



A-Line Mobile Ordering System

User Guide © 2023 - 2024

Table of contents

1. Introduction	3
2. Home Page	5
3. Customer Information	8
3.1. Orders	10
3.1.1. Adding Items	15
3.1.2. Removing Items	17
3.1.3. Canceling	18
3.1.4. Additional Notes	19
3.1.5. Submitting	20
Reviewing Out-of-Stocks	22
3.2. Credit and Rebill	24
3.2.1. Adding Items	27
3.2.2. Removing Items	29
3.2.3. Canceling	30
3.2.4. Additional Notes	31
3.2.5. Submitting	32
3.3. Credit and Destroy	34
3.3.1. Adding Items	37
3.3.2. Removing Items	38
3.3.3. Canceling	39
3.3.4. Additional Notes	40
3.3.5. Submitting	41
4. Bluetooth Scanner	44
4.1. Connecting the Scanner	45
4.2. Configuration	48

1. Introduction

The A-Line Mobile Ordering System has been designed to allow users to complete orders and credits for their customers on a mobile device or tablet with the aid of a Bluetooth scanning device.

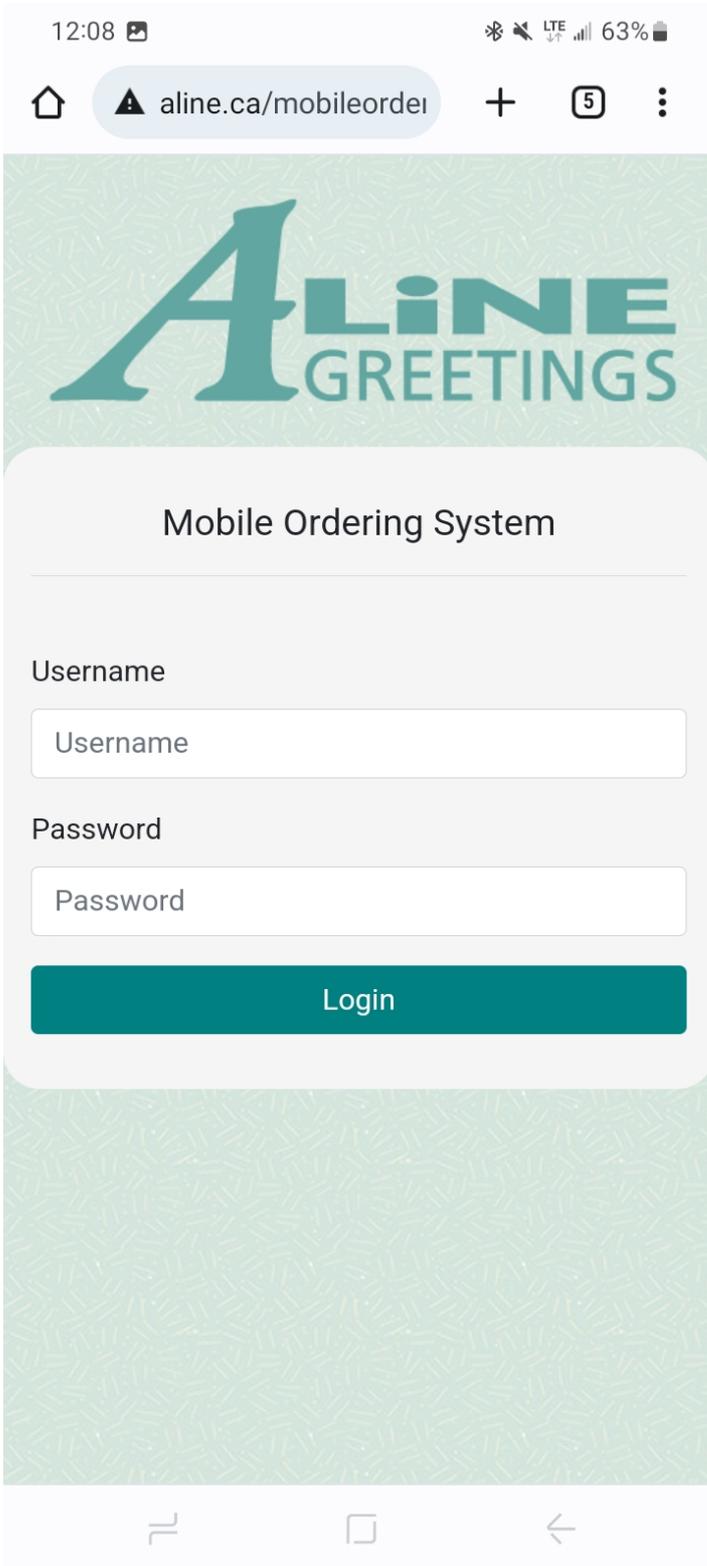
Some of the current key features are as follows:

- Be able to scan your customer label to sign into their account.
- Handle multiple orders per customer.
- Order by scanning or typing in our UPCs or SKUs.
- Order by planogram by scanning or selecting the planogram, and then scanning or typing in the rack and pockets.
- Complete both a credit and rebill as well as a credit and destroy.
- Acquire a customer's signatures before submitting.

To access it, please click on the following link:

<https://www.aline.ca/mobileordering>

Note: Depending on the device you are on when you navigate to it, a popup will appear that can help you put this application on the home screen of your device.

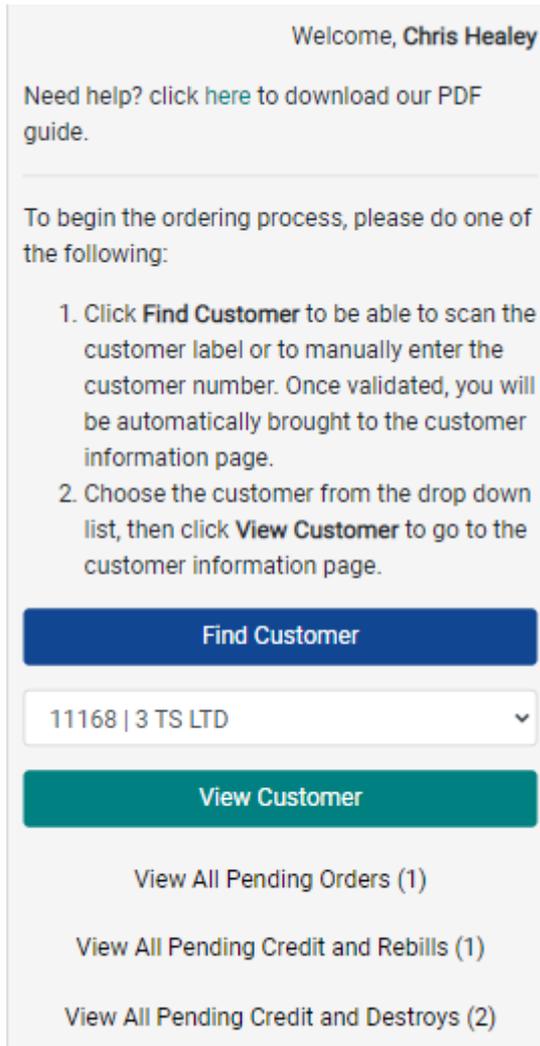


You will be prompted for your login credentials. This information is the same as what you would use to login to our *Staff Access* application.

Once you have your credentials entered, please click the **Login** button. Once validated, you will be taken to the home page.

2. Home Page

Once you successfully login, the following home page will appear with your relevant information.



Welcome, **Chris Healey**

Need help? click [here](#) to download our PDF guide.

