

Gold Sales

Instruction Manual

Version 0.1
27th October 2021

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Overview

Gold Sales is a Mobile App that provides Sales Reps with the ability to view, track and manage real-time information on every wholegood in the dealership. It replaces the need for paper stock lists, which are immediately out of date once printed, and gives access to detailed information about each wholegood, including images and service history. With features like 'Favourites' and 'Reservations', it is a great tool for the Sales Reps to use during conversations with customers. The key features are:

- Real time wholegood stock inventory
- Images of wholegoods (NOTE: The Docstore is required for this feature to work)
- Wholegood specification details
- Search function with multiple filtering
- Service history summary
- Reservation of wholegood items for a customer (with synchronised tracking to Gold)
- Favourite wholegoods function
- Offline mode
- Note taking facility against specific wholegoods (with synchronised tracking to Gold)

What does this document contain?

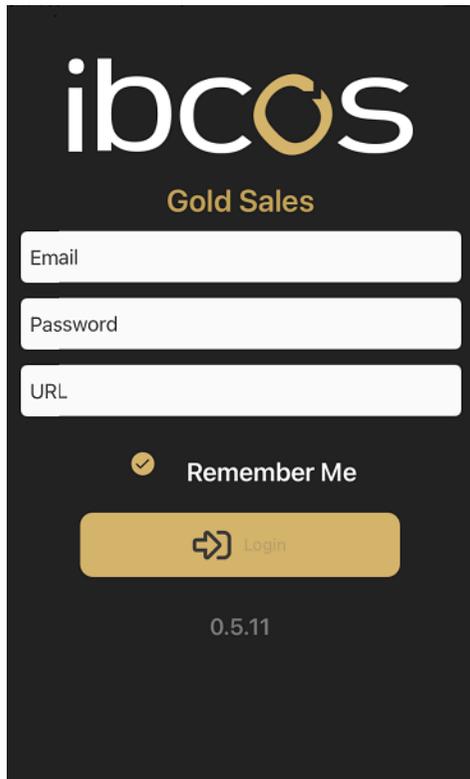
This document is intended to be used as a training manual for all users of Gold Sales. It contains screen shots and process instructions for all parts of the product. This App works on both mobile and tablet devices. The majority of the screenshots are from the mobile version, with a specific page to show what the tablet screens look like.

Overview of the Icons on the App

- ☆ = Wholegood is *not* saved in your favourites folder
- ★ = Wholegood is saved in your favourites folder
- = Wholegood can be reserved
- ✔ = Wholegood has been reserved by you
- ❌ = Wholegood has been reserved by someone else
- ⊕ = Wholegood reservation is pending (awaiting connectivity to the Gold server to update and synchronise back to the app)

Logging into the App

Your system administrator can get you set up to use the Gold Sales app – they can refer to the Gold Sales Set Up Manual. When you first open the Gold Sales App, you will see the 'Log In' Screen. Here you will be required to enter the following data:



Email Address



Password



URL (this will have been provided by your Systems Administrator)



When you have entered these details, you need to press the 'Log In' button



Did you know?

The Log In screen has a 'Remember Me' function, and when this option is selected, the App will retain the users email address and URL details for future use. The password will not be retained for security protection purposes.

Overview of the App Screens

The Home Page

When you log into the App, the first page you will see is the 'Home Page', and it will display the list of wholegoods:

Each wholegood will be displayed on its own 'card' with the following 'summary information':

- Wholegood Number
- Wholegood Description
- Retail Price of the wholegood (note: if the sales price exists within the wholegood in Gold, then this price is visible in the App. If it is set to zero, then the Retail Price is used. The one visible in the App is the one that is set in Gold).

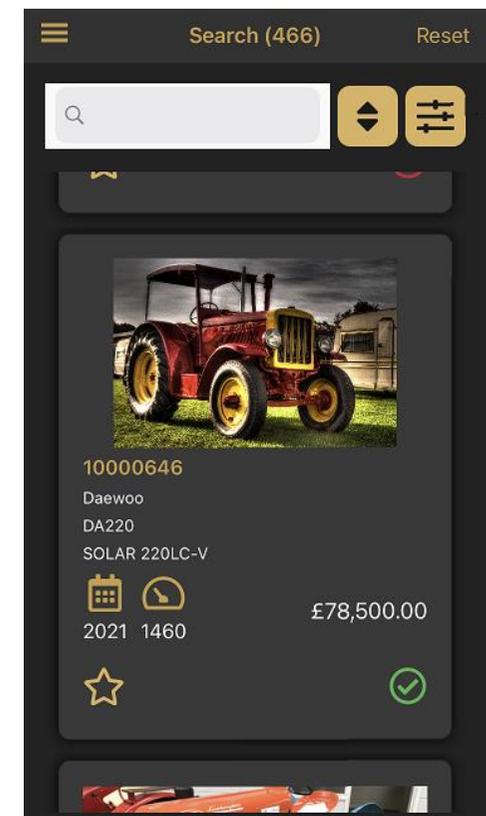
You will also see 4 icons on the wholegood card:

-  = The year of manufacture for the wholegood record
-  = Number of machine hours on the wholegood record
-  = Favourites icon to allow user to save the wholegood in their Favourites folder
-  = Reserve icon to allow the user to reserve the wholegood for a customer



Did you know?

You can view more details on the wholegood by pressing on it to open the 'Detailed Wholegood Screen'.

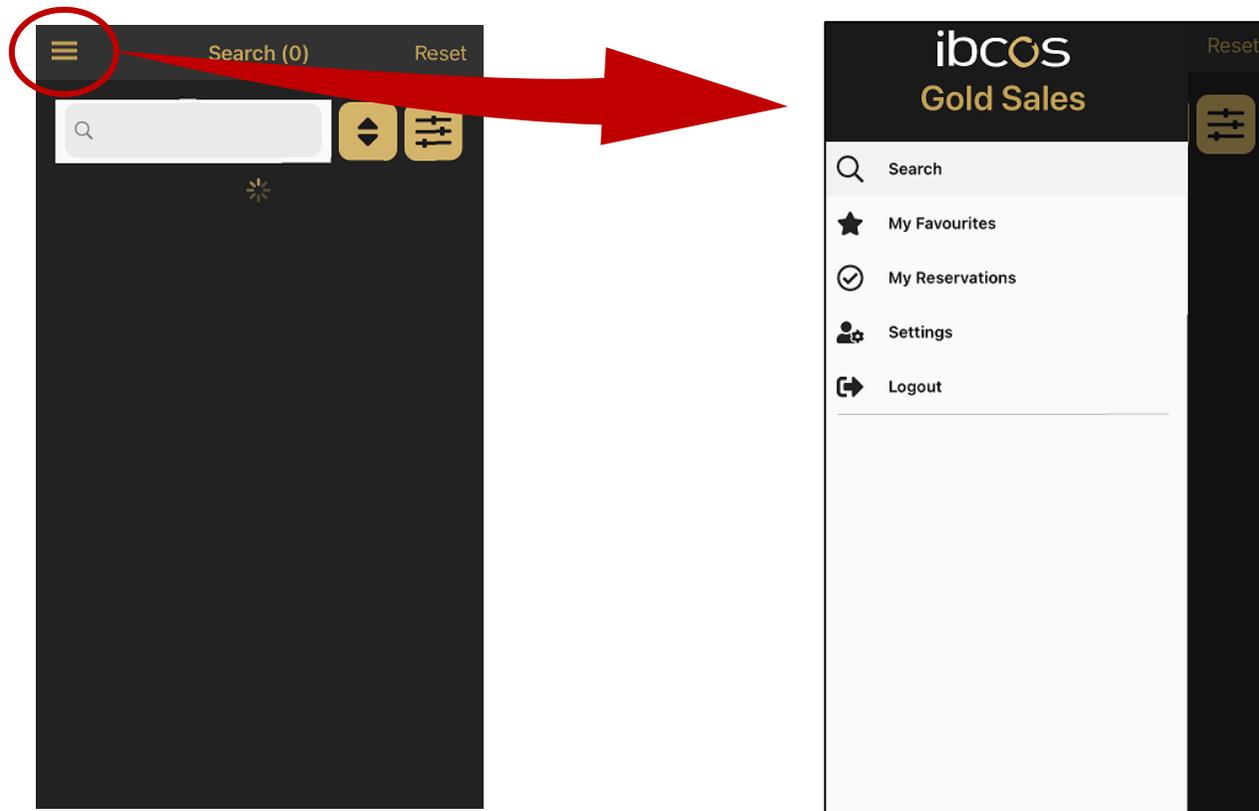


The Main Menu

On the Home Screen you will see three lines at the top left-hand side of the screen. Pressing this will open the 'Main Menu'. Here you will be able to access the following pages:

- My Favourites folder
- My Reservations folder
- Settings

You will also be able to log out of the App by pressing the 'Log Out' button.



The Detailed Wholegood Card

You can view more details on the wholegood by clicking on the card. This will open the 'Full Screen' mode. You can scroll down through to screen to see the following information:



Download Images

Download all the images attached to the wholegood by pressing this 'download' arrow



Images

Images will only be visible if they exist against the wholegood in Gold. You can view more images by swiping from left to right on the picture. By default, only the first image will be downloaded from the Docstore



Status

The status section will show you whether the item is in stock, on order or on consignment. It will also show you where the item can be located



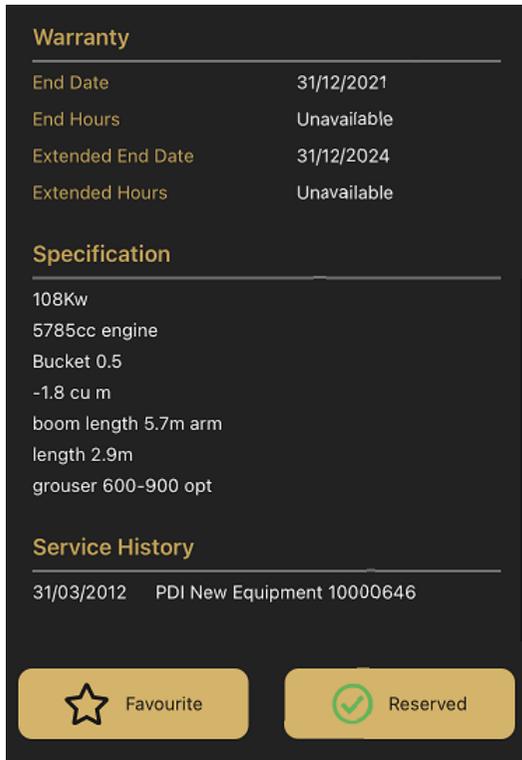
Information

The Information section provides detailed information about the wholegood. The data displayed is taken directly from the wholegood record in Gold, which will be as up to date as the last time the data was refreshed



Did you know?

Images will only be visible in the App if they exist against the wholegood in Gold. By default, only the first picture is downloaded from the Docstore. You can change this default in your settings menu. The following extensions are permitted for images: PNG / JPG / JPEG / TIFF / TIF / GIF. If you do not have Docstore, no image will be displayed.



Warranty

End Date	31/12/2021
End Hours	Unavailable
Extended End Date	31/12/2024
Extended Hours	Unavailable

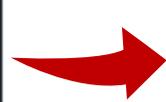
Specification

108Kw
5785cc engine
Bucket 0.5
-1.8 cu m
boom length 5.7m arm
length 2.9m
grouser 600-900 opt

Service History

31/03/2012 PDI New Equipment 10000646



Warranty

The Warranty section will show the warranty information for the wholegood, taken from the wholegood record in Gold



Specification

The Specification section shows the full specification from the wholegood record in Gold. Note: There are two specifications in a wholegood, this one is the general one that customers see. If the specification is set to 'private' then it will not be visible



Service History

The Service History section provides details of the service history for the wholegood. The data is displayed in chronological order, with the most recent service date at the top of the list



Favourite and Reserve buttons

You can add the wholegood item to your 'Favourites' folder, or you can reserve it by pressing the 'Reserve' button



Did you know?

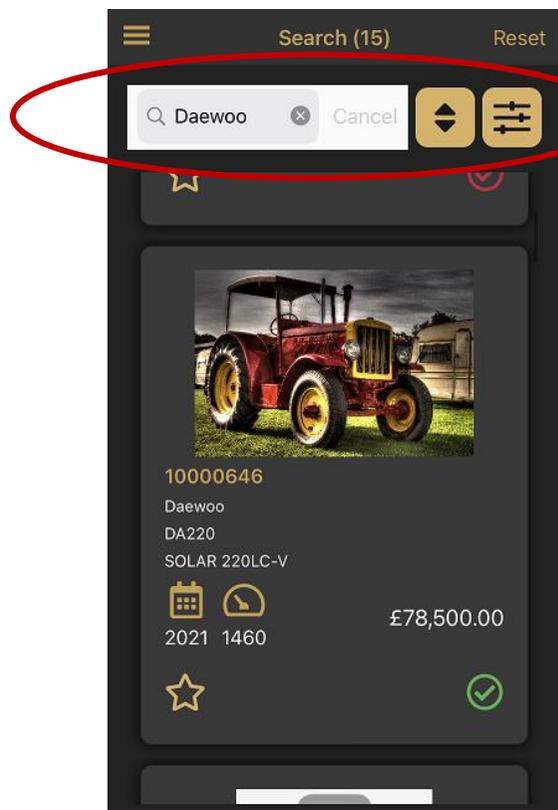
There are several places from which you can 'Favourite' or 'Reserve' a wholegood. Instructions on how to do this can be found in this manual.

Searching, Sorting and Filtering on wholegood items

When you are on the Home Screen of the App, you are able to perform the following functions:

- Search for wholegoods
- Sort the order of the data
- Filter on the data

At the top of the Home Screen, you will see the search bar, and 2 additional icons:



The Search Bar



The 'Search Bar' allows you to search on key words on the following categories: make, model, model description, wholegood number and general specification

The 'Sort' Icon



The 'Sort' icon allows you to sort the data into an order based on the category chosen

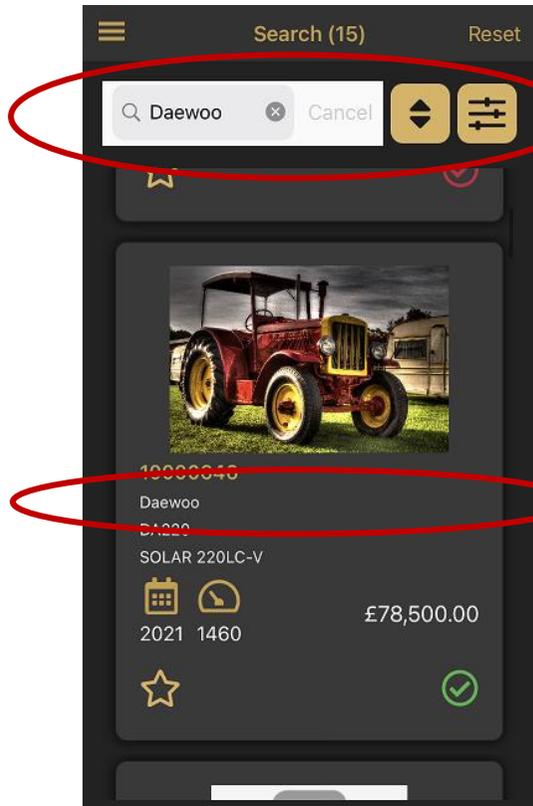
The 'Filter' Icon



The 'Filter' icon allows you to filter the data on certain categories

Searching for wholegoods

You can search for certain wholegoods by using the 'Search Bar' at the top of the Home Screen.



