

# Infusion Mobile Trade Portal Functionality

## Setup

Infusion Business Software needs to first activate the Trade Portal functionality for a site so as to make the Profile option for this available. When done the Profile option of Buyer can be used in setting up a new user.

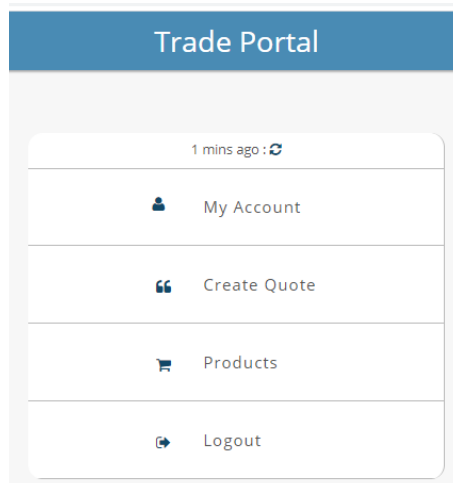
The account setup allows a Customer account to be associated with the login

The screenshot shows a user setup form with the following fields and values:

- Name: Firstname Test, Surname Buyer
- Email: buyer@yopmail.com
- Permissions: Admin (toggle off)
- Repcode: Repcode
- Lab code: Lab code
- Location: Christchurch
- Manager: -- Unallocated --
- Profile: Buyer
- Lab Group: (dropdown)
- Supplier: -- Unallocated --
- Customer: Alice Smith (highlighted with a red box)
- Buyer Software: Fergus
- Fergus ID: 0
- Set Password (if required): Password (masked), Repeat Repeat

This will limit the Customer information (eg account details, history) available under the login to this account. It will also set the file format downloads for Invoices and Pricefiles (based on the Buyer software selection).

Logging in with the required account will display the following home screen



## My Account

The My Account section displays the account details for the user

Customer Info

HISTORY

OUTSTANDING

Alice Smith

|                                     |                   |
|-------------------------------------|-------------------|
| Phone 03 8952407                    | Mobile 021 282602 |
| Email mikem@infusionsoftware.com.au | Fax 03 3725066    |
| Location -- Unallocated --          |                   |
| Line 1 154 Cashel Street            |                   |
| City Ashburton                      |                   |
| State South Canterbury              |                   |
| Line 1 154 Cashel Street            |                   |
| City Ashburton                      |                   |
| URL beautgiftmerv.com               |                   |
| Current \$ 0.00                     |                   |
| 30 Days \$ 0.00                     |                   |
| 60 Days \$ 0.00                     |                   |
| 90 Days \$ 5,624.66                 |                   |
| Total \$ 5,624.66                   |                   |





Balance doesn't include any Deferred amounts.

General account details can be seen from this screen

The History tab displays a list of Invoice and Payments for the account

← History for: Alice Smith

Enable download

|   |                           |         |   |
|---|---------------------------|---------|---|
|  | Payment<br>26 Dec 19      | -25.00  | - |
|  | Payment<br>4 Dec 19       | -133.88 | - |
|  | Invoice 10574<br>4 Dec 19 | 133.88  | - |
|  | Payment<br>1 Dec 19       | -874.00 | - |
|  | Payment<br>1 Dec 19       | -934.09 | - |

The Outstanding tab will display all invoices that haven't yet been fully paid.

Selecting the Enable Download option from under the History or Outstanding screen allows the download of Invoices into a format suitable for upload to the software options available. To download selected invoices firstly select the required invoices then the Download Selected

button. Download All will download all available invoices while the Download All New option download all invoices not previously downloaded.

Any invoices that have previously been downloaded will be timestamped

History for: Alice Smith

Enable download

File format Fergus

Download Selected Download All New Download All

|                          |                           |        |             |
|--------------------------|---------------------------|--------|-------------|
| <input type="checkbox"/> | Invoice 10574<br>4 Dec 19 | 133.88 | 13 Dec 2019 |
| <input type="checkbox"/> | Invoice 10634<br>1 Dec 19 | 874.00 | 13 Dec 2019 |
| <input type="checkbox"/> | Invoice 10633<br>1 Dec 19 | 934.09 | 13 Dec 2019 |

Selecting a transaction in the Outstanding and History screens will display its detail. The transaction can be copied to a Pending Quote using the Copy Sale option. This will only be available for positive value invoices ie not Credits.

Copy Sale PDF

Invoice# 1026596 Date 4 Jul 2019

A PDF copy of the transaction can also be downloaded

## Create Quote

The user can create a Quote from within the software. This is initiated by selecting the plus button at the bottom right of the Pending Quotes screen

Draft Info for: Alice Smith  
ADD PRODUCT GALLERY QUICK MISC ITEM

Delete Re-cost

Total

Total \$ 0.00

Items can be added to the Quote from the four options at the top of the screen.

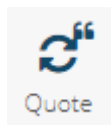
The Add Product option allows for searching for a Product from a list

The Gallery option allows browsing for a Product through images. The grouping of the Products can be done by either the Infusion Product Group or Product Type. The setting to dictate which it is to be is the “Arrange by Type in Gallery” setting in the Settings / Product Settings menu. When setting up the system to display by Group, the images supplied need to be in the folder specified in the “Product Image Folder” section of the sync tool and named the same as the Group (ie short code) whereas for Product Type display the images need to be labelled as the Product Type Description.

