Code Finix Order Manager V 1.0 User Guide

Introduction

Code Finix Order Manager App allows you to take sales order on any smartphone or tablet. Integrated offline order taking along with online synchronize app that allows your sales reps to showcasing catalogs and take orders in real-time. Reduce cost of massive paperwork. Time saving app that makes your customer happy.

If you want to download the latest version please check our website at

http://www.codefinix.com/order-manager.html

Getting Help

The pages on this site should help you to get the most out of Order Manager. If, however, you have specific requirements or questions or wish to report a bug then mail us at

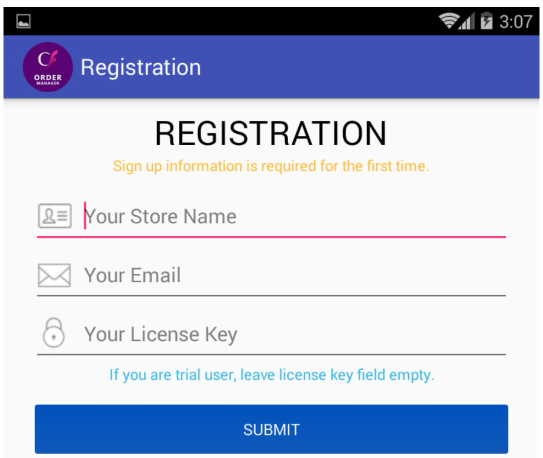
support@codefinix.com

Installing Order Manager on Android

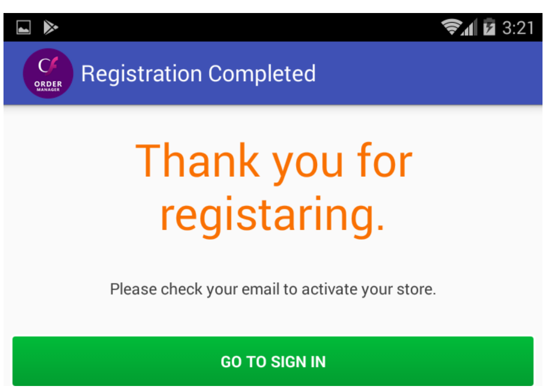
To run Order Manager on Android simply download and install the APK file from following link and follow the instructions.

http://www.codefinix.com/downloads/cf_order_manager_v1.0.apk

On first time run you will see the following registration screen. If you have purchased license key (single device key) enter the license key along with your store name and email address or leave license key field blank if you are a DEMO user. Email address is unique for store setup.



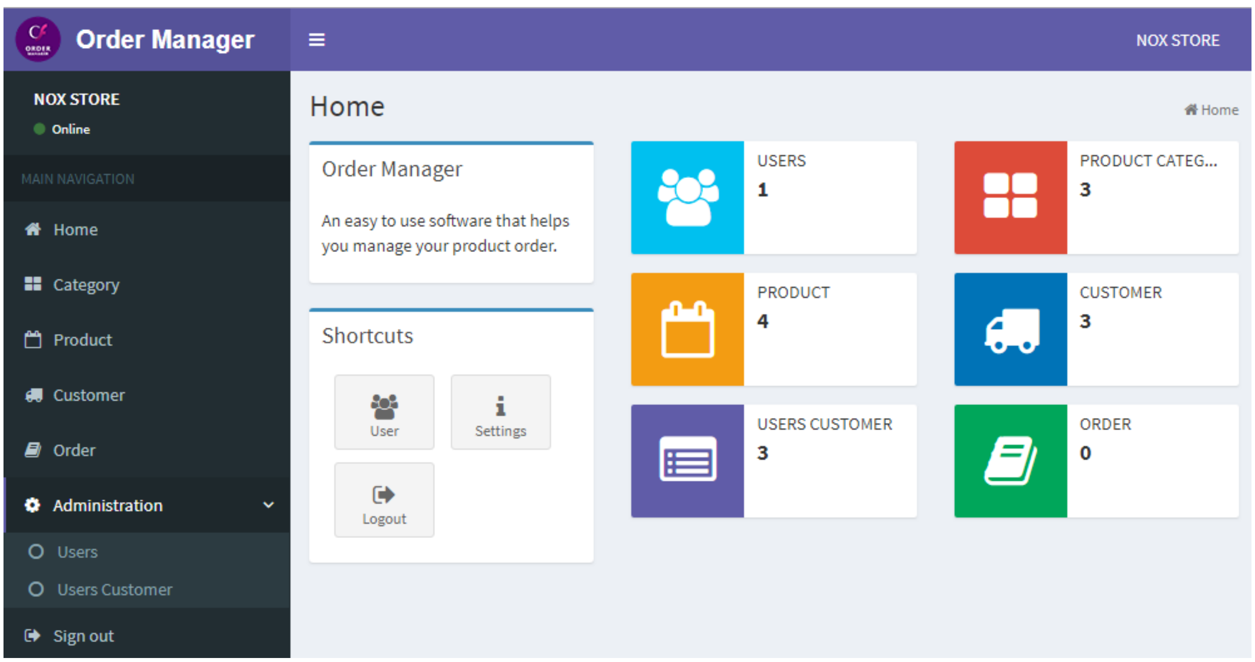
Once your registration completed successfully, you will see the following screen and an email will be sent your store email address instantly.



Finally you need to activate your product by clicking activate from your email. After successful activation you will get another email contains login detail for Online Store administration and Android device.

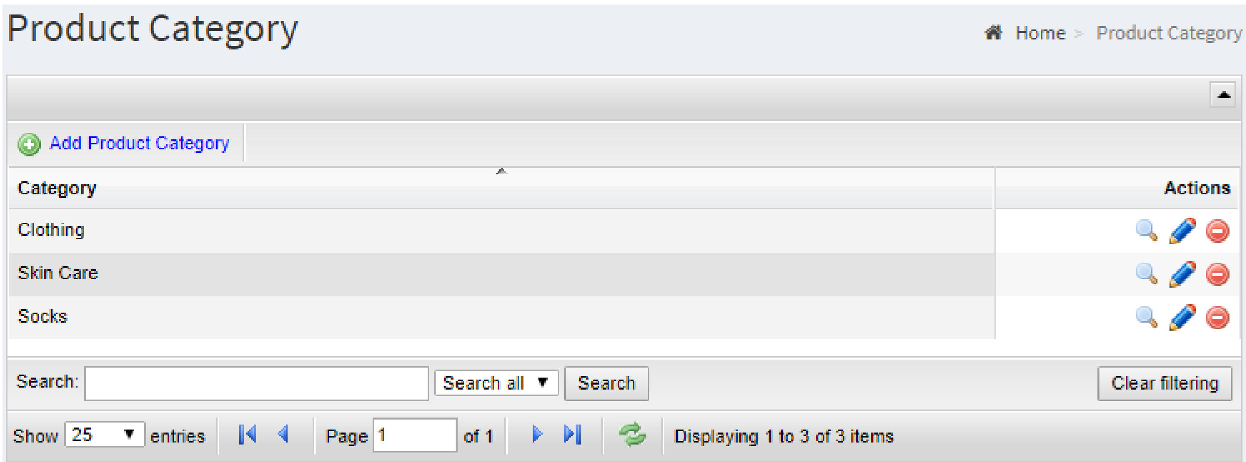
Setup Online Store

You must create your Product Category, Product, Customer, User (sales rep) and Users Customer to working with Android app. Once you configure all correctly then only you can go for using Android app.

