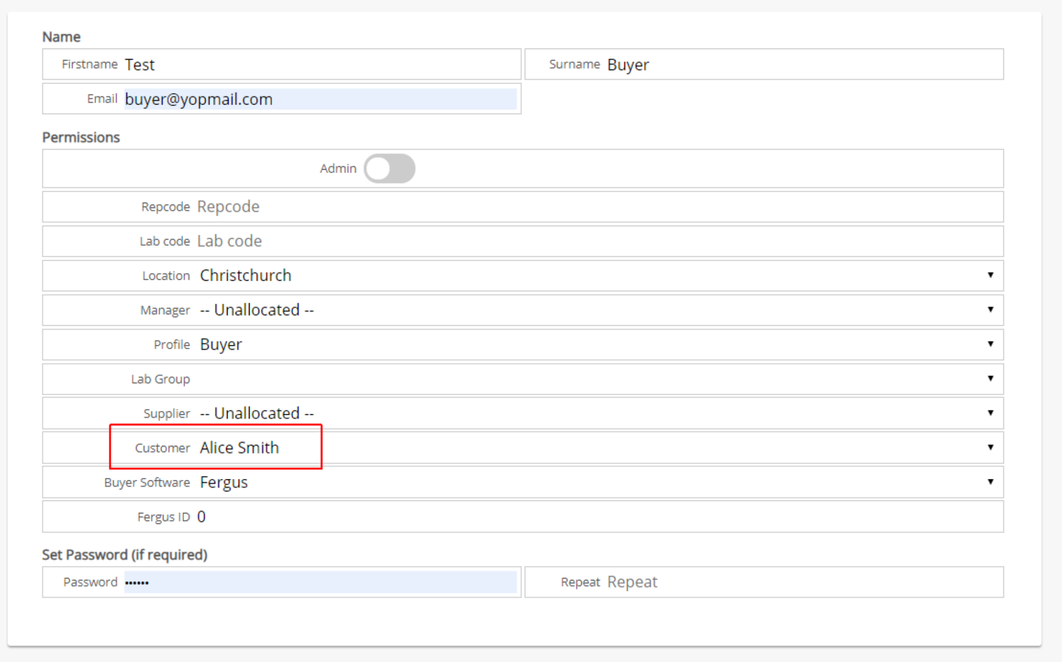
Infusion Mobile Trade Portal Functionality

Setup

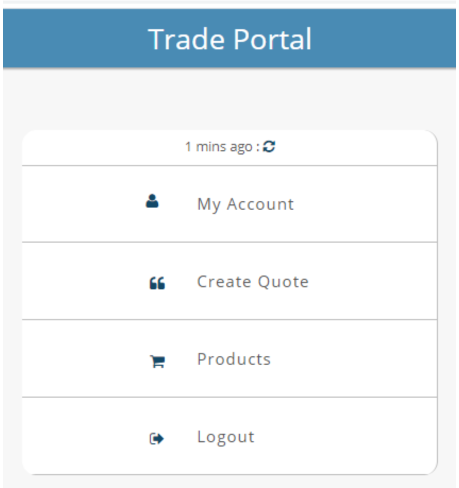
Infusion Business Software needs to first activate the Trade Portal functionality for a site so as to make the Profile option for this available. When done the Profile option of Buyer can be used in setting up a new user.

