
am pm
Product Name

Complexion
Product Name

Tap to Edit



Tap on the  icon that appears on the edit screen, in order to send the recommended products to the customer, via e-mail.

SECTION 11

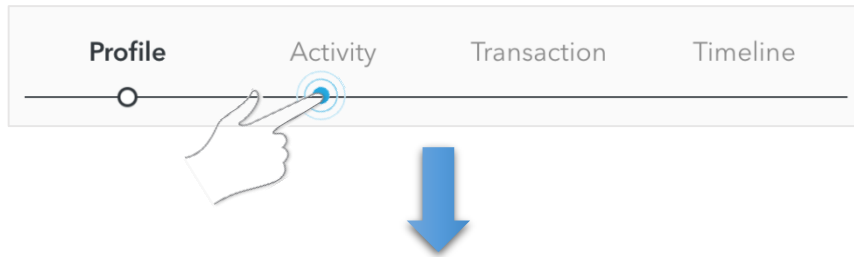
CUSTOMER OVERVIEW

Profile: Notes

Tap on the notes section to review, edit and/ or add notes about the customer.

Activity

Activities are services provided, either when customer is at the Point of Sales (Instant Service) or scheduled for a future time (Appointments). In order to review the customer's activity history, tap on the corresponding field on the tab bar. See how to add an activity on page 41.



Maria Adams

Profile

Activity

Transaction

Timeline

Club 2

Appointment

Call

Instant Service

Other

Date	Type of Activity	Sales	Status
<div><div></div><div>15 Mar 2018 10:00</div></div>	Service 4	<div>...</div>	<div><div>▼</div><div>Completed</div><div><div></div></div></div> <div><div></div></div>
<div><div></div><div>14 Mar 2018 11:00</div></div>	Service 3	<div>...</div>	<div><div>▼</div><div>Pending</div><div><div></div></div></div> <div><div></div></div>
<div><div></div><div>7 Mar 2018 14:00</div></div>	Service 5	<div>...</div>	<div><div></div><div>Canceled</div><div><div></div></div></div> <div><div></div></div>



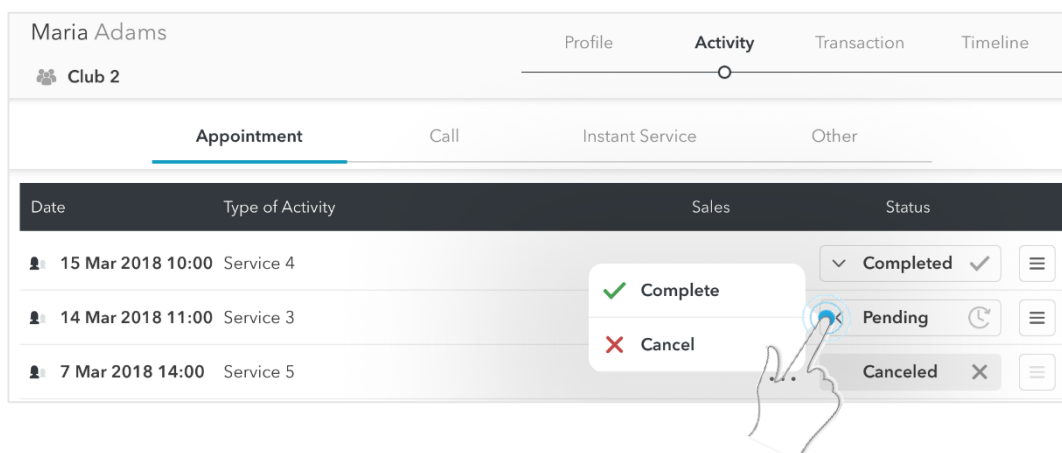
On an activity's line the user can:

- Tap on the status button to edit the activity's status (see next page)
- Tap on the ≡ icon to edit the activity
- Tap on the ■ ■ ■ icon to view more details about the activity.

SECTION 11

CUSTOMER OVERVIEW

Status Button: Tap on the status button in order to complete or cancel an activity.



- 📌 **Appointments:** the default status is Pending. The user can either Complete the appointment or Cancel it.
- 📌 **Instant Services & Calls:** the default status for instant services is Completed and for Calls, Contacted. The only allowed action is to set the status as canceled.



Tap on the **+** button to add a new activity. Then, select the required type of activity.



In case you have changed the appointment's status to Completed by mistake, tap again on the status bar to undo it.



Undo Status



Completed



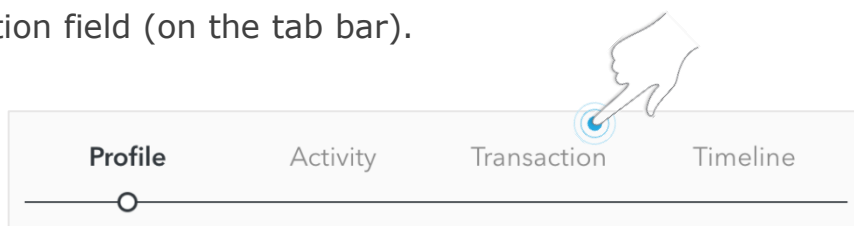
Afterwards, you can type the reason for undoing.

SECTION 11

CUSTOMER OVERVIEW

Transaction

In order to review the customer's transaction history, tap on Transaction field (on the tab bar).



Tap on the ■■■ icon to view more details.

Tap on the + icon to add a new transaction.

Maria Adams		<div> <div>Profile</div> <div>Activity</div> <div>Transaction</div> <div>Timeline</div> </div>			
Club 2		<div> <div>Purchases</div> <div>Pending Orders</div> <div>Exchanges</div> </div> <div>All</div>			
Date	Code	Description	Quantity	Value	
22 Mar 2018	00000002	Product name	1,00	100,00	... 25
Store Store 1		Notes	Price 100,00	Life cycle	
Justification			% Disc 0,00		
User Demo User			Gift 0,00		
22 Mar 2018	00000002	Product name	1,00	120,00	... 25
22 Mar 2018	00000004	Product name	1,00	100,00	... 25
22 Mar 2018	00000005	Product name	1,00	100,00	... 25

The Transaction tab includes the below segments:


- Purchases. In this section, the customer's purchase history as well as the offered samples are displayed.





The product's life cycle **25** is displayed on the right of the line, indicating the estimated number of days until replenishment.

SECTION 11


CUSTOMER OVERVIEW



 Pending Orders. The customer’s history of orders, that have not been converted yet into a sale, is displayed.




To convert a customer order into a sale, on the Sales screen (see section 13), tap on the  icon at the top right corner. Afterwards, tap on the Convert Order Field and select the order for conversion. Finally, tap again on the  icon to convert the order and return to the Sales screen.

 Exchanges. The customer’s history of point exchanges is displayed.

To add an exchange, tap on the  button and then select Exchange.

Cancel			Exchanges			Save		
Club 2 - Loyals: 6.217			150 Exchanged					
Available Gifts			Selected Gifts					
Description	Loyals		Description	Qty	Loyals			
 Search in list			Club 2					
06000000 Product name	50		07000000 Product name	1	50			
09000000 Product name	100		08000000 Product name	1	100			
10000000 Product name	150							



At the left side of the new screen, the items available for exchange are displayed, as well as their cost in points. The user can also search for items in the list through the search bar. The selected items are added to the list on the right side. The customer’s points and the cost in points of the selected items are displayed on the top left corner. After selecting the items to be exchanged, tap on Save. The company/Brand can choose to enable mandatory address validation. In this case, tap on the  icon at the top right corner of the screen and fill in the address.

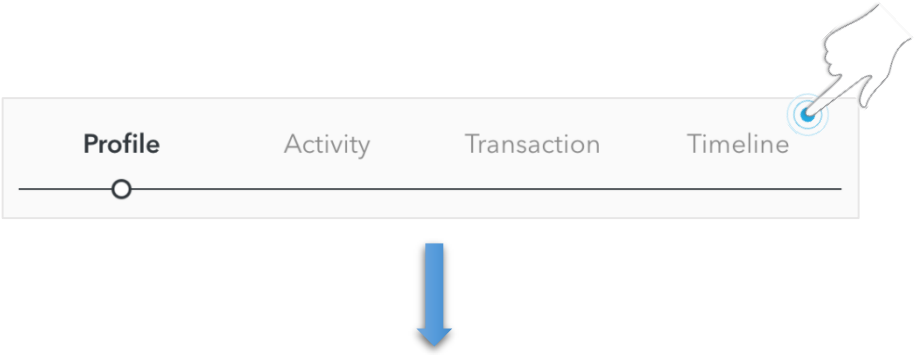
SECTION 11

CUSTOMER OVERVIEW

Timeline

The customer’s Timeline displays a chronological history of their transactions, product recommendation, point exchanges, consultation changes, activities (appointments, calls, instant services etc.), allowing the user to view and understand the customer’s purchase behavior. Furthermore, at the bottom right corner of the screen, the customer’s registration date is displayed.

To access the customer’s timeline, tap on the field Timeline (on the tab bar).



Maria Adams

Club 2

ProfileActivityTransaction**Timeline**

Last Month

7 Feb 2018 15:03

Product Recommendation
Group 1

More Info.
Modified Recommendation

7 Feb 2018 14:47

2 Months ago

Appointment
Service 11

✓

31 Jan 2018 10:00

Purchased Products
Product name

More Info.
Quantity : 1.0 - Value : 100.0

24 Jan 2018 14:30

Exchanges
Product name
... 1 more

More Info.
Quantity : 2.0 - Loyals : 200.0

24 Jan 2018 14:25

REGISTRATION DATE: 21 APR 2017

SECTION 12

ADD AN ACTIVITY

Follow the below steps to register an activity for an already registered customer:

- 1 Search for the customer, tap on their line/swipe the line to the left and tap on Profile.
- 2 On the tab bar, tap on the field Activity. The customer's history of activities is displayed.

Maria Adams

Profile

Activity

Transaction

Timeline

Club 2


Appointment

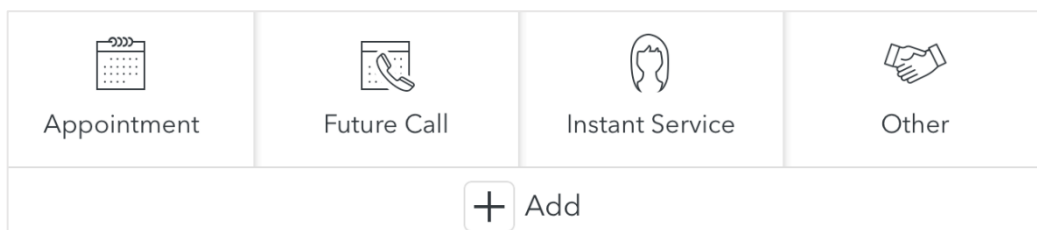
Call

Instant Service

Other

Date	Type of Activity	Sales	Status
<div><div></div>15 Mar 2018 10:00</div>	Service 4	<div>...</div>	<div><div>Completed</div><div></div></div>
<div><div></div>14 Mar 2018 11:00</div>	Service 3	<div>...</div>	<div><div>Pending</div><div></div></div>
<div><div></div>7 Mar 2018 14:00</div>	Service 5	<div>...</div>	<div><div>Canceled</div><div></div></div>

- 3 Tap on the  Add button at the bottom of the screen.
- 4 Select a type of activity from the pop-up menu.

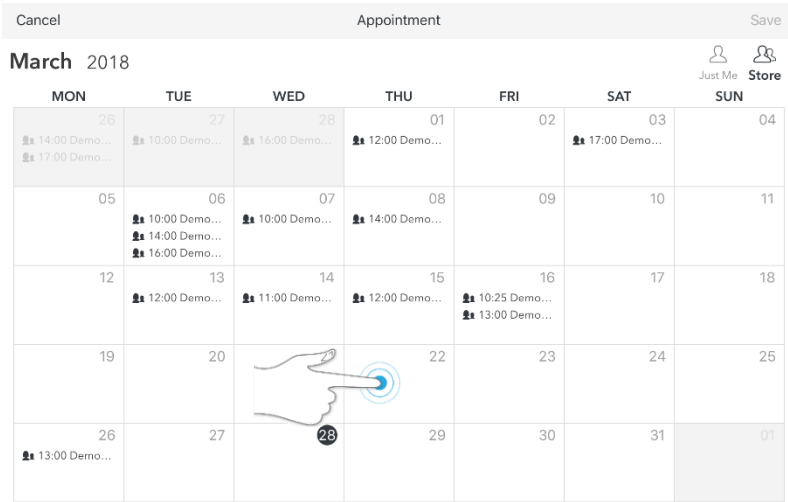


SECTION 12

ADD AN ACTIVITY

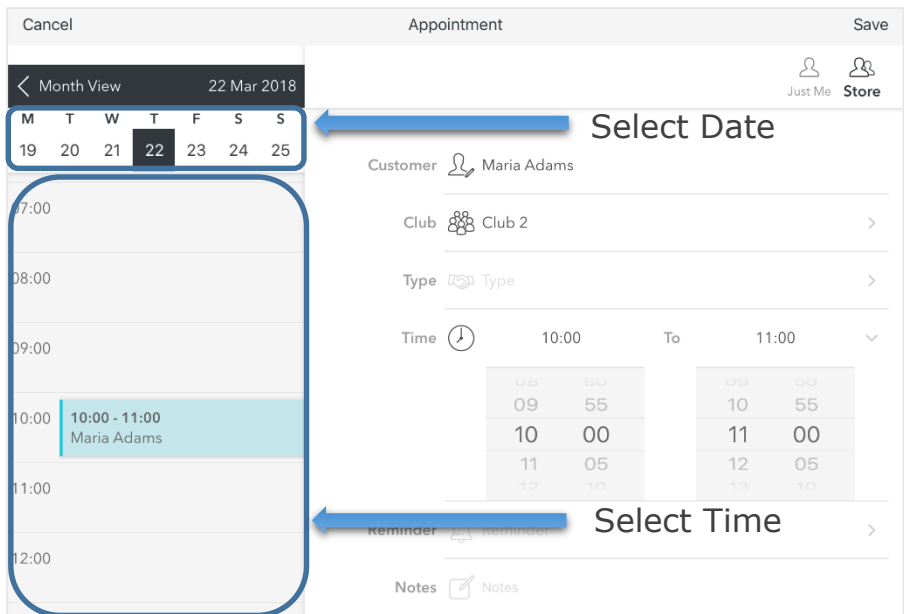
- 5

If you selected an appointment, the registered appointments of the current month will be displayed on a monthly calendar. Tap on the required date to add an appointment.