To begin the ordering process, please do one of the following:

1. Click **Find Customer** to be able to scan the customer label or to manually enter the customer number. Once validated, you will be automatically brought to the customer information page.
2. Choose the customer from the drop down list, then click **View Customer** to go to the customer information page.

Find Customer

11168 | 3 TS LTD

View Customer

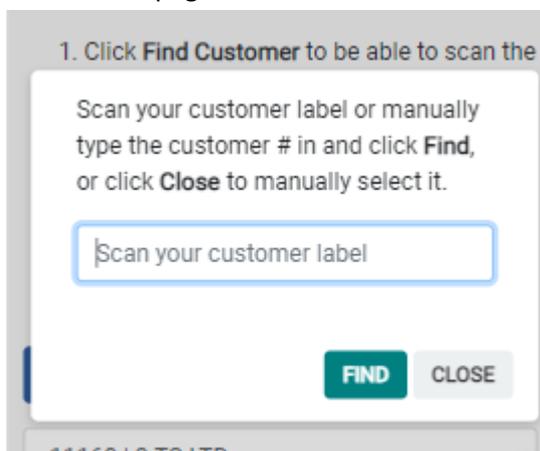
View All Pending Orders (1)

View All Pending Credit and Rebills (1)

View All Pending Credit and Destroys (2)

The next thing you will need to do is load up a customer. This can be done by doing one of the following (which is also indicated on the page):

1. You can click on the **Find Customer** option to scan or type in your customer #, which will then take you to the customer information page.



1. Click **Find Customer** to be able to scan the

Scan your customer label or manually type the customer # in and click **Find**, or click **Close** to manually select it.

Scan your customer label

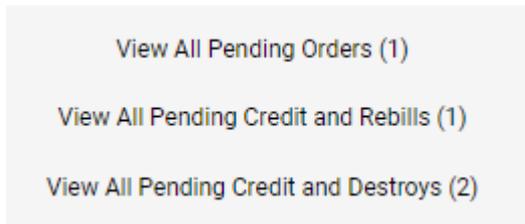
FIND **CLOSE**

11168 | 3 TS LTD

**Note: Please make sure before you scan your customer label, that you click on the textbox that is displayed if you accidentally click outside of it. It is selected by default.*

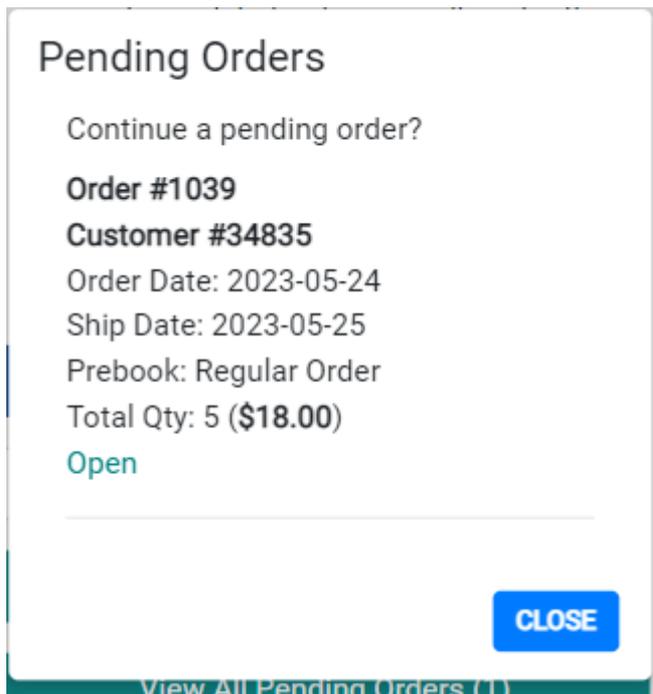
2. Select from the drop down list that is on the page the customer that you would like to view, then click on **View Customer**. This will also take you to the customer information page.

You will also see on this screen a section displaying the following:

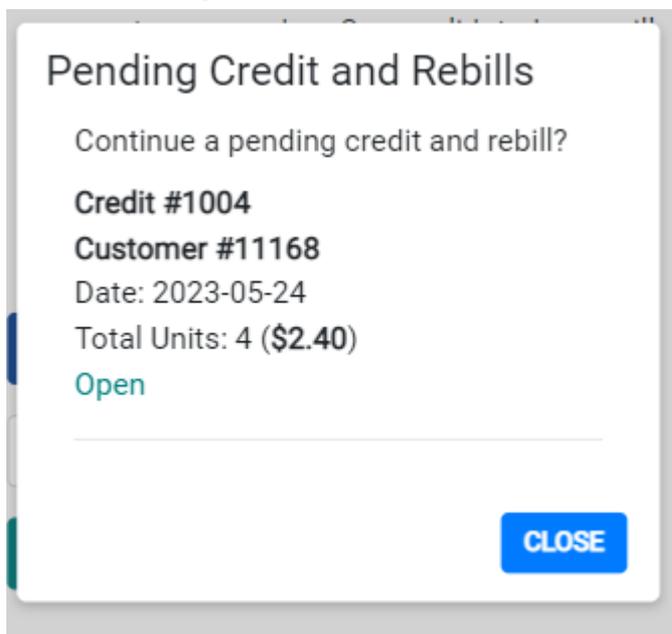


These are pending entries that you have created for all of your customers. You can click on each of them to view them. Here is an example of each:

View All Pending Orders



View All Pending Credit and Rebills



View All Pending Credit and Destroys

Pending Credit and Destroys

Continue a pending credit and destroy?

Credit #1001

Customer #11168

Date: 2023-05-23

Total Units: 3 (\$1.80)

[Open](#)

Credit #1002

Customer #34835

Date: 2023-05-24

Total Units: 3 (\$1.50)

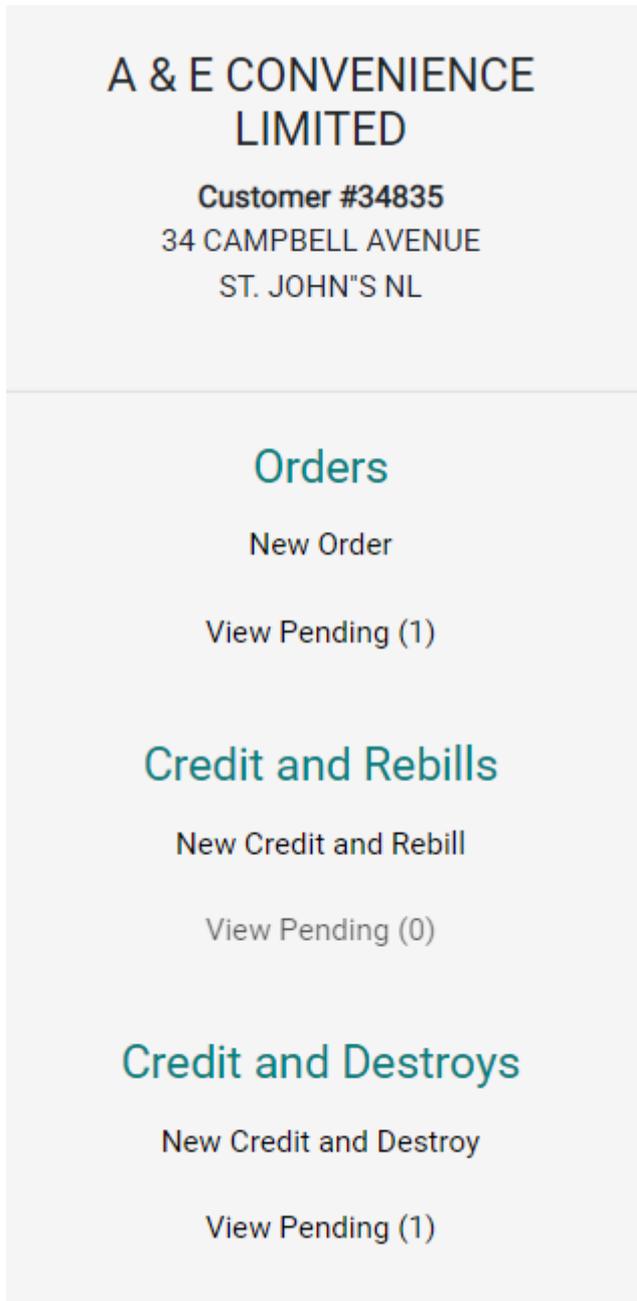
[Open](#)

CLOSE

You can use the "Open" option on each of them to open up that particular entry and continue where you left off.

