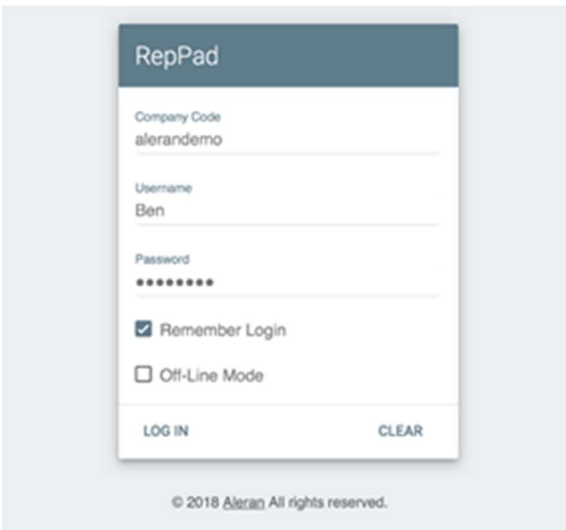
# RepPad Training manual

## UNDERSTANDING REPPAD

### Downloading RepPad

Go the the Apple store and search for Aleran RepPad. Install the app.



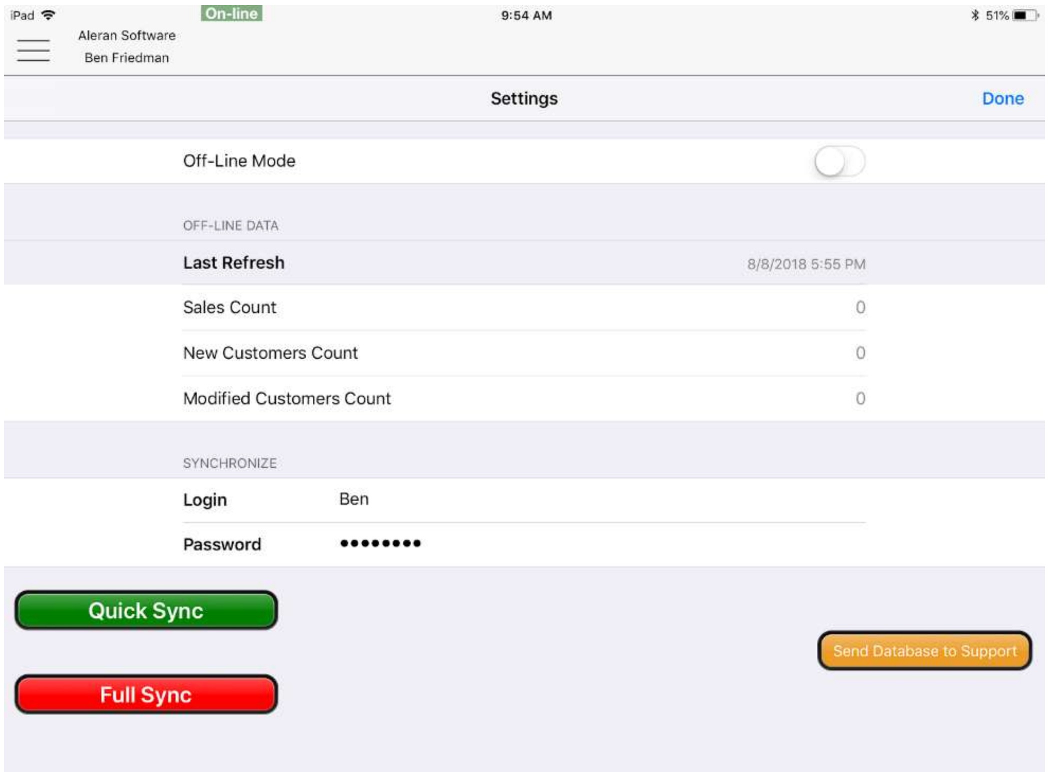

### Signing In

1. To log in, enter your Company Code, Login, and Password. Make sure that Offline Mode is *not* activated and that your iPad is connected to the internet. If you wish, you can turn "Remember Login" on. Press Login to sign into RepPad.

2. When you sign on for the first time, make sure you are online and connected to the internet.

3. When you've confirmed this, press the menu icon (looks like three lines stacked on each other) at the top left of the screen to open the menu. Then press "Offline and Sync".

4. Once you've opened that screen, press the red "Full Sync" button at the bottom. This will sync all your organization's information, vendors, and catalog with the iPad. This should take no more than 60 seconds to complete the process.

5. 