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



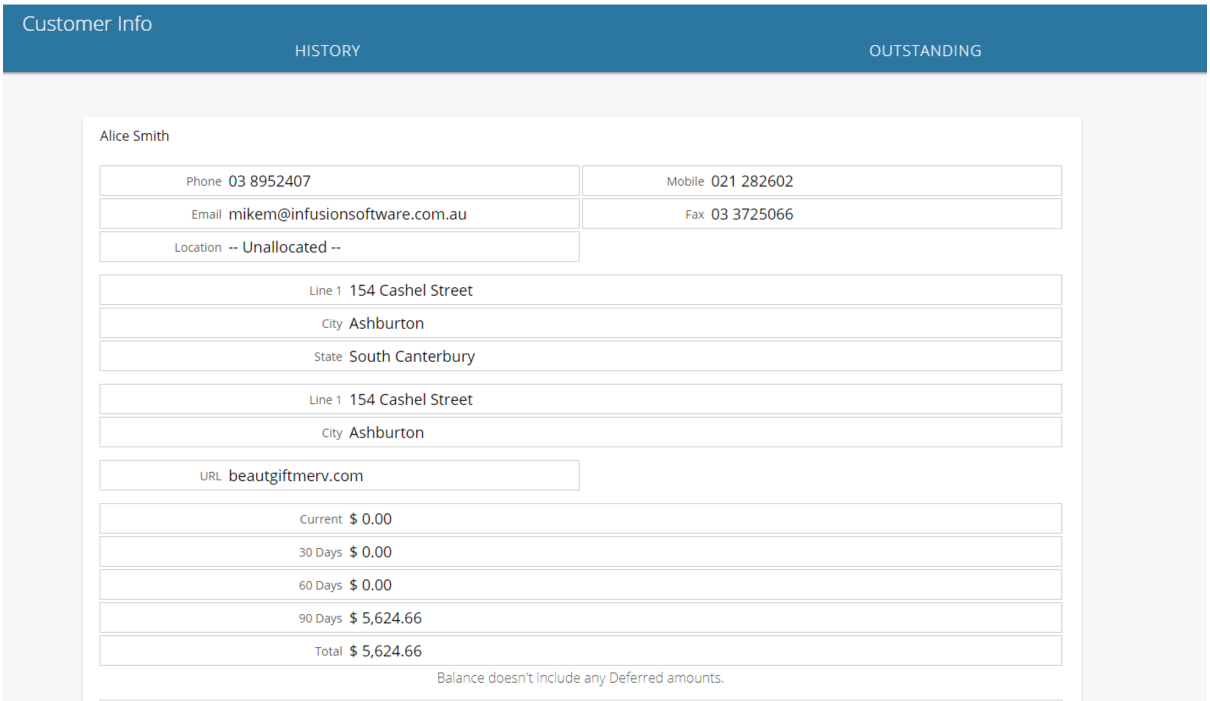
This will limit the Customer information (eg account details, history) available under the login to this account. It will also set the file format downloads for Invoices and Pricefiles (based on the Buyer software selection).

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



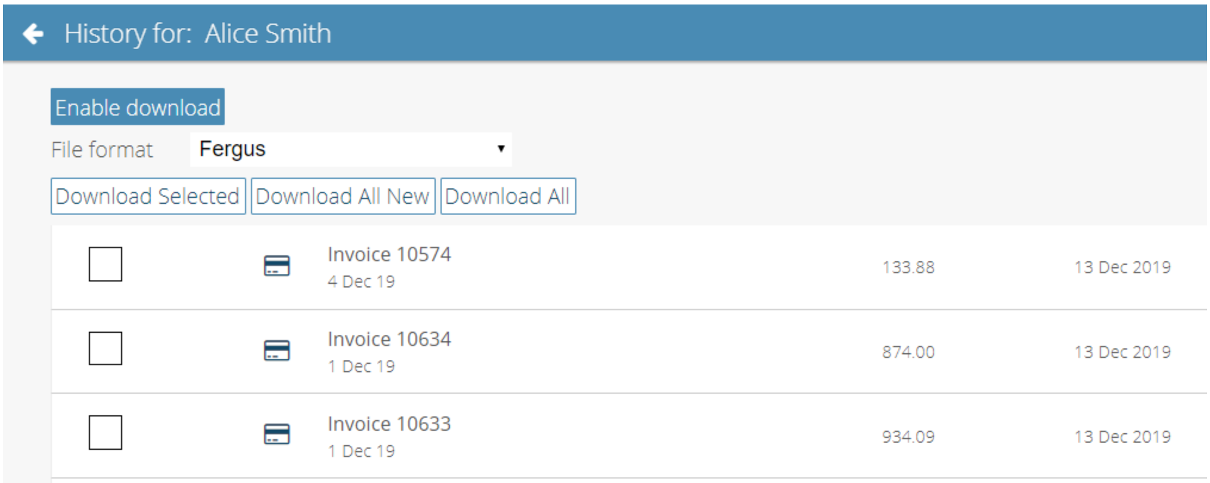
General account details can be seen from this screen