To search on a wholegood, simply click into the search bar, enter a 'key word', and press the 'search' or 'enter' button on your keypad (buttons will vary between devices)



Any wholegood data which contains this key word will be shown on the screen



Did you know?

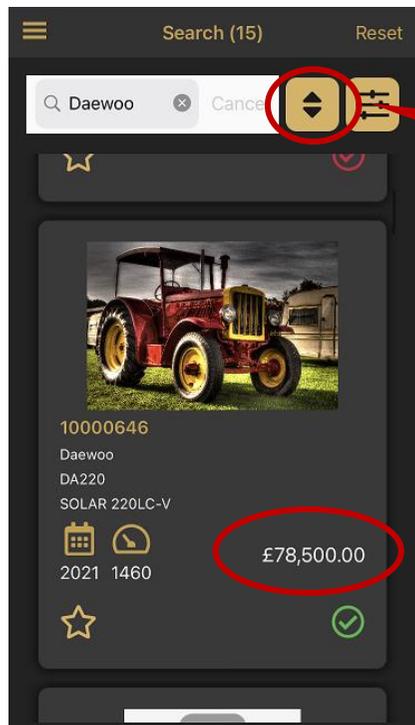
To clear the search results, press the 'Cancel' option found within the Search Bar:
Note: Android devices will only show an 'X' and not the word 'Cancel'.



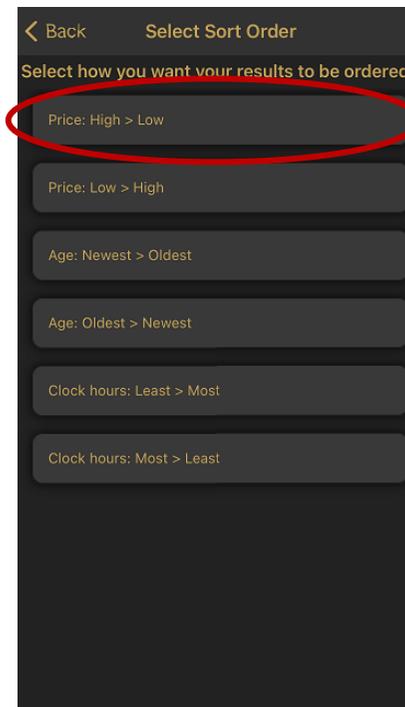
Sorting the data

From the Home Screen, you have the option to 'sort' the wholegood data by the following criteria:

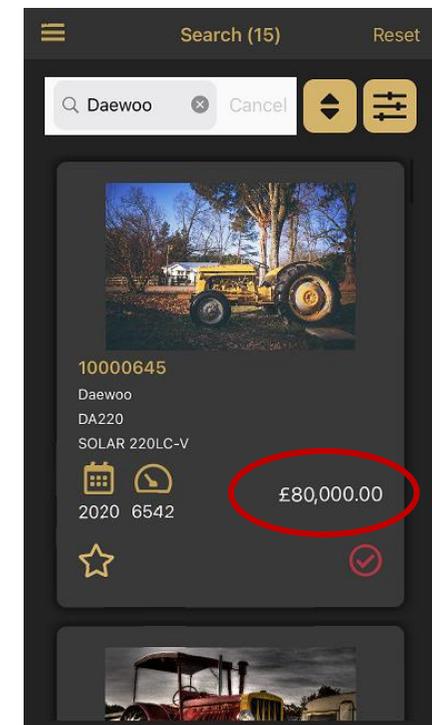
- Price (High to Low)
- Price (Low to High)
- Age (Newest to Oldest)
- Age (Oldest to Newest)
- Clock Hours (Least to Most)
- Clock Hours (Most to Least)



To sort on a specific set of criteria, click on the 'Sort' icon



A new screen will open, allowing you to select your preferred criteria

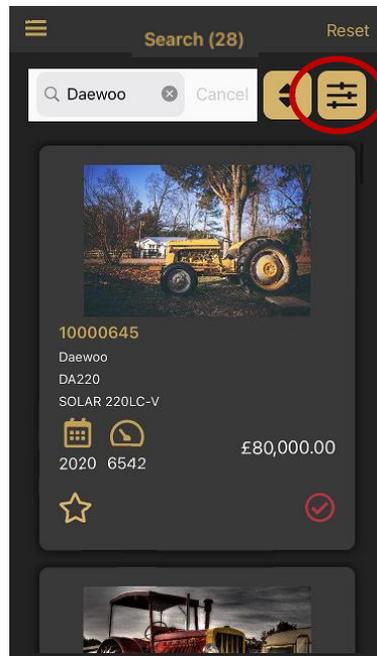


As soon as you select an option, the data will be sorted on the home screen

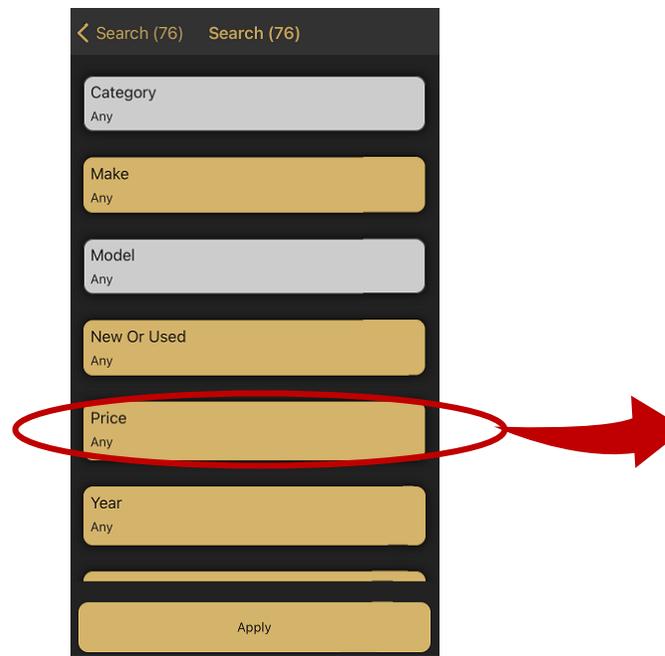
Filtering the data

From the Home Screen, you have the option to 'filter' the wholegood data by the following criteria:

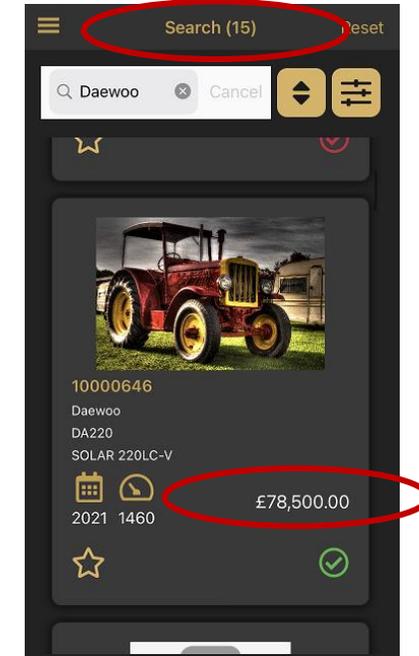
- Category
- Make
- Model
- New or Used
- Price
- Year
- Clock Hours



You can filter wholegoods on specific criteria by pressing the 'Filter' icon. This opens a new screen and allows you to set specific filters