## Full Sync vs. Quick Sync

1. A “full sync” means that any new data entered from another iPad or from RepDesk will be loaded onto your iPad and will also push any information you’ve entered into the cloud for others in your agency to see. This usually takes between 40-60 seconds to complete. It’s recommended that you perform a full sync at the beginning of each day.

2. A “quick sync” only pushes information to the cloud but does not download anything onto the iPad. This is a good option if you have been working in Offline mode limited access to the internet and just need to push out orders quickly. This takes about 10 seconds to accomplish.

## Online Mode vs. Offline Mode

1. You may use RepPad either while connected to the internet (online) or not connected to the internet (offline).

2. In online mode (which should be your default setting), all submitted sales, customer/vendor additions, and catalog updates are immediately pushed to the cloud. Any changes made somewhere else or on RepDesk can be loaded onto the iPad by pressing “Full Sync”.

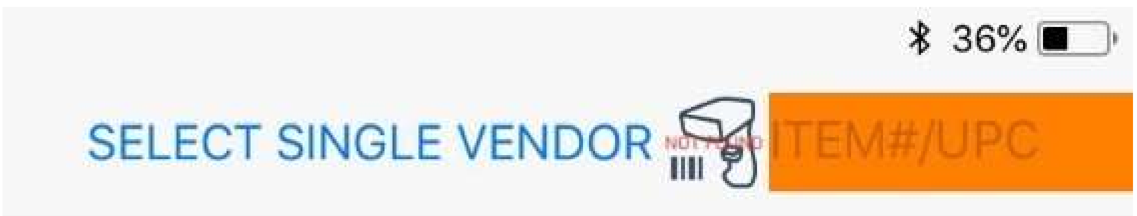
3. In offline mode, you are only working with the information that was downloaded from the last “Full Sync”. To activate offline mode, go into the menu, and then press on “Offline and Sync”. In there, at the top of the screen switch the app into Offline mode. This is a good option if you are in an area with poor/nonexistent internet service. You can still perform all of the programs’ functions (creating new sales, adding customers and vendors, etc.), but all information will be stored locally on the iPad until it’s synced again.

## Using/Syncing the Barcode Scanner

1. The easiest way to add items to a sale is by using a barcode scanner. The Socket Mobile brand is designed to be used with RepPad. There are two models you can use: the 7mi and the 7 ci.

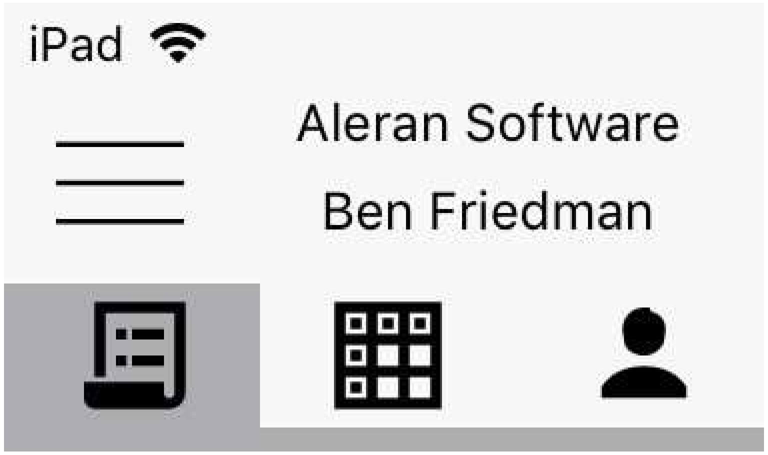
2. Ensure that the Bluetooth has been enabled on your iPad. On the scanner, press and hold the small black circular button until you hear it beep.

3. You can verify that it's synced successfully when the barcode scan icon in the top right corner turns from red to green.

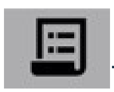
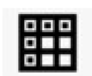
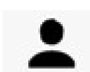



4. Once the scanner is successfully synced, you can start a new sale and start scanning barcodes. The items will automatically show up on the screen. To add multiple units of the same item to a sale, scan the barcode repeatedly until you reach the desired number of units.