3. Customer Information

After you have selected the customer you want to view, or successfully scanned their customer label, you will be brought to the customer information page, which will appear similar to below for the customer you are viewing:



The screenshot shows a customer information page for 'A & E CONVENIENCE LIMITED'. The page is divided into three main sections: 'Orders', 'Credit and Rebills', and 'Credit and Destroys'. Each section has a 'New' button and a 'View Pending' link with a count in parentheses.

A & E CONVENIENCE LIMITED
Customer #34835
34 CAMPBELL AVENUE
ST. JOHN'S NL

Orders
New Order
View Pending (1)

Credit and Rebills
New Credit and Rebill
View Pending (0)

Credit and Destroys
New Credit and Destroy
View Pending (1)

This page displays basic customer information for you, and is maintained all while viewing and doing anything under that customer to help you keep track of what customer you are working on.

From here, you can create an order, credit and rebill, or credit and destroy.

You can also view any pending entries you have created, just like on the home page, except it's specific for the customer you are viewing.

New Order

Click on *New Order* to begin creating a new order for the customer you are viewing. More will be explained in the [Orders](#) section.

New Credit and Rebill

Click on *New Credit and Rebill* to begin creating a new credit and rebill for the customer you are viewing. More will be explained in the [Credit and Rebill](#) section.

New Credit and Destroy

Click on *New Credit and Destroy* to begin creating a new credit and destroy for the customer you are viewing. More will be explained in the [Credit and Destroy](#) section

3.1. Orders

When you choose to create a new order, the default options such as shipping information, will be automatically populated and you will be provided with a unique Order # for that order.

When you choose to open a pending order, the information for it will simply populate for you to edit.

In both scenarios, the screen will appear similar to below to display the relevant information for the order.

Note: Any changes you make, like changing the time, the prebooking, various options that are available to you, or even adding and removing items, will be automatically saved as you work on it.

The screenshot displays the 'Order #1039' management interface. On the left, a vertical list of callouts (1-13) points to specific UI elements. The interface is divided into two main panels. The left panel contains order details: Order #1039, Order Date: 2023-05-24, Time In: 11:35 AM, Time Out: 11:36 AM, shipping options (Ship with Next Order, Ship to Schedule, Ship and Deduct), minimums (Card-only: \$250.00, Accessory-only: \$300.00), and totals (Cards: 5 (\$18.00), Accessories: 0 (\$0.00), Total: 5 (\$18.00) with a 'Below Minimum' warning). The right panel shows 'Items on the Order' (00773 - Furry Friends - Birthday, 00859 - Birthday Age - Adult, A1 - Birthday - Juvenile, A4 - Birthday - Juvenile, A5 - Birthday - Juvenile), a 'Remove Selected Items' button, 'Planograms' (with a dropdown menu), 'Scanning' (with a 'Scan' button), 'Typecodes' (with a 'Show Typecodes' button), and three action buttons at the bottom: 'Cancel Order' (red), 'Additional Notes' (blue), and 'Save Order' (dark blue).

1 Order Number

Order #1039

This is the unique order number that is assigned when you first create the order, encase you need to reference it.
Note: This is NOT the number that is used for the recap or for invoicing.

2 Order Date

Order Date: 2023-05-24

This is the date that the order was first created. It cannot be changed.

3 Time in/Time out

Time In:

11:35 AM



Set

Time Out:

11:36 AM



Set

These are the time settings you can manually adjust if needed. By default, when the order is created, the time in and the time out values will be automatically created using your local time zone.

You can press the **Set** options in each section to manually set them to your current local time.

4 Additional Options

- Ship with Next Order.
- Ship to Schedule.
- Ship and Deduct.

Use the **Ship with Next Order** option if you want the order you are working on to be appended to the next above minimum order.

Use the **Ship to Schedule** option if you want the order to follow the customer's routing schedule.

Use the **Ship and Deduct** if you want the order to be shipped and deducted from another order.

5 Order Minimums

Card-only minimum:\$250.00

Accessory-only minimum:\$300.00

The minimum order requirements for free freight are displayed here and will vary depending on the customer. If there are combinations are cards and accessories on the order, it should meet one of these requirements.

6 Totals

Cards: 5 (\$18.00)

Accessories: 0 (\$0.00)

Total: 5 (\$18.00)

Below Minimum

This section is automatically updated whenever an item is either added to the order, or removed. It is an accumulation of the pack quantities and dollar values for the order. The "Below Minimum" that appears by default will update once the order has hit "Above Minimum" and will change to reflect it.

7 Prebooking

Pre-booking:

Regular Order

By default, when an order is created, it is done as a "Regular Order". This shouldn't be changed unless it is needed, but clicking on it will give you a list of available prebookings that the order can be set it, such as a Christmas prebooking or one that is setup for a specific tradeshow.

8 Shipping and Arrival dates

Ship Date:

2023-05-25



Ship to Arrive:

2023-05-29



When the order is first created, a default shipping dates and arrival dates will be provided depending on whether the customer is set to require immediate shipping or to ship according to their routing schedule.

Both of these can be changed and will adjust accordingly.

9 Items

Items on the Order:

00773 - Furry Friends - Birthday
00859 - Birthday Age - Adult
A1 - Birthday - Juvenile
A4 - Birthday - Juvenile
A5 - Birthday - Juvenile

Remove Selected Items

This section will look slightly different depending on the device you are using. It will either display like above or show a drop down list that you can click on to view the items.

If you see **0 Selected** , it just means that there are no items on the order that you have currently checked off, which is only used for removal purposes.

If you need to remove any items, click the drop down list of items and check off the items you want to remove, or select the ones you want to remove if that option isn't available on your device, then click **Remove Selected Items**.

10 Planograms

Planograms

Selecting a planogram will allow you to use the **Scanning** feature to scan the rack and pocket labels.

On the order, there will be a drop down list you can use to select a planogram. At this time, selecting the planogram from here will only allow you to scan and order using the rack and pocket combinations alongside with the **Scanning** feature.

11

Scanning

Scanning

You can use a scanner connected to your device, such as a Bluetooth scanner, to add items to your order. Click the **Scan** button below to begin.

Scan

Adding items is done with the **Scanning** feature in this section.

Click on the **Scan** button and follow the instructions provided to begin adding items. This will be covered in the next section.

12

Order Options

Cancel Order

Additional Notes

Save Order

If you need to cancel the order you are working on, click the **Cancel Order** option.

If you want to set some notes on the order, use the **Additional Notes** option.

When you are done with the order, click on **Save Order**.

Each of these will be covered in upcoming sections.

Typecodes

You can also add items to your order by navigating our *Typecodes*. Click on the **Show Typecodes** below to get started.

Show Typecodes

You can add items by using the Typecode option. Click the **Show Typecodes** option to expand it.

3.1.1. Adding Items

Items can be added using either the **Scanning** or **Typecode** features.