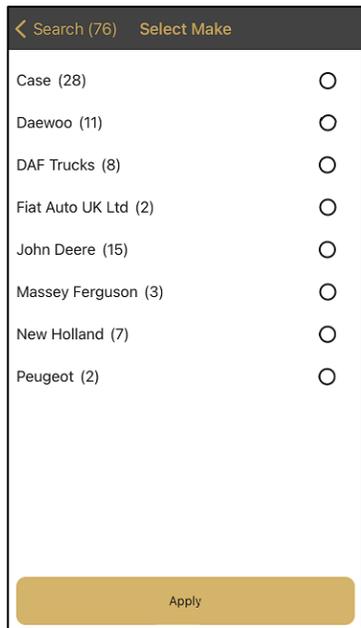


Select a filter option to apply more detail (see next page for further instructions). To apply the filters, press the 'Apply' button

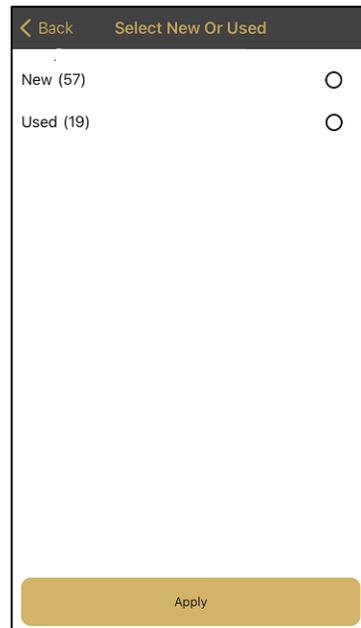


You will return to the Home Screen, and the filters will be applied. The search number at the top of the screen reflects the number of wholegoods available

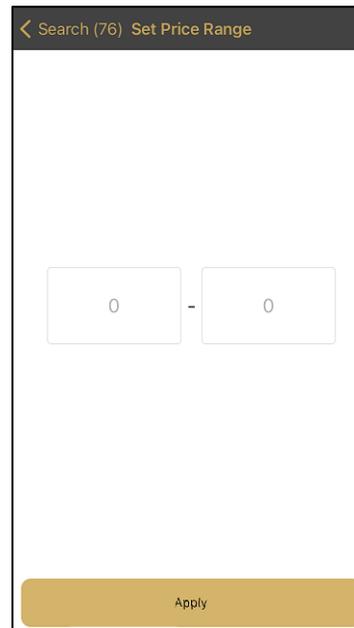
For each category you select, a new screen will open allowing you to specify the selection in more detail:



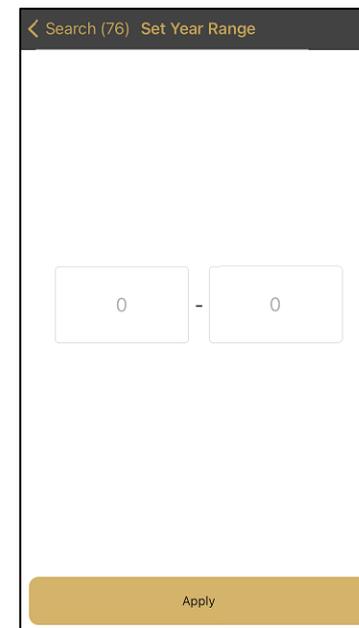
Search on a specific Make of wholegoods by selecting the Make you want and pressing 'Apply'



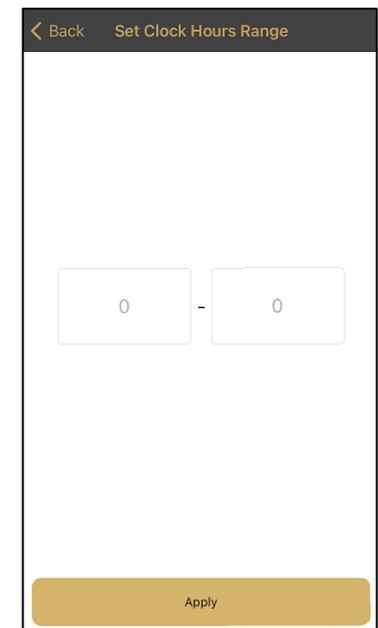
You can search for 'New' or 'Used' wholegoods. Select the option you want and press 'Apply'



Choose the Price Range you want to view by adding in the prices and pressing 'Apply'



Set the Year Range of the wholegoods by adding the in the years and pressing 'Apply'



Set the range of Clock Hours for the wholegoods by adding the in the hours and pressing 'Apply'

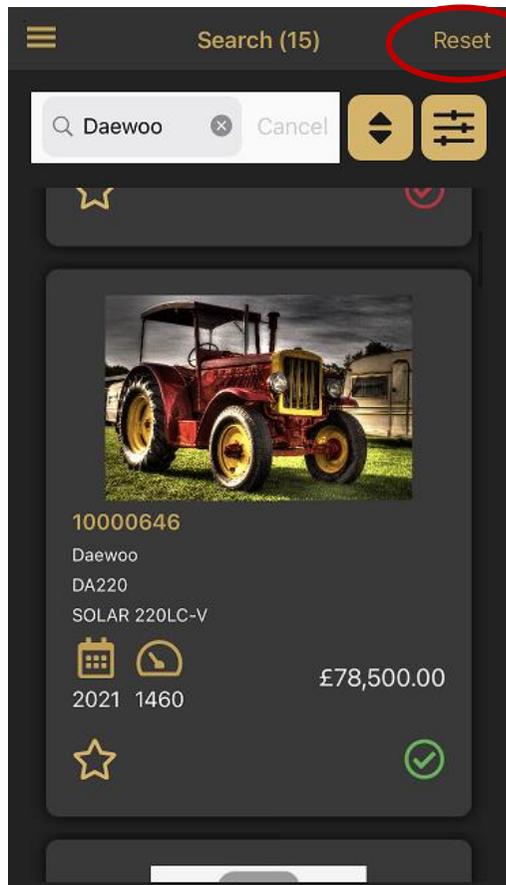


Did you know?

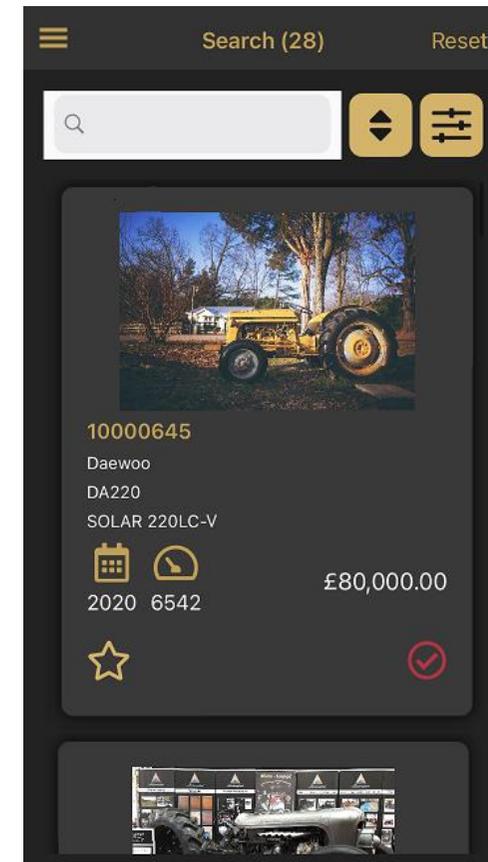
You can select multiple filters at once. When you have made a selection on one category and pressed the 'Apply' button, you will be taken back to the Filter screen. When you have made all your selections, press the 'Apply' button at the bottom of the Filter screen. This will take you back to the Home Screen, where you will only see wholegoods with the selected filtered criteria.