On the top right corner, tap on Just Me or Store to view the registered appointments of your user or all the users that have logged in the store respectively.

After tapping on a date, on the left side of the new screen, the user can check the availability, change date and quickly set the appointment's time.



SECTION 12

ADD AN ACTIVITY



In the application's Settings (see page 90) a switch is available to activate/deactivate the automatic redirection to the monthly calendar when adding an appointment.

The duration of the activity is 1 hour by default. Change it manually by tapping on the suitable Time fields.

Time 11:31 To 11:32 >

6

Fill in the necessary fields (when adding an appointment they are located on the right part of the screen).

Cancel New Activity Save

Activity Activity >

Club Club 2 >

Type Type >

Date 27 Mar 2018 >

Time 11:31 To 11:32 >

Notes Notes



The fields are similar for all activities (appointment, calls, instant service). The only difference lies in the Type field that will display the corresponding values for each type of activity.

Club: Tap on the field and select the suitable Club (if Club functionality is available).



In case only one Club is available, the field will be filled automatically.

Type: Tap on the field and select the suitable type of activity.

SECTION 12

ADD AN ACTIVITY

Reminders: Tap on the field to set reminders before the appointment. On the new screen that appears, select from the existing options (e.g. 1 week, 1 day, 5 min., etc) or set a custom time period for the reminder. Note that multiple selection is available.

Appointment

Reminder

Minutes/Hours

Days/Weeks

15 Min

30 Min

1 Hour

2 Hours

1 Day

3 Days

1 Week

2 Weeks

Apr

12

Set a custom reminder

Custom

Remind me

Minutes

before

Minutes

Hours

Days

Weeks

0

1

2

3

4

5


6

7

8

9

C

 A notification, that will remind you about the booked appointment, is displayed, even if the iPad is idle and/ or iPPoS application is closed.

Appointment
26 Mar 2018 12:20
Service 5
Maria Adams
21061072222
[Slide for more](#)

SECTION 12

ADD AN ACTIVITY

7 After filling in the necessary fields, tap Save.

Cancel

New Activity

Save

Activity

Instant Service

Club

Club 2

Type

Service 6

Date

26 Mar 2018

Time

12:20

To 12:45

Notes

Notes



The booked activity appears on the customer’s overview.

Maria Adams

Club 2

ProfileActivityTransactionTimeline

AppointmentCallInstant ServiceOther

Date	Type of Activity	Sales	Status
26 Mar 2018 13:00	Service 3	...	Pending
26 Mar 2018 12:20	Service 5	...	Canceled



In order to add an activity to an anonymous customer tap on the corresponding field (bottom bar of the Customers screen). Select Appointment or Instant Service, fill in the necessary fields and tap Save.

Anonymous Customer

Appointment

Instant Service

Return

Sale

Add Customer

Anonymous Customer

SECTION 12

ADD AN ACTIVITY

Quick activity registration

If the quick access menu is activated (see page 89 on how to activate) follow the below steps to quickly register an activity to an already registered customer:

- 1 Search for the customer, tap on their line, swipe to the left and select Appointment or Instant Service.

- 2 On the new screen, select the required Type of the appointment or instant service.
- 3 Tap on the field and select the suitable Club (if Club functionality is available).



In case only one Club is available, the field will be filled automatically.


- 4 Select Type, Date, Time, add notes (if necessary) and finally, tap Save.

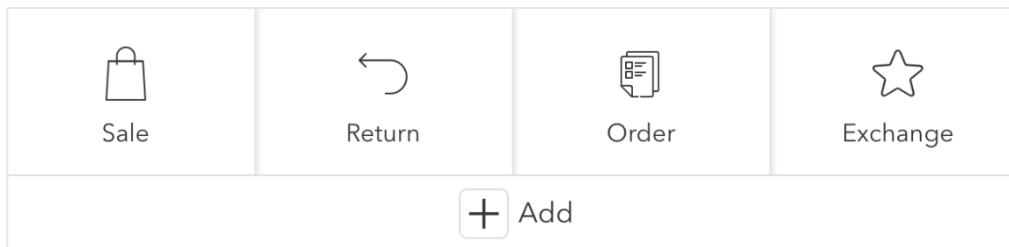
SECTION 13

REGISTER A TRANSACTION

Follow the below steps to register a transaction (sale, return, order) to a registered customer:


Quick Search: Scan Items

- 1 Search for the customer and open their profile.
- 2 On the tab bar, tap on the Transaction field.
- 3 Tap on the  Add button and select the type of transaction.



- 4 Aim the scanner at the barcode and press the scanner's (+) button. If needed, scan more items.



You can also scan the barcode by tapping on the  icon and aiming the iPad at the barcode. To exit camera scan mode tap outside of the camera screen.

- 5 After adding all the required items, tap Save and then Yes on the Save transaction message that appears.



A saved transaction cannot be modified. See page 81 for further information on how to cancel a saved transaction.

SECTION 13

REGISTER A TRANSACTION

Quick Search: Search Bar

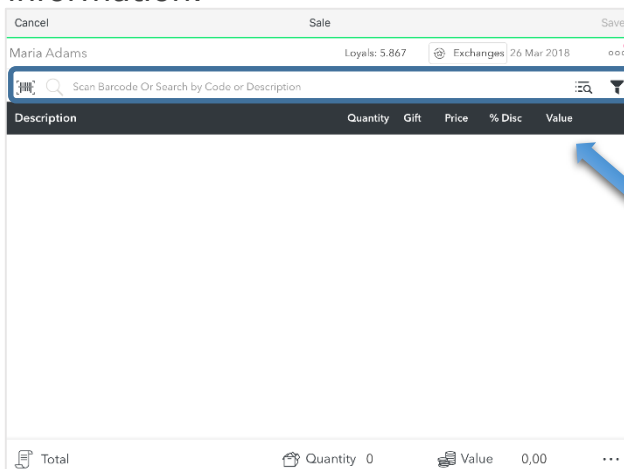


Use this option if you can not scan the barcode (e.g. the scanner is not available).

Steps 1 to 3 are the same with the Scan process (see page 47).

4

On the Search Bar type the item's barcode, code or description. You can also type a part of the above information.



Search/View Products
or Samples



If you are using a scanner device, press the minus (-) button to open/hide the iPad's keyboard!

5

On the iPad keyboard tap on the Search button. If the search result is a single item, it is added automatically to the list. If the search results are multiple items the user has to select the required items on the new screen that appears (see next page for item selection).



Delete/remove a product from the list: Swipe the product's line (from right to left) and then tap Delete.

6


After adding all the required items, tap Save and then tap Yes on the Save transaction message that appears.

SECTION 13

REGISTER A TRANSACTION

Advanced Search

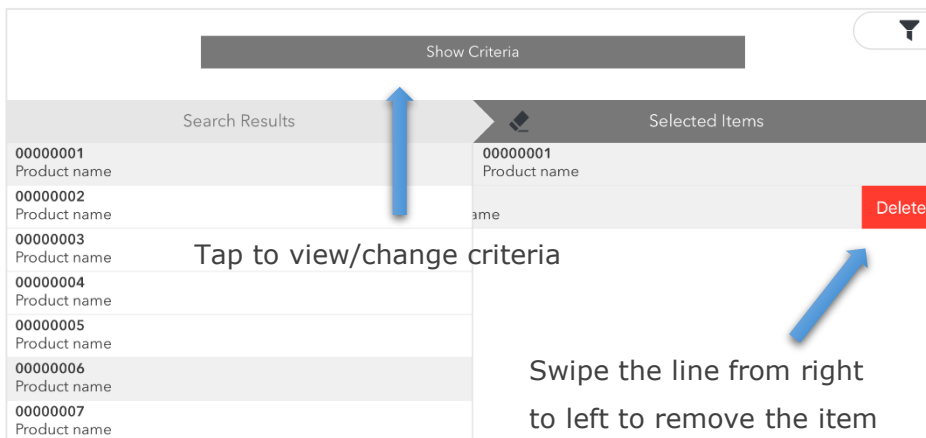
Steps 1 to 3 are the same with the Scan process (see page 47).

- 4 Tap on the advanced search icon , to display the criteria screen.




Combine the search criteria in order to limit the results, (e.g. select brand, item category etc.)

- 5 Tap on the Search field, in order to receive the list with the results.
- 6 Tap on the product's line in order to select it. The selected product is displayed under the Selected Items section



The screen allows multiple selection of items. In addition, it gives the possibility of changing the search criteria, during the product selection process.

- 7 After adding all the required items, tap on the  icon and then save the transaction.



In case the application is terminated unexpectedly while registering a transaction, a message to restore the unsaved transaction will appear when the user re-enters the same transaction screen (on the same client).

SECTION 13

REGISTER A TRANSACTION

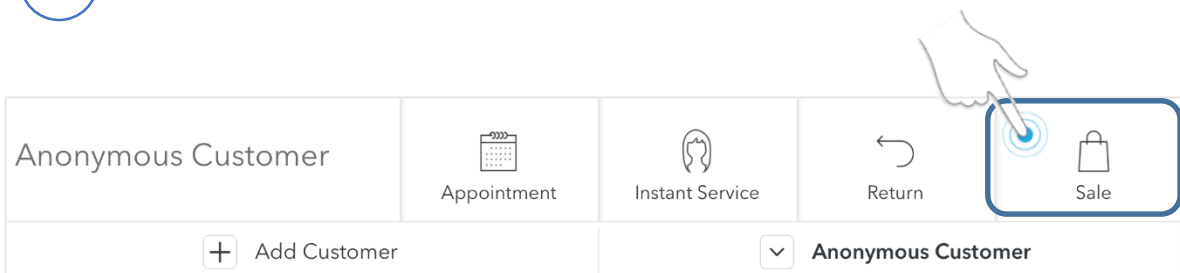
Anonymous Customer

Anonymous Customer is the customer who purchases products, but does not want to share their personal details or register to a club. Follow the below steps to register a transaction to an anonymous customer:

- 1 On the Customers screen tap on the Anonymous Customer field (bottom bar of the screen).



- 2 From the bottom bar that is displayed, select Sale.



- 3 On the Sales screen, scan or search for the required items to add them to the list, modify the quantities, tap Save and then tap Yes on the Save transaction message that appears.



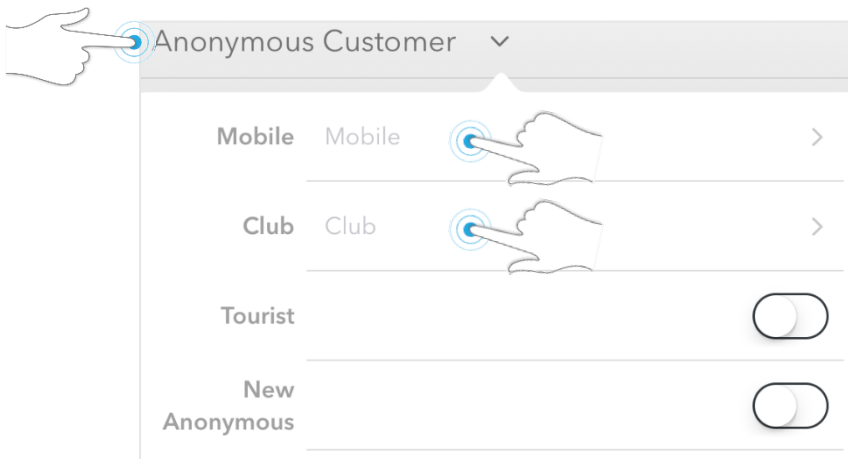
In case the user is unable to find a registered customer (e.g. due to lack of stable connection to the network) they can register a sale to an anonymous customer and link the sale to the registered customer through the Anonymous Customer field in the sale screen (see next page). After the sale is synchronized, it will be linked overnight to the registered customer.