Scanning

Scanning

You can use a scanner connected to your device, such as a Bluetooth scanner, to add items to your order. Click the **Scan** button below to begin.

Scan

The following will appear, with focus on the textbox that says *Begin scanning...*:

Scanning

Begin scanning...

Selected Planogram:MB08-16

If you accidentally click outside of the above textbox, please make sure you click inside it again before scanning.

CANCEL

It is critical that this textbox remains focused in order to add items, so if you accidentally click away, just click inside it again

From here, you can scan or type any of our 17-digit UPCs, individual product SKUs, planograms, or rack/pockets. Whatever you scan will automatically be checked, but if you manually type something you will need to press **enter** on your device's keyboard.

Note: In order to input a rack/pocket from a customer's planogram, the planogram must be selected, so you can either pick it from the drop down list on the order page, or you can scan/manually type it in here.

If the product is valid, and is in stock, it will be added to your order. A unique sound will indicate this on your device. The quantity and dollar amount totals will update as you add product.

If there are any issues with adding the item, such as it being an invalid item, being out of stock, or the customer cannot order it, a message will appear on the screen indicating it and a different sound will be emitted.

Typecodes

Typecodes

You can also add items to your order by navigating our *Typecodes*. Click on the **Show Typecodes** below to get started.

Show Typecodes

Click on **Show Typecode** to expand the typecode section which will appear like below:

Hide out of stock items
 Hide items in this customer's planograms
 Hide seasonal cards ordered last year and credit and rebilled last year.
 Hide Mill Brook Unwrapped

Master Type
Everyday

Sub Type
Ages

Typecode
RD Ages

Major:
--ALL--

Minor:
--ALL--

View POS

Show 10 entries

Search:

Item	
SKU #16210 Birthday Age - Adult Age 30 - General QOH:0	1 Add
SKU #16221 Birthday Age - Adult Age 50 - General QOH:15	1 Add
SKU #16225 Birthday Age - Adult Age 60 - General QOH:0	1 Add
SKU #16235 Birthday Age - Adult Age 70 - General QOH:0	1 Add

- Use the check boxes that are provided if you wish to filter out products that display.
- Use the drop down lists below them to filter the products even further based on the master type, sub type, typecode, and majors/minors.
- Click on **View POS** to view any available Point of Sales items within the selected master type. (If any are available)
- By default, the number of entries that show is 10, but you can select a different value if you want to show more.
- Based on the options you have selected, you can use the **Search** feature to filter your results even more by typing in a major or minor you want to filter, such as "Birthday".
- Click on the **Add** button next to the item you want to add to add it to the order. By default, the quantity is set to **1**, but you can adjust it by changing the number value above it.

3.1.2. Removing Items

Items on the Order:

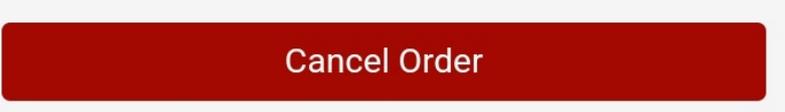
0 selected ▼

Remove Selected Items

Items can be removed by clicking on the drop down list, checking off which items you want to remove, then clicking **Remove Selected Items**.

Removing one or more items will update the totals that is displayed.

3.1.3. Canceling



Cancel Order

If you need to cancel the order you are working on, you can click the **Cancel Order** option and confirm it.

Confirming the cancellation will remove all the items from the order, mark the order as cancelled, and bring you back to the home page. **This cannot be undone.**

3.1.4. Additional Notes

Additional Notes

You can add your own notes to the order by clicking the **Additional Notes** option. This will display a screen like this:

Additional Notes

- Liftgate(Tailgate) Required.
- Appointment Needed for Delivery.
- Pickup at Warehouse.

UPDATE NOTES

CANCEL

From here, you can check off the options that are provided as well as insert your own notes as needed.

Once you have made the change, click **Update Notes**.

3.1.5. Submitting

Save Order

Any changes you make to the order as you make them are automatically updated in the system and saved, but the order still needs to be submitted.

Press the **Save Order** option to be brought to the order summary page. It will appear like this and the information displayed will pertain to the order you are finishing:

COLEMANS FOOD CENTRE # 9

Customer #11440

1 PENNELL'S LANE
DEER LAKE NL

Order Details

Order #: 1022

Order Date: 2023-08-05

Prebook: Regular Order

Ship Date: 2023-05-09

Arrival Date: 2023-05-11

Time In: 12:10 **Time Out:** 12:11

Item Summary

MBWEDEDE - MB Wrapped Everyday

Total Qty: 70

Total Cost: \$252.00

Signature

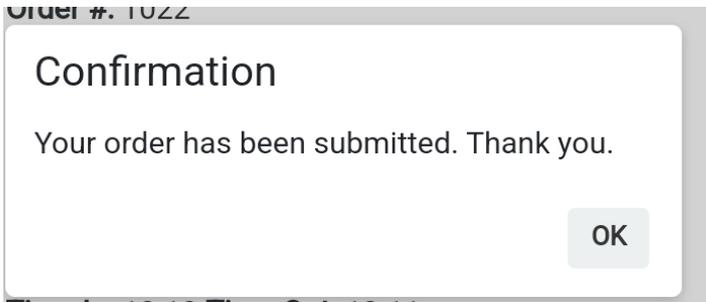
Submit Order

If you want to get a signature for the order, you can click **Signature** to have a popup like this appear:



You can use your devices touch screen to sign within the white space area, then click **Save** to apply the signature. If you want to remove the signature, click **Clear** and then click **Save**.

If you are done with the order and it is ready to be submitted, click on the **Submit Order** option and confirm it. Doing so will mark the order as submitted for processing and a message indicating it was submitted will display like this:



You will then be taken back to the home page where you can begin another order for another customer.

Reviewing Out-of-Stocks

If you have any items that are out-of-stock on your order when you press the **Save Order** button, you will be brought to the **Out-of-Stock Review** page first where you will be able to look for any substitutions that are available for the cards that are on your order and decide what you want to do with the accessories and the cards you can't substitute.

Here is an example:

Out-of-Stock Review

The following items are currently out of stock and need to be reviewed. Please select which products you want to keep on the order. Keep in mind, only cards can be substituted.

Add to Order	Item
<input checked="" type="checkbox"/>	<p>MRRG56-(NLAGHM)16 A8 19781 <i>Birthday - Juvenile</i> <i>Girl</i> Quantity Ordered: 1</p> <p>Substitute</p>
<input checked="" type="checkbox"/>	<p>MRRG56-(NLAGHM)16 A11 15900 <i>Birthday - Juvenile</i> <i>Boy</i> Quantity Ordered: 1</p> <p>Substitute</p>

[Select All](#)

[Deselect All](#)

[Continue to Summary](#)

[Back to Order](#)

- If you want to look for a substitute for a card, click on **Substitute** next to that item. Here is an example:

Item

11638

Birthday - Juvenile//Girl

QOH:113

Use as Substitute

11639

Birthday - Juvenile//Girl

QOH:93

Use as Substitute

11636

Birthday - Juvenile//Girl

QOH:32

Use as Substitute

OK

CLOSE

- When you are looking for a substitution for a card, you will be given a list of products to choose from that isn't on your order already. Additionally, if the product you are substituting is in a planogram, you will not see product within the same planogram.

When you are done picking the substitutions you want, you can then decide whether or not you want to add the remaining out-of-stock products to your order or remove them. You can do this by checking off each checkbox next to the items you want to keep, then click **Continue to Summary** when you are finished.

- When you click **Continue to Summary**, any items you have selected will be added to your order and the rest of the out-of-stock items will be removed, which will then bring you to the summary screen where you can finish your order and submit it.