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

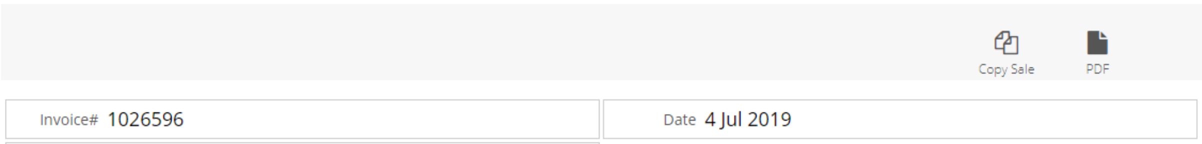
The Outstanding tab will display all invoices that haven't yet been fully paid.

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



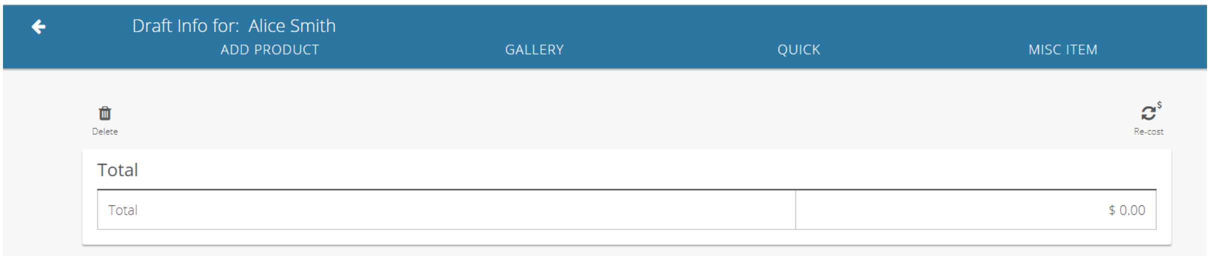
Selecting a transaction in the Outstanding and History screens will display its detail. The transaction can be copied to a Pending Quote using the Copy Sale option. This will only be available for positive value invoices ie not Credits.



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



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.

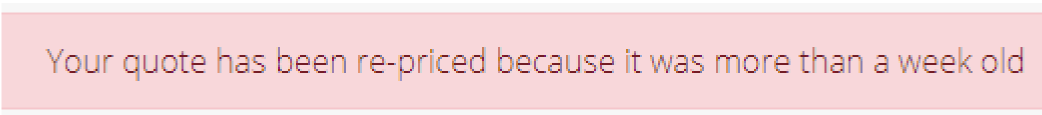
The Quick option has a list of Products that have recently been used