SECTION 13

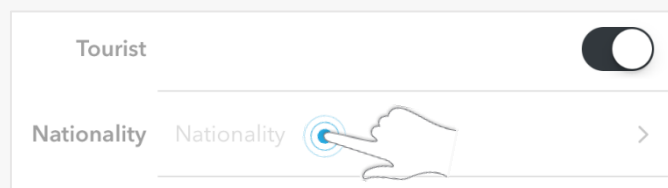
REGISTER A TRANSACTION

Follow the below steps to link an anonymous customer sale to a registered customer:

- 1 Tap on the Anonymous Customer field in the Anonymous Customer sale screen.
- 2 Tap on the mobile field and type the customer's mobile.
- 3 Tap on the club field and select the customer's club (if multi-club functionality is available).



The user can mark the Anonymous customer as a Tourist or New Anonymous by tapping on the switches. After activating the Tourist switch, the user can select the nationality by tapping on the respective field.



SECTION 14

EDIT A TRANSACTION

Before saving the transaction, the user can modify the item quantity, add or modify prices and/ or discounts, add a saleable product as a gift, add a justification and/ or add notes.



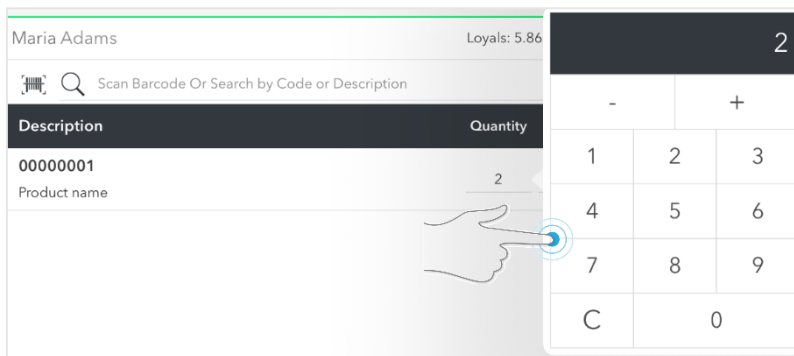
To change the date of the transaction, tap on the button at the top right corner. Then, tap on the Date of Transaction field and select the required date.

Modify the quantity, price, discount

- 1 After adding the item, tap on the required field (quantity or price or discount).

Description	Quantity	Gift	Price	% Disc	Value	
00000001 Product name	1	0	100,00	0,00	100,00	...

- 2 On the calculator screen that is displayed, type the corresponding value or tap on the + or – buttons to increase or decrease the value.



- 3 Tap outside of the calculator screen in order to close it. The modified value appears on the item's line. After modifying the values, save the transaction.



Modify/add data into the fields: Price, Gift and Discount, after receiving clear directions from the Brand/Company.

SECTION 14

EDIT A TRANSACTION

Add saleable product as a gift

- 1 Scan (or search) the product that will be given as a gift.
- 2 On the product's line tap on the Gift Field.

Description	Quantity	Gift	Price	% Disc	Value	
00000001 Product name	2	0	100,00	0,00	200,00	...

- 3 From the dropdown list that appears, select the quantity of the product that will be given as a gift (for example, to offer 1+1 gift with purchase, the Quantity of the product should be 2 and the Gift quantity should be 1).

Description	Quantity	Gift		Value	
00000001 Product name	2	0	<div>0</div> <div>1</div> <div>2</div>	200,00	...

! Add a product as a gift only after receiving clear instructions from your Brand/Company.

Add justification

- 1 On the product's line, tap on the ■■■ icon.
- 2 On the screen that is displayed, tap on the Justification field.
- 3 Select a justification from the dropdown list that appears.

Product name	Justification	Notes	Gift
	Justification	Notes	Self Purchase




! If necessary, tap on the Notes field and type a note about the specific item.

SECTION 15

AGENDA









The Agenda is a quick and easy tool to organize the user’s responsibilities for the selected time period. Through the Agenda, the user can view, organize or edit appointments, their to do list and their contact list.



- In each tab of the Agenda, the user can tap on the Όλα  field at the right side of screen, to filter the entries based on the status: Pending, Completed or All.
- Tap on the required Date to select it.
- Swipe the date bar to the left or to the right to change the selected week.
- Tap on the   icons to view information regarding your user or all users that have logged in to the store.

Summary

The Summary tab displays an overview of the booked appointments, to do list and contact list, for the selected time period.

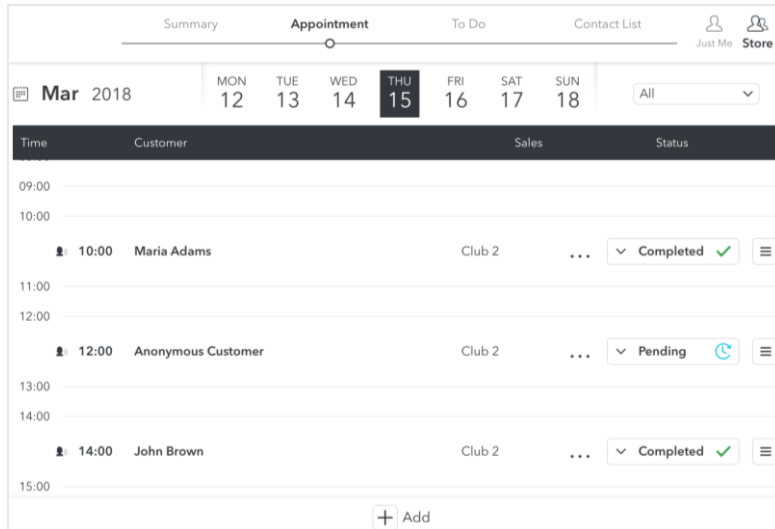
<div>Summary</div> <div>Appointment</div> <div>To Do</div> <div>Contact List</div>							<div> Just Me</div>	<div> Store</div>
Mar 2018	MON 12	TUE 13	WED 14	THU 15	FRI 16	SAT 17	SUN 18	<div>All</div>
Appointment		To Do			Contact List			
<div> 10:00 Maria Adams</div>		<div> New Product Launch</div>			<div> Birthday <div>1</div></div>			
<div> 12:00 Anonymous Customer</div>		<div> Inventory</div>						
<div> 14:00 John Brown</div>								


SECTION 15

AGENDA


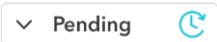

Appointment

On the Appointment screen, the user can review, edit, complete or cancel, the booked appointments.





Tap on the calendar icon  to change from weekly to monthly view and vice versa.

On the appointment screen, the user can tap on a date to display the booked appointments. On the appointment's line:



- Tap on the  icon, to view more information about the appointment.
- Tap on the status field  to complete or cancel the appointment.
- Tap on the  icon to edit the appointment, access the customer's profile or register the anonymous customer, link a sale to a completed appointment, register a new appointment.



In monthly view, 3 icons are available on the left of the appointment:

 Red indication:  Canceled

 Green indication:  Completed

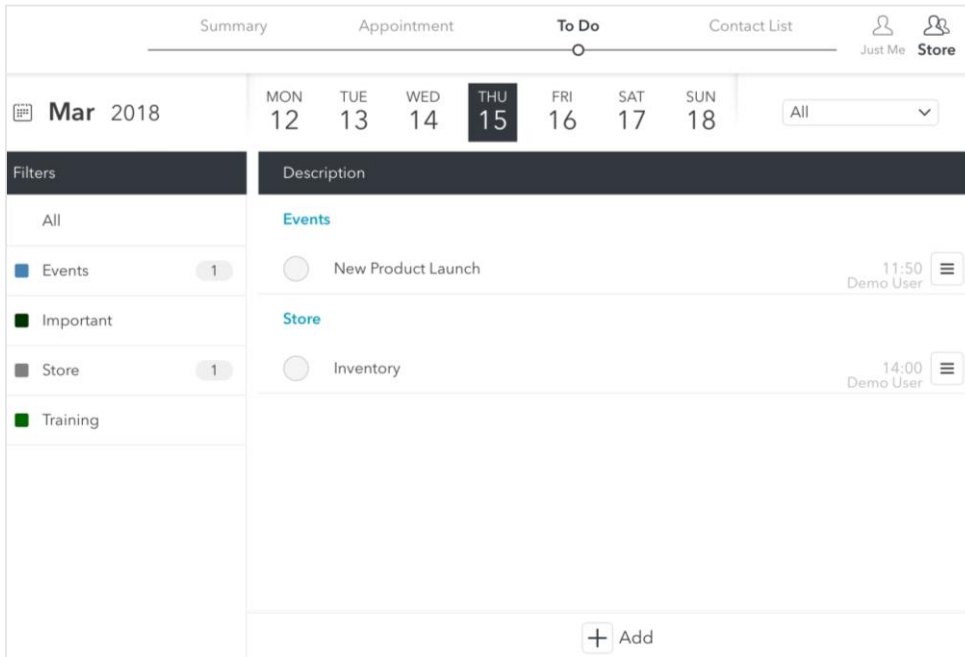
 No indication:  Pending

SECTION 15

AGENDA

To Do

On the To Do tab, the user can review, add, edit or cancel scheduled tasks.



Through the To Do list the user can:

- Add a new task by tapping on the button at the bottom of the screen.
- Select a date to view the scheduled tasks
- Manage a task by:
 - Tapping on the icon, to complete it. Tap on the icon to undo its completion.
 - Tapping on the icon on the right side of the task's line and selecting Edit or Cancel.



The task categories are displayed on the left side of the screen. The user can select the required category to filter the task results.

SECTION 15

AGENDA

Contact List

The Contact List tab displays a list of customers that were selected for a specific reason e.g. birthday, to offer them a service/product. The user can view the customers' preferred contact channels in order to contact them.

Summary		Appointment		To Do		Contact List		Just Me	Store
<div> Apr 2018 </div>		MON 02	TUE 03	WED 04	THU 05	FRI 06	SAT 07	SUN 08	All
Contact Reason	Customers		Preferred Communication		History		Status		
<div> Birthday <div>2</div> </div>	John Brown		Mobile		...		No Status <input type="checkbox"/>		
<div> Nameday </div>	Maria Smith				...		No Status <input type="checkbox"/>		

The user is able to:

- View the list of customers to be contacted on a specific date by tapping on the date.
- View the contact history by tapping on the icon on the customer's line.
- Select the contact method and modify the contact status by tapping on the status button.
- Add notes or access the customer's profile by tapping on the icon.



The contact reasons are displayed on the left side of the screen. The user can select the required reason to view the corresponding customers on the list.



The user is unable to add contact reasons and customers on the list. The contact list is generated automatically based on the Brand/Company's preferences.

SECTION 16

CAMPAIGN

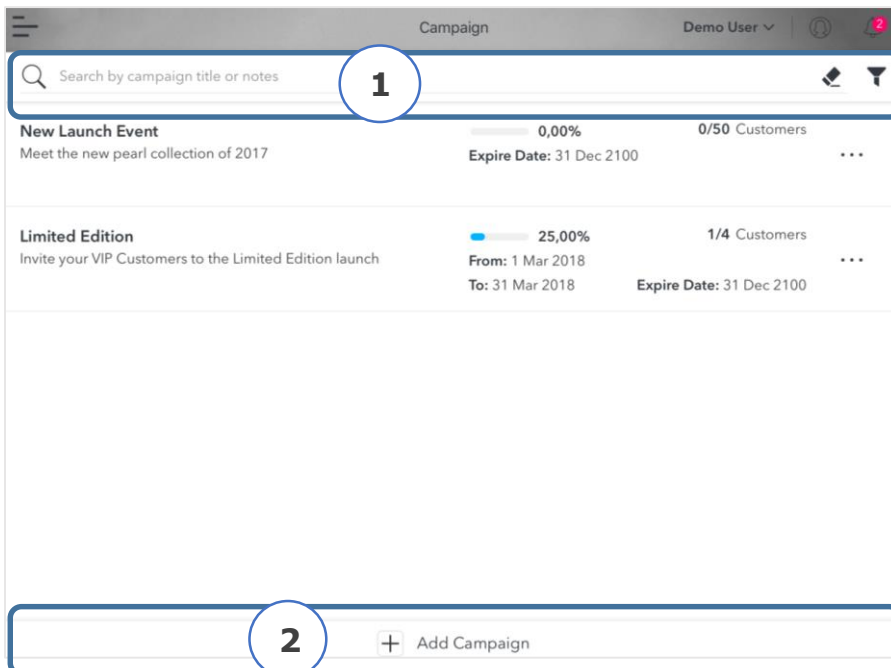
The Campaign module allows to automatically generate targeted customer lists, that will facilitate the contact with the customer. The user can create and execute a campaign, aiming to offer the highest quality of service to the customers and to increase sales.

For example, the user can create and execute campaigns in order to:

- 📧 inform customers about products replenishment, new launches, etc.
- 📞 call customers for birthday wishes
- 🔄 re-engage lapsed customers

The key elements of the screen layout are the following:

- 1 Search Bar: allows the quick or advanced search of an existing campaign.
- 2 Add Campaign: tap on the button to add a new campaign.