3.2. Credit and Rebill

When you choose to create a new credit and rebill, a unique credit and rebill number will be generated for it.

When you choose to open a pending credit and rebill, the information for it will simply populate for you to edit.

In both scenarios, the screen will appear similar to below to display the relevant information for the order.

Note: Any changes you make, like changing the time, notes, or even adding and removing items, will be automatically saved as you work on it.

The screenshot shows a mobile application interface for managing a credit and rebill. The screen is titled "Credit and Rebill #1004". It contains several sections: "Time In:" with a time picker set to 10:43 AM and a "Set" button; "Time Out:" with a time picker set to 10:44 AM and a "Set" button; "Totals" showing "Cards: 4 (\$2.40)", "Accessories: 0 (\$0.00)", and "Total: 4 (\$2.40)"; "Items" listing four "20880 - Family" items; a "Remove Selected Items" button; a "Scanning" section with a "Scan" button; and an "Options" section with "Cancel Credit", "Additional Notes", and "Save Credit" buttons. Numbered callouts (1-7) point to these specific elements.

1 Credit

Credit and Rebill #1004

This is the unique credit number that is assigned when you first create the credit, encase you need to reference it.

2 Credit Date

Date: 2023-05-24

This is the date that the credit was first created. It cannot be changed.

3 Time in/Time out

Time In:
10:43 AM ⌚
Set

Time Out:
10:44 AM ⌚
Set

These are the time settings you can manually adjust if needed. By default, when the credit is created, the time in and the time out values will be automatically created using your local time zone.

You can press the **Set** options in each section to manually set them to your current local time.

4 Totals

Cards: 4 (\$2.40)
Accessories: 0 (\$0.00)
Total: 4 (\$2.40)

This section is automatically updated whenever an item is either added to the credit, or removed. It is an accumulation of the unit quantities and dollar values.

5 Items

Items:

- 20880 - Family
- 20880 - Family
- 20880 - Family
- 20880 - Family

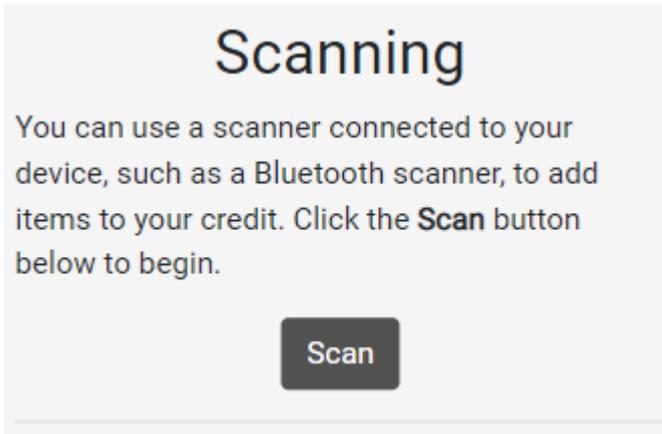
Remove Selected Items

This section will look slightly different depending on the device you are using. It will either display like above or show a drop down list that you can click on to view the items.

If you see **0 Selected** , it just means that there are no items currently checked off, which is only used for removal purposes.

If you need to remove any items, click the drop down list of items and check off the items you want to remove, or select the ones you want to remove if that option isn't available on your device, then click **Remove Selected Items**.

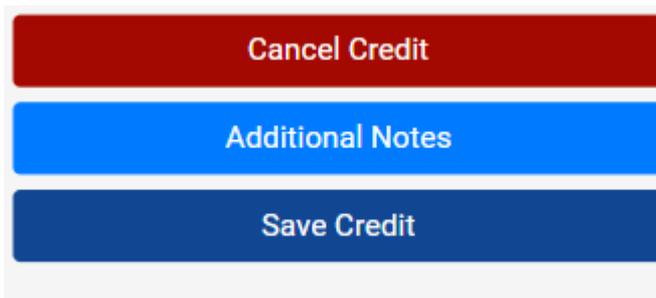
6 Scanning



Adding items is done with the **Scanning** feature in this section.

Click on the **Scan** button and follow the instructions provided to begin adding items. This will be covered in the next section.

7 Options



If you need to cancel the credit you are working on, click the **Cancel Credit** option.

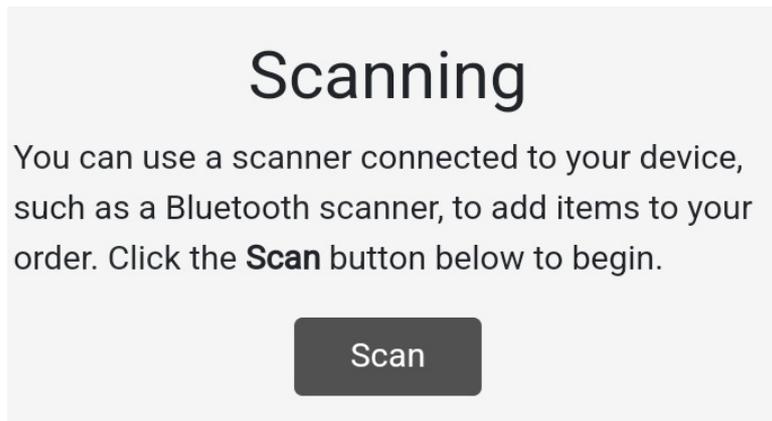
If you want to set some notes on the credit, use the **Additional Notes** option.

When you are done with the credit, click on **Save Credit**.

Each of these will be covered in upcoming sections.

3.2.1. Adding Items

Scanning



The following will appear, with focus on the textbox that says *Begin scanning...*:

Scanning

If you accidentally click outside of the above textbox, please make sure you click inside it again before scanning.



It is critical that this textbox remains focused in order to add items, so if you accidentally click away, just click inside it again

From here, you can scan or type any of our 17-digit UPCs or individual product SKUs. Whatever you scan will automatically be checked, but if you manually type something you will need to press **enter** on your device's keyboard.

If the product is valid and can be credited, it will be added. A unique sound will indicate this on your device. The unit quantity and dollar amount totals will update as you add product.

If there are any issues with adding the item, such as it being an invalid item, or it cannot be added to the credit, a message will appear on the screen indicating it and a different sound will be emitted.

Items Flagged for Destroying

There are several items that are marked to be destroyed, instead of credit and rebilled.

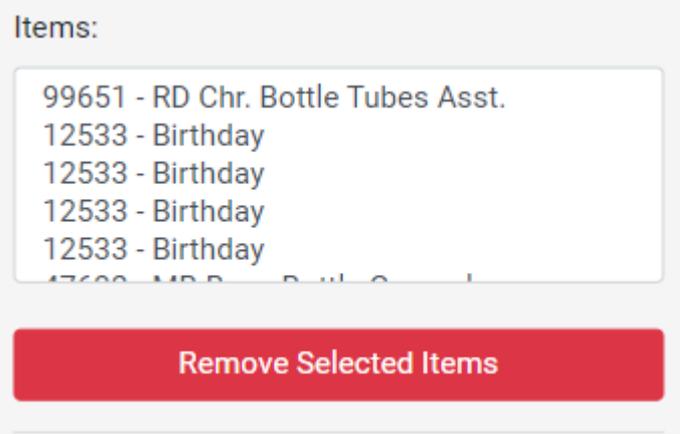
These items, when you scan them and they are valid, will be placed in either a new credit and destroy if you don't have one pending, or the latest existing one if there is one already.

When you scan an item that is marked for destroying, it will emit a different sound than everything else that will allow you to differentiate between an item added to the credit and rebill and one that is added to a credit and destroy automatically.