Resetting the data

If you have searched, applied filters, or sorted the data, you can reset this view by pressing the 'Reset' button at the top of the screen. This will remove all the sorting and filter criteria you have previously applied.



The number next to the 'Search' at the top of the screen shows '28' wholegoods available with the Sort and Filter criteria added



When the 'Reset' button is pressed, the Sort and Filter criteria is removed. The number at the top of the screen shows '76' wholegoods in total

Favouriting a wholegood

You can mark a wholegood as a 'Favourite' to save it to your Favourites folder, removing the need to search for the item. This is useful when you are preparing for a customer conversation. You can 'Favourite' all the wholegoods you think that the customer would be interested in so that they are saved in one place. To save a wholegood to your favourites folder, press the 'Star' icon. There are 2 places where you find the Star icon: from the Home Screen and from the Detailed Wholegood Screen.

★ means the wholegood is *not* saved in your Favourites folder and ★ means the wholegood *is* saved in your Favourites folder

Home Screen



On the Home Screen, the 'Star' icon can be found here

Detailed Wholegood Screen

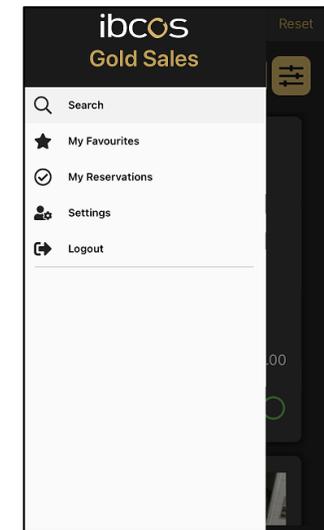


On the Detailed Wholegood Screen, the 'Star' icon can be found here

Your Favourites Folder



Access your Favourites by clicking on the 3 lines at the top of the Home Screen



This opens the menu and allows you to select your Favourites folder



Did you know?

You can click on a wholegood from your Favourites folder to access the Detailed Wholegood Screen. If you want to remove an item from your Favourites folder, click on the star again. If you favourite a wholegood, all available images are downloaded automatically and removed from the device when you remove the item from your Favourites folder.

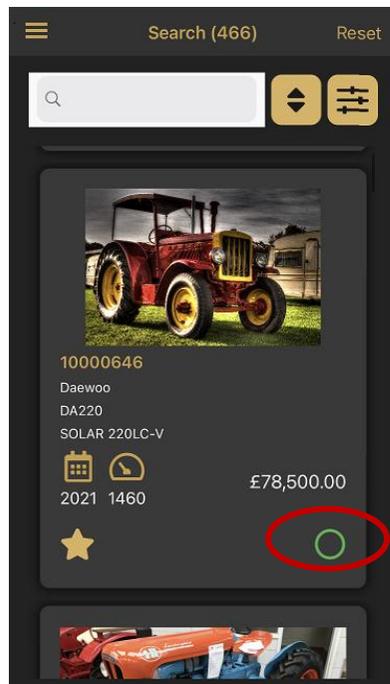
Reserving a wholegood

You can reserve wholegoods for customers to 'hold' it for them until you are in a position to complete the final sale.

There are 3 places where you can find the 'Reserve' button:

- The Home Screen
- The Detailed Wholegood Screen
- The Favourites folder

The Home Screen



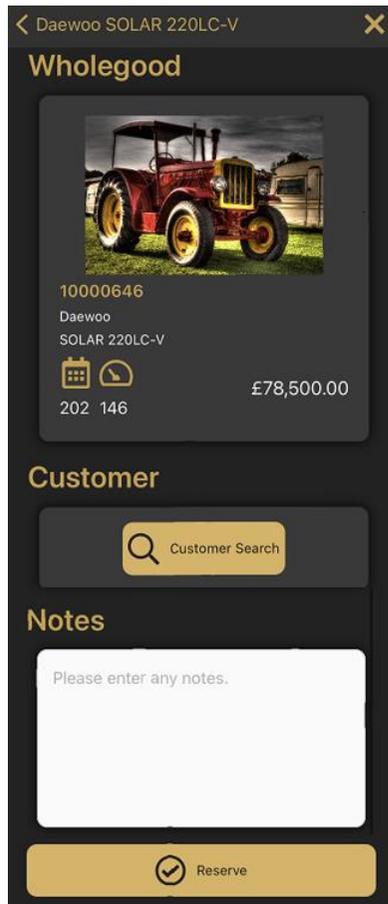
On the Home Screen, the 'Reserve' icon can be found here

The Detailed Wholegood Screen



On the Detailed Wholegood Screen, the 'Reserve' icon can be found here

When you press the reserve icon, a new screen will open, and here you will see the following:



Wholegood Details

Details of the wholegood that you are about to reserve



Customer Search Function

A search function to allow you to search for the customer you are reserving the wholegood for



Notes Section

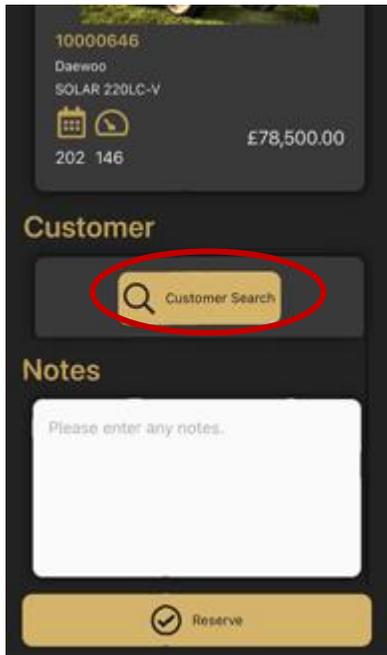
A section to allow you to add notes about the reservations. Any notes you add into reservation page will be stored against the wholegood in Gold



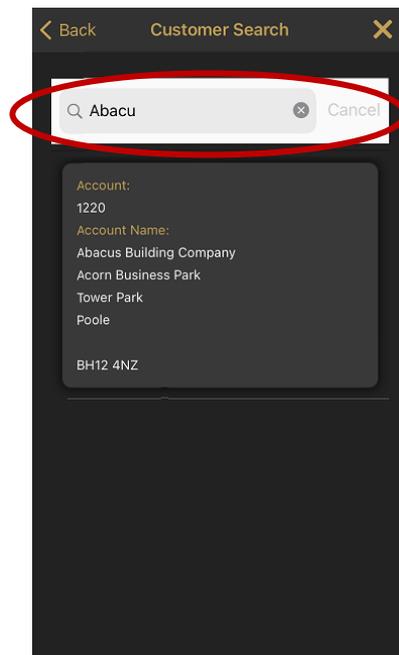
Did you know?

If someone tries to sell a wholegood within Gold that had been reserved in the App, they will receive a warning in the 'Invoice & Self Bill' program to say it has already been allocated.

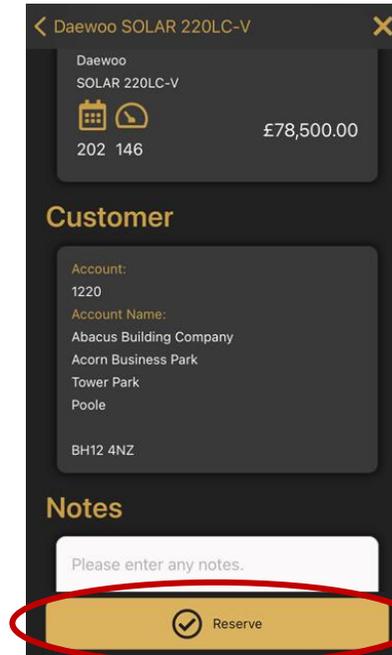
To complete the reservation process, you need to select the customer you are reserving the item for.