Tap on the ■ ■ ■ icon to view more information about the campaign as well as the selected criteria.

SECTION 16

CAMPAIGN

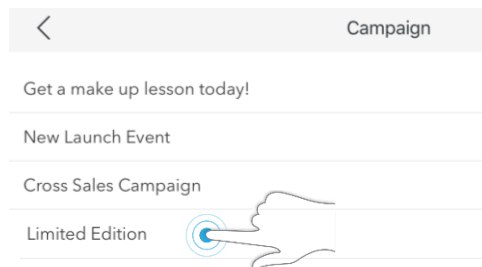
Add a new Campaign

Follow the below steps in order to add a new campaign:

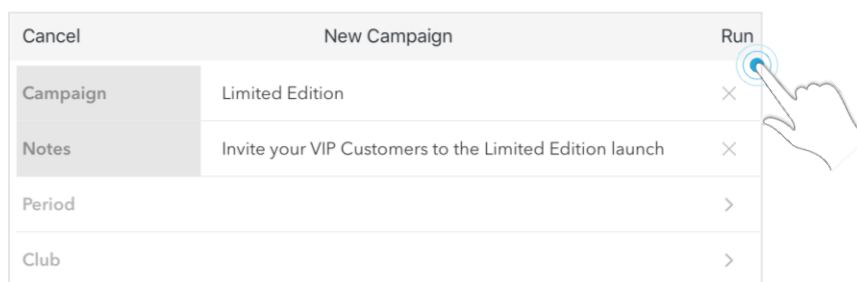
- 1 On iPPOS Main Menu, tap on the Campaign field.
- 2 On the new screen, tap on the Add campaign button (at the bottom) then, tap on the Campaign field.



- 3 On the predefined (by the Brand/ Company) list that appears, tap on the required campaign, in order to select it.



- 4 On the fields that are displayed, fill in the necessary criteria (only if the selected campaign includes criteria).
- 5 Tap on Run. The customer list will be displayed. Tap on Back to Campaign to return to the Campaign module main screen.



SECTION 16

CAMPAIGN

Manage a Campaign

After running a campaign, the generated customer list is displayed on the screen.

All No Status Interested Pending Not Interested					
Customer	Preferred Communication	Notes	History	Status	
CUSTOMER NAME 1	Mobile, Email, Post			Interested	
CUSTOMER NAME 10	Mobile			No Status <input type="checkbox"/>	
CUSTOMER NAME 5				No Status <input type="checkbox"/>	
CUSTOMER NAME 6	Email			No Status <input type="checkbox"/>	
CUSTOMER NAME 7		✓		No Status <input type="checkbox"/>	
CUSTOMER NAME 25	Email			No Status <input type="checkbox"/>	
CUSTOMER NAME 8	Mobile			No Status <input type="checkbox"/>	
CUSTOMER NAME 15				Pending	

In order to manage an already created campaign, tap on its line, in order to display the customer list.



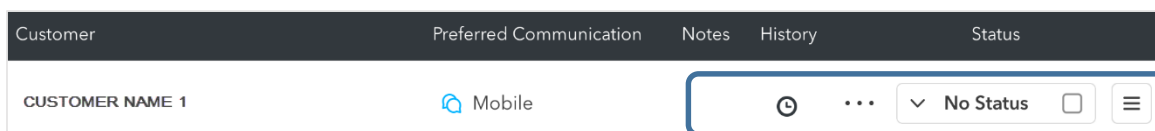
You can search for a campaign through the Search bar or by tapping on the icon to display advanced search criteria.

Campaign			Demo User	
Search by campaign title or notes				
New Launch Event Meet the new pearl collection of 2017	0,00% Expire Date: 31 Dec 2100	0/50 Customers		
Limited Edition Invite your VIP Customers to the Limited Edition launch	25,00% From: 1 Mar 2018 To: 31 Mar 2018	1/4 Customers Expire Date: 31 Dec 2100		

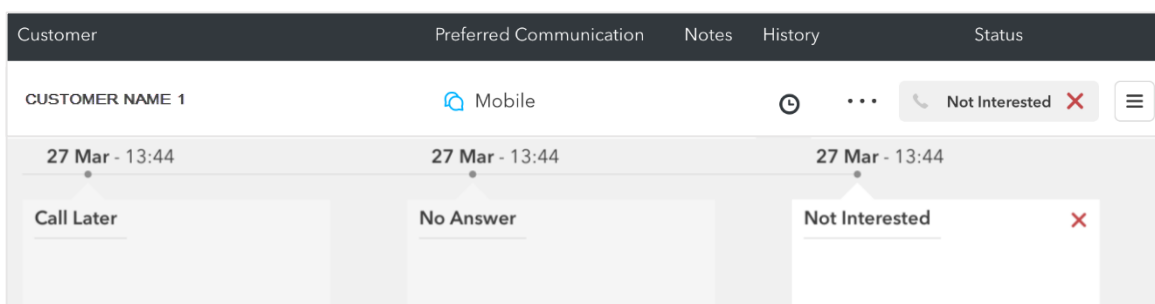
SECTION 16

CAMPAIGN

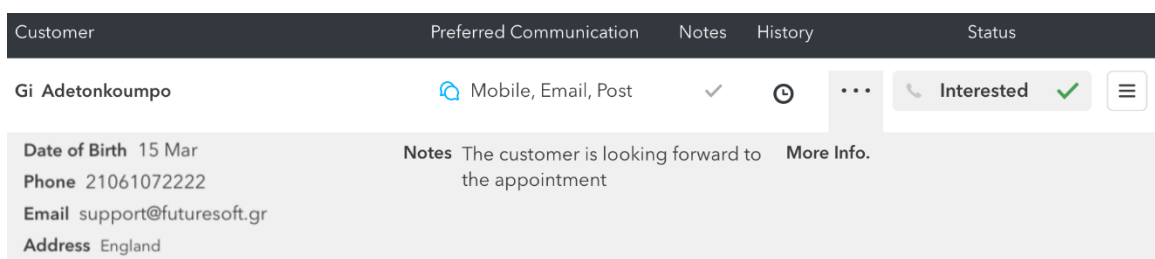
On the customer list, the user can filter the results through the segment bar or through the search bar by tapping on the 🔍 button. On the customer's line the user is able to:



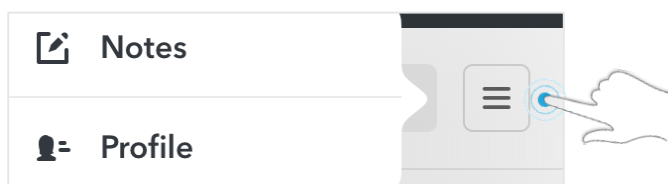
🕒 View the contact history: tap on the 🕒 icon.



👤 View more details about the customer: tap on the 📄 icon.



👤 Add Notes or access the customer's profile: tap on the ☰ icon

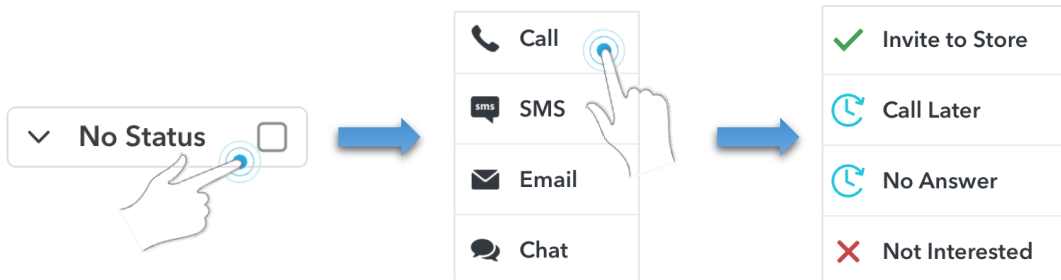


On a customer's line, if a user has added notes the ✔ icon is displayed on the Notes field.

SECTION 16

CAMPAIGN

Change the customer's contact status, by tapping on the Status field. Select the contact method on the first list. On the next list, select the communication result.



The available options are determined by the Brand/Company.

The customer's status can be set as:

📌 Interested: when the user successfully contacted the customer.

CUSTOMER NAME 10	📶 Mobile	✓	🕒	⋮	📞 Interested ✓	☰
------------------	----------	---	---	---	----------------	---

For example: Tap on a customer's 'No Status' button, select SMS, then select SMS sent, fill out the new form and tap Save. The status is changed to Interested.

📌 Pending: communication is pending (e.g. the user called the customer, but the customer did not answer).

CUSTOMER NAME 10	📶 Mobile	🕒	⋮	▼ Pending 🕒	☰
------------------	----------	---	---	-------------	---

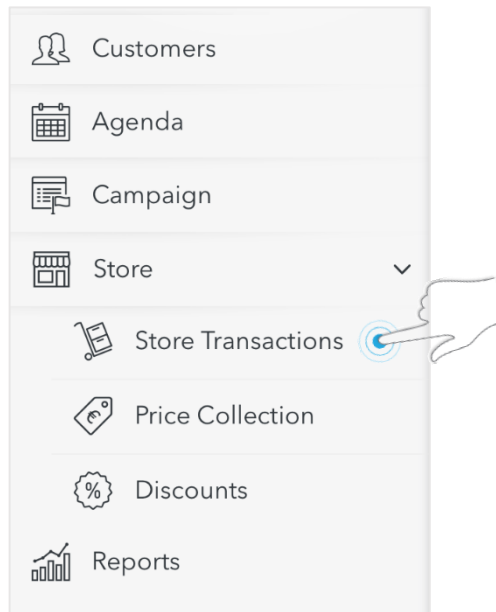
📌 Not Interested: when the user contacted the customer, but the customer is not interested or does not want to be contacted again.

CUSTOMER NAME 10	📶 Mobile	🕒	⋮	📞 Not Interested ✗	☰
------------------	----------	---	---	--------------------	---

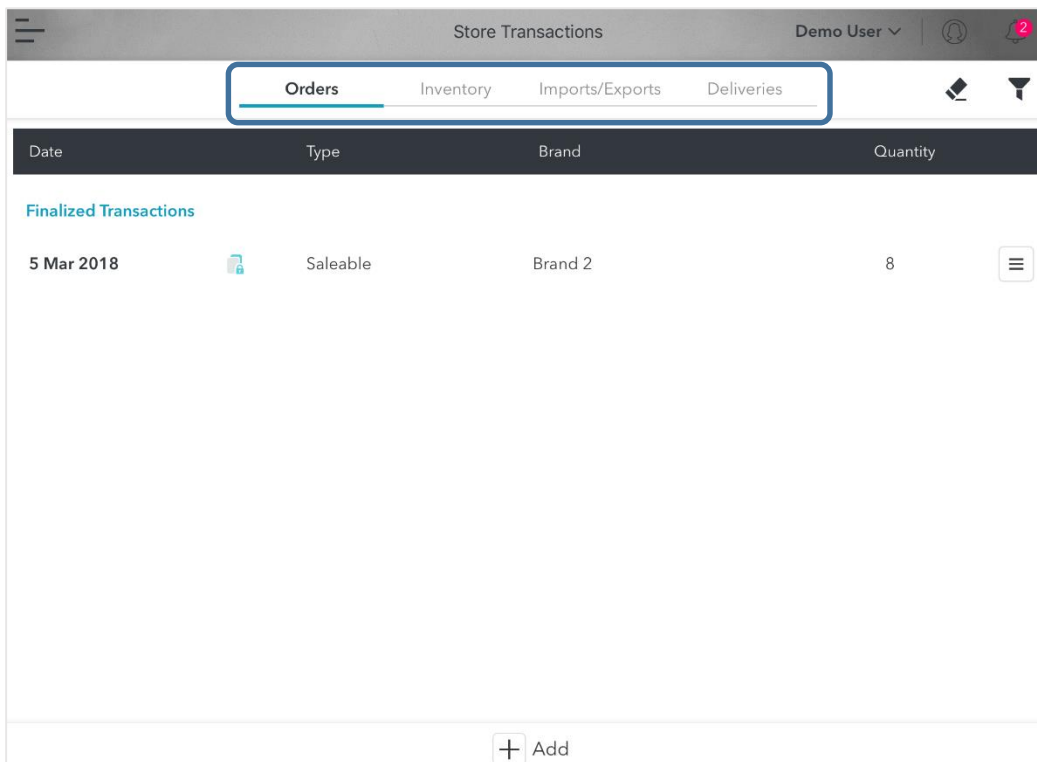
SECTION 17

STORE

The Store module includes the store transactions, price collection and discounts. To access the store transactions tap on Store and then tap on Store Transactions.



On the new screen, select the type of transaction (Orders, Inventory, Imports/Exports, Deliveries) from the segment bar.