Viewing Sales/Creating a New Sale



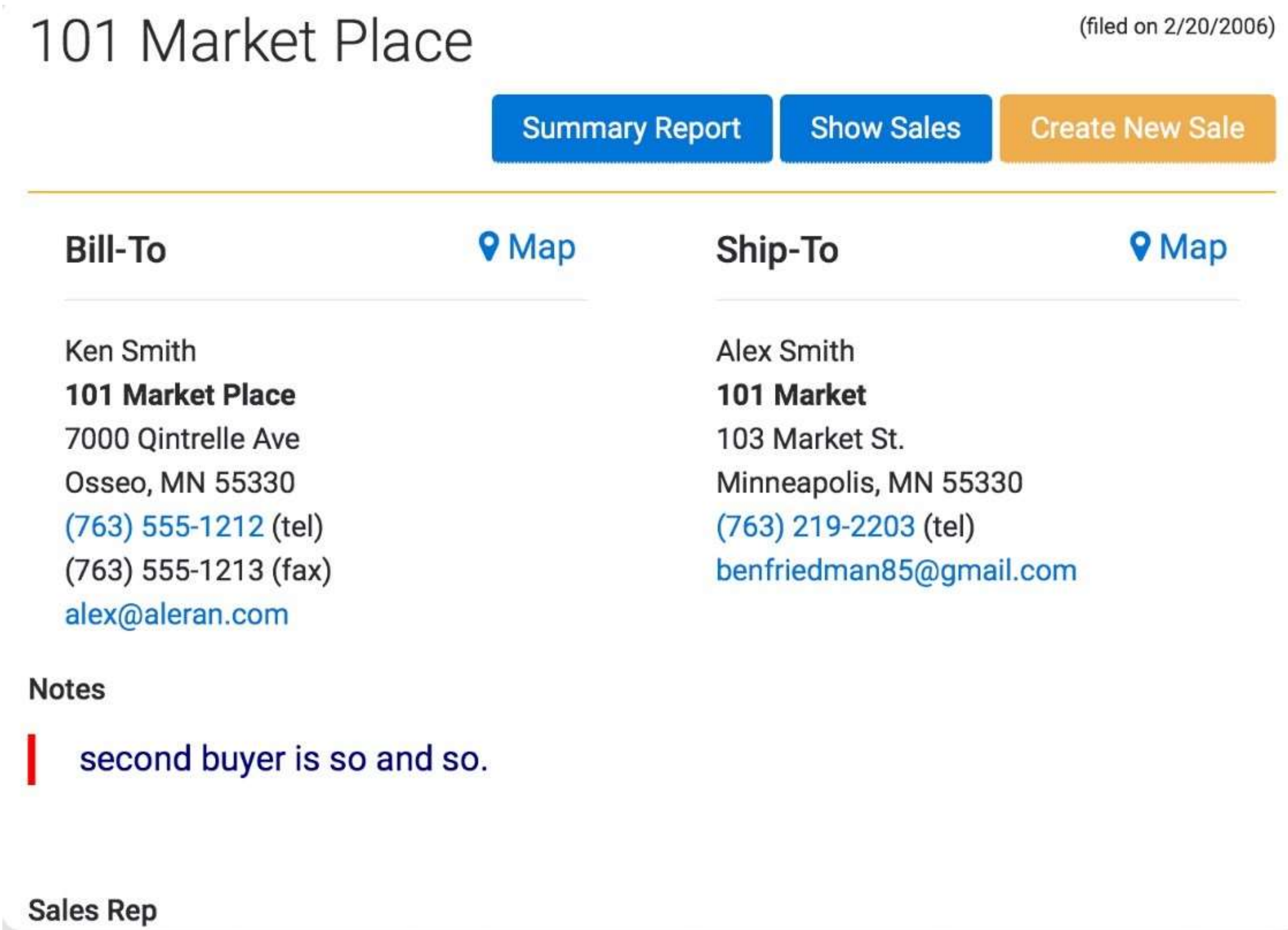

To start a new sale, touch the menu icon and select press the “Sales” tab. A new screen will come up with three icons just beneath the menu icon.

1. The first is “Sales”, which is represented by an icon depicting a sales list.
2. The icon to the right of it is the “Catalog”, represented by a grid.
3. To the right of that is the “Customer” list, represented by an icon of a person.

2. To create a new sale, press the image at the top of the screen that looks like a floppy disk.

This will bring up a blank sale.