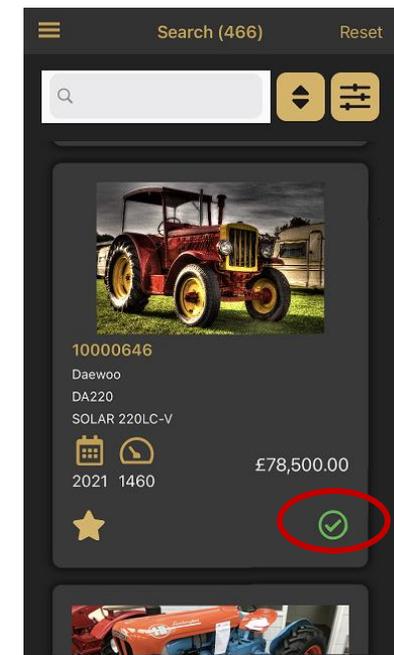
Press the 'Customer Search' button. This will open a new page and allow you to search for the customer



Enter the customer's name or address in the search bar and select the customer you want to reserve the wholegood for



The 'Customer' section will be populated with the details of the customer selected. Press the 'Reserve' button to reserve the item



You will see on the Home Screen that the 'Reserve' icon now has a green tick in it. This shows it has been reserved by you



Did you know?

You only have to type part of the customer name in the Search bar – it will look through the customer fields in Gold and return all customers names or addresses associated with the characters entered. For example: type 'Aba' and 'Abacus Building Company' will be presented.

Reservation data in Gold

Once the wholegood has been reserved, the details of the reservation will be synchronised back to the Gold Server.

The 'Reservation Details' can be found within the Tracking section of the wholegood enquiry of the wholegood. It will show the time and date that the reservation was made.

In Stock (3835 days)

Stock No: 10000602 NEW WHOLEGOOD Make: IB Group: NTRA
 Model: IB150 Description: TRACTOR Stat: S

Hdr | Spec | Costs | Audit | Att | Bonus | WIP | WSJ | Serial | Invoice | Sale | Options | Doc* | OIP | PM | Events

Depot: POOLE Location: Serial:
 Customer: 1234 Tel No: 01202 714200 Alt No:

Ibcos Computers Ltd
 Abacus House
 Acorn Business Park
 Poole
 Dorset, BH12 4NZ

Reg No: Reg Date:
 WARRANTY:- STANDARD EXTENDED
 Start Date: End Date: End Clock:

FINANCIAL SUMMARY

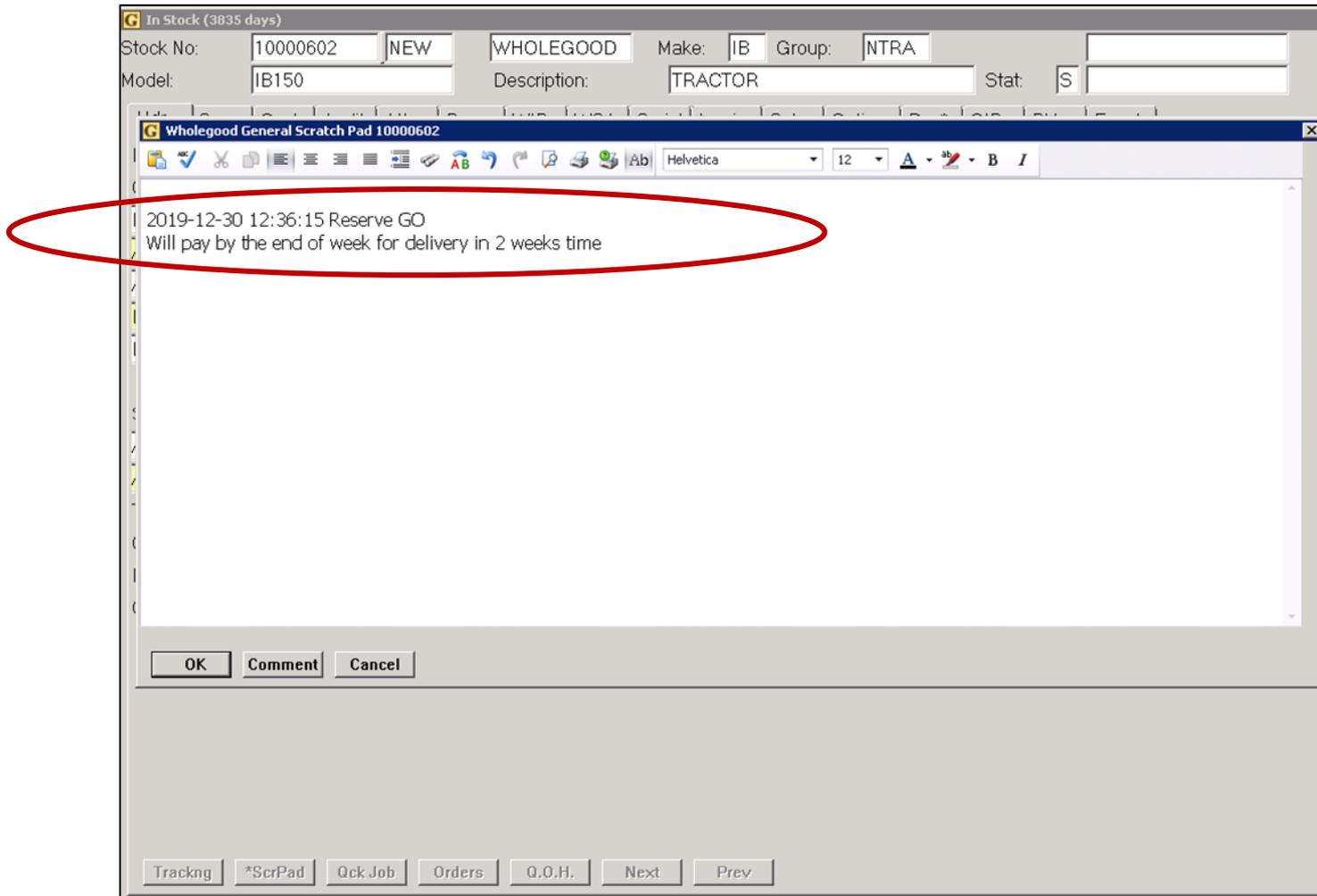
Wholegood Enquiry Cmp. 46/1 POOLE

Date	Time	Op	Text	Sts	Act Date
30/12/2019	12:36	GO	Allocated Customer 1234: Ibcos Computers Ltd	R	