SECTION 17

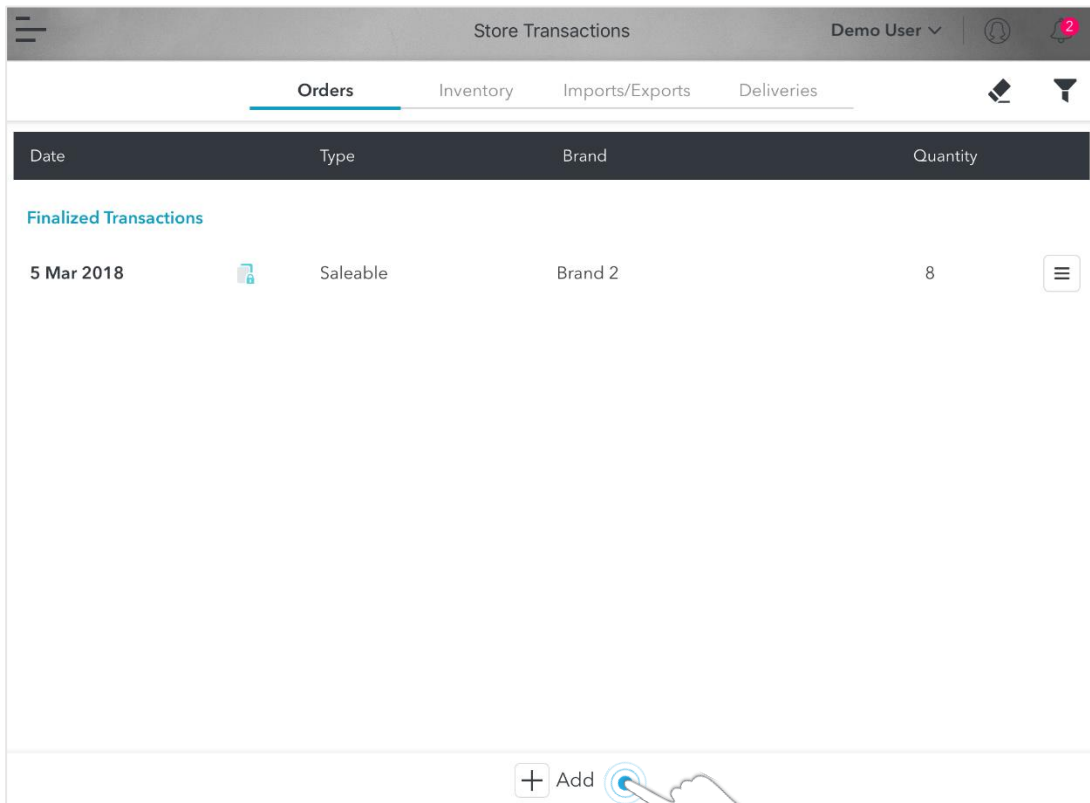
STORE: Transactions

Orders

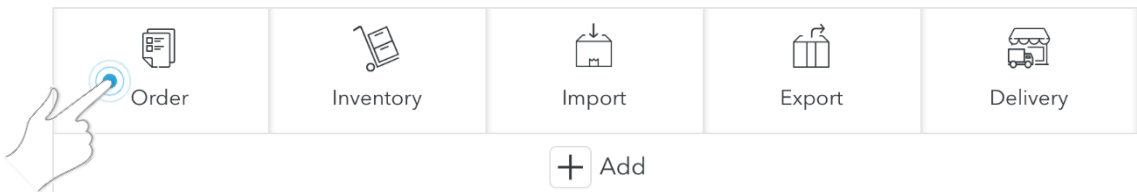
On the Orders tab, the user can view, add and cancel the store's orders.

To add an order follow the below steps:

- 1 Tap on the **+** button at the bottom of the screen.



- 2 Tap on Order, on the transaction menu.



On the new screen, the available fields-criteria of the order are displayed. Tap on the fields to make the required selections from the lists.

SECTION 17

STORE: Transactions

3

On the new screen, tap on the field Template to select a predefined order (if Template functionality is available) with recommended product quantities, based on the company's preferences.

4

Tap on the Product Type Field and select a type to filter the products that can be added to the order.



After selecting a Template or Placement, the Product Type and Brand Fields are locked.

5

Tap on the Brand field and select a Brand to filter the products that can be added to the order.

6

Tap on the Placement field (if Placement functionality is available) and select a placement to filter the products that can be added to the order based on predefined criteria.

7

Tap on the Notes Field and type the notes for the order.



8

After filling in the necessary fields tap on Next at the top right corner of the screen.

SECTION 17

STORE: Transactions

- If the user selected a Template or Placement, filled in the rest of the necessary fields and tapped on Next, the order screen will appear, containing the predetermined products with their recommended quantities.

On a product's line, the order quantity, the current stock and the sales for the last three months, are displayed. Tap on the  icon to view sales information. Tap on the  icon to add notes or justification.

Cancel

Order

Save

U

Brand 2

📁

New Products Winter 2017-2018

28 Mar 2018

⋮

🔍

Search in list

Description	Quantity	Stock	Sales March	Sales February	Sales January		
TP000001 Product name	2	6	0	52	39		...
TP000002 Product name	2	9	0	24	129		...
TP000003 Product name	3	3	0	32	17		...
TP000004 Product name	3	5	0	120	83		...
TP000005 Product name	3	7	0	56	68		...
TP000006 Product name	3	5	0	29	32		...
TP000007 Product name	3	8	0	78	19		...
<div>📄</div> <div>Total</div>	<div>📊</div> <div>Quantity 170</div>		<div>💰</div> <div>Value 181.600,00</div>				



In order to modify the recommended quantity tap on the Quantity field. On the calculator screen enter the required quantity. The total quantity and value of the order is displayed at the bottom of the screen.



Total



Quantity 170

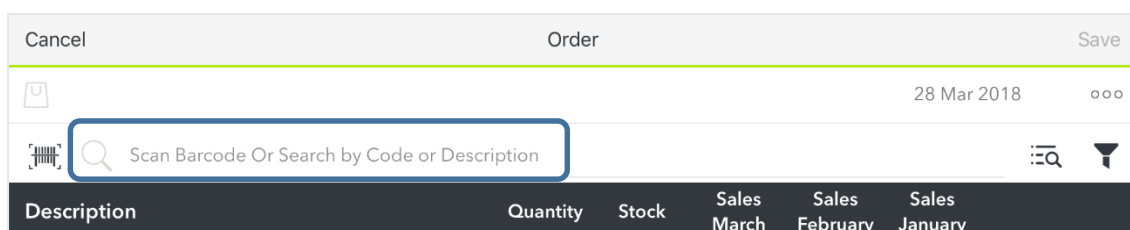


Value 181.600,00

SECTION 17

STORE: Transactions

- 8 If the user did NOT select a Template or Placement, filled in the required fields and tapped on Next, the order screen will appear and the user will have to scan or search for the items to add them to the order list (see pages 47-49 on the three available methods to add products).



- 9 After adding the required products, select the correct quantities.
- 10 Tap on Save on the top right corner and select Finalize Transaction or Temporary Save. If you tapped on Finalize Transaction then, tap on YES on the message that appears, in order to confirm finalization.

The temporary and finalized store orders are displayed in the orders tab on the Store Transactions screen. Tap on the icon to:

- Edit or Delete a temporary order.
- View or Cancel a finalized order.

If an order contains a Template, the icon will be displayed on the order's line.



After finalization the order is sent to the Headquarters through the automatic synchronization. In case you finalized a wrong store order you will have to inform your Supervisor.

SECTION 17

STORE: Transactions

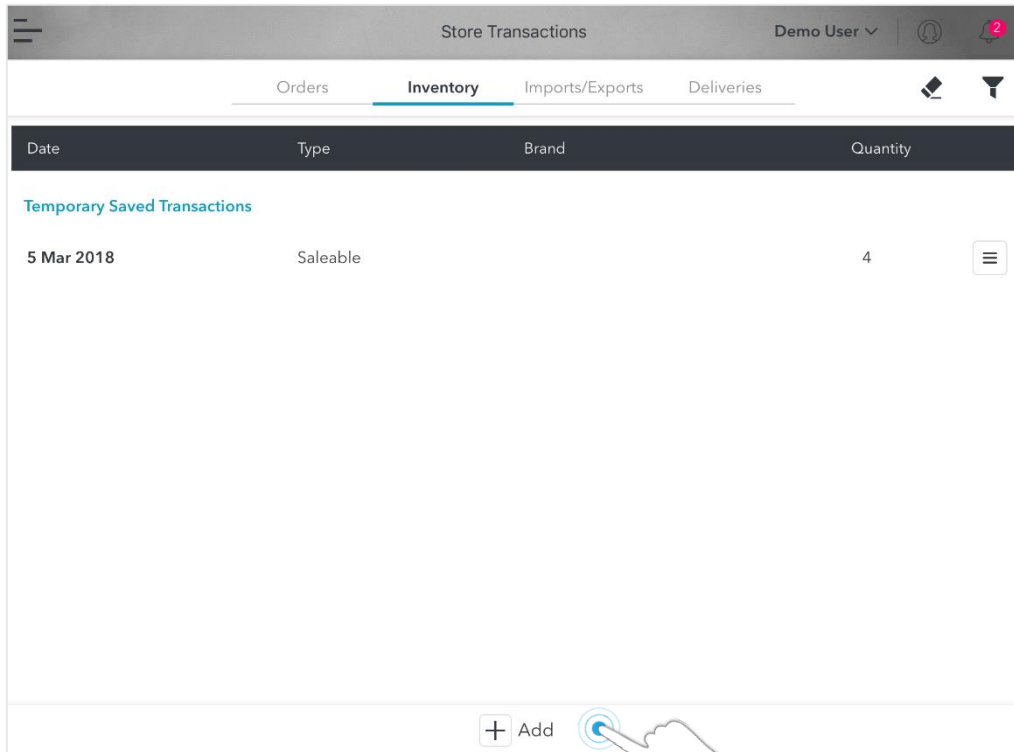
Inventory



It is strongly recommended NOT to register any other type of transaction (sales, returns etc.) while registering inventory data!

On the Inventory tab the user can take inventory of the store's items in order to set the store's stock. To take a new inventory follow the below steps:

- 1 Tap on the **+** icon at the bottom of the screen.



- 2 Tap on Inventory, on the transaction menu.

On the new screen, tap on the fields and select from the lists the required criteria of the inventory.

SECTION 17

STORE: Transactions

3

Fill in the fields Product Type (mandatory field), Brand in order to filter the items that can be added.

The screenshot shows the 'Inventory' screen with a header bar containing 'Cancel', 'Inventory', and 'Next'. Below the header, there are five input fields, each with an icon and a right-pointing arrow:

- Date of Transaction: 28 Mar 2018
- Product Type: Saleable
- Brand: Brand
- Connect: Connect
- Notes: Notes



Connect: Tap on the field Connect to connect the current inventory to an already existing, finalized one in order to correct it or add products (see page 71).

4

After filling in the fields, tap on Next.

5

Scan or search for the items to be added.

The screenshot shows the 'Inventory' screen with a header bar containing 'Cancel', 'Inventory', and 'Save'. Below the header, there is a search bar with the text 'Scan Barcode Or Search by Code or Description'. Below the search bar, there is a table with the following columns: Description, Quantity, Stock, Diff. The table is currently empty. At the bottom of the screen, there is a footer bar with 'Total' and 'Quantity 0'.

SECTION 17

STORE: Transactions



When scanning the same barcode, the quantity increases automatically.


On the search result screen tap on the required item's line to select it and tap again to deselect it.


On the inventory screen, to modify an item's quantity, tap on the quantity field in the item's line.

5

After adding the required items, modify their quantities and then tap Save. Afterwards, select Finalize Transaction or Temporary Save. If you tapped on Finalize Transaction then, tap on YES on the message that appears, in order to confirm finalization.



After finalization, the inventory transaction **CANNOT** be modified! The user is able to view the finalized inventory's details or cancel it by tapping on the  icon on the right and selecting View or Cancel.


To modify/delete a temporary saved inventory, tap on the  icon on the right of the line and select Edit or Delete. After modifying and completing a temporary saved inventory tap on Save, then Finalize Transaction and tap on YES on the message that appears.

SECTION 17

STORE: Transactions

Connected Inventory: Through the Connect field you can correct a finalized inventory in which you registered items with wrong quantity or forgot to register certain items.

To register a connected inventory follow the below steps:

- 1 Tap on the  icon at the bottom of the screen.
- 2 Tap on Inventory, on the transaction menu.
- 3 On the new screen, tap on the field Product Type and select a type from the list.
- 4 Tap on the field Connect.
- 5 Select the (wrong) finalized inventory from the list.
- 6 Fill in the rest of the necessary fields and tap on Next.
- 7 Scan or search for the items that were added with a wrong quantity or that you forgot to add to the finalized inventory.
- 8 Modify the quantities (see next page) or add the missing items and tap on Save. Then, tap on Finalize Transaction and YES on the message that appears.

SECTION 17

STORE: Transactions




IMPORTANT NOTE: To correct the quantity of the (wrong) finalized inventory, on the screen of the connected inventory add or subtract **ONLY** the difference. **DO NOT** register the full quantity!




Example: if the item's quantity in the finalized inventory is 4 units, but the correct quantity is 5 then, in the connected inventory you should register the item with quantity 1. The quantity of the item in both transactions is added (4 plus 1) and results in 5 units.



The connected inventory is available **ONLY** in the same iPad that registered the specific finalized inventory. The method to correct an inventory that was registered in a different iPad, depends on the company's inventory policy, for example, register a new inventory (leaving the Connect field blank) that includes all of the items with the correct full quantity of each item.