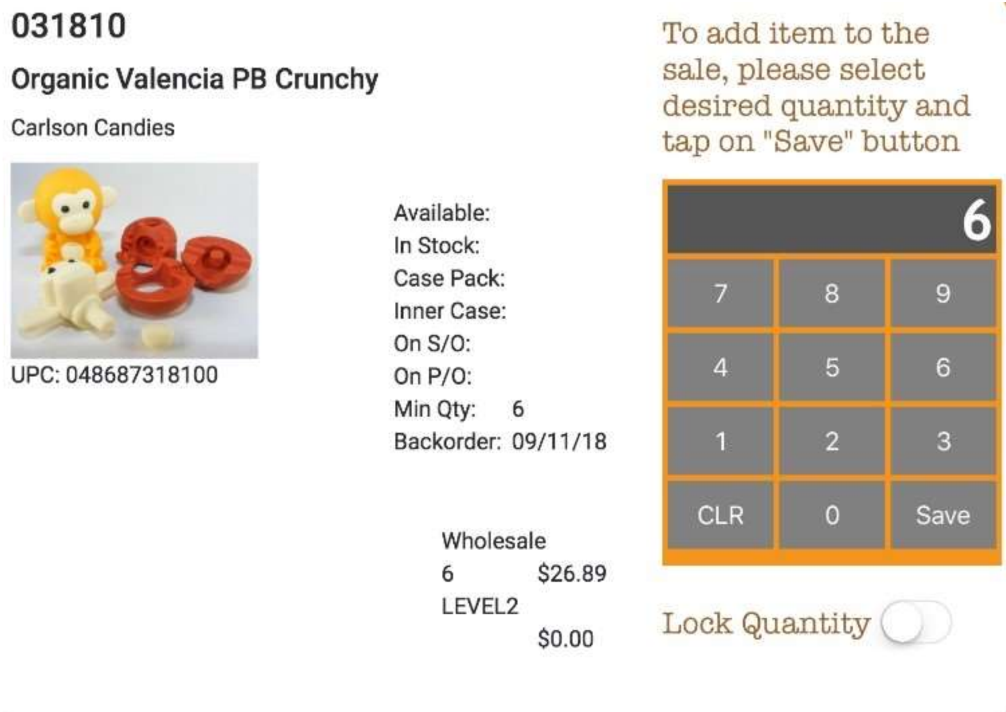
3. To add a customer, press the Customer icon. This will bring up a list with all your existing customers. Find the customer you want to write a sale for and press their name. A new window will appear with their billing and shipping formation. To create a new order for them, click on the orange button on the right side of the window that says, “Create New Sale”.



4. 

If you want to add a new customer. Create a new sale and instead of selecting a customer, click on the blue pencil next to “Bill-to” or “Ship-To”.  A message will appear and ask if you want to create a new customer, select Yes.  A new window will appear, where you will fill in their contact information. When you’re finished, press Save. You can change their shipping/billing info at any point by clicking on the blue pencil again.

5. When you’ve selected the customer, their name will appear at the top of the order, along with their shipping address and billing address. You will also see the name of the writer, the territory you’re selling in, and the location of the sale.