The Quick option has a list of Products that have recently been used

The MISC ITEM option will add the product code set under the Misc Item field in the Settings / Quotes and Invoices Settings screen

Quotes can be synced to Infusion either as Quotes or Pending Invoices. Configuration for this is set from the “Sync orders as quotes” under the Settings / Quotes and Settings menu. If they are to be synced back as Quotes the icon



will display at the top right of the screen when in a Quote. If they are to sync as Pending Invoices this icon will display with the text Process below it. Pending Invoices will sync to Infusion with a status of On Hold.

If a Quote was created 7 days or more prior to the current date when it is Processed it will automatically be re-costed. A message will appear notifying the user of this

Your quote has been re-priced because it was more than a week old

The Quote will appear in Infusion after the next sync cycle.

The Re-cost option can be used to manually do this

The Header of a Quote can be edited by selecting the



button at the bottom right of the screen. An Order number for the Quote can be entered here if required.

When the Process option is selected for a Quote that has been created or re-costed within the past 7 days the user will be given option to email a copy of the Quote / Order to several email addresses

Order # Order Number

Notes

Email to

User  buyer@yopmail.com

Customer  mikem@infusionsoftware.com.au

And also

Email Dont send email

Dont send email

Manually enter email address

Mikes Bikes






Sign

Email To

Quotes that have been Processed will display in Infusion after a sync cycle. They will have a Status of On Hold.

## Products

The List screen displays a list of available Products.

| Search <span style="float: right;">✕</span>   |                                       |                  |                          |
|---|---------------------------------------|------------------|--------------------------|
|  | 1000<br>Double Bed<br>0 avail.        | RRP : \$525.00   | Cost Price : \$ 498.75   |
|  | 1001<br>Queen Size Bed<br>0 avail.    | RRP : \$999.00   | Cost Price : \$ 850.00   |
|  | 1003<br>King Size Bed<br>0 avail.     | RRP : \$1,199.00 | Cost Price : \$ 1,139.05 |
|  | 1004<br>Single Bed<br>0 avail.        | RRP : \$755.00   | Cost Price : \$ 717.25   |
|  | 1005<br>Dining Table Rimu<br>0 avail. | RRP : \$498.00   | Cost Price : \$ 473.10   |

If an image is available it will display along with the Product Code, Description, Quantity available (allocated stock is removed to give the Available Quantity), the RRP and user's price.

The Search field works on the Product Code, Description and (Infusion) main barcode.

The Gallery option allows browsing for a Product through images. The grouping of the Products can be done by either the Infusion Product Group or Product Type. The setting to dictate which it is to be is the "Arrange by Type in Gallery" setting in the Settings / Product Settings menu. When setting up the system to display by Group, the images supplied need to be in the folder specified in the "Product Image Folder" section of the sync tool and named the same as the Group (ie short

code) whereas for Product Type display the images need to be labelled as the Product Type Description.

The list of Products available for a Buyer can be restricted by:

- 1) Selecting the Display only “Include in IM” setting under the Buyer’s Profile (which will limit the Products they can see to just those in Infusion with the Include in IM setting selected under the Settings section of a Product in Infusion.
- 2) By selecting a range (Display Only “Product Range” option) from under the Products section of the Buyer Profile

A Pricebook can be downloaded by selecting the Pricebook option. The file will include the Product Code, Description, Category Code, Category Description, RRP, User Price.

### Fergus Integration Setup

To setup a Buyer so they can activate / deactivate the sending of their invoices from Infusion to their Fergus account the following needs to be done:

Under Settings / Mobile Sire settings select the option Enable Fergus Integration.

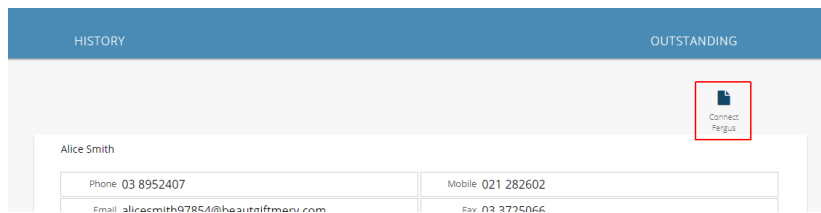
Under the Buyer user’s account select Fergus as the software package.

The screenshot shows a form for setting up a Buyer profile. The 'Name' section includes fields for 'Firstname Test', 'Surname Buyer', and 'Email buyer@yopmail.com'. The 'Permissions' section has an 'Admin' toggle switch. Below this are several dropdown menus for 'Recode', 'Lab code', 'Location' (set to 'Christchurch'), 'Manager' (set to '-- Unallocated --'), 'Profile' (set to 'Buyer'), 'Lab Group' (set to '-- Unallocated --'), 'Supplier' (set to '-- Unallocated --'), 'Customer' (set to 'Alice Smith'), and 'Buyer Software' (set to 'Fergus', which is highlighted with a red box). The 'Fergus ID' is '112233'. At the bottom, there is a 'Set Password (if required)' section with 'Password Password' and 'Repeat Repeat' fields.

In Infusion the key file export routine “Fergus Invoice Export – FTP upload” must be installed and setup. The Customer ID for this will come from Fergus.

The Customer account in Infusion must have the “Associated With” field under Terms / Pricing set to the Customer Account used in the “Fergus Invoice Export – FTP upload” routine.

When the user / Buyer logs in to their account they will see a “Connect Fergus” at the top of their My Account screen



Selecting this will display a screen requesting login details for Fergus. Once entered a connection between their Fergus account and the corresponding Infusion software will be established. It will also populate the Fergus ID field under the user’s account with a system generated number.