Chapter 4.45: Managing Default Products on MangoMobile

Overview

This document will describe where to find the various options for allowing the drivers to manage customers default products, prices and quantities via the MangoMobile Handheld.

Introduction

This document describes the various ways the driver can manage a customers' Default Products from the MangoMobile handheld program. They are able to Add, Remove and Modify Prices and Quantities from the handheld that will update the Default Products on the customers' account. This document will cover the various ways of completing those tasks.

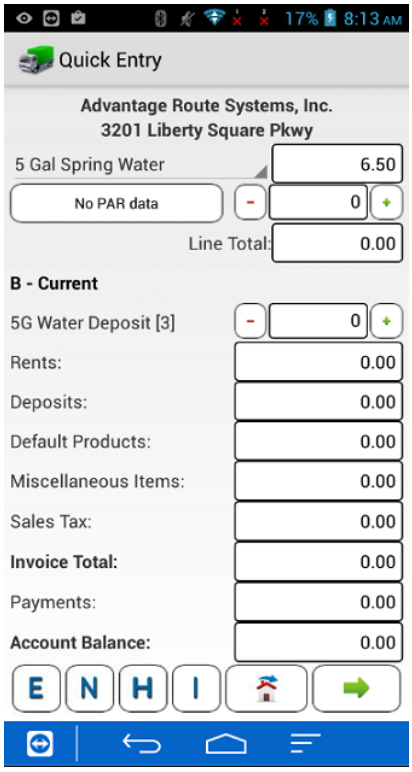
Add Default Products via Misc Items

All Drivers, by default are allowed to add a new item to a customers' default product list from within the *Miscellaneous Items* screen. Adding the product to the default product list makes it so the item is on the main invoice entry dropdown page from that point forward. When a driver finds a customer purchasing products frequently, they may choose to enter them as a default to save time on future deliveries. This feature does not allow them to modify the price or the quantity of the product he chooses. It simply takes the current price and zero quantity and adds it to the customers default product list.

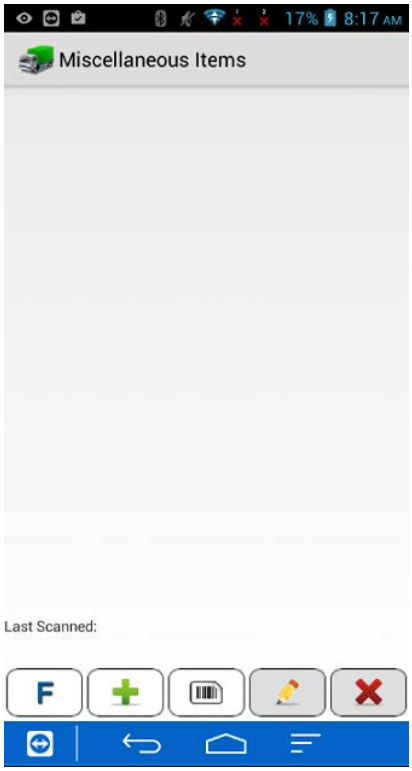
NOTE: If you prefer that the drivers do not have the ability to add default products via the Misc. Items screen, you can disable this by going to *List > Routes > Handheld Class > Sales Rules 2 Tab*, and check the option for *Block Adding Default Products*.

Below, we'll walk through the steps of adding a product to the customers default product list.