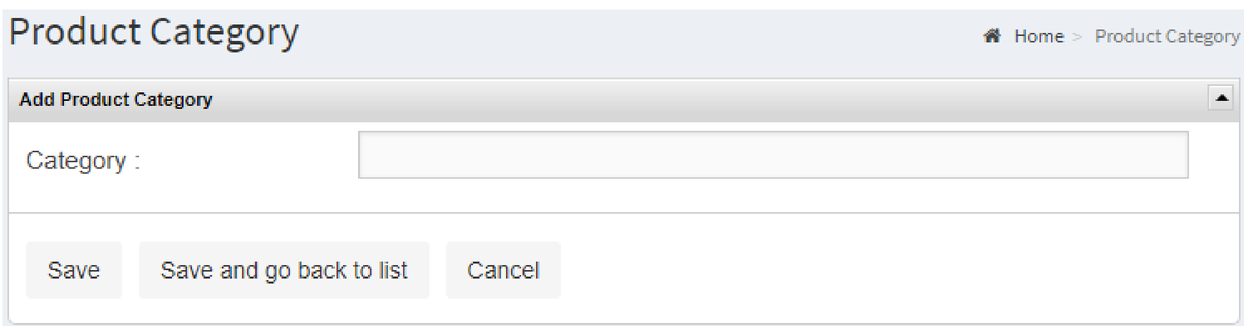


Creating Product Category

Click “Category” from left navigation panel, you will see following “Product Category List”. You can add, edit, view and delete item from the “Action” column.

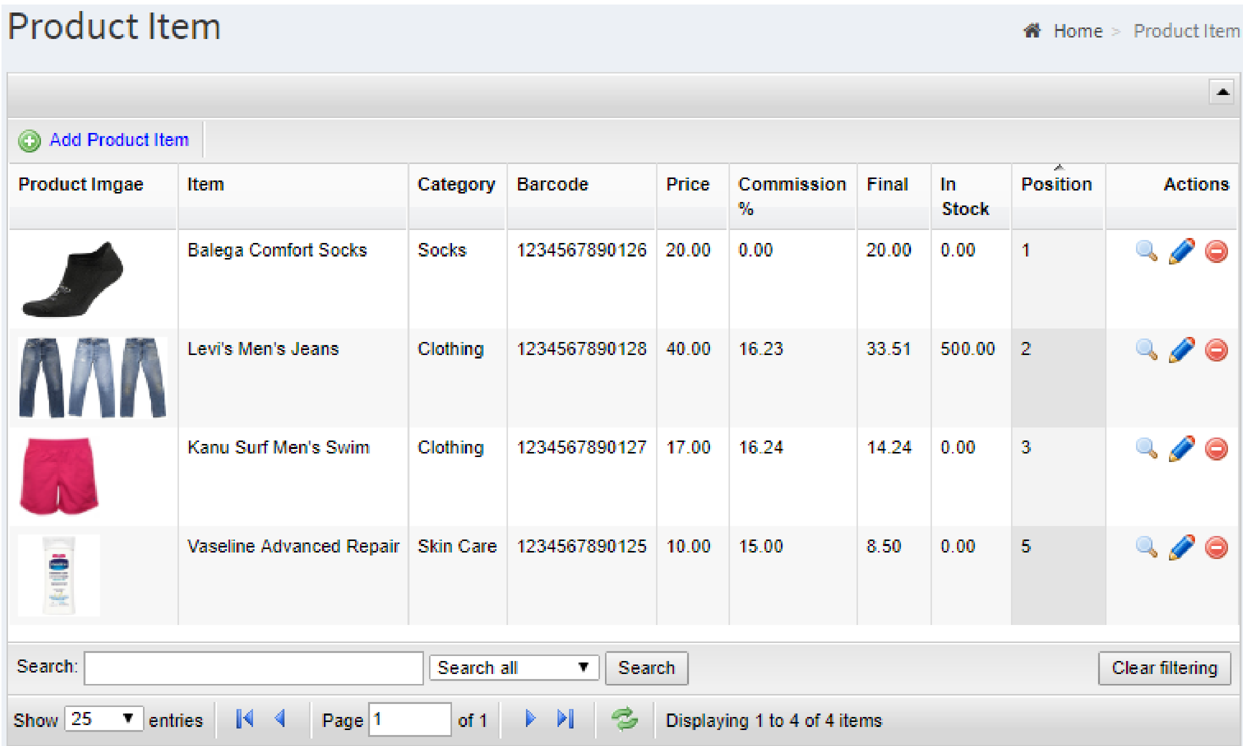


Click “Add Product Category” to create new category. Enter unique category name and save.



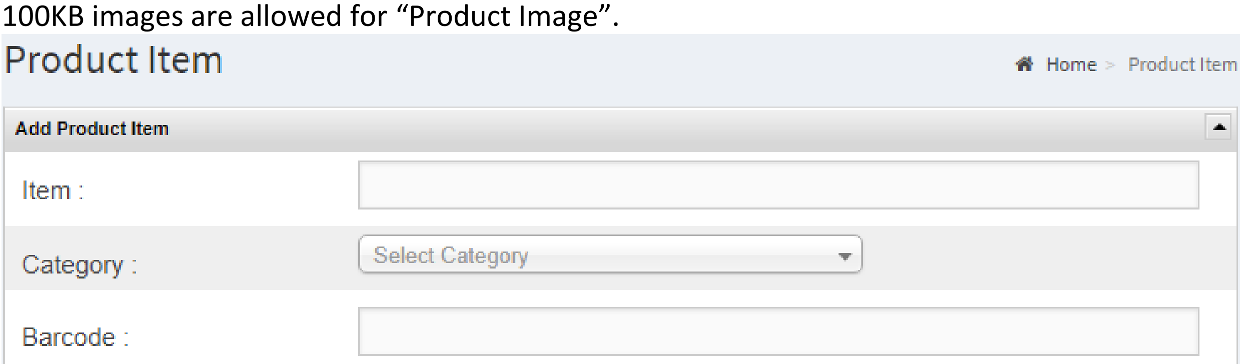
Creating Product

Click “Product” from left navigation panel, you will see following “Product List”. You can add, edit, view and delete item from the “Action” column.



