Gold Sales
Mobile Application

Setup

Contents

System Management

1) In order to be able to login to the system, two parts of the system need to be setup. A representative and a Gold user.

Representative setup

- System Management>Prospect Data>Representative

- Select the insert function
- Enter up to 4 initials
- Follow and add the additional data as prompted

```
                          ─── Insert Mode ───
|Details|
 Representative Code: IB

 Name:                Ibcos person
 Position:            Sales

 Calls:               No

 Depot Code:          1

 Mobile Phone No.:

 Email Address:

 Email Notification?  No
 Allow View All Reps: No
 View Profit Tab?     No
 Leaving Date:        _

Enter the Date the rep is leaving or left
F2   OK   |F3 Cancel |F4        |F5        |F6        |F7        |F8
```

User setup

     System Management>Security>Personnel Security File

     Users should be setup by the system administrator.

```
┌───────────────────── Amend Mode ─────────────────────┐
│ Details│Email│Security│Financial│Document Store│Windows│Applications│
│  Password:            ADMIN     Initials:  ADM        │
│                                                       │
│  Access Codes: 2    25    30    31    32    33    34    40    0    0 │
│  Companies Allowed:        All                        │
│                                                       │
│  SuperUser:                Yes                        │
│  Allow Batch Operations:   Yes                        │
│  Allow Additional Process: No                         │
│  Detach Prints on Windows? No                         │
│  Wgd Exclude Access Codes:                            │
│  Restricted {WGD} Amend:   No                         │
│  Set Stop Flag ?           No                         │
│                                                       │
│  Rep Code:                                            │
│                                                       │
│  Application User?         Yes                        │
│  Email:          info@ibcos.co.uk                     │
│                                                       │
├───────────────────────────────────────────────────────┤
│ Enter the User Access Number                          │
│ F2   OK   │F3 Restore│F4        │F5 Securty│F6       │F7       │F8 │
└───────────────────────────────────────────────────────┘
```