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



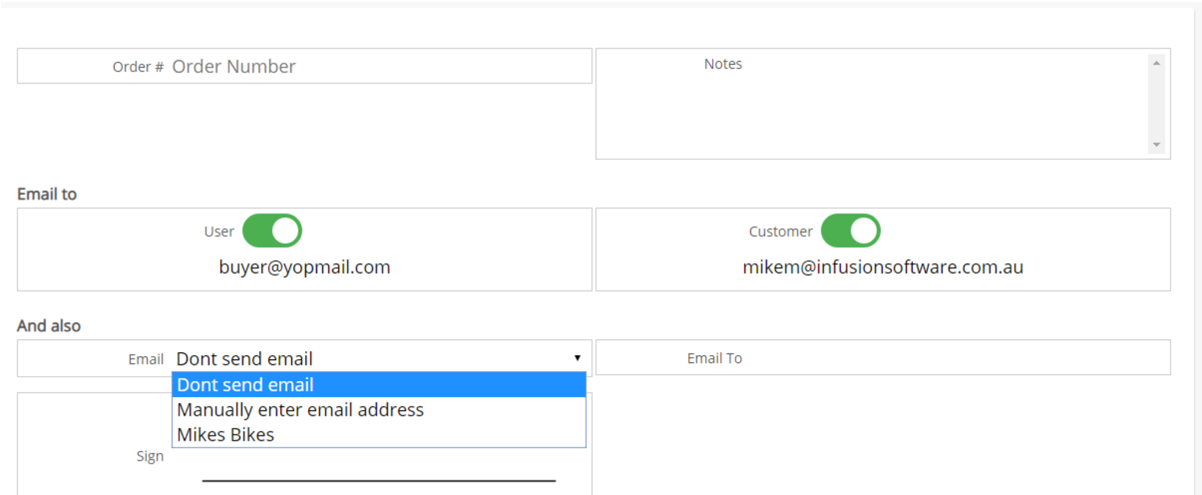
The Quote will appear in Infusion after the next sync cycle.

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.

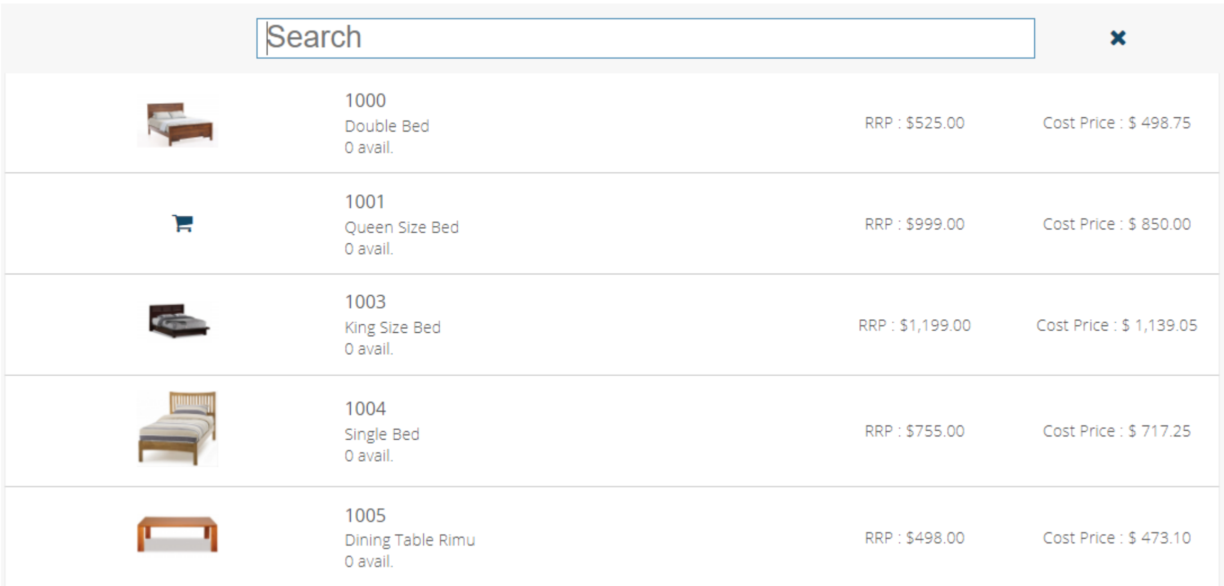
When the Process option is selected for a Quote that has been created or re-costed within the past 7 days the user will be given option to email a copy of the Quote / Order to several email addresses



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.