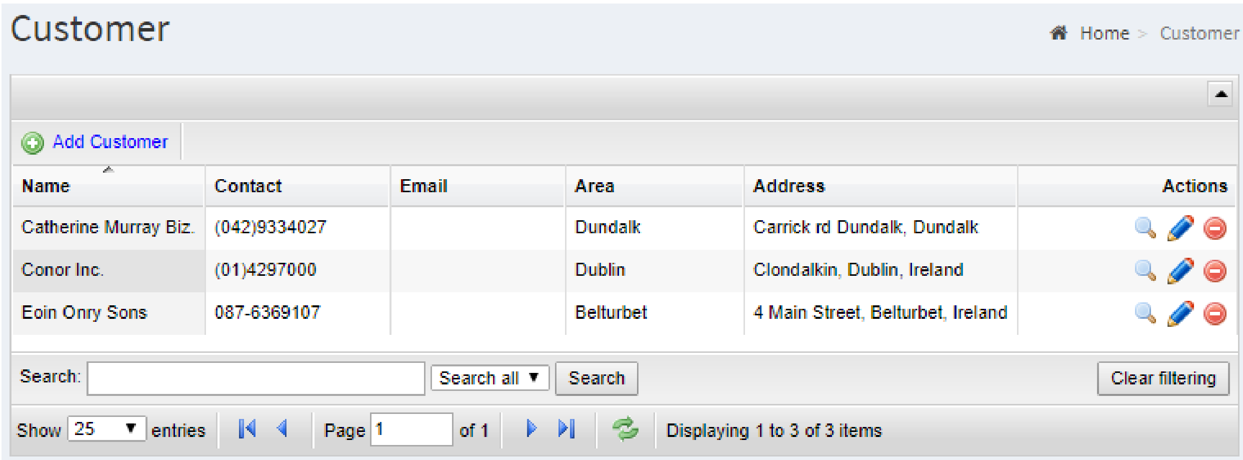
Product Imgae	Item	Category	Barcode	Price	Commission %	Final	In Stock	Position	Actions
	Balega Comfort Socks	Socks	1234567890126	20.00	0.00	20.00	0.00	1	
	Levi's Men's Jeans	Clothing	1234567890128	40.00	16.23	33.51	500.00	2	
	Kanu Surf Men's Swim	Clothing	1234567890127	17.00	16.24	14.24	0.00	3	
	Vaseline Advanced Repair	Skin Care	1234567890125	10.00	15.00	8.50	0.00	5	

Click “Add Product Item” to create new product. Enter Item name, category, barcode, price, customer commission, in-stock, product image and save. Barcode (EAN13) is necessary when scanning product using device camera for order. Once “Customer Commission” added your sales rep will see the deducted product price based on commission. In-Stock amount will not effect on ordering product but show the deducted amount once order is processed. Less than 100KB images are allowed for “Product Image”.

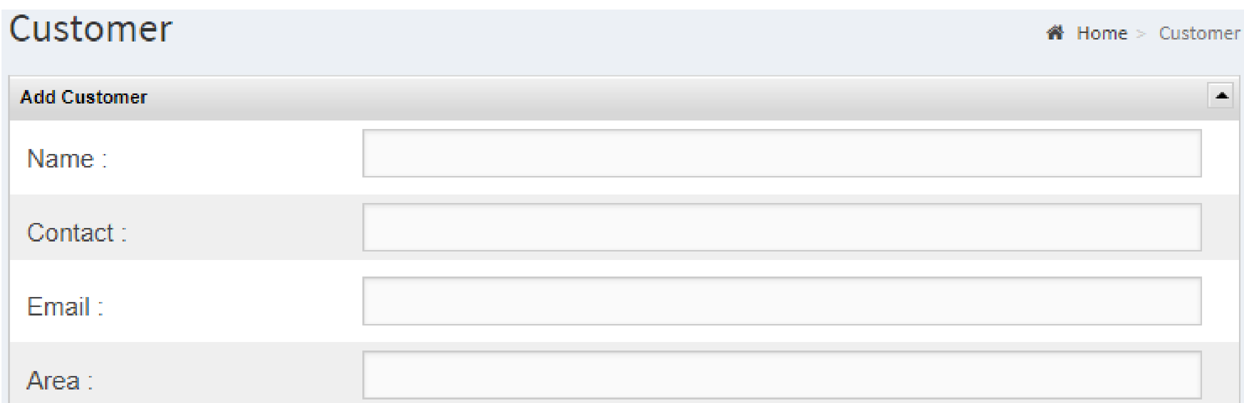


Creating Customer

Click "Customer" from left navigation panel, you will see following "Customer List". You can add, edit, view and delete item from the "Action" column.

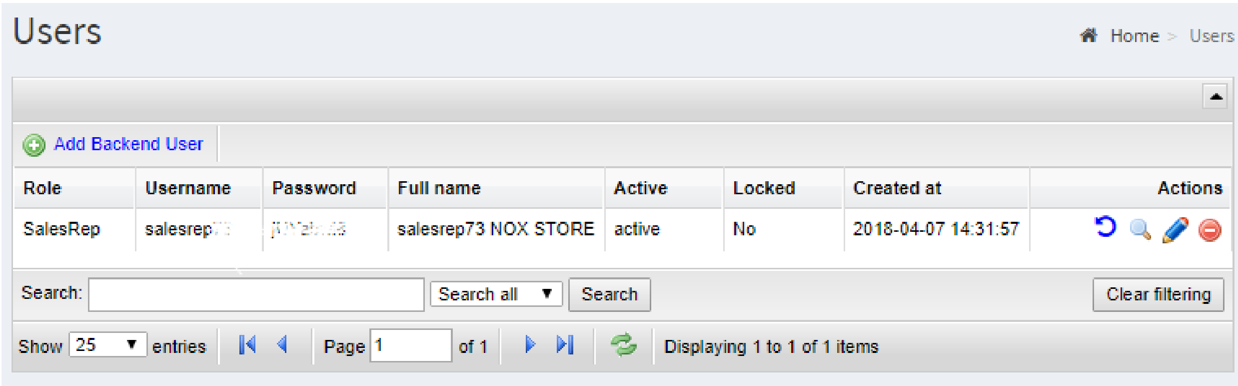


Click "Add Customer" to create new customer. Enter name, contact number, email, area, address and save.

