

*Note: some features may not be enabled in this demo. To learn more about ProSel and take full advantage of the app, contact Ai2: sales@ai2.com or (800) 835-3200*



# QUICK GUIDE

## Start Here

### Select a Customer

1. Tap Customers to display the Customer Browse.
2. Use View Options to change the sort or view.
3. Scroll up or down in the list of customers to locate a customer, or...
4. Tap the Search field to bring up a keyboard and type part of the customer name.
5. Tap on a customer. A check appears, and so do Dynamic Panels at the bottom of the screen. Scroll left or right in this area to display panels of different information about the checked customer..
6. Tap the arrow at the right to display detailed information. Press Back to return to the Customer Browse.
7. Tap the asterisk button for options including mapping the customer, e-mailing the customer, and entering contact information.

### Start an Order

1. On the Customer Details, tap either New Blank Order or New Order from History.
2. Double-tap with one finger on the quantity to increment it by 1.
3. Tap-and-hold on the quantity to bring up a calculator you can use to set the quantity.
4. Tap-and-hold on the price to bring up a calculator you can use to change the price.
5. Tap on an item. A check appears, and so do Dynamic Panels at the bottom of the screen. Scroll left or right in this area to display panels of different information about the checked item.
6. Tap the arrow at the right to display detailed information.

### Add New Items

*Bar code scanning is not available in the demonstration. Contact Ai2 to incorporate scanning.*

Add items by item number:

1. Touch the blank space at the bottom of the order. The Add New Item box will display.
2. Type the item number. Tap Return. The item description will display in the box.
3. The quantity is automatically set to 1. You can tap-and-hold the quantity to display the quantity calculator. Make the desired changes and tap Done.
4. The customer's price is displayed. You can tap-and-hold the price to display the price calculator. Make the desired changes and tap Done.
5. Tap the screen to close the Add New Item box. The item is already on the order.

**ProTip:** Email a copy of this document to yourself for later reference.

### Browse for New Items

1. Tap the Item Browse button. The item catalog will display.
2. Use the View Options button to change the sort between by item number and by description.
3. Scroll up or down in the Item Browse to locate a product, or...
4. Tap the Search field to bring up a keyboard and type part of the item description.



5. Tap on an item. A check appears, and so do Dynamic Panels at the bottom of the screen. Scroll left or right in this area to display panels of different information about the checked item.
6. Tap the arrow at the right to display detailed information.

### **Progressive vs. Keyword Search**

In the Browse, tap on the search field to display the keyboard. You can search in one of two ways.

1. Progressive Search  
Begin typing in the search field. If you pause typing, ProSel will search for your term in the descriptions of the items.
2. Keyword Search  
Type in the search field and tap [Search]. The search function will operate over the entire keywords set.

### **Order to History**

1. If any item has history, you can order the same quantity by selecting the item (in the Order or the Browse) and double-tapping with two fingers. This will set the quantity to whatever quantity was ordered on the last invoice.

### **Delete Items**

1. On an order, quickly swipe your finger across the item line from left to right. A [Delete] button will appear at the right of the line. Tap it to delete the item.

### **Close The Order**

1. In the order, tap on the Close Order button. This will bring up the Close Order box.
2. Tap Yes to make the order Ready to Send. Orders that are Ready to Send will be sent to the server as soon as they are saved to the Order Log.
3. Tap No, save for later to mark the order as in process. The order will be saved to the Order Log in a state in which it cannot be sent. You can reopen this order later to send it.
4. Close order without saving will abandon the order. The order cannot be recovered.

### **Sync**

ProSel will automatically synch with the server the first time it is started. You can also synch manually.

1. Close any open orders.
2. Tap on the Customers tab button. At the top, click on the synch button. This will synch the ProSel database with any information waiting on the server.

### **Send Orders**

When an order is closed and marked Ready to Send, it is automatically transmitted to the server. However, if you are concerned that an order may not have been transmitted, you can click on the Sync Databases button. In addition to downloading any information, the Sync Databases button will send all Ready to Send orders.

1. Close any open orders.
2. Tap on the Customers tab button. At the top, click on the synch button. This will send any Ready to Send orders and also update the databases with any information waiting on the server.



**Questions? Comments? Ready to see how ProSel will help your organization? (800) 835-3200 or sales@ai2.com**