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

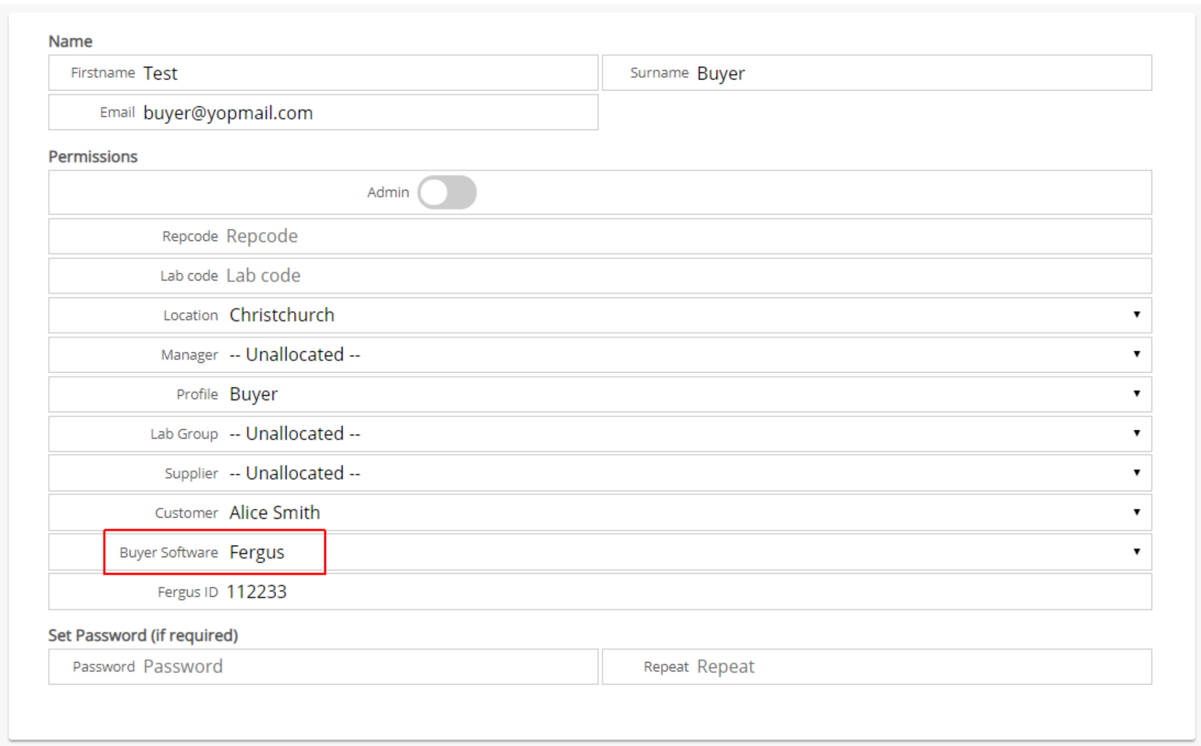
A Pricebook can be downloaded by selecting the Pricebook option. The file will include the Product Code, Description, Category Code, Category Description, RRP, User Price.

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.

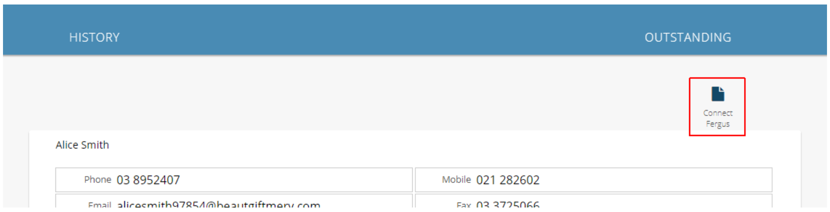
Under the Buyer user’s account select Fergus as the software package.


Name
Firstname Test
Surname Buyer
Email buyer@yopmail.com
Permissions
Admin
Repcode Repcode
Lab code Lab code
Location Christchurch
Manager -- Unallocated --
Profile Buyer
Lab Group -- Unallocated --
Supplier -- Unallocated --
Customer Alice Smith
Buyer Software Fergus
Fergus ID 112233
Set Password (if required)
Password Password
Repeat Repeat

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.