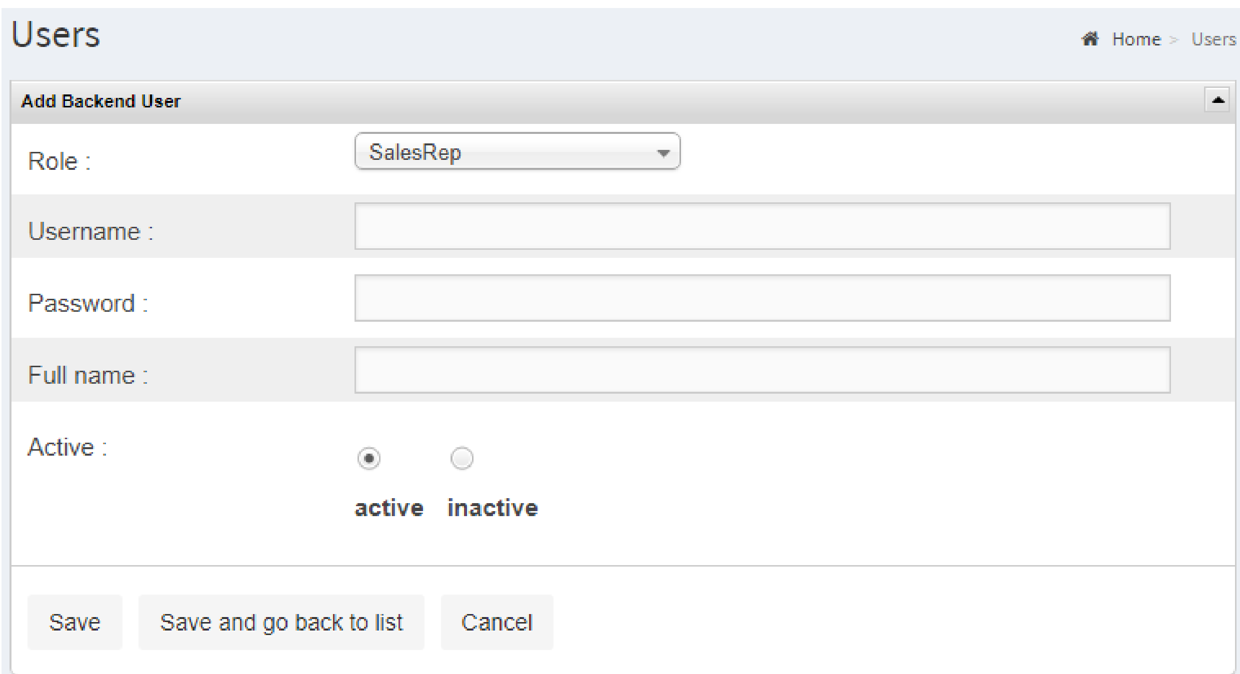


Creating User

Click “User” from left navigation “Administration” panel, you will see following “User List”. Basically these users are your sales representative. You can add, edit, view and delete item from the “Action” column.

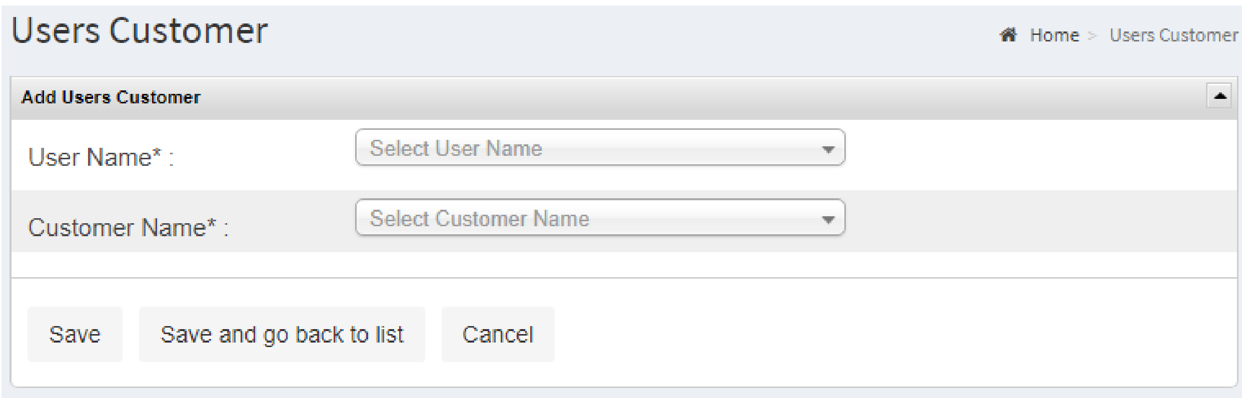


Click “Add Backend User” to create new user (sales rep). Enter role, username, password, full name, select active/inactive and save.



Creating Users Customer

Click “Users Customer” from left navigation “Administration” panel, you will see following “Users Customer List”. Usually “Sales Reps” are not working with all customers. They assigned to selected area to work with selected customers. Without assigning “Users Customer” Android apps will not showing or taking any orders. Select user and select customer then save.



Now, you are ready to working with Android app.

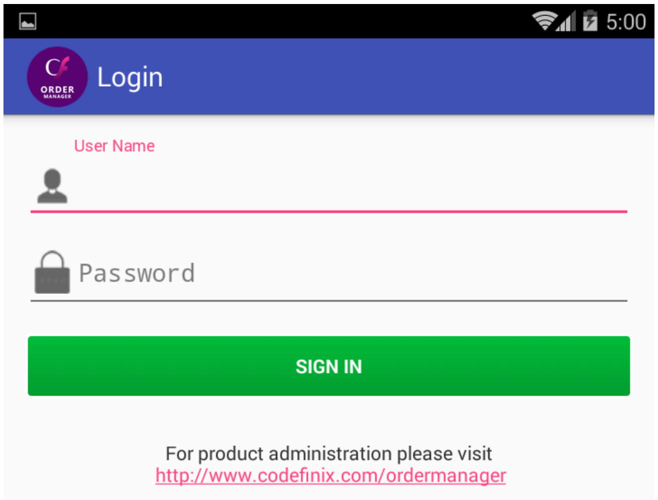
Using Order Manager Android App

Android app is designed to take product orders from customer. To do taking orders properly you need to go through the following tasks.

- **User Login**
- **Selecting Customer**
- **Selecting Product**
- **Creating Order**
- **Review Order**
- **Sync Order**

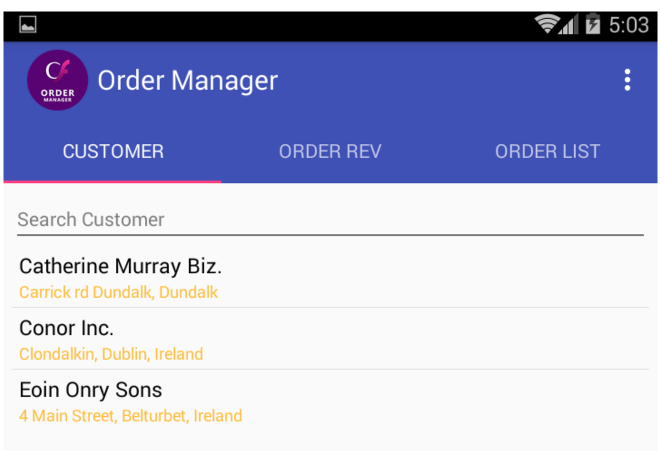
User Login

Enter sales representative user name and password and press “Sign In”. First time you need internet connection to pull product items and customers data from your online store. It takes few munities if you have large number of product items and customers.