These items need to be destroyed just like any other item that is credit and destroyed.

You will also need to keep in mind that if you do encounter this, you should make sure you submit the credit and destroy afterwards.

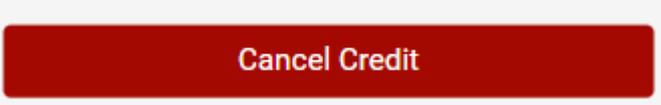
3.2.2. Removing Items



Items can be removed by clicking on the drop down list, checking off which items you want to remove (or selecting the items if it appears like above) then clicking **Remove Selected Items**.

Removing one or more items will update the totals that is displayed.

3.2.3. Canceling



Cancel Credit

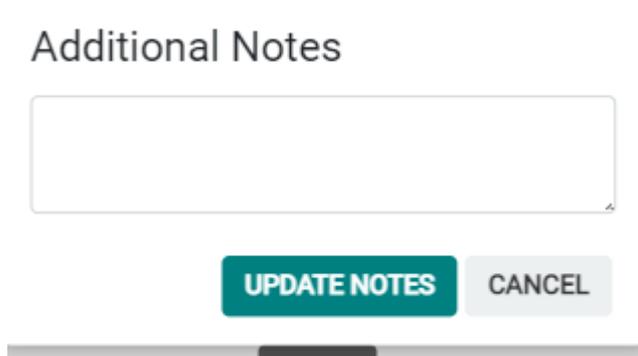
If you need to cancel the credit you are working on, you can click the **Cancel Credit** option and confirm it.

Confirming the cancellation will remove all the items from the credit, mark it as cancelled, and bring you back to the home page. **This cannot be undone.**

3.2.4. Additional Notes

Additional Notes

You can add your own notes to the credit by clicking the **Additional Notes** option. This will display a screen like this:



Additional Notes

UPDATE NOTES CANCEL

From here, you can insert the note you would like to add, then click **Update Notes**.

3.2.5. Submitting

Save Credit

Any changes you make to the credit as you make them are automatically updated in the system and saved, but it still needs to be submitted.

Press the **Save Credit** option to be brought to the summary page. It will appear like this and the information displayed will pertain to the credit you are finishing:

3 TS LTD
Customer #11168
MAIN ROAD
P.O. BOX 71
WOODY POINT NL

Credit and Rebill Details

Credit and Rebill #: 1004
Date: 2023-05-24
Time In: 10:43 **Time Out:** 10:44

Item Summary

MBWCHCHE - MB Wrapped Christmas
Total Qty: 18
Total Cost: \$10.80

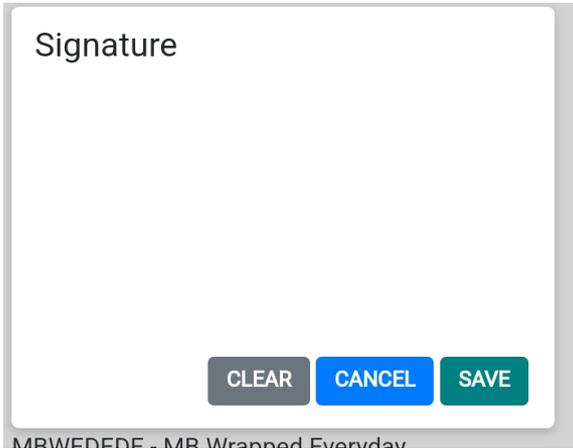
Total Qty: 18
Total Cost: \$10.80

Signature

Submit

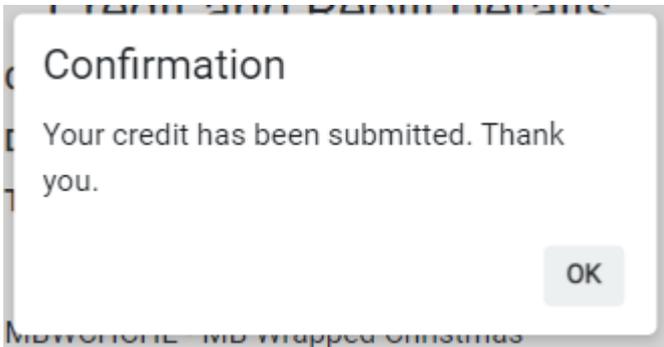
[Go Back](#)

If you want to get a signature for the credit, you can click **Signature** to have a popup like this appear:



- You can use your devices touch screen to sign within the white space area, then click **Save** to apply the signature.
- If you want to remove the signature, click **Clear** and then click **Save**.

If you are done with the credit and it is ready to be submitted, click on the **Submit** option and confirm it. Doing so will mark the credit as submitted for processing and a message indicating it was submitted will display like this:



You will then be taken back to the home page where you can begin another credit, or an order, for another customer.

3.3. Credit and Destroy

When you choose to create a new credit and destroy, a unique credit and destroy number will be generated for it.

When you choose to open a pending credit and destroy, the information for it will simply populate for you to edit.

In both scenarios, the screen will appear similar to below to display the relevant information for the credit.

Note: Any changes you make, like changing the time, notes, or even adding and removing items, will be automatically saved as you work on it.

The screenshot shows a mobile application interface for managing a credit and destroy. The form is titled "Credit and Destroy #1001" and contains the following elements:

- 1 Credit #:** The unique identifier for the credit, displayed as "Credit and Destroy #1001".
- 2 Credit Date:** The date of the credit, displayed as "Date: 2023-05-23".
- 3 Time in/Time out:** Two time selection fields. The "Time In" field is set to "04:55 PM" and the "Time Out" field is set to "04:56 PM". Each field has a "Set" button below it.
- 4 Totals:** A summary section showing "Cards: 3 (\$1.80)", "Accessories: 0 (\$0.00)", and "Total: 3 (\$1.80)".
- 5 Items:** A list of items with a "Remove Selected Items" button below. The items listed are "01047 - Birthday - Juvenile", "21119 - General", and "21119 - General".
- 6 Scanning:** A section titled "Scanning" with a "Scan" button. The text below the button reads: "You can use a scanner connected to your device, such as a Bluetooth scanner, to add items items. Click the Scan button below to begin."
- 7 Options:** A section with three buttons: "Cancel Credit" (red), "Additional Notes" (blue), and "Save Credit" (dark blue).

1 Credit

Credit and Destroy #1001

This is the unique credit number that is assigned when you first create the credit, encase you need to reference it.

2 Credit Date

Date: 2023-05-23

This is the date that the credit was first created. It cannot be changed.

3 Time in/Time out

Time In:

04:55 PM 

Set

Time Out:

04:56 PM 

Set

These are the time settings you can manually adjust if needed. By default, when the credit is created, the time in and the time out values will be automatically created using your local time zone.

You can press the **Set** options in each section to manually set them to your current local time.

4 Totals

Cards: 3 (\$1.80)
Accessories: 0 (\$0.00)
Total: 3 (\$1.80)

This section is automatically updated whenever an item is either added to the credit, or removed. It is an accumulation of the unit quantities and dollar values.