Insert Amend Print

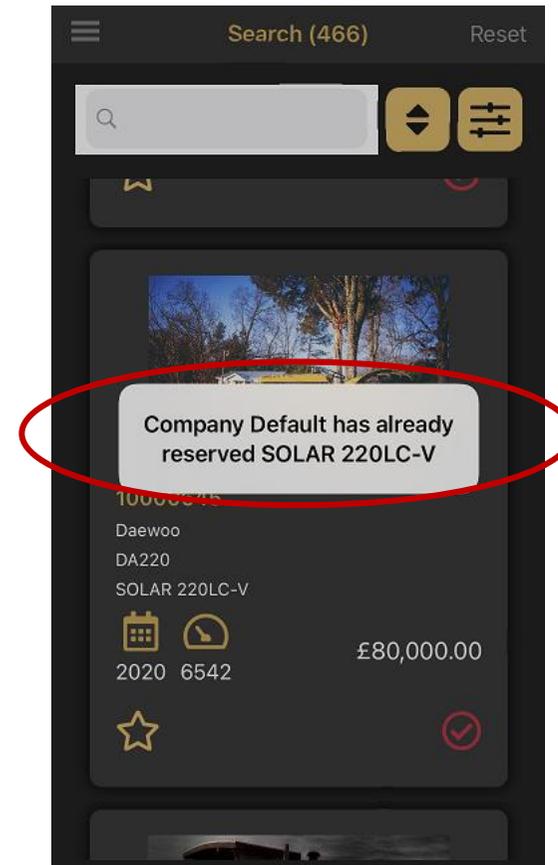
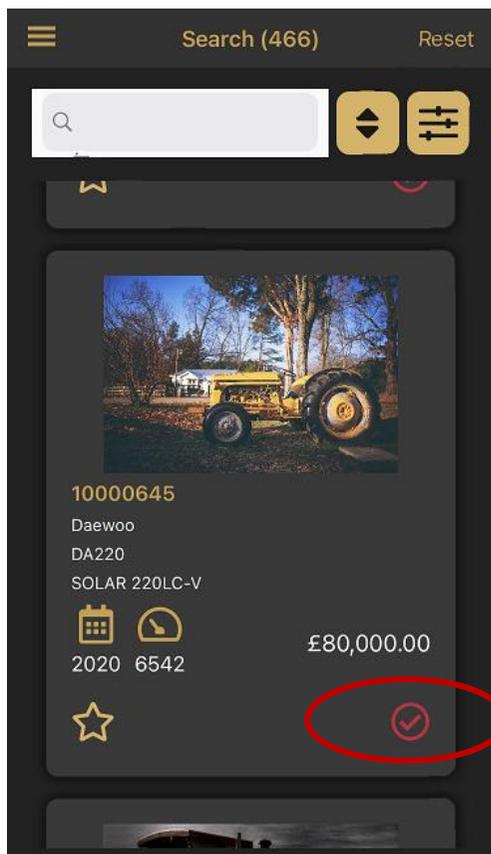
Trackng *ScrPad Qck Job Orders Q.O.H. Next Prev

Any information that you add to the 'Notes' section of the wholegood in the App will be stored within the scratchpad of the wholegood in Gold. It will be time and date stamped with the sales representative's name to show who made the comments and when they were recorded.



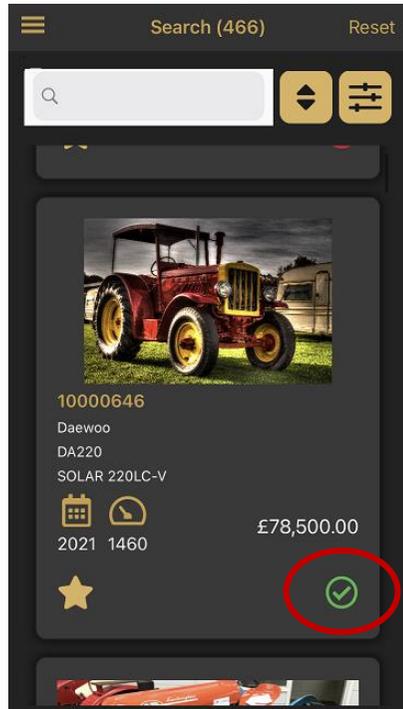
Wholegoods reserved by other Sales Representatives

If the 'Reserve' icon is red with a tick in it, it means that the wholegood has been reserved by another Sales Representative. If you click on the icon, it will show you who it was reserved by.

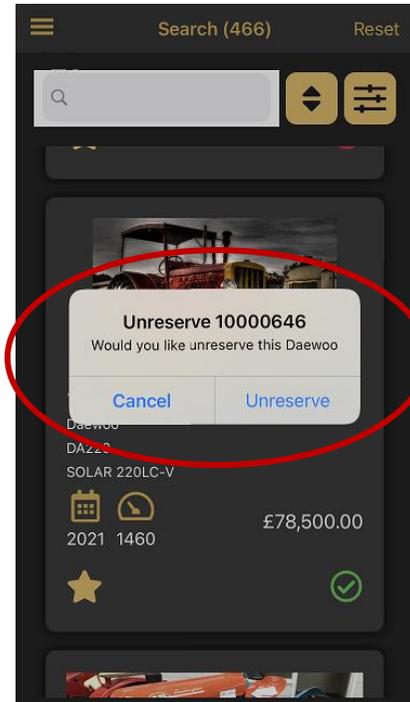


Un-reserving a wholgood

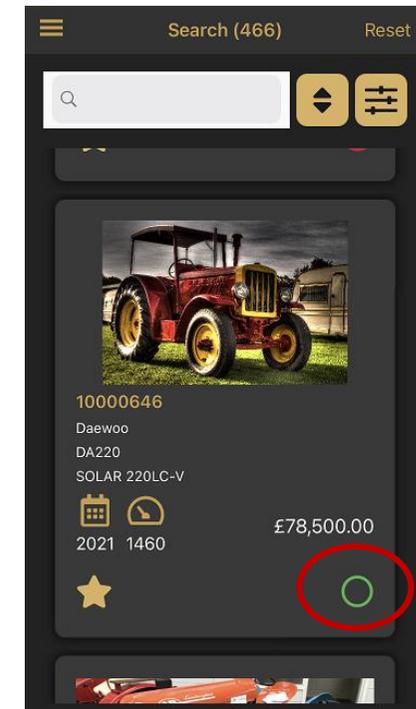
You can unreserve wholgoods that you have reserved by pressing the 'Reserve' button again.



You can unreserve a wholgood reserved in your name by pressing the 'Reserve' button again



A notification will appear asking if you want to 'unreserve the wholgood'. Press 'Unreserve' or 'Cancel' to discard the changes



You will see that the green tick has disappeared from the green circle, indicating the wholgood is no longer reserved by you



Did you know?

Users can only unreserve wholgoods that they have reserved in the app and cannot unreserve a wholgood that somebody else has reserved. However, Managers can unreserve any wholgoods in Gold, regardless of who reserved them.

Settings

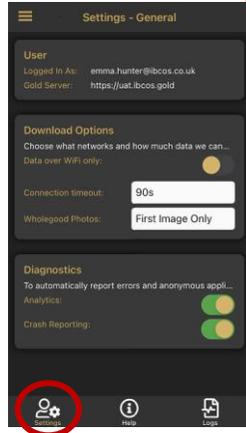
App Settings

In the main menu of the App, you can see your username and the Gold Server you are logged into. You also have the options to configure the settings.

Diagnostics: You can choose whether your device automatically reports the errors and anonymous applications within the App. These settings will be switched 'on' by default to assist with the support and analysis of the product. If you want to turn them off, use the Toggle buttons.

Download Options: Choose whether to download data over Wi-Fi, set your connection time outs and choose how your photos are downloaded to your device.

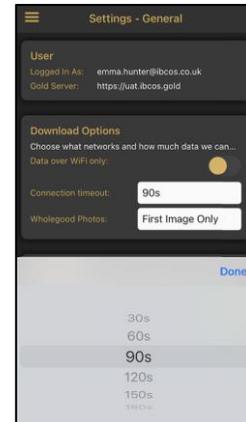
Data over Wifi only



You can choose to have wholegood data downloaded using Wi-Fi connection only. It is disabled by default, but you can use The 'Toggle' to change these preferences

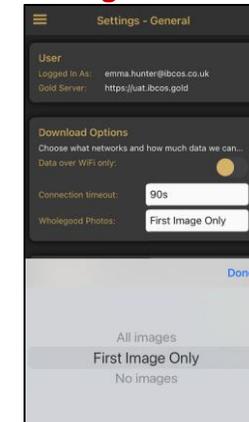
 = images sent using your data
 = images sent over Wi-Fi only

Connection Timeout



Connection timeout is set to 90 seconds by default. You can increase or decrease this if required. For example: if you have poor network connection, you may want to increase the connection time out to its maximum capacity