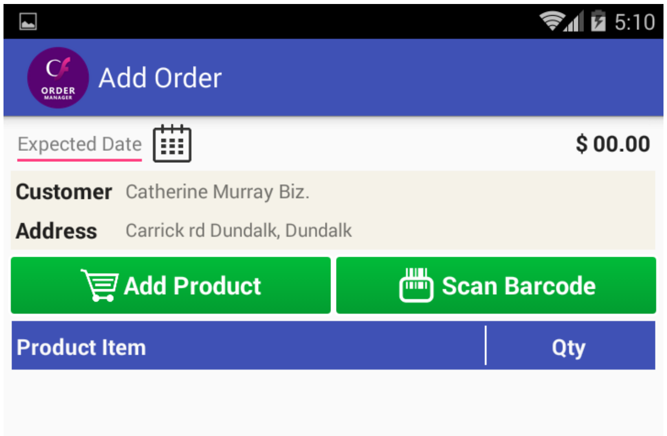
Selecting Customer

After successful login you will see the following screen. You can search “Customer” by typing customer name, contact etc. or you can directly select “Customer” from the list to start taking product order for selected “Customer”.



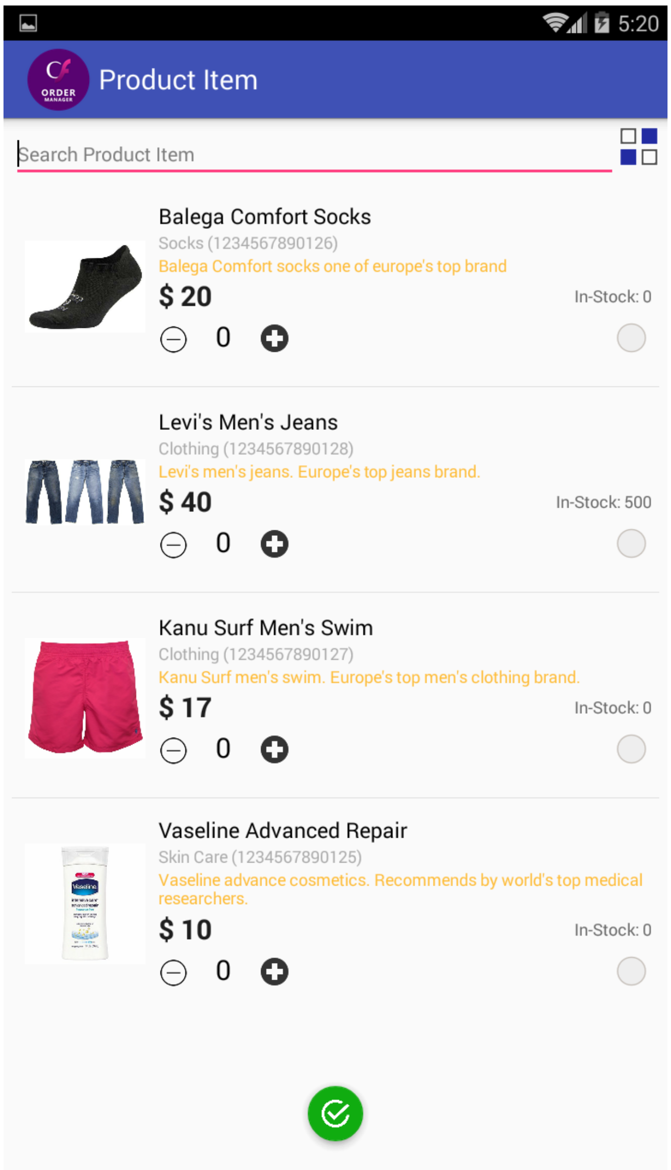
Selecting Product

Once you select customer following “Add Order” screen will be shown.

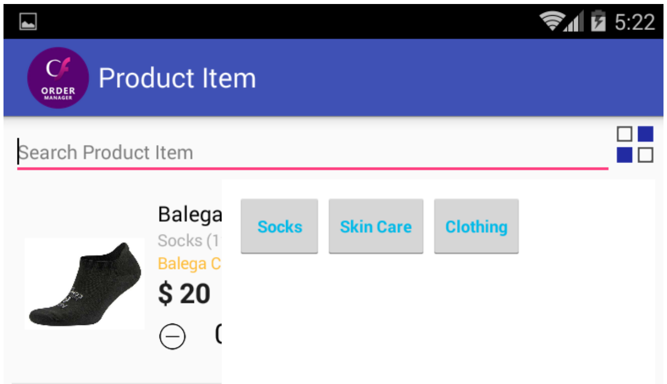


Creating Order

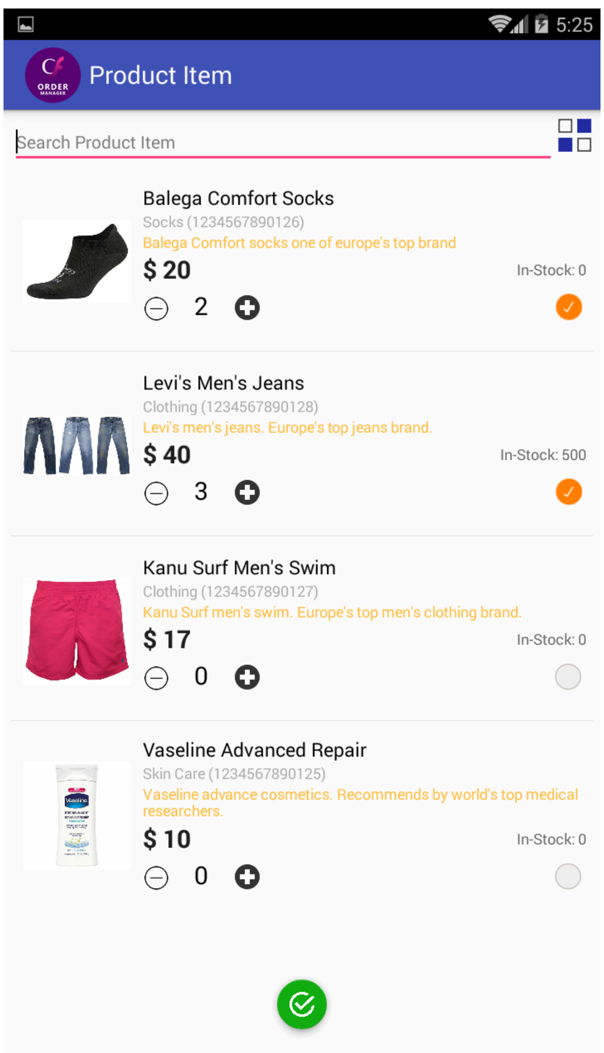
To create a customer order you need to select “Expected Date” of delivery, “Product Item” with “Item Quantity”. If your product has “Barcode” you can press “Scan Barcode” button, your product will be shown automatically. If you want to select product by choosing from product catalogue, you can press “Add Product” button and you will see the following screen. You can search “Product Item” by item name, category, barcode etc. or you can filter product by pressing “Category” button.