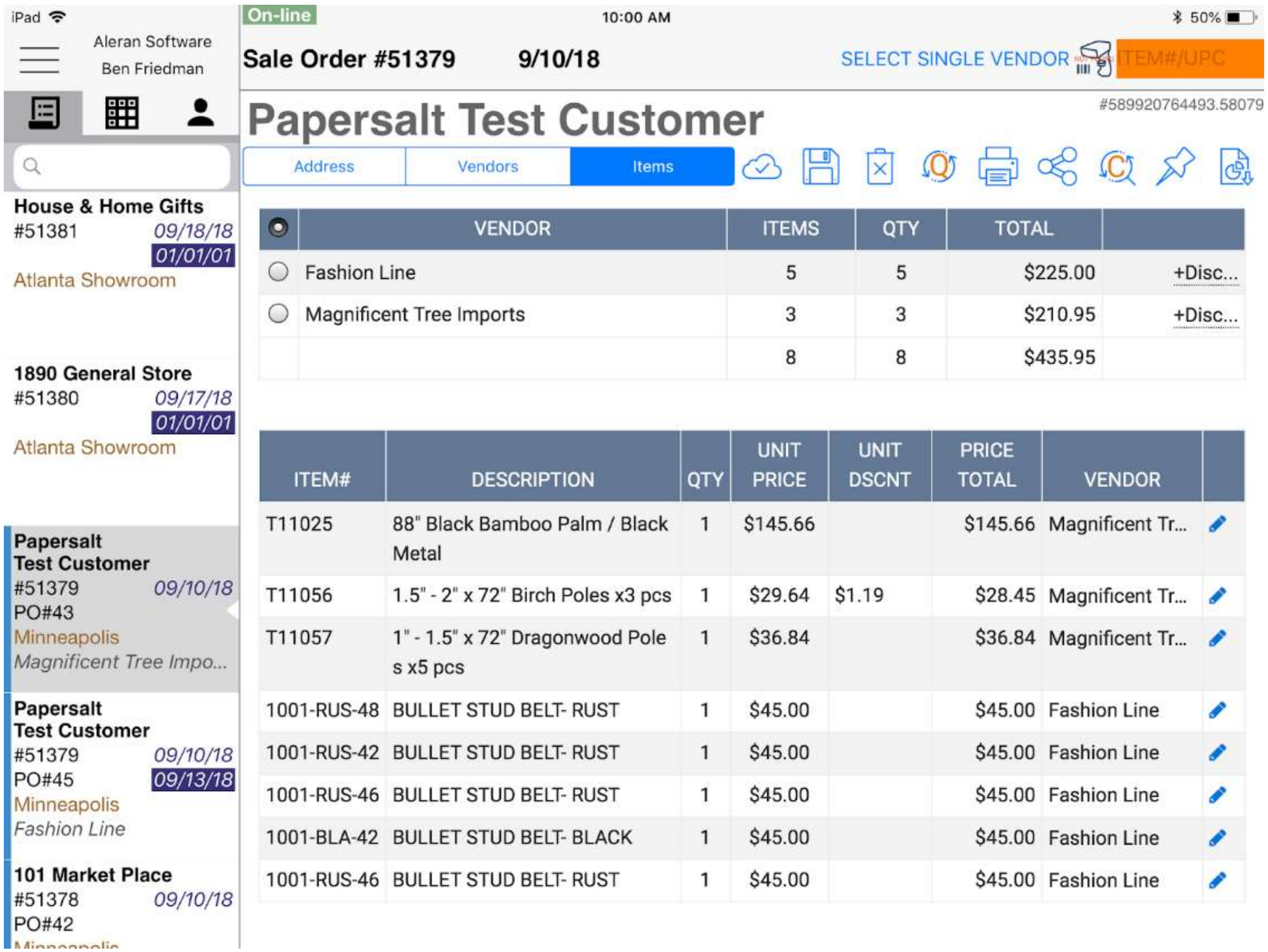

6. Now you can start adding items. The first way you can do this is by using your barcode scanner to enter the items into the sale. When you scan an item, you'll hear a "ding" noise to indicate that you've successfully rung up the item. A new window will come up with a picture of the item, the description, and a calculator if you wish to manually add the quantity. This is optional, as you can just scan the item's barcode as many times as you want. When you are finished entering items, press the Save button on the bottom right of the quantity adjustment window.

7. You may also manually select items from RepDesk to add to the order. To do this, press the "Catalog" icon. This will bring up the list of items currently in your system. You can search manually by scrolling through the list, or by looking up an item by number or name using the search bar.

8. If you need to add a new item, press "Add SKU to Sale". This will bring up a new window where you will enter the item name, the vendor, the description, UPC, quantity, price, and if a discount applies. Press Save to add it to the catalog.

9. When you select an item, the description and calculator will appear. Manually type in the number of items and press Save to add it to the order.

You can view the SKU's you have entered into the sale by pressing the Items tab near the top of the order. You can touch the vendor name to bring up all their items currently attached to the order.



When you are finished entering items, you have a few options located near the top right corner of the screen (from left to right)

1. Sync: Opens the Full/Quick Sync screen
2. New Sale: Start a New Sales
3. Delete: You can delete the order by touching the trash can icon. Keep in mind that this cannot be reversed, and an alert will pop up reminding you of that. If you delete the order, you'll have to start over from the beginning.
4. Quote: Convert the sale to a quote. To change it back to a sale, press the icon again.
5. Print: Touch the printer icon to print the entire order, or by specific vendors only.
6. Submit/Share Order: This icon does two things. First, you have the choice to submit the order to the vendor(s). You can choose to send the order to all vendors or just a specific one. When you successfully submit the order, you will receive a pop-up message indicating so. The other option is to share the order. A new window will come up and you can select which orders to share, the recipients, a fax number, and if any attachments will go with it (an Excel spreadsheet, product images.) Press "Share" at the bottom of the window to email the recipients.
7. Change Customer: You can change the customer on the fly by pressing this button. A drop-down menu will appear, and you will choose (or add a new) customer from there.
8. Pin: Pin the order to the top of the sales list on the left side of the screen. This will also pin those customer's

9. Customer Report: This bar graph icon will bring up a report that breaks down that specific customer's sales from the last three years by dollars spent, vendors they purchased from, and number of total sales. You may print this out for the customer.