On a connected inventory's line the  icon is displayed. If a temporary saved inventory was connected by mistake or you forgot to connect it to a finalized one you can disconnect/connect it by following the below steps:

- Tap on the  icon on the inventory's line and tap on Edit.
- Tap on the  icon at the top right corner.
- Tap on the field Connect.
- Tap on the selected inventory to deselect it or select the required inventory.
- Tap on the  icon to save the change and return to the inventory screen.

SECTION 17

STORE: Transactions

Imports/Exports

Imports include the registration of items received from other stores, while exports include the items sent to other stores.

On the Imports/Exports tab, the user can register an import or an export by following the below steps:

1 Tap on the **+** icon at the bottom of the screen.

2 Select Import or Export from the Transaction menu



3 Scan or search for the items to add them to the transaction.

4 Modify the quantity of the items.

5 Tap on Save to complete the transaction. On the confirmation message that appears, tap on YES in order to finalize the transaction.


SECTION 17

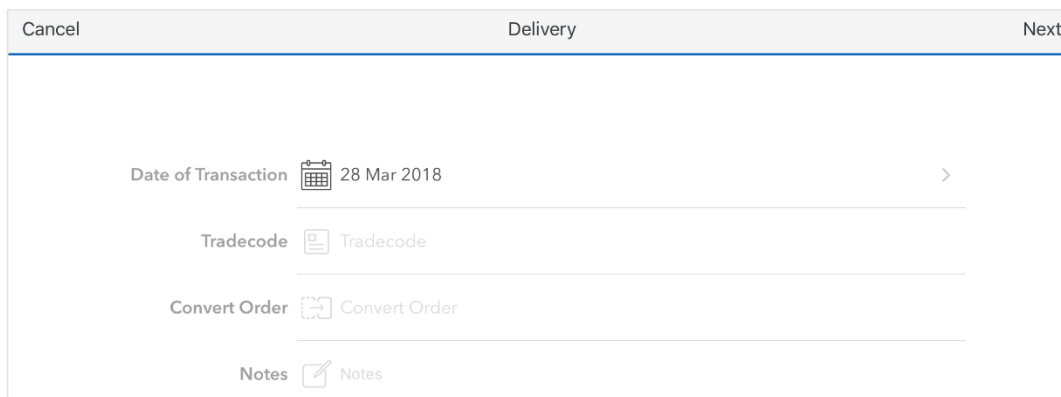
STORE: Transactions

Deliveries

The user is able to convert a Store Order into a Delivery through the Deliveries tab in the Store Transactions screen. After registering a delivery, the stock is automatically updated.


To register a delivery follow the below steps:

- 1 Tap on the  icon at the bottom of the screen.
- 2 Tap on Delivery, in the transaction menu.
- 3 Type the invoice number (if available) in the Tradecode field.
- 4 Tap on the Convert Order field and select from the registered store orders, to convert the order into a delivery.
- 5 After filling in the necessary fields, tap Next.



- 6 If necessary, add items and modify quantities, then tap Save to complete the delivery.



On a delivery's line, the  icon is displayed if the transaction was a result of a converted store order.

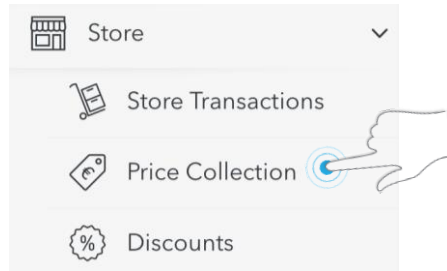
SECTION 17

STORE: Price Collection

Price Collection

Follow the below steps in order to add the Store's Retail Price to the products after receiving clear directions from the Brand/Company.

- 1 On iPPOS Main Menu, select Store and then select Price Collection.



- 2 On the new screen, Scan or search for the product.



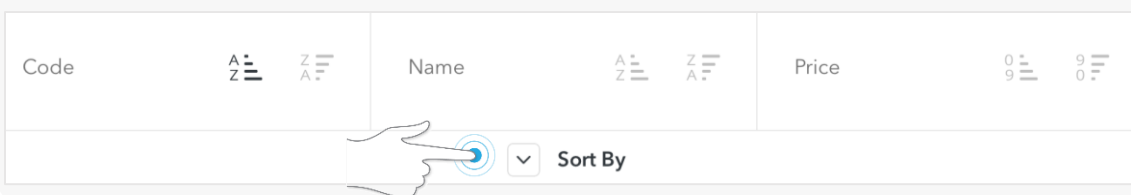
When the user scans a product, the calculator screen is automatically displayed. After searching for a product, tap on the product's line, to display the calculator screen.

- 3

On the calculator screen, type the price. Tap on an empty space outside the calculator screen to close it. The price has been added and is displayed on the screen.



The products can be sorted (in ascending or descending order) per Price, Code or Name, by tapping on the Sort by field (bottom of the screen) and then select the sort order.




On the Sales screen, tap on the Price field, modify the price and tap on the green icon on the calculator to set it as the default price through Price Collection.

SECTION 18

STORE: Discounts

Through the Discounts section, the user can apply customized discounts automatically, for the selected time period, to sales made in their store or view all active discounts.

 The Discounts section can be optimized based on the Brand/Company’s preferences. The user should register discounts ONLY after receiving clear directions.

To register a new discount or view the active discounts, follow the below steps:

- 1 On iPPOS Main Menu, tap on Store, then tap on Discounts.
- 2 On the new screen, the user can view the active discounts. To view discounts during a specific time period, tap on the field in the top right corner of the screen and select a time period.
- 3 In order to add a new discount, tap on **+** Add at the bottom.
- 4 On the next screen, select the discount Scenario and tap on on Next. The available scenarios are determined by the Company/Brand.



SECTION 18

STORE: Discounts

- After selecting a discount scenario, fill in the fields Period, Store/Brand/Category/Item, type the required discount percentage and finally, tap on Save.

Cancel

Discount Settings

Save

Scenario

Brand

Period

02 Nov

>

Brand

Brand 1

>

Percentage

20,00

>

- The new discount will appear on the screen as long as it is active on the selected time period.

Active Discounts

Today

BRAND

20%

Brand 1

From

02 NOV

/

To

02 NOV

≡

+

Add




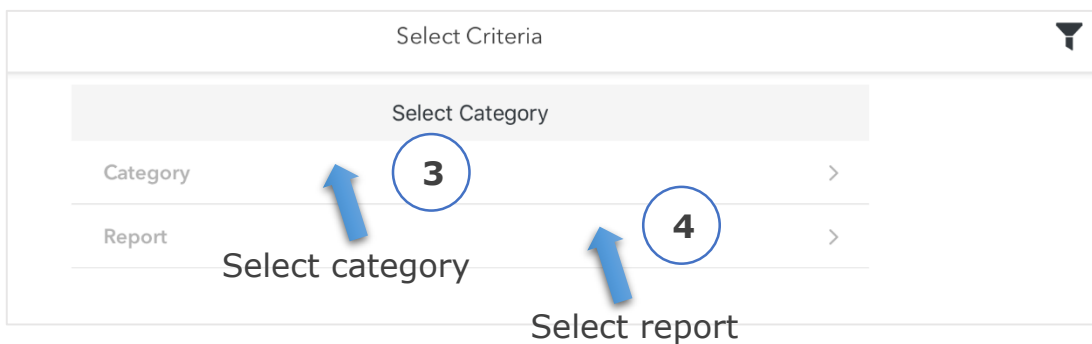
The user can edit or delete the discount by tapping on the ≡ icon at the right side of its line.

SECTION 19

REPORTS

iPPOS can support a wide variety of reports. Through the Reports, the user can evaluate their/the store's performance and organize the necessary course of action to achieve their/the store's targets.

- 1 On iPPOS Main Menu, tap on Reports to access the module.
- 2 Tap on the  icon at the top right corner of the screen to access the report criteria.
- 3 Tap on the Category field to select the required report category from the list
- 4 After selecting the report category, tap on the Report field to select the required report from the list



Select Criteria	
Select Category	
Category	>
Report	>

- 5 On the new screen, fill in the required criteria and then, tap on Search.



The available criteria are determined based on the Brand/Company's preferences and may differ per report.



SECTION 19

REPORTS

On the report screen, data is displayed in the form of a table.

Sales							
Online Sales Per Product							
Sales Per Product							
Code	Description	Sales Qty	Sales Value	Return Qty	Return Value	Total Qty	Total Value
!1	Product name	1	100,00	0	0,00	1	100,00
!10	Product name	2	200,00	0	0,00	2	200,00
!100	Product name	4	1.056,00	0	0,00	4	1.056,00
!1000	Product name	1	100,00	0	0,00	1	100,00
!102	Product name	2	195,00	0	0,00	2	195,00
!103	Product name	1	100,00	0	0,00	1	100,00
!104	Product name	2	200,00	0	0,00	2	200,00
!105	Product name	1	100,00	0	0,00	1	100,00
!118	Product name	2	200,00	0	0,00	2	200,00
!135	Product name	1	0,00	0	0,00	1	0,00
!516	Product name	1	150,00	0	0,00	1	150,00
00000001	Product name	14	995,00	2	100,00	12	895,00
00000002	Product name	13	925,00	2	100,00	11	825,00
00000003	Product name	9	700,00	0	0,00	9	700,00
		56	5.221,00	4	200,00	52	5.021,00

The user is able to:


- ➊ Search for data on the table by tapping on the  icon and typing on the Search field.
- ➋ Change the current report criteria or switch to a different report/category by tapping on the  icon at the top right corner of the screen. After changing the criteria, tap on Search to view the updated data.
- ➌ Tap on a column of the report to sort it with ascending/descending order.
- ➍ View column Totals at the bottom of the report screen.

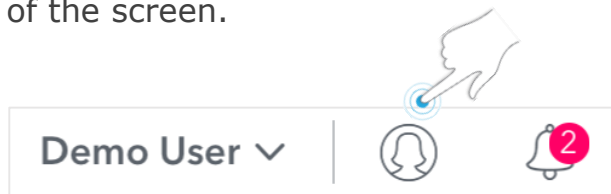
SECTION 20

USER PROFILE

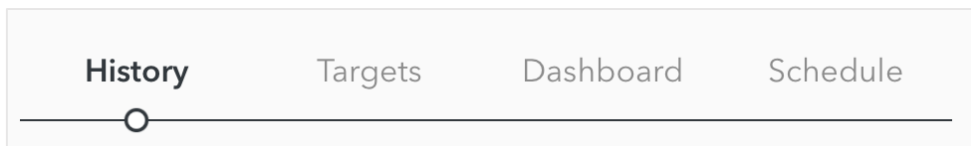
The User Profile gives the opportunity to:


- 🔗 view, edit, complete or cancel the user's scheduled appointments
- 🔗 view, add, edit the user's working schedule
- 🔗 view information about targets, actual and previous year sales and the percentage of the target achievement
- 🔗 view key data about sales, activities etc.
- 🔗 view the history of all actions the user has completed

In order to access the User Profile, tap on the user icon  on the top right corner of the screen.



The user can navigate through the tab bar to the History, Targets, Dashboard and Schedule tabs.




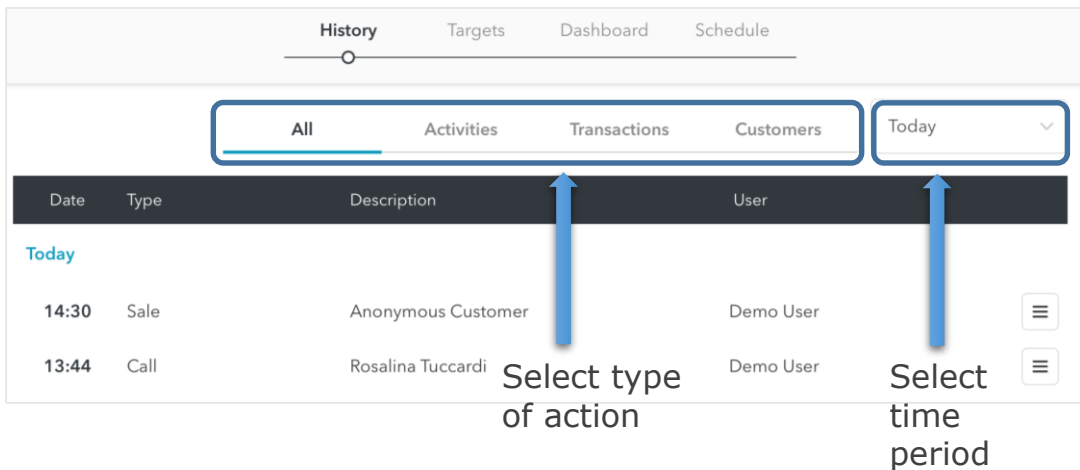
In the Targets, Dashboard and Schedule tabs, the user can tap on the  icon (top right corner), to view information about all users that logged in to the store.

SECTION 20

USER PROFILE

History


The History screen displays all actions made by the user (sales, calls, appointments, instant services). The user can edit or cancel activities and view or cancel transactions by tapping on the  icon on the right of the line.