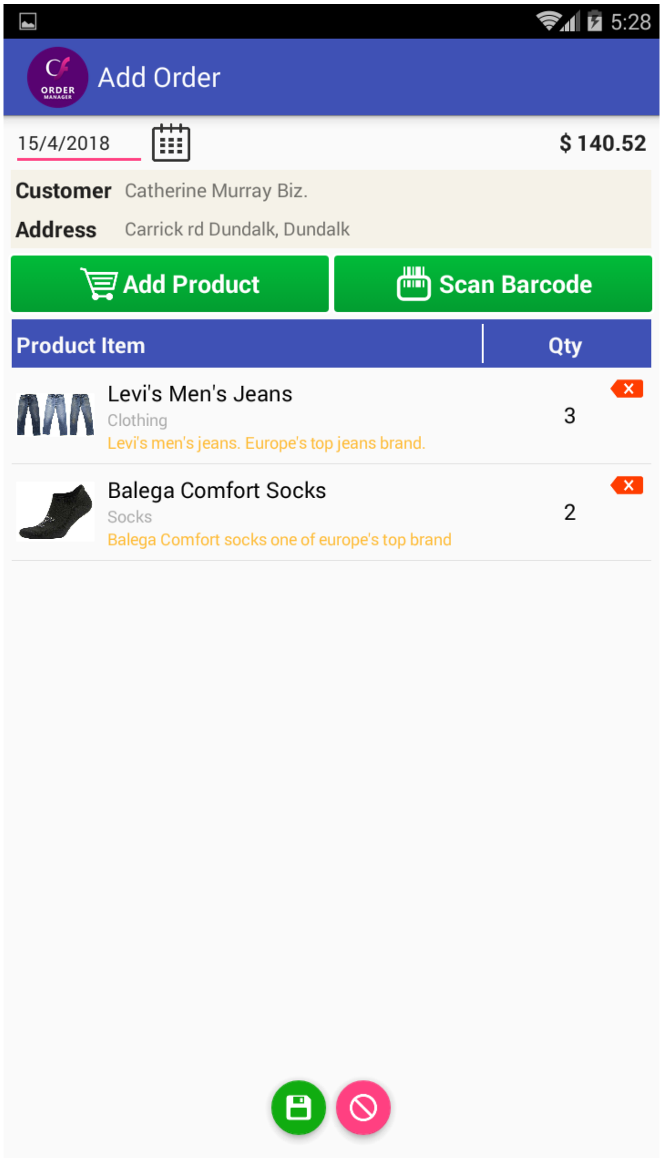
Filter by category



Once you find your product you need to change the order quantity and check the items from the list.

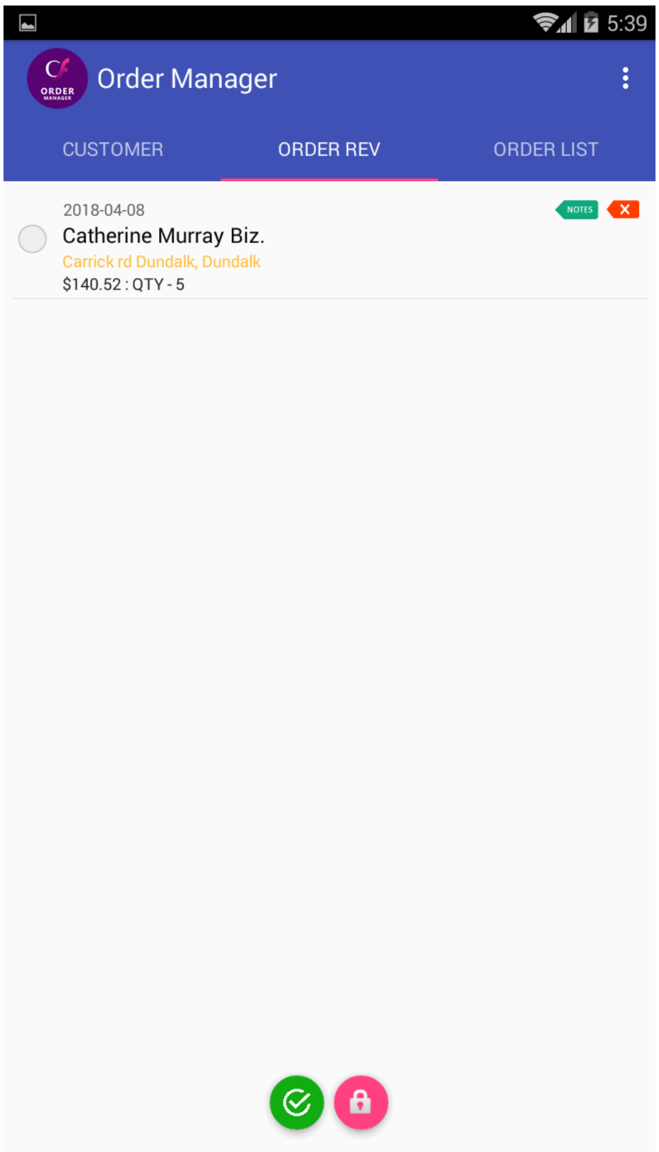


To show the product item in the order list you need to press “OK” button from the bottom and you will see the following screen. You can also add or remove item from order list as usual. To complete the “Order” you need to press “Save” button from the bottom.