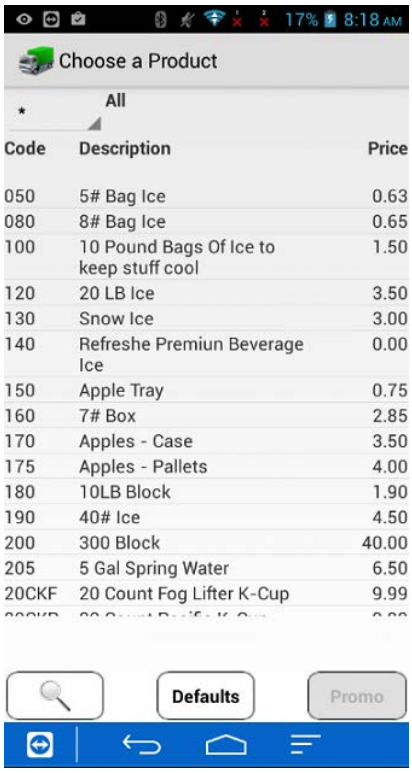
As the customer selects an account from his Route List, they will be taken to the Quick Entry screen as shown below in the screenshot below. The Default Products dropdown is located near the top, where the *5 Gal Spring Water* product is shown. When adding a product to the default product list, it will appear in this dropdown for future deliveries. To add a product to this list, the driver will first tap the *Miscellaneous Items* option on the screen:



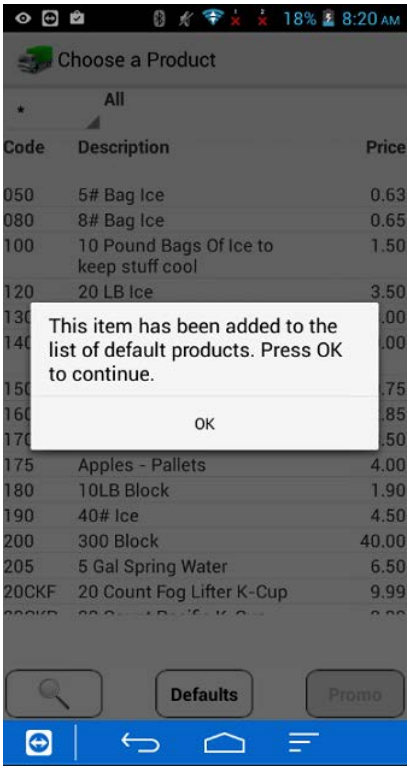
This will bring the driver to the Miscellaneous Items summary screen, as shown below. The driver will then proceed to the Misc. Items List by selecting the Add Product button (Green +) at the bottom of the screen.



Now the driver is presented with the entire list of items available for them to sell to a customer. To add a specific product to the Default Product list, they will first choose the *Defaults* button at the bottom of the screen:

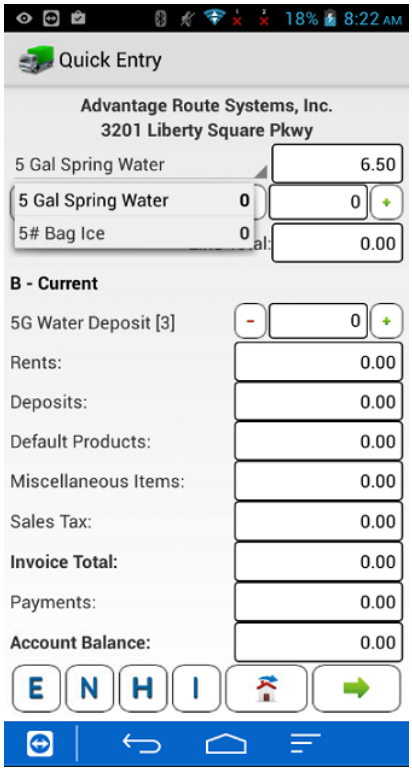


That will then change the button to now show a *Cancel* option. This indicates the driver is now in the correct mode to add a new default product. The next product they choose from the list will be added to the default product list for this specific account. Once selected, the driver will be notified of this change on their screen:



The driver can then select the *OK* button to proceed. From this point, they can choose to add additional products by repeating the same steps as previously noted, sell a product as normal, or use the back button on their device to exit the *Misc. Items Entry* area of MangoMobile.

Now, back at the customers Quick Entry screen, the driver can immediately see the new products added to the default product list, by selecting the default product dropdown, as shown below.



At this point, the driver is then free to service the stop as normal. This new default product will be updated on the desktop during the Afternoon Upload, and future deliveries to this account will now show this new product in the default product dropdown.