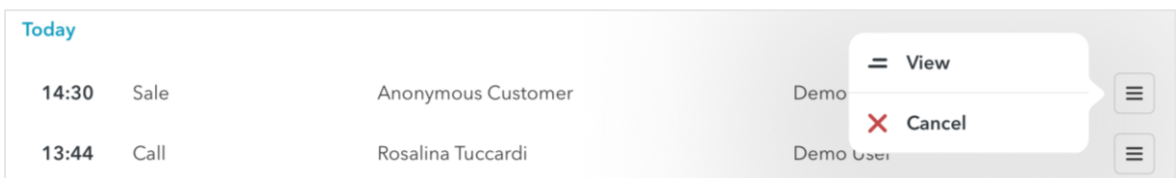


Cancel a saved transaction



The user can cancel a saved transaction (sale or return) **ONLY** from the History tab, by following the below steps:

- 1 On the History screen locate the transaction that has to be canceled.
- 2 Tap on the  icon on the right of the transaction's line.
- 3 On the displayed list, tap Cancel. The user can tap on View first to see the transaction's details and confirm that they want to cancel it. Tap on Close to exit the transaction details screen.



SECTION 20

USER PROFILE

Targets


On the Targets screen the user can review the targets, the actual and previous year sales and the percentage of target achievement.


History

Targets

Dashboard

Schedule


 Just Me

 Store

Online

Description	Previous Year	Target	Actual	% Achieved
User Sales March 2018	€2.705.504,05	€35.000,00	€2.390,00	<div><div></div></div> 6,83% ...
Team - Capture Rate	0,00%	85,00%	70,00%	<div><div></div></div> 82,35% ...



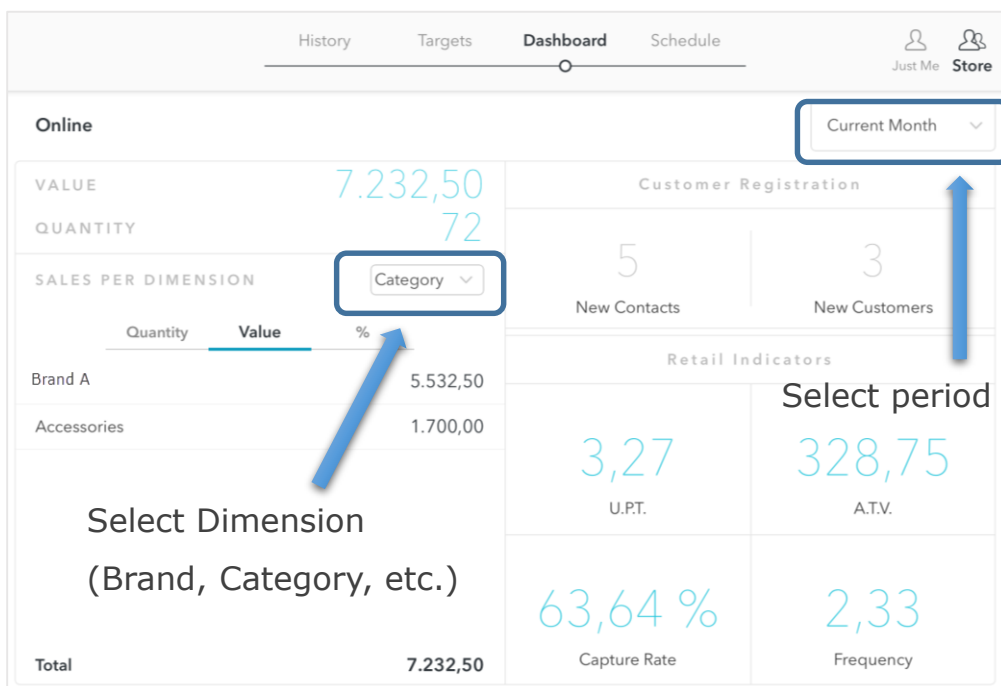
Tap on the  icon to display more information about the target.



The targets are refreshed when connected to the Internet. If there is no Internet connection, they are displayed in their latest synchronized state.

Dashboard



The Dashboard displays some key data about sales, activities customers etc. The displayed data are determined by the Brand/ Company.



SECTION 20

USER PROFILE

The Dashboard includes a general overview of the Retail Indicators.

The user can select  or  (at the top right corner of the screen) to view the indicators regarding the user or Store respectively.



The Retail Indicators are displayed at the bottom right part of the screen.

Retail Indicators	
3,27 U.P.T.	328,75 A.T.V.
63,64 % Capture Rate	2,33 Frequency

The Retail Indicators are calculated as follows:

- 🔍 U.P.T.: Units Per Transaction is the average units per visit for purchases in the selected timeframe.
- 🔍 A.T.V.: Average Transaction Value is the average value per visit for purchases in the selected timeframe.
- 🔍 Capture rate: % transactions made by registered customers (excluding anonymous & tourists) in the selected timeframe
- 🔍 Frequency: Average number of times that a customer purchases in the selected timeframe.

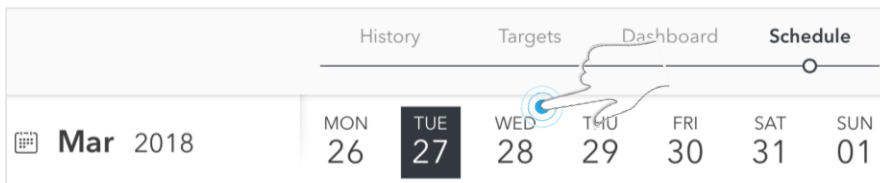
SECTION 20


USER PROFILE

Schedule

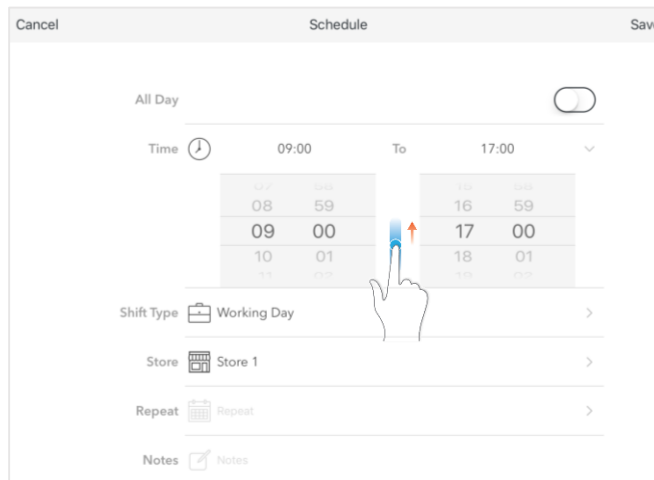
The Schedule screen gives the option to register the user's shifts for working days, days off, holidays etc.

- 1 Select the day from the Calendar bar and then tap on the plus **+** icon at the bottom of the screen.




Tap on the calendar icon  on the left of the calendar bar in order to switch from weekly to monthly view.


- 2 In order to register a working day, tap on the Time field and adjust the hours.



The user can add notes and/ or change the Store, by tapping on the corresponding fields.

For all the other options (leave, holiday, day off etc.) tap on the All Day button.

All Day (Disabled) 

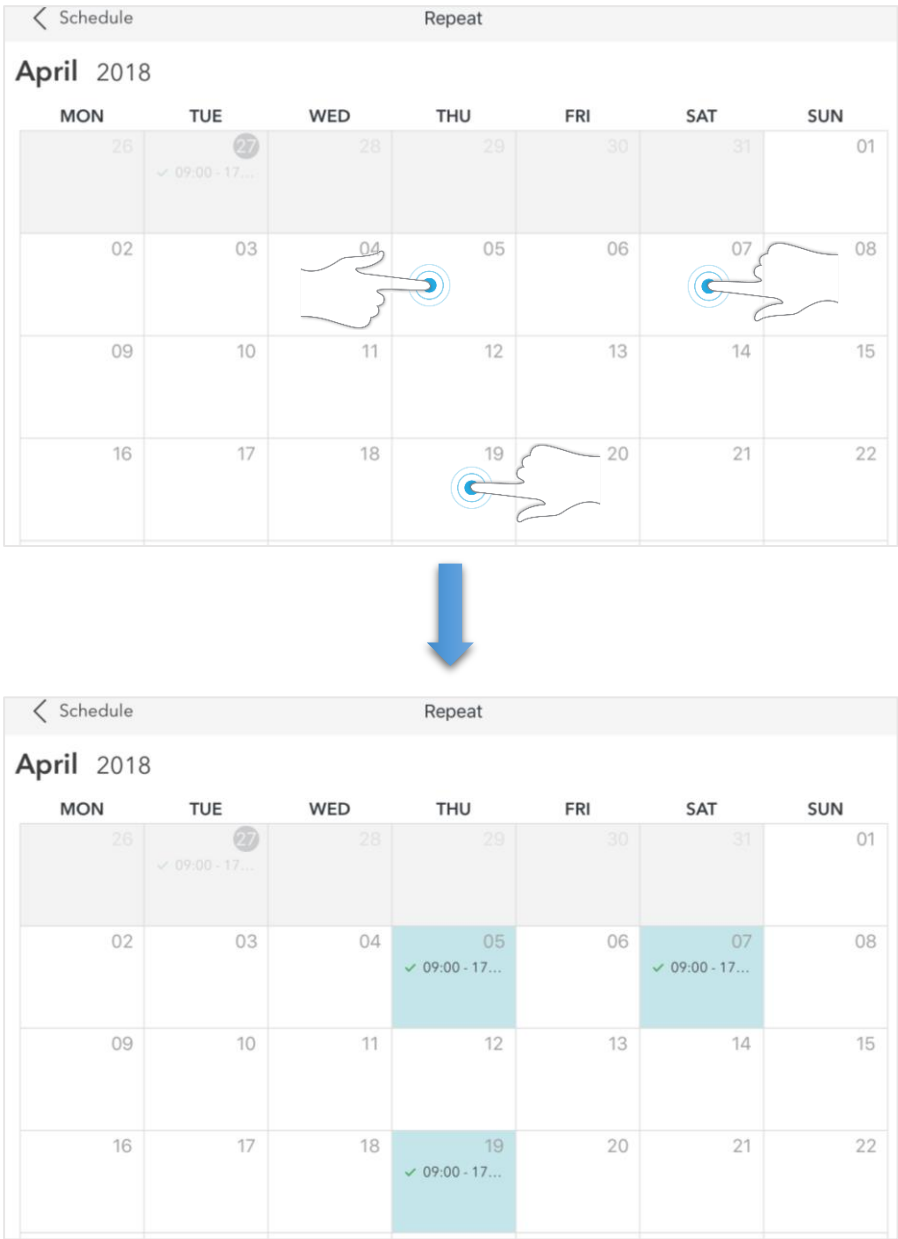
All Day (Enabled) 

SECTION 20

USER PROFILE



In order to register the same working hours for multiple days, tap on the field Repeat. Then select the dates you want to apply the same schedule. To change month, swipe the screen to the left/right for past/future months. To deselect dates tap on them again. At the end, tap on the < button, to return to the previous screen.

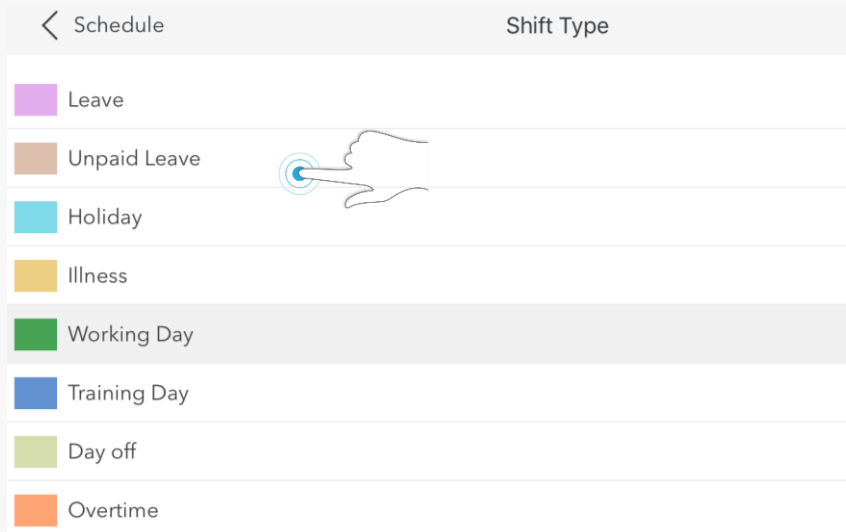


SECTION 20

USER PROFILE




The default Shift Type is "Working Day". To change it, tap on the field Shift Type and select a new type from the list that appears (e.g. day off, leave, etc.).



3

After filling in the required fields, tap Save (top right corner of the screen).




→ Tap on the Store icon  (top right corner of the screen), in order to view the schedule for all users that logged in to the store.

→ To edit/cancel a registered shift, select the day, tap on the shift's line and select Edit or Cancel. In case the shift is repeated, a message will appear with the following options: Delete selected shift, future shifts, all or Cancel to exit without deleting.