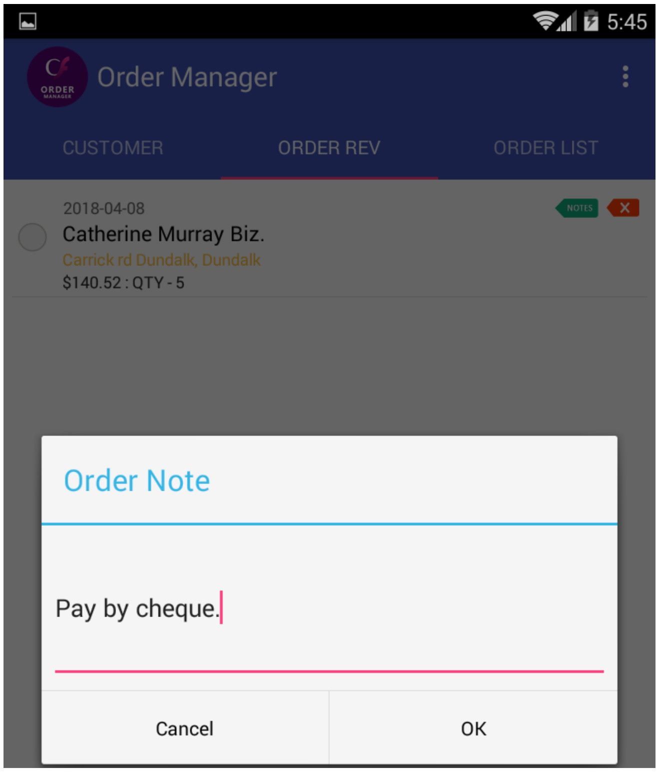


Review Order

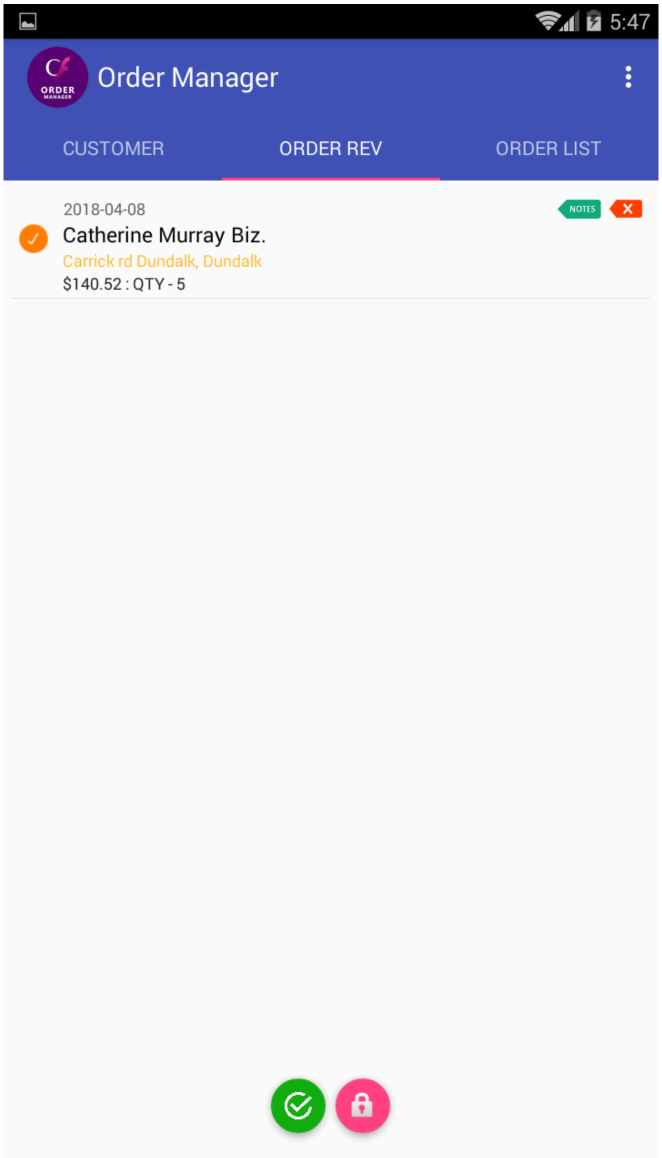
Review order is essential when you are working with large number of customers. By pressing "Review Order" from main form you see the following screen. You can select and check orders are correct or not. Also you can change product item, quantity or you can add notes on order by pressing "Notes" button from the right.



Adding “Notes”

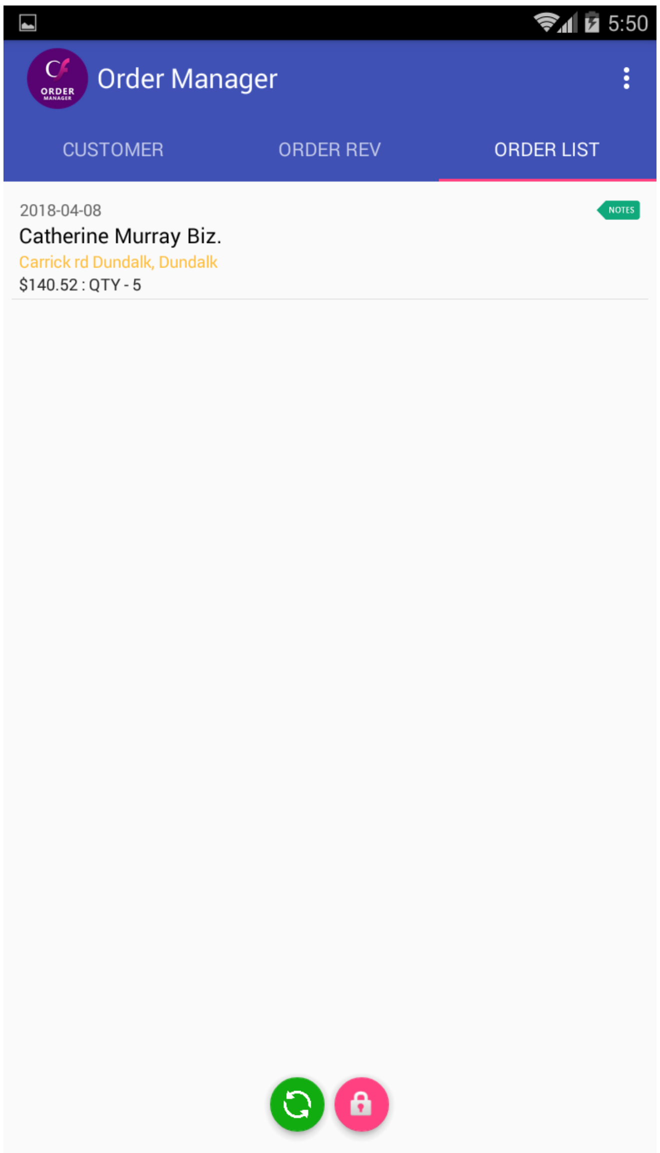


Once you are sure that the order is correct you need to select the order items and press "OK" button from bottom to confirm the order like the following screen.

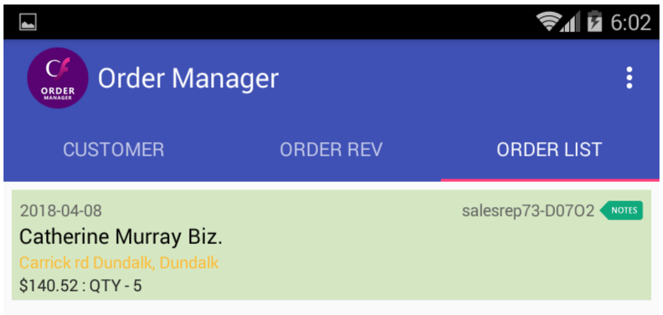


Sync Order

You confirmed order directly goes to “Order List” and cleared from “Review Order”. Now back to main form and press “Order List” you will see the following screen. In this order list you cannot change or delete anything, you can only view the product items from the order and see the notes.

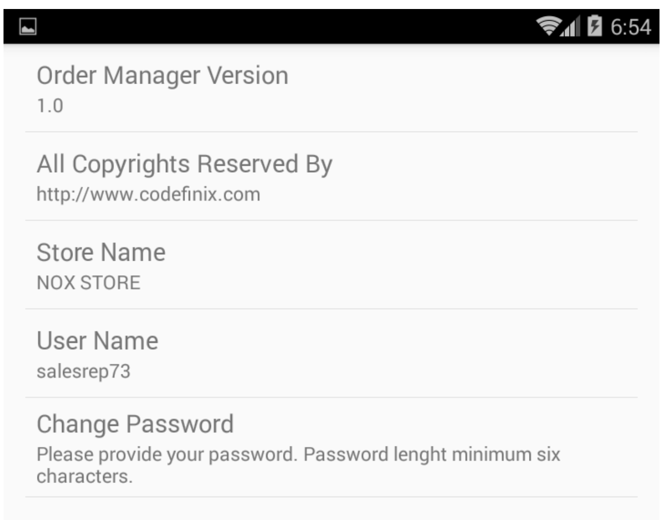


Everything's are done so far without internet connection. Now to send order data to online store you need internet connection again. Once you connected simply press "Sync" button from bottom and you are done taking your first order. If your order synced successfully you will see the following screen with automatically assigned order number to your order and light green color.



