

# mERP

*Order Entry for Syspro*

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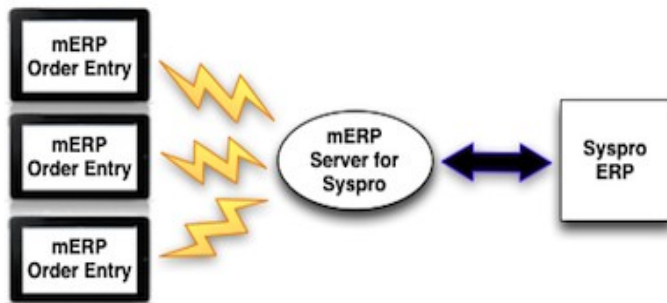
# mERP

## *Making Business Systems Mobile*


mERP is a sales order entry application for Syspro ERP that runs on an iPad.

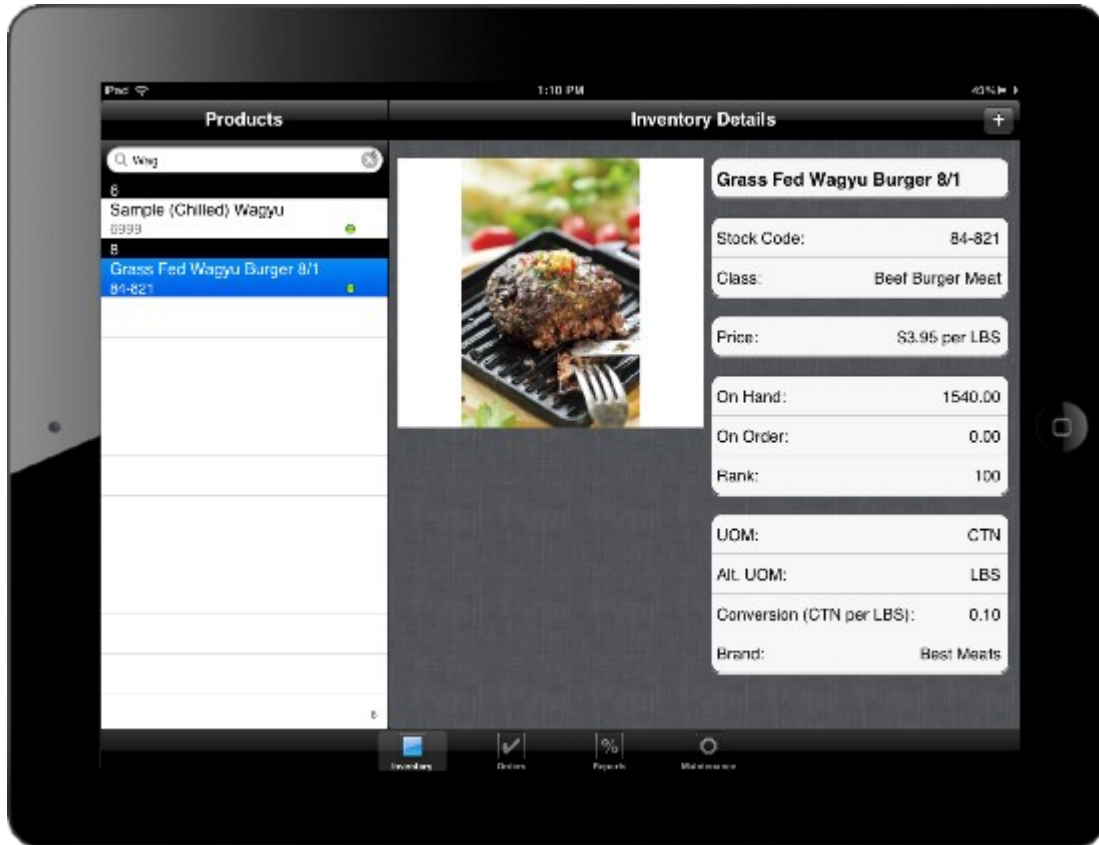
mERP provides mobile access to the customer, product, and inventory data from Syspro, so you can enter and book sales orders, anywhere, anytime.

mERP works even when wireless or cellular service is unavailable, because it has a local database of information about the products you sell and the customers you sell to. mERP's on-board database is lightweight and current: it is selectively populated with the just the Syspro data you need, and it automatically syncs up with Syspro, via the mERP Server for Syspro.



## Inventory Details Page

The screenshot below is the **Inventory Details** page in mERP Order Entry, which shows key information about a product. Tap the **Inventory** icon —  — at the bottom of the page to display the **Inventory Details** page.

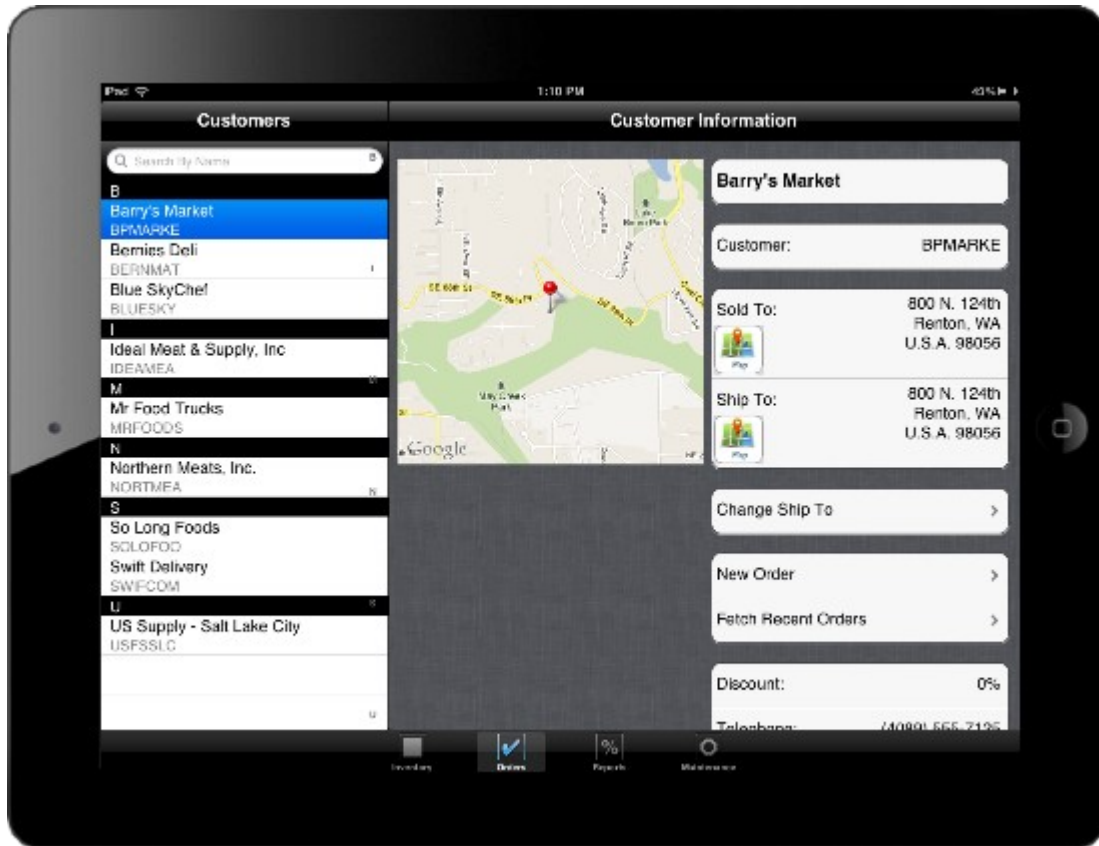


### About the Inventory Details Page

- In landscape mode, the products that a user sells appear in the **Products** panel on the left. In portrait mode, tap the **Products** button in the upper left corner to list products in a popup. mERP Order Entry's local database is user-specific: it is populated with product information based on the user's Syspro ID.
- The green or red dot to the right of each product in the list indicates whether it is in stock or not.
- When you tap the search widget, the iPad keyboard appears. Enter all or a portion of a product name and tap **Search**; matching products are listed in the **Products** panel. Product search functionality is configurable: you can search by Product Description or Stock Code — you choose your preference on the **Maintenance** page.
- Tap a product in the **Products** list to select it. If there is an image in Syspro for the product, it appears in the middle of the page. The standard Syspro fields that appear are: Product Description, Stock Code, Product Class, Price, On Hand, On Order, UOM, Alt UOM, and Conversion. Rank is a calculated value that indicates product popularity, based on recent unit sales. Note that you can configure mERP Order Entry to present one or more additional fields from Syspro. The Brand field in the demo is an example of an additional field; it is the Alternate Key field from Syspro, with a custom label.

## Customer Information Page

The screenshot below is the **Customer Information** page in mERP Order Entry, which shows key information about a customer. Tap the **Orders** icon —  — at the bottom of the page to display the page.

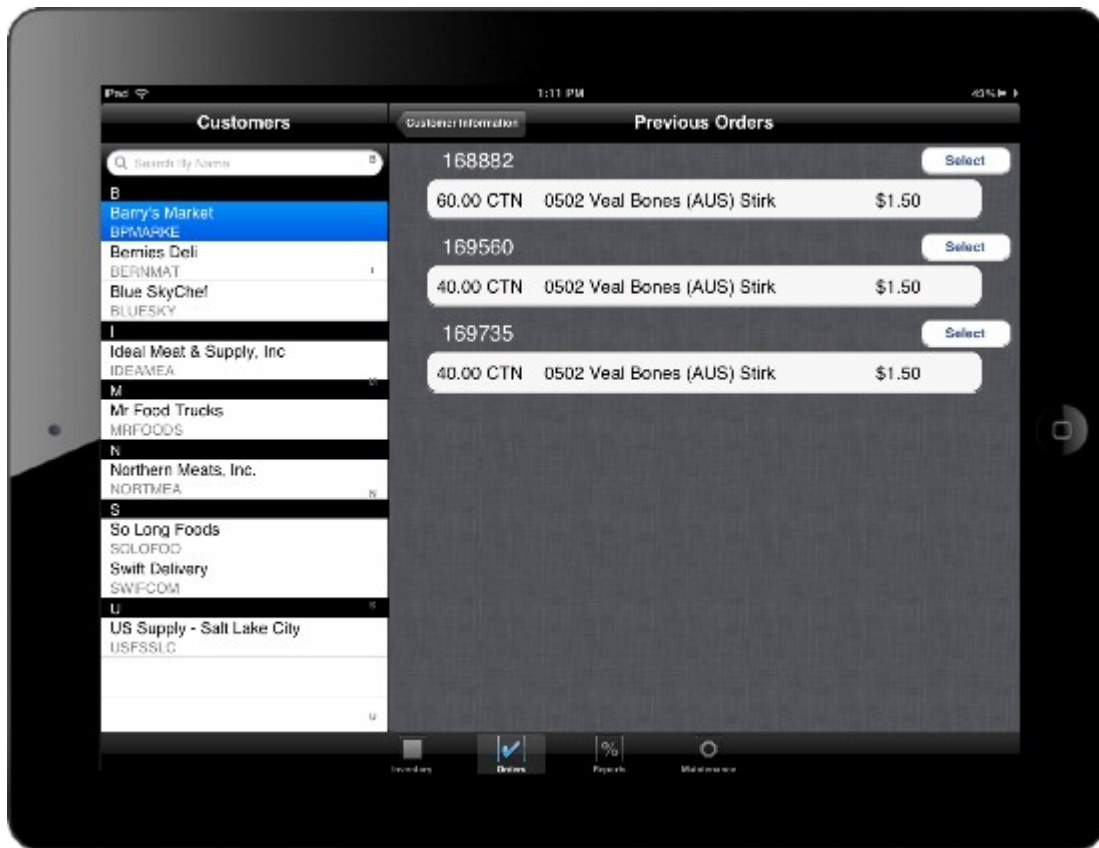


### ***About the Inventory Details Page***

- In landscape mode, all of the user's customers appear in the **Customers** panel on the left. In portrait mode, tap the **Customers** button in the upper left corner to list customers in a popup. mERP Order Entry's local database is user-specific: it is populated with customer information based on the user's Syspro ID.
- When you tap the search widget, the iPad keyboard appears. Enter all or a portion of a customer name and tap **Search**; matching customers are listed in the **Customers** panel.
- Tap a customer in the **Customers** list to select it.
- A map of the customer's Shipping Address appears in the center of the page. If you click on the map icon next to the Sold To or Ship To address, mERP Order Entry opens a full page map of the location, on which you can scroll and zoom, and from which you can jump to Google Maps for directions.
- The standard Syspro fields that appear are Customer Name, Customer Number, Sold to Address, Ship to Address, and Discount. In addition to the standard fields, you can configure mERP Order Entry to present one or more additional fields from Syspro. Telephone is an example of an additional customer field in the demo.

## Previous Orders Page

The screenshot below is the **Previous Orders** page in mERP Order Entry, which shows the three most recent orders for a customer. On the **Customer Information** page, tap **Fetch Recent Orders** to display the **Previous Orders** page.

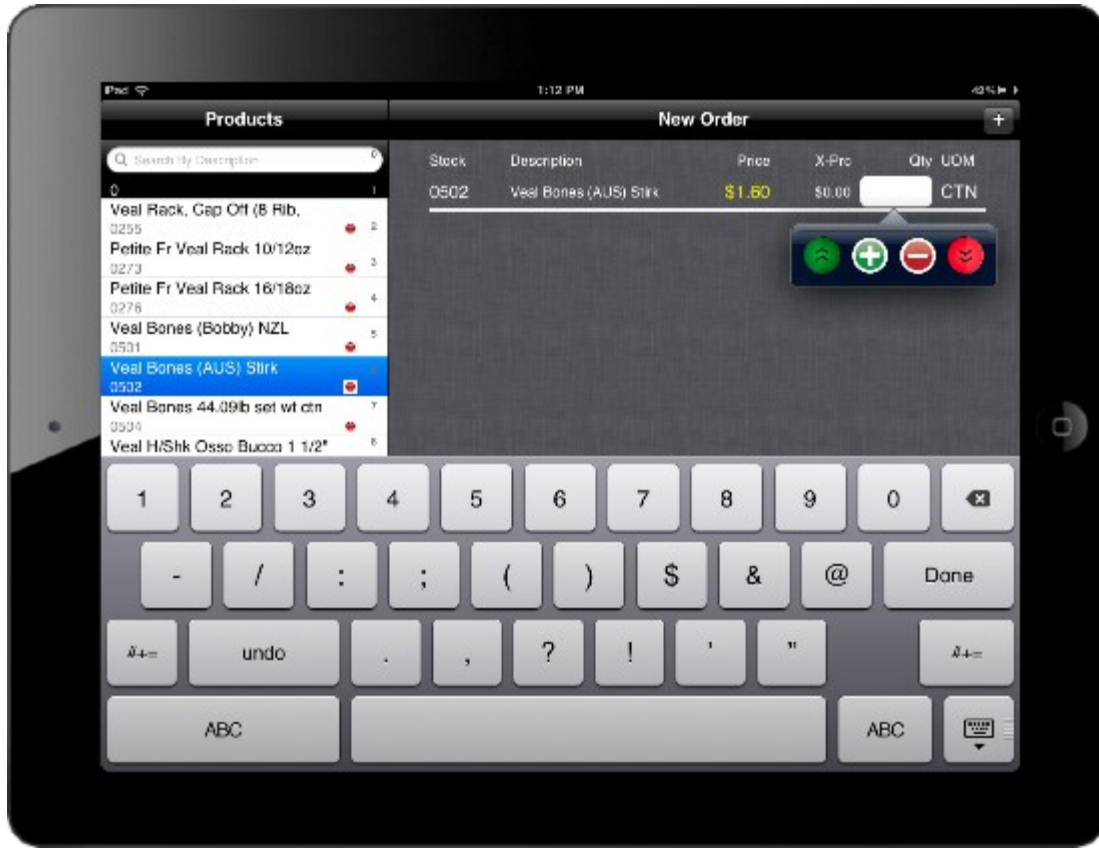







### About the Previous Orders Page

- The Sales Order number for each order is shown, along with this information for each line item on the order: Quantity Ordered, Units of Measure, Stock Code, Unit Price.
- Tap on an order number to display a popup with the Order Date, Customer PO number, and order total.
- Tap the **Select** button above an order to start a new sales order based on the lines in the selected order.

## New Order Page

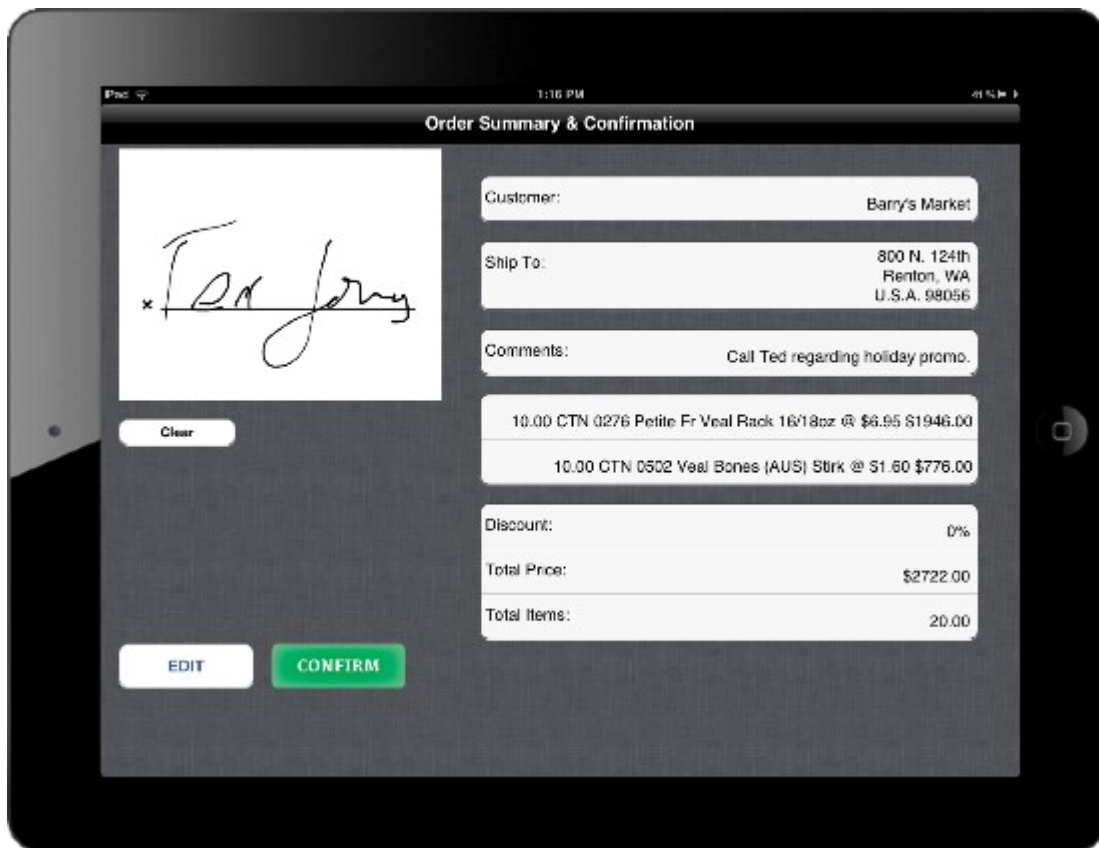
- To create a sales order, first select the customer. On the **Customer Information** page for the customer, there are two ways to start a sales order:
  - To base an order on a previous order, tap the **Fetch Recent Orders** button and select the desired order,
  - To start from scratch, tap **New Order**.
- The **New Order** page appears — if you copied an existing order, the line items from the that order appear.



- Tap a product in the **Products** panel to add it to the order. A line item for the product is added to the sales order, the quantity field is automatically selected, and the iPad keyboard appears.
- To change quantity of a item, tap the current quantity, and then:
  - Use the iPad keyboard to edit the value, or
  - Tap the plus —  — or minus —  — icon to increment the or decrement the value by the products's sales UOM, or
  - Tap the green double up —  — or red double down icon —  — to increment or decrement the quantity by the product's alternate UOM.
- To remove a line item, tap its stock code, and then the minus sign —  — that appears to the left of the stock code.
- To change from standard to promotional pricing and vice versa, tap the price. When promo pricing is selected the price is shown in yellow.
- When you are done adding line items, tap **Finish**. The **Order Summary & Confirmation** page appears.

## Order Summary & Confirmation Page

The **Order Summary & Confirmation** page appears when you tap **Finish** on the **New Order** page.




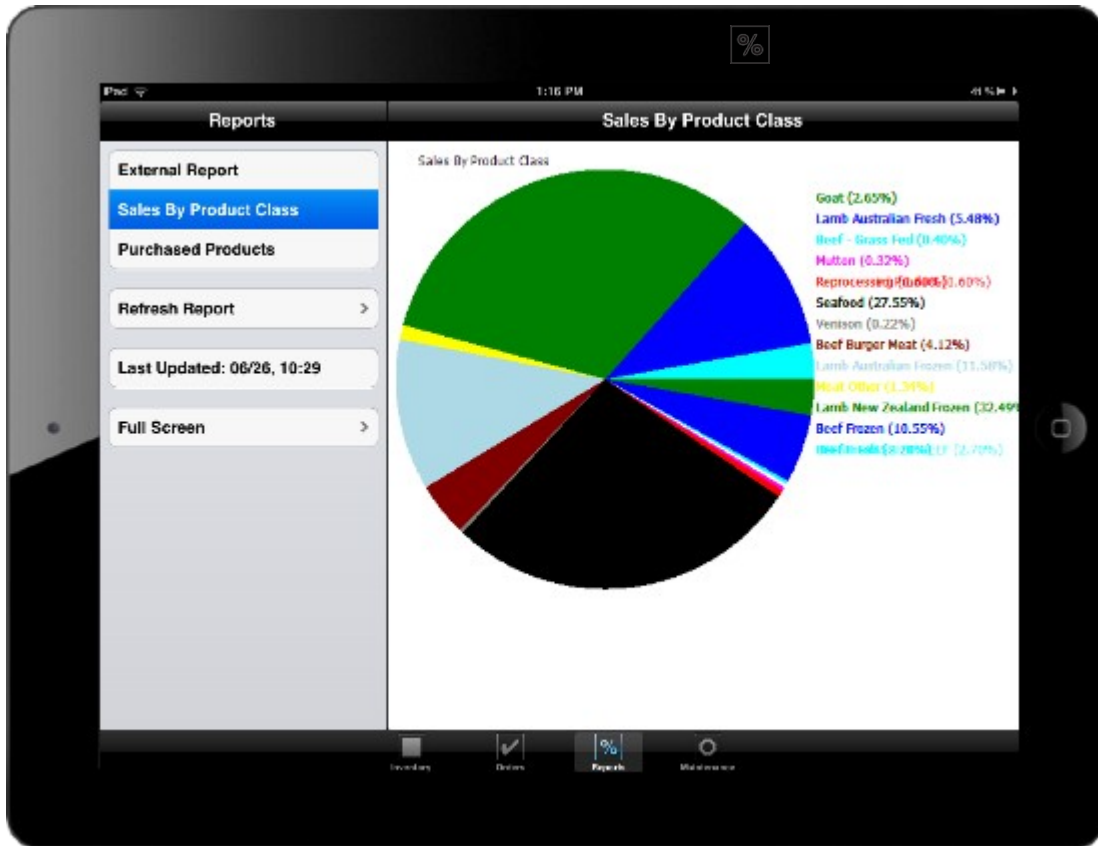
### About the Order Summary & Confirmation Page

- The **Order Summary & Confirmation** page lists the following order details: Customer, Ship to Address, Comments (if you entered any), details for each line item, Discount applied, Total Price, Total Items on the order.
- The order can be signed with a finger.
- If you wish to modify the order, tap **Edit**.
- When you are ready to submit the order, tap **Confirm**.
- In live operation:
  - If you have connectivity, the order is immediately transmitted to the mERP Server for Syspro, and then on to Syspro. If you do not have connectivity, the order will be transmitted as soon as connectivity is restored.
  - The order will appear as a recent order after it has been processed in Syspro.
  - The mERP Server will send a confirmation email to the user and optionally to the customer.

## Reports Page

The **Reports** page is a customizable web page viewer that is embedded in mERP Order Entry. It is basically a web browser that allows the user to view selected web pages and applications.

Tap the **Reports** icon —  — to display the **Reports page**.



- The **Reports** page is completely configurable — when you set up the mERP Server for Syspro, you define the the pages or applications you want to make available.
- The **Reports** page can display any content that is supported by an HTTP browser. For example:
  - Sales reports based on Syspro data in HML , PDF, or a supported graphics format.
  - Pages in a web-based application, for example, CRM systems, expense reporting, benefits management, or other enterprise systems you use.
- Reports can be user-specific, based on the user's Syspro ID.
- Reports are locally cached, and can be refreshed on-demand.