SECTION 21


NOTIFICATIONS

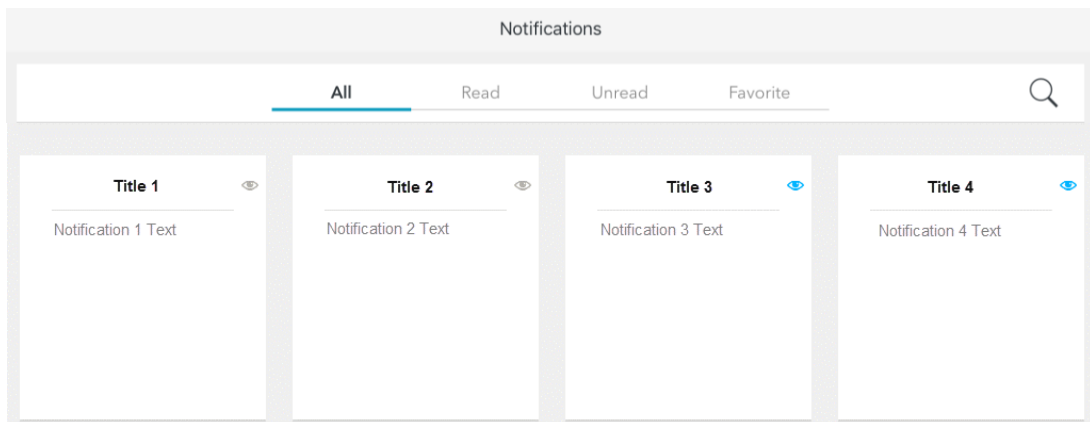
Notifications are the incoming messages that concern the application's users. In case there are unread notifications, a red bubble with the total number of unread notifications appears on the right corner of the  icon.



You can receive notifications from your Company as well as the Free FutureSoft Support Department.

Follow the below steps in order to manage notifications:


- 1 Tap on the  icon to display the notification screen.




Navigate on the tab bar in order to filter and view only read, unread or favorite notifications.

- 2 Tap on the notification, in order to maximize the screen.



The icon  indicates that the notification is Read.

The icon  indicates that the notification is Unread


The icon  indicates that the notification is Favorite.

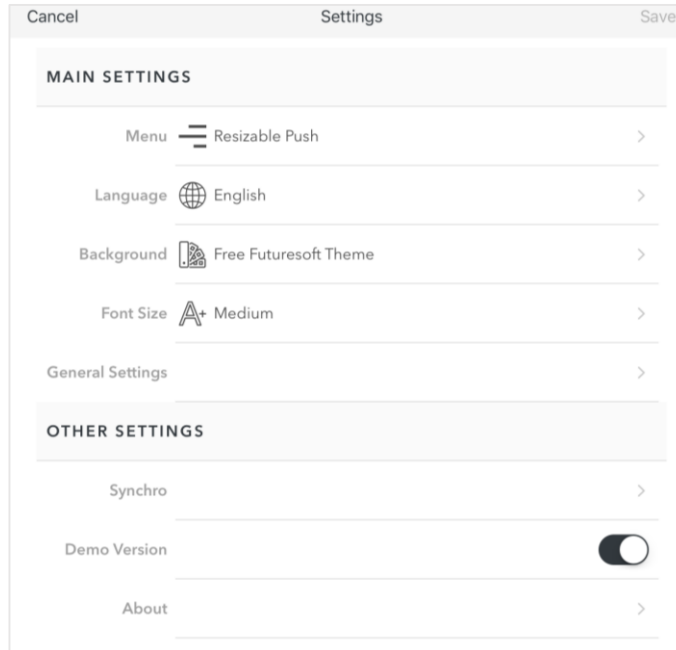


Drag the notification upwards to mark it as read or unread.
Drag it downwards to mark it as favorite or simple.

SECTION 22

SETTINGS

After logging in, on iPPoS Home screen tap on the settings icon  in the bottom left corner, in order to set the user's preferences:

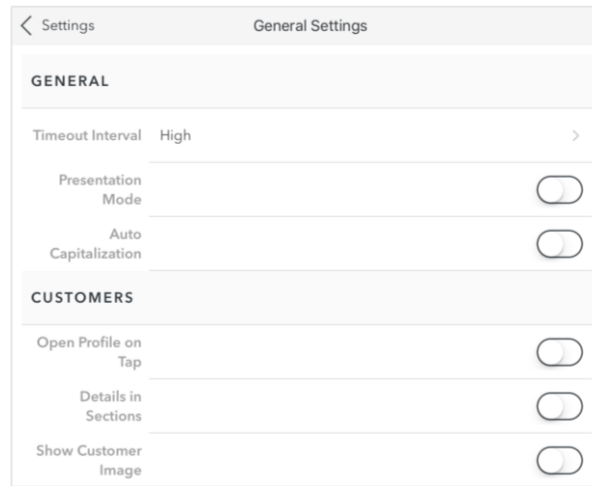


- 1. **Menu:** Tap on the field and select the required method of showing/hiding the main menu.
- 2. **Language:** tap on the field and select the preferred language, from the list that is displayed.
- 3. **Background:** Tap on the field and select the preferred background. Your Company may set a default background and deactivate the option to change it.
- 4. **Font Size:** tap on the field and select the preferred font size (small, medium, large).
- 5. **General Settings:** Tap on the field to access the general settings screen.

SECTION 22

SETTINGS

In the General Settings screen the following settings are available:





- ⓘ Timeout Interval: Modified **ONLY** by the Free Future Soft Support Team.



DO NOT change anything on the specific field!



Tap on the "OFF" switch  to turn it "ON" , in order to activate the respective settings.

- Presentation Mode: An indication will appear on the iPPOS screen on the area that the user taps on.
- Auto Capitalization: In customer registration, while typing the customer's first name and last name, the letters are set to capital automatically.
- Open Profile on Tap: In the customer search screen, when tapping on a customer's line, their profile is automatically opened.
- Details in Sections: All the profile sections (Profile Details, Consultation, Product Recommendation, Notes) appear on a single tab under Profile.
- Show Customer Image: In the customer search screen, the customer's profile picture appears on the left of their line.

SECTION 22

SETTINGS

- Begin with Month Calendar: In appointment registration, the first screen that appears is the Monthly Calendar.
- Scanner Camera: Tap on the field to set the use of the Back or Front Camer as the default option.

In the main Settings screen the following settings are also available:



- 📘 Synchro: Tap on the field to view the status of iPPOS' synchronization.
- 📘 Demo Version: When the Demo Version is activated, the user's transactions are not synchronized in the normal version of the application. Tap the switch to turn it "ON" (the icon will turn black) only if the Free FutureSoft Support Department or your Brand/Company request from the user to practise (during iPPOS training).

DEMO OFF



DEMO ON



IMPORTANT: Demo Version should be turned OFF while registering sales, activities, customers etc. during your shift.

- 📘 About: Tap on the field to view general information about iPPOS application and Free Futuresoft.



After modifying the settings, tap on Save in the top right corner of the main Settings screen.

SECTION 23

SCANNER: iPad pairing

The Symbol CS3070 Series Scanner captures barcodes and transmits the data to the iPad via Bluetooth.

In order to pair the scanner with the iPad, follow the steps below:

- 1 Go to the iPad's Home screen.
- 2 Tap on the "Settings" icon.
- 3 Tap on the "Bluetooth" field.
- 4 Tap on the "Bluetooth" button (*right side of the screen*) to switch it "ON".



Skip step 4, if Bluetooth is already enabled.

Bluetooth OFF



Bluetooth ON



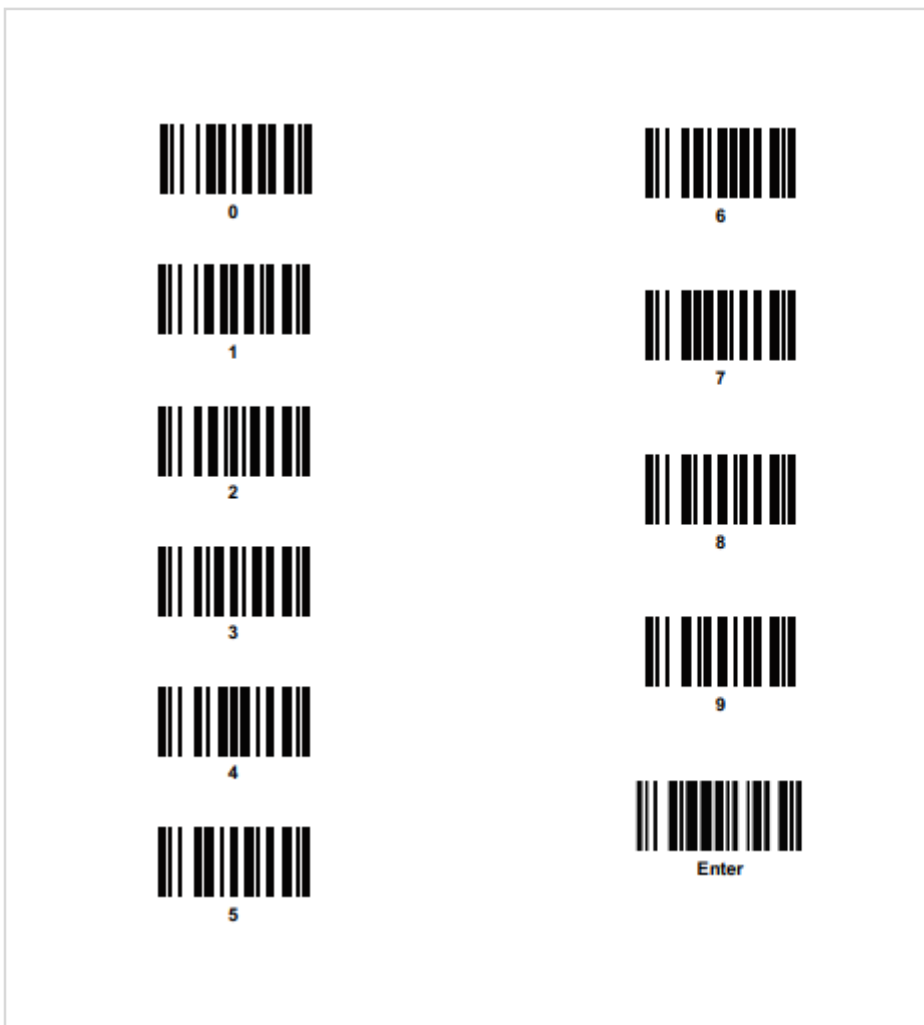
- 5 On the scanner device, press and hold the M button, until you hear the "beep" sound.
- 6 On the Bluetooth screen tap on the line "CS3070". A message pops up with a 4-digit-code.
- 7 Scan the 4 numbers, one by one, using the barcodes from the scanner leaflet (pages 8 and 9) or the next page and at the end scan "Enter".

You will hear a "beep" sound and the status of the device will change to connected.

SECTION 23

SCANNER: iPad pairing

The barcodes for pairing are available below. Print this page and follow the steps in the previous page in order to pair the scanner Symbol CS3070 Series with the iPad.



SECTION 24

iPad Basics

Activate / Deactivate the iPad

Activate: Press and hold the Sleep/Wake button until the “apple” appears on the screen.

Deactivate: Press and hold the Sleep/Wake button. Slide to the right the “slide off” line that appears on the screen.



Lock / Unlock the iPad

Lock: Press the Sleep/Wake button.

Deactivate: Press the Home button or the Sleep/Wake button, then slide to the right the “slide to unlock” line that appears on the screen.

Alternatively, in more recent iOS versions, press the “Home” button twice. Enter the password (if password usage is enabled).

Close apps

1st Option: Click the Home button, in order to go back to the Home screen.

2nd Option: Clear the iPad’s memory.

- 1) Press the Home button two times quickly. Small previews of recently used apps are displayed on the screen.
- 2) Slide left to find the app you want to close.
- 3) Drag upwards the app's preview to close it.
- 4) Tap on the Home screen.

Navigate between screens

Slide the screen to the left or to the right to navigate between the screens.

SECTION 24

iPad Basics



Bluetooth:



To activate the Bluetooth, follow the below steps:


- 1) Tap on Settings.
- 2) Tap on the Bluetooth field.
- 3) Tap on the "Bluetooth" button (right side of the screen) to switch it "ON".

Type text

The onscreen keyboard lets you enter text when needed. Tap on a text field to display the onscreen keyboard, then tap on the letters to type.

Tap the  button to switch to numbers. Tap on  to return to letters.

Tap on Shift  to type uppercase. If you have several keyboards, tap on  to switch the language.



After finishing texting, tap on the keyboard  key, to hide the onscreen keyboard.

Screenshot

Simultaneously press the Home and the Sleep/Wake button when viewing the screen that has to be captured. The iPad screen will then flash if done correctly, and you'll hear a faint shutter noise (*if the device isn't in silent mode*).

Once captured, the screenshot is automatically saved within the camera roll (*Photos > Camera Roll*).

Send the screenshot via e-mail

Access the Album, tap on the photo to select it and then tap the Sharing . Tap on the e-mail icon . In the e-mail message form that appears, fill in the necessary fields (To, Cc/Bcc, Subject etc.). If necessary, type the message text and then tap on Send.