5 Items

Items:

01047 - Birthday - Juvenile
21119 - General
21119 - General

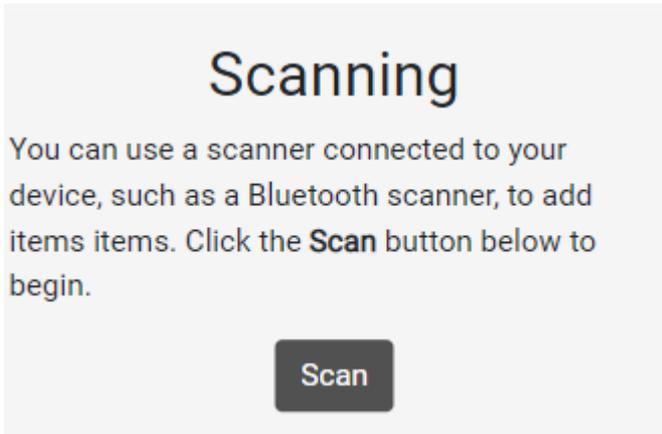
Remove Selected Items

This section will look slightly different depending on the device you are using. It will either display like above or show a drop down list that you can click on to view the items.

If you see **0 Selected** , it just means that there are no items currently checked off, which is only used for removal purposes.

If you need to remove any items, click the drop down list of items and check off the items you want to remove, or select the ones you want to remove if that option isn't available on your device, then click **Remove Selected Items**.

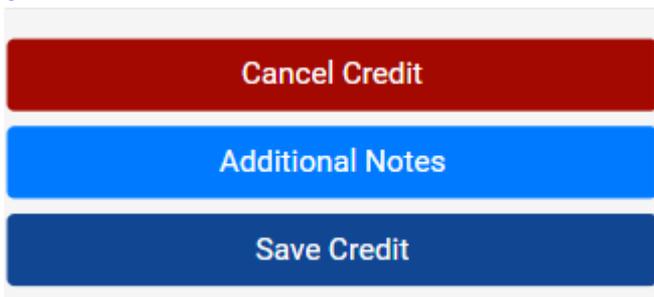
6 Scanning



Adding items is done with the **Scanning** feature in this section.

Click on the **Scan** button and follow the instructions provided to begin adding items. This will be covered in the next section.

7 Options



If you need to cancel the credit you are working on, click the **Cancel Credit** option.

If you want to set some notes on the credit, use the **Additional Notes** option.

When you are done with the credit, click on **Save Credit**.

Each of these will be covered in upcoming sections.

3.3.1. Adding Items

Scanning

Scanning

You can use a scanner connected to your device, such as a Bluetooth scanner, to add items to your order. Click the **Scan** button below to begin.

Scan

The following will appear, with focus on the textbox that says *Begin scanning...*:

Scanning

Begin scanning...

If you accidentally click outside of the above textbox, please make sure you click inside it again before scanning.

CANCEL

It is critical that this textbox remains focused in order to add items, so if you accidentally click away, just click inside it again

From here, you can scan or type any of our 17-digit UPCs or individual product SKUs. Whatever you scan will automatically be checked, but if you manually type something you will need to press **enter** on your device's keyboard.

If the product is valid and can be credited, it will be added. A unique sound will indicate this on your device. The unit quantity and dollar amount totals will update as you add product.

If there are any issues with adding the item, such as it being an invalid item, or it cannot be added to the credit, a message will appear on the screen indicating it and a different sound will be emitted.

3.3.2. Removing Items

Items:

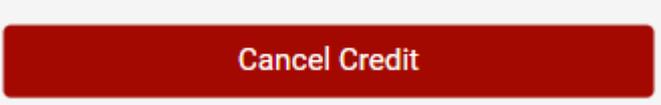
- 20880 - Family
- 20880 - Family
- 20880 - Family
- 20880 - Family

Remove Selected Items

Items can be removed by clicking on the drop down list, checking off which items you want to remove (or selecting the items if it appears like above) then clicking **Remove Selected Items**.

Removing one or more items will update the totals that is displayed.

3.3.3. Canceling



Cancel Credit

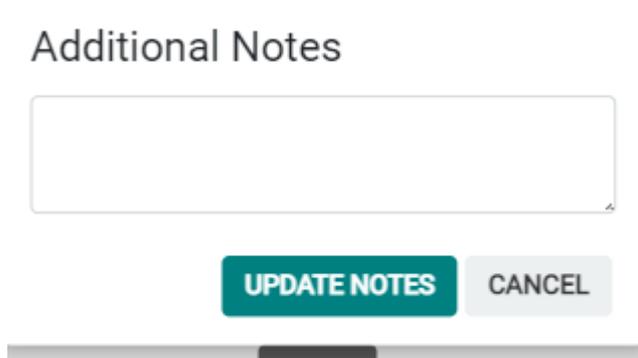
If you need to cancel the credit you are working on, you can click the **Cancel Credit** option and confirm it.

Confirming the cancellation will remove all the items from the credit, mark the credit as cancelled, and bring you back to the home page. **This cannot be undone.**

3.3.4. Additional Notes

Additional Notes

You can add your own notes to the credit by clicking the **Additional Notes** option. This will display a screen like this:

A screenshot of a web form titled "Additional Notes". The form has a title "Additional Notes" at the top left. Below the title is a large, empty rectangular text input field. At the bottom of the form, there are two buttons: a green button labeled "UPDATE NOTES" and a light gray button labeled "CANCEL". The form is set against a white background with a thin gray border.

From here, you can insert the note you would like to add, then click **Update Notes**.

3.3.5. Submitting



Save Credit

Any changes you make to the credit as you make them are automatically updated in the system and saved, but it still needs to be submitted.

Press the **Save Credit** option to be brought to the summary page. It will appear like this and the information displayed will pertain to the credit you are finishing:

Credit and Destroy Details

Credit and Destroy #: 1001

Date: 2023-05-23

Time In: 16:55 Time Out: 16:56

Item Summary

MBBEDBTE - MB Everyday Gift Bags Bottle
Total Qty: 1
Total Cost: \$0.55

MBBEDLGE - MB Gift Bags Large
Total Qty: 3
Total Cost: \$2.55

MBWCHCHE - MB Wrapped Christmas
Total Qty: 2
Total Cost: \$1.20

MBWEDEDE - MB Wrapped Everyday
Total Qty: 1
Total Cost: \$0.60

MBWEDEDI - MB Wrapped Everyday Italian
Total Qty: 4
Total Cost: \$2.40

RDXCHBXE - RD Chr. Boxes
Total Qty: 1
Total Cost: \$1.50

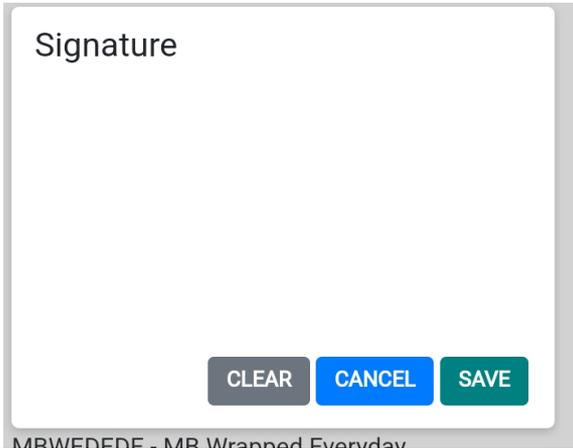
Total Qty: 12
Total Cost: \$8.80

Signature

Submit

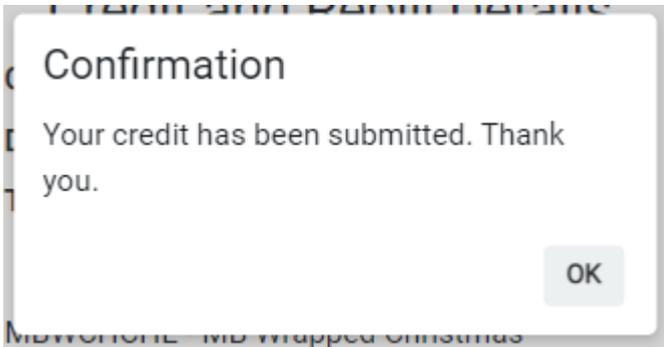
Go Back

If you want to get a signature for the credit, you can click **Signature** to have a popup like this appear:



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If you are done with the credit and it is ready to be submitted, click on the **Submit** option and confirm it. Doing so will mark the credit as submitted for processing and a message indicating it was submitted will display like this:



You will then be taken back to the home page where you can begin another credit, or an order, for another customer.

4. Bluetooth Scanner

An Opticon 2006 Bluetooth scanner is recommended for using this web application in order to utilize its features and it must be configured to scan our 17-digit UPCs

This section will cover both configuring this scanner as well as setting the scanner up on your Apple or Android devices.

4.1. Connecting the Scanner

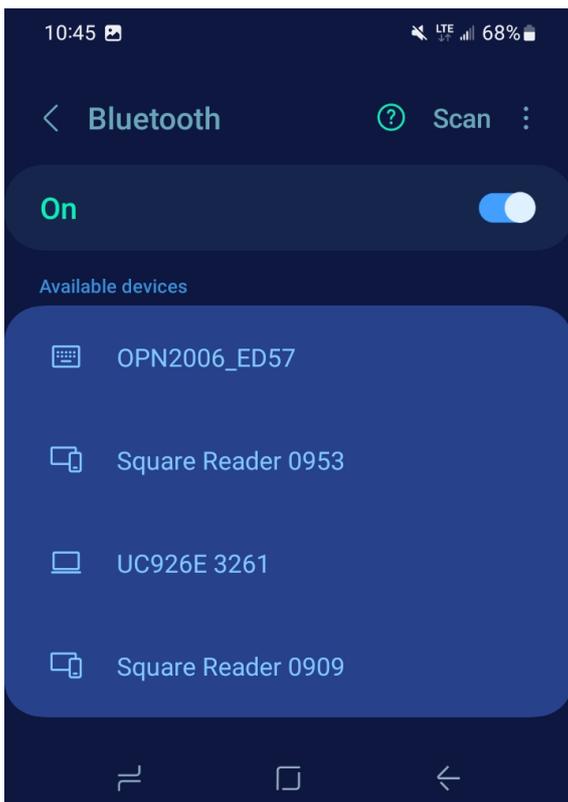
To connect your Opticon Bluetooth scanner, it first needs to be put into a pairing mode. This can be done by holding down the small button (as indicated below) on the scanner for a few seconds just until it beeps and begins flashing blue. For as long as it is flashing, your device can search for it, so if it stops while you are trying to connect it, just repeat the process.



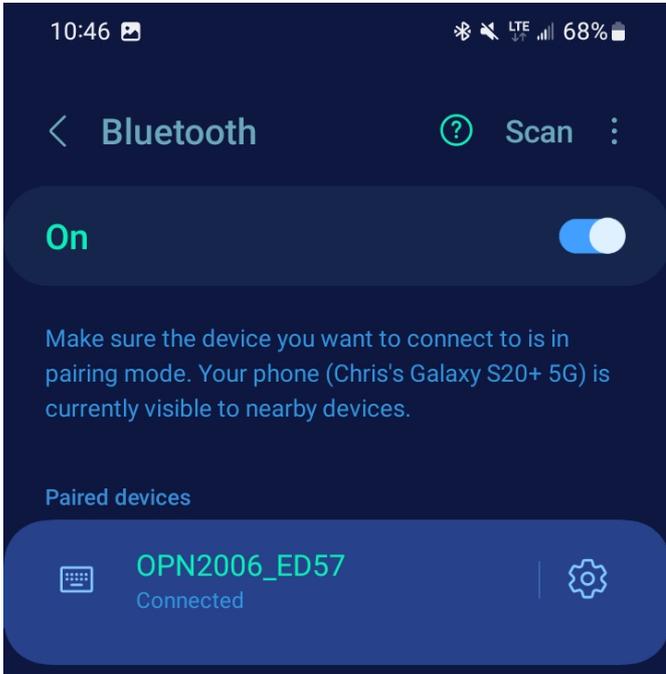
While it is in the pairing mode, do the following depending on your device:

Android Devices:

Open up **Settings** -> **Connections** -> **Bluetooth**. Make sure your Bluetooth is set to **On**.

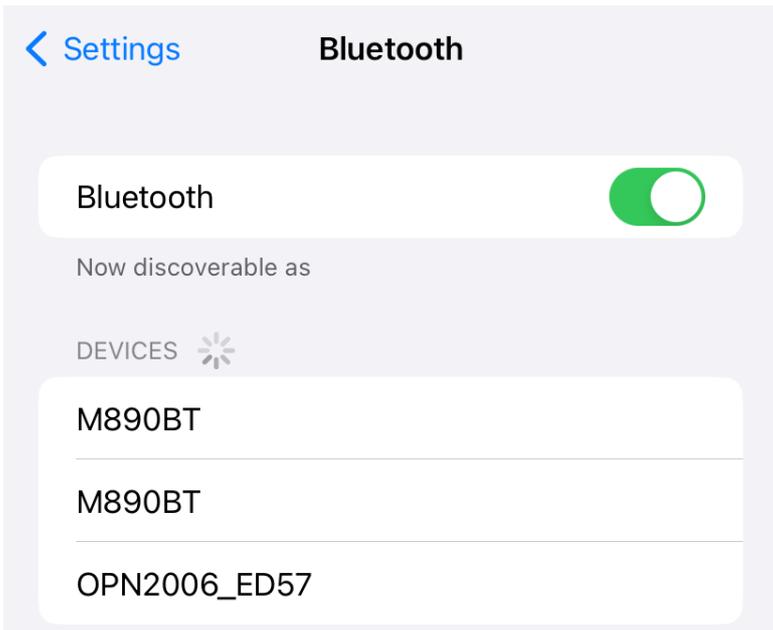


You should see a device starting with "**OPN2006**" under the **Available Devices**. Click on it, and confirm the pairing (if needed). The device should beep and display **Connected** afterwards:



Apple Devices:

Open up **Settings** -> **Bluetooth**. Make sure your Bluetooth is set to **On**.



You should see a device starting with "**OPN2006**" under **Devices**. Click on it, and confirm the pairing (if needed). The device should beep and display **Connected** afterwards:

Bluetooth



Now discoverable

MY DEVICES

OPN2006_ED57

Connected 

4.2. Configuration

If you received an Opticon 2006 Bluetooth scanner, it should already be configured. The following steps will outline setting the configuration up if your scanner does not appear to be recognizing 17-digit UPCs.

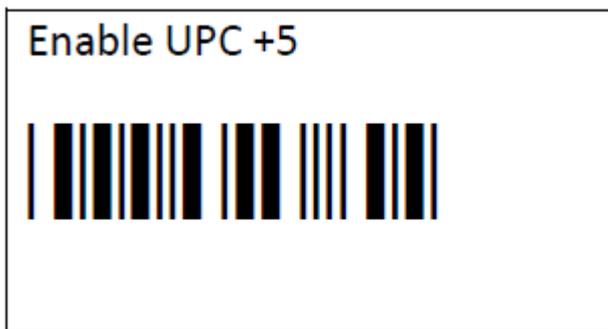
STEP 1: Using the big button on the scanner, scan the following barcode:



STEP 2: Scan the following barcode. The scanner will beep continuously.



STEP 3: While the scanner is still beeping continuously, hover the scanner over the barcode below without pressing anything. It should beep and continue beeping.



STEP 4: While the scanner is still beeping, hove the scanner over the following barcode without pressing anything to complete the process. It should stop beeping.



Your scanner will now be configured to scan our 17-digit UPCs