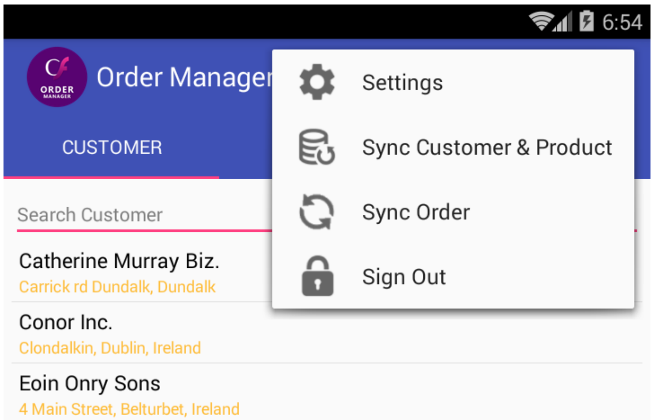
Menu Settings

Settings menu looks like the following image. User can change password by pressing "Change Password". Password length minimum 6 characters are allowed.



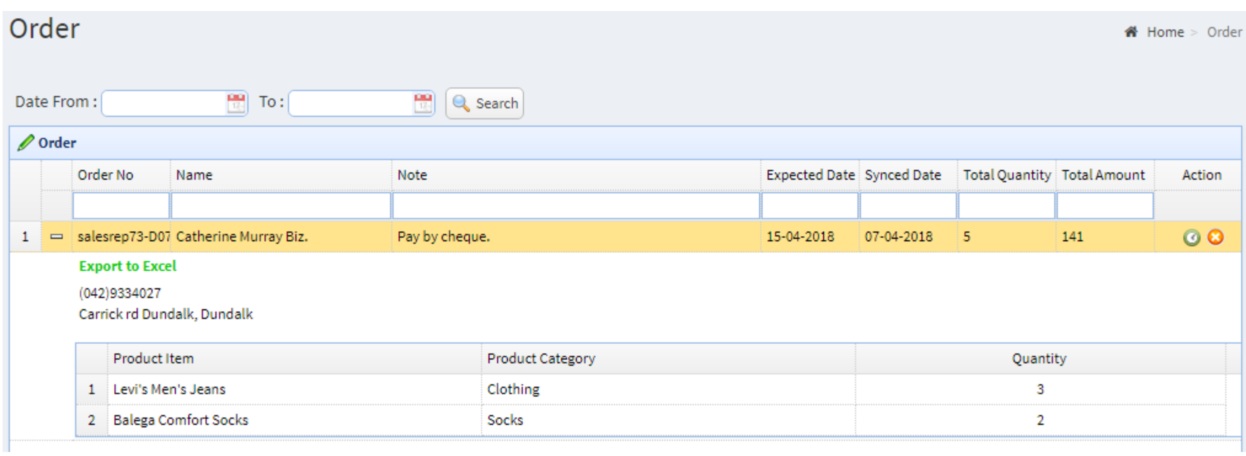
Menu Sync Customer & Product

Once online store change or add product items and customers, users need to press “Sync Customer & Product” menu item.



Processing Order

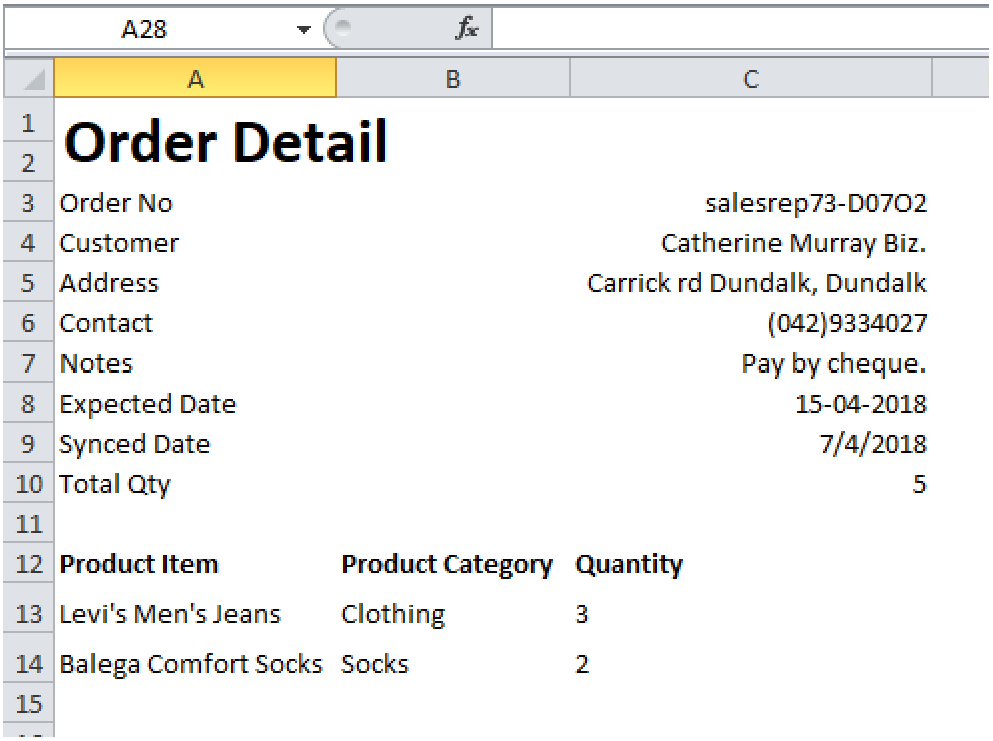
Now login to online store and select “Order” from left navigation panel. You will see the following screen.



To process the “Order” you need to click “Pending” icon from action column. Once order processed your on-hand item quantity will be changed based on order quantity.

Export Order Detail to Excel

To export “Order Detail” to Excel you need to click “Export to Excel” from the expanded order list.



	A	B	C
1–2	**Order Detail**		
3	Order No		salesrep73-D07O2
4	Customer		Catherine Murray Biz.
5	Address		Carrick rd Dundalk, Dundalk
6	Contact		(042)9334027
7	Notes		Pay by cheque.
8	Expected Date		15-04-2018
9	Synced Date		7/4/2018
10	Total Qty		5
11			
12	**Product Item**	**Product Category**	**Quantity**
13	Levi's Men's Jeans	Clothing	3
14	Balega Comfort Socks	Socks	2
15			