The Application Gold Sales should be set to active

Set company to the company for that user to use

Set their Rep code that you previously setup

```
┌───────────────────── Amend Mode ─────────────────────┐
│ Details│Email│Security│Financial│Document Store│Windows│Applications│
│  Application    Description                    Status  │
│  SALEAPP        Gold Sales                     Active  │
│  SRVAPP1        Gold Service                   InActive│
│  WEB CRM        Customer Relationship Management InActive│
│  SRVAPP2        Gold Service Plus              InActive│
│                                                       │
│                                                       │
│                                                       │
│                                                       │
│                                                       │
│                                                       │
│                                                       │
├───────────────────────────────────────────────────────┤
│  Application:SALEAPP        Description:Gold Sales     │
│  Active                                                │
│  Company:  1                                           │
│  Rep Code:IB                                           │
├───────────────────────────────────────────────────────┤
│ Enter the Representative Code                          │
│ F2   OK   │F3        │F4        │F5        │F6       │F7  Default│F8 │
└───────────────────────────────────────────────────────┘
```
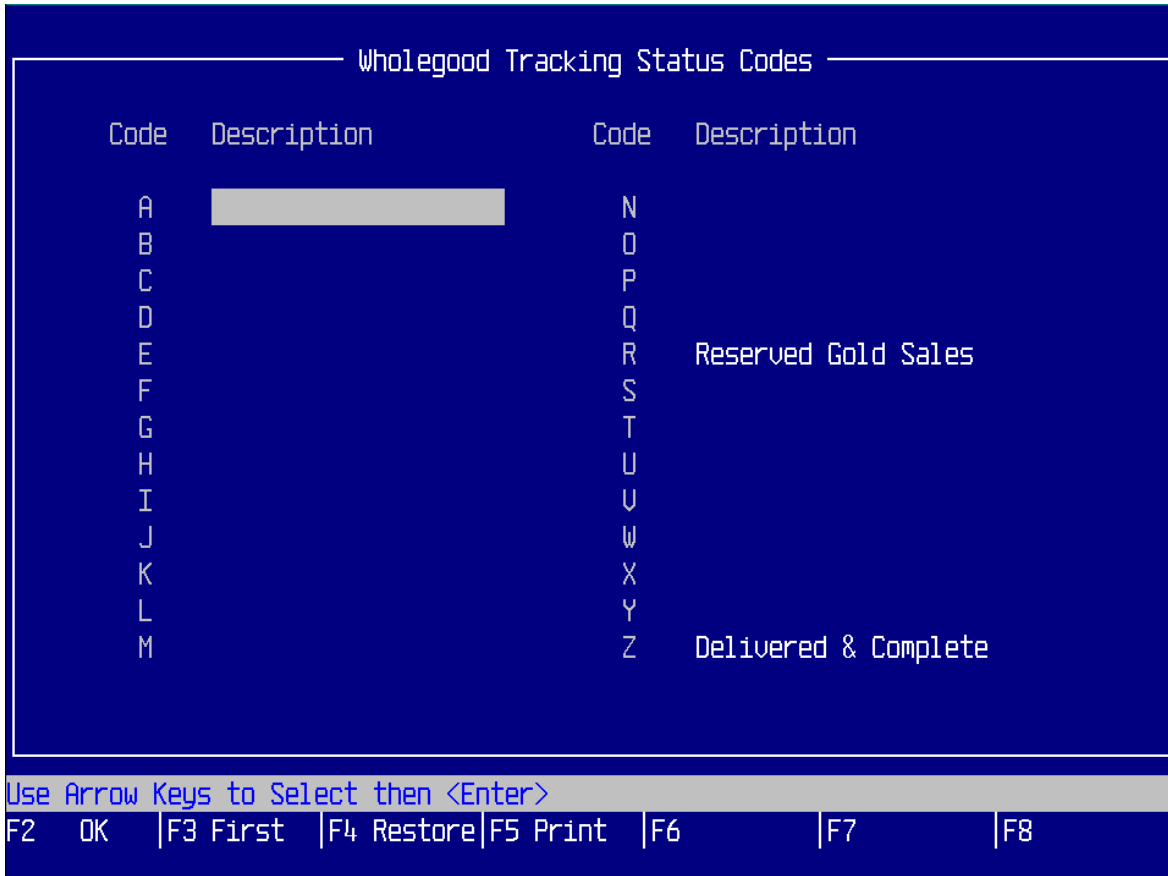
Tracking Status Code setup

A tracking status code of R is required to use the tracking reporting

To setup, go to

System Management> Ledgers / Mapping / Currency>Tracking Status Codes

Select Wholegoods

Select the Code 'R' and enter a description as per the example below

```
┌──────────────── Wholegood Tracking Status Codes ────────────────┐
│                                                                 │
│     Code   Description              Code   Description           │
│                                                                 │
│      A   [                    ]      N                           │
│      B                               O                           │
│      C                               P                           │
│      D                               Q                           │
│      E                               R      Reserved Gold Sales  │
│      F                               S                           │
│      G                               T                           │
│      H                               U                           │
│      I                               V                           │
│      J                               W                           │
│      K                               X                           │
│      L                               Y                           │
│      M                               Z      Delivered & Complete │
│                                                                 │
│                                                                 │
└─────────────────────────────────────────────────────────────────┘
Use Arrow Keys to Select then <Enter>
F2   OK   |F3 First  |F4 Restore|F5 Print |F6         |F7        |F8
```

Category setup

In order to utilise the categories feature, the web classification must be set on the wholegood group codes you wish to categories.

This then enables you group many wholegood group codes to one category.

The web classification is in
System Management> Wholegoods / Workshop> Wholegood Web Classifications

Select Insert
Enter up to 4 characters in WEB Classification field
Select Ok

Now enter

Additional Information

Wholegood Images

Wholegood images will only appear in the app if the Document type is set to **WGSW**

e.g. the email subject must start WGSW <wholegood number>

The first picture shown in the app on the search screen and in the detail of the wholegood is the first image that was received by the docstore with WGSW type