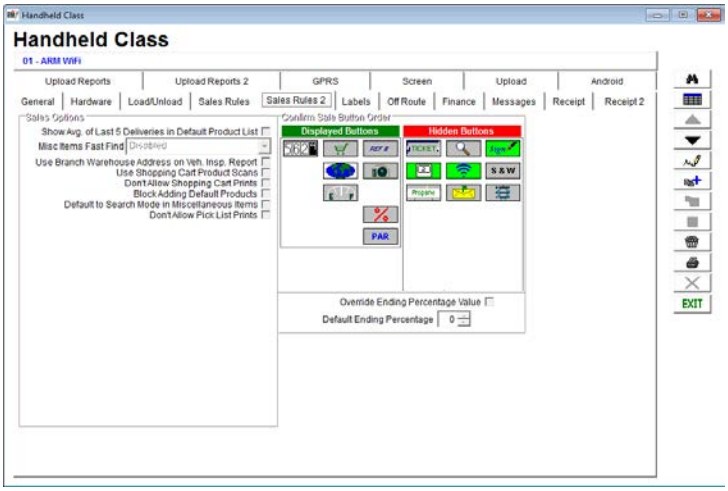
Default Product Management

The Default Product Management feature is a new option that is only available in Versions 7.0.2r1 and newer. This new feature allows a driver to quickly remove items from the default product list within the *Quick Entry* screen, and have access to the new *Default Product Management* screen located on the *Confirm Sale* screen. On this new management screen, the driver can add new default products, modify existing default products and remove default products.

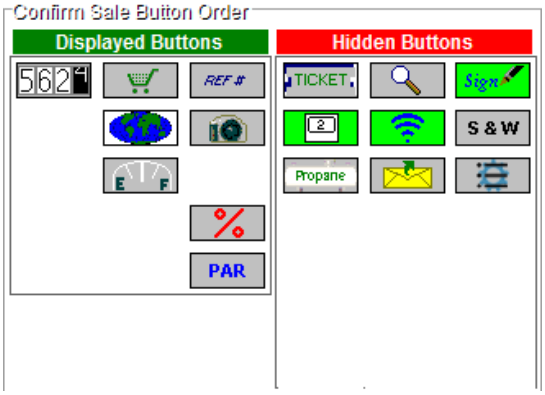
Below, we'll discuss how the drivers can utilize these new features to better manage their customers default products. Starting with how to enable the feature.

Enabling Default Product Management

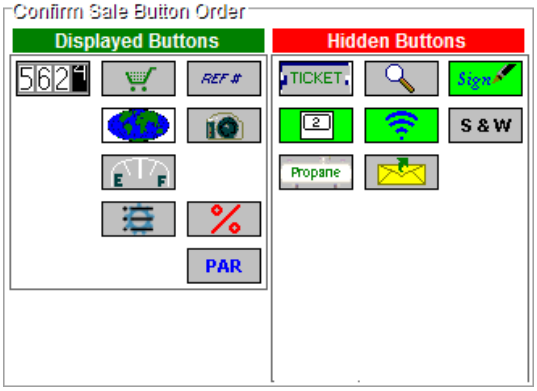
By default, this feature will NOT be enabled. Since this gives the drivers a large amount of freedom to modify accounts, this is something that should be reviewed and enabled only when you are comfortable allowing the drivers to make these changes. Once you are ready to proceed, navigate to the *List > Routes > Handheld Class > Sales Rules 2 Tab*. Locate the section for the *Confirm Sale Button Order*, and the two boxes below it for *Displayed Buttons* and *Hidden Buttons*.