Wholegood Photos



The default setting for images is to download 'First Image Only' from the wholegood in Gold. Choose 'No Images' to not download anything and choose 'All Images' to download every image of every wholegood



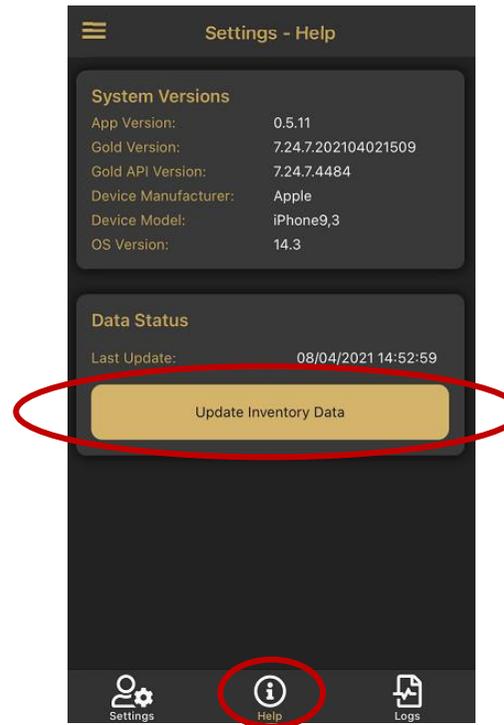
Did you know?

If you choose to download 'All Images', they will be downloaded once your device re-synchronises with the Server. It will download images of items that are in stock, on order or on consignment. If you favourite a wholegood, all images are downloaded for that wholegood, regardless of this setting.

Help Menu

Within the 'Settings' section, you can access the 'Help' option. Here you will see the 'System Version' information. You will also see the 'Data Status', which shows when the data on the device was last updated.

The database between Gold and the device is checked every 24 hours. If the database on the device is older than this, then the app will automatically refresh the database on the device. Should you wish to update the data on the device at any time, press the 'Update Inventory Data' button.



Did you know?

The database on the Gold server refreshes every hour. If any changes or a new wholegood is created, these will be available when the database refreshes on the hour.

Offline mode

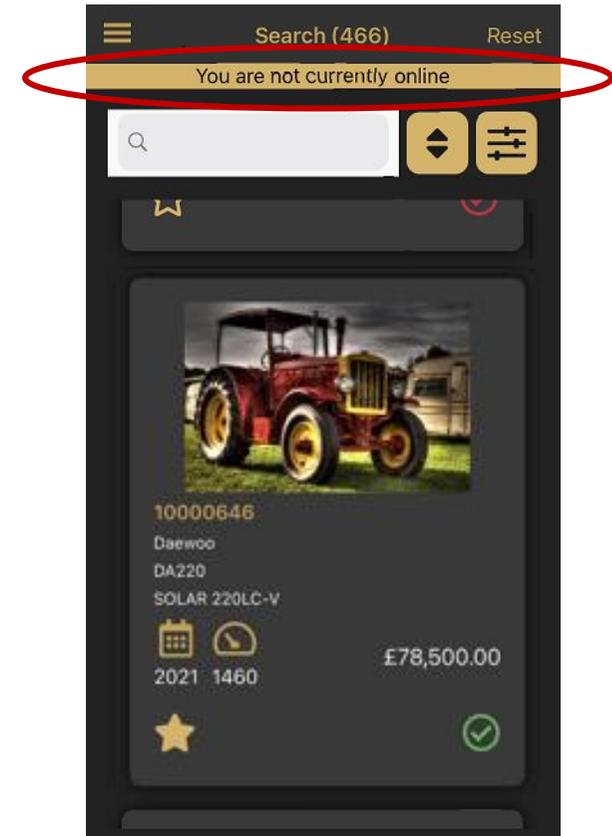
You can use the App even when you have no connection.

The following functions are still available offline:

- Search function
- View the first image of the wholegood (settings must be configured to 'First Image Only')
- Images for wholegoods you have previously downloaded using the download arrow
- All images on wholegoods that have been saved in your Favourites folder
- All reservations confirmed for yourself or someone else
- Reservations that are pending confirmation

When the App is offline, or cannot connect to the database, you will see a notification at the top of the screen to confirm you are working in 'Offline' mode.

When the device has connection again, the synchronisation to the Server will happen automatically.



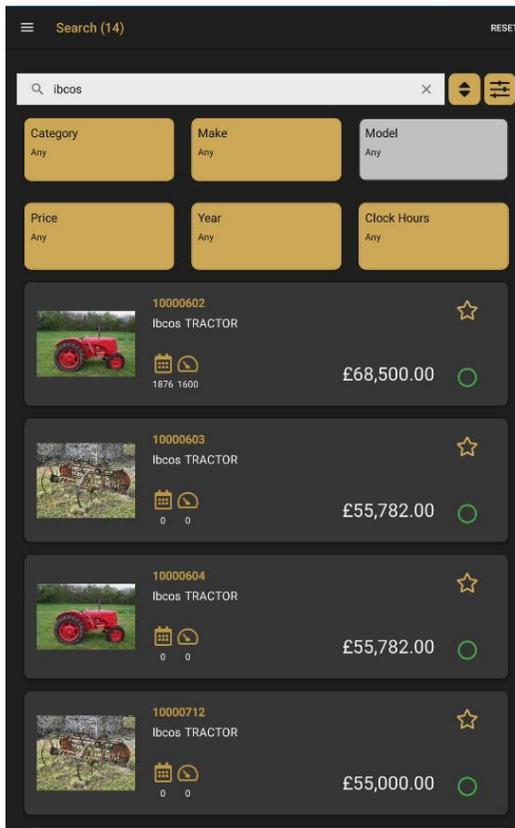
Did you know?

If 2 Sales Representatives are using the App in 'Offline' mode, and they both try to reserve the same wholegood, the person who connects to the server first will get the reservation. Both that reservation and the failed reservation will be stored in the Tracking within the wholegood enquiry in Gold. The times displayed against the reservation (and attempted reservation) will be the time that connection was re-established (and not the time the Sales Representatives attempted to make the reservation).

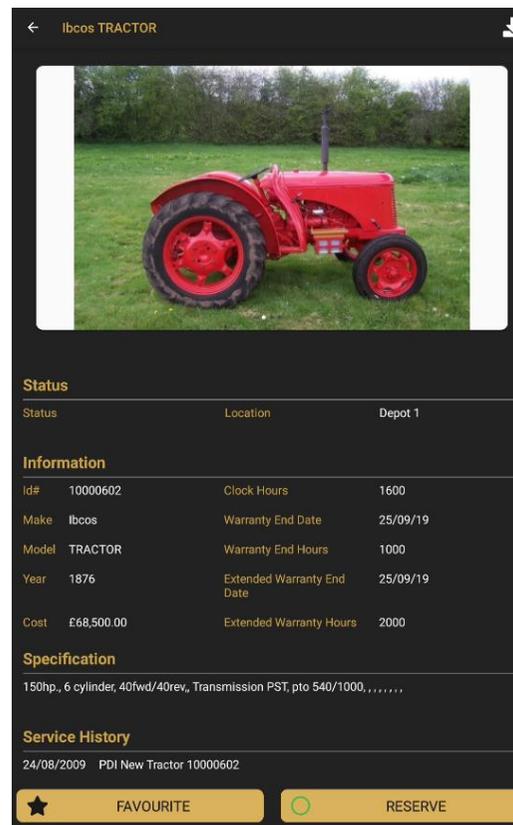
Tablet screen shots

If you are using the Gold Sales App on a tablet device, the screenshots may vary to the ones shown throughout this manual (as these are from a mobile device). Below are some examples of what the tablet screens look like:

The Home Screen



The Detailed Wholegood Card



The Reservation Screen