Next, *Modify* the screen and then locate the new Default Product Management button under the Hidden Buttons section:



Then click and drag it over to the Displayed Buttons section, then save the changes:

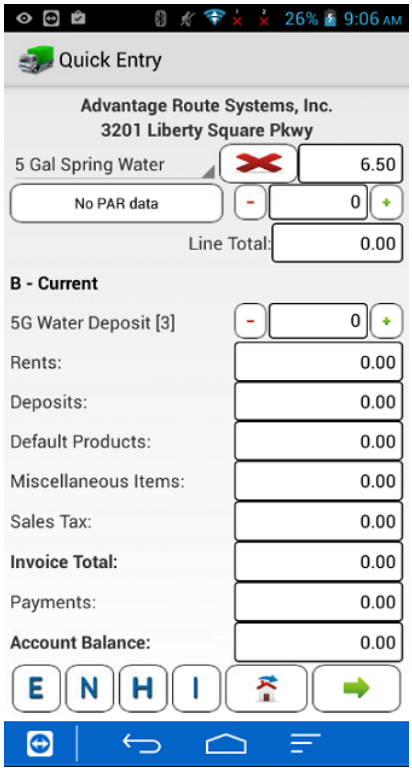


NOTE: By enabling this feature, any changes the driver makes to a customer will be shown on the Default Product Changes afternoon report (if enabled under Upload Reports 2 tab) as well as add contact messages on each account.

The next time the driver downloads their route to their handheld, they'll have a new button available to them next to the *Default Product Dropdown* as well as on the *Confirm Sale* screen, as we discuss below.

Default Products Quick Removal

After enabling the new *Default Product Management* feature, the driver will most likely notice this new button on the *Quick Entry* screen first. As you can see in the screenshot below, next to the *Default Product Dropdown* section is now a red X button:



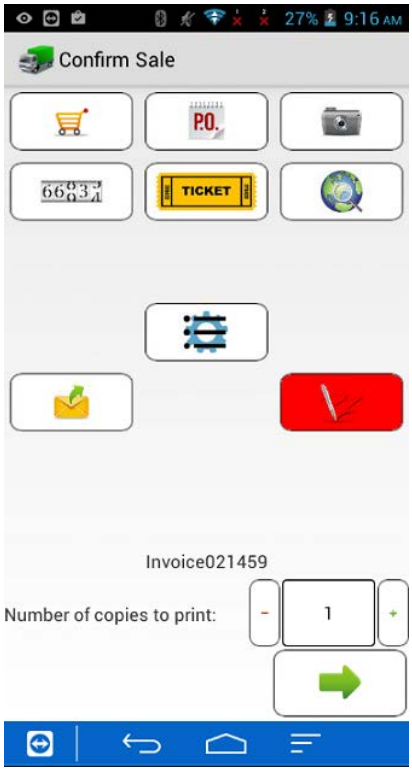
The driver can now select any of the default products from the dropdown list, and then select the new X button to remove that product from this invoice as well as from the default product list on the account.

After choosing a product and then selecting the X, the driver will be prompted with a confirmation window to make sure this was what they intended to do. If they intended to remove the product, selecting the *Yes* option will continue on with that request and remove the product from the list. Selecting *No* cancels the request.

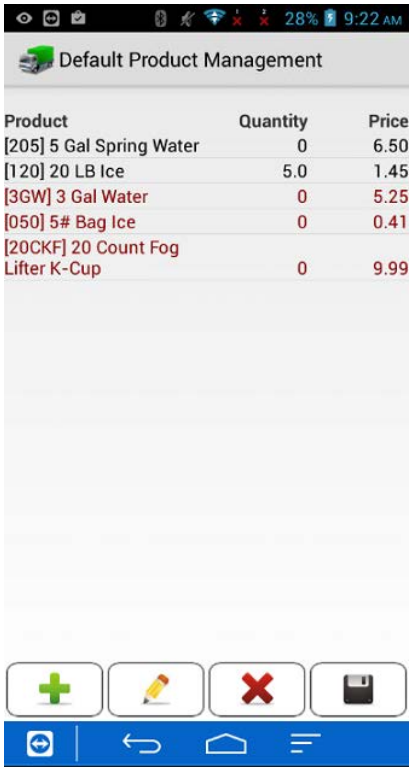
At this point, the driver is then free to service the stop as normal. The default product that was removed will be updated on the desktop during the Afternoon Upload, and future deliveries to this account will no longer show this product in the default product dropdown.

Default Product Management Screen

When the driver proceeds to the Confirm Sale screen on their handheld, they'll also notice a new button, the Default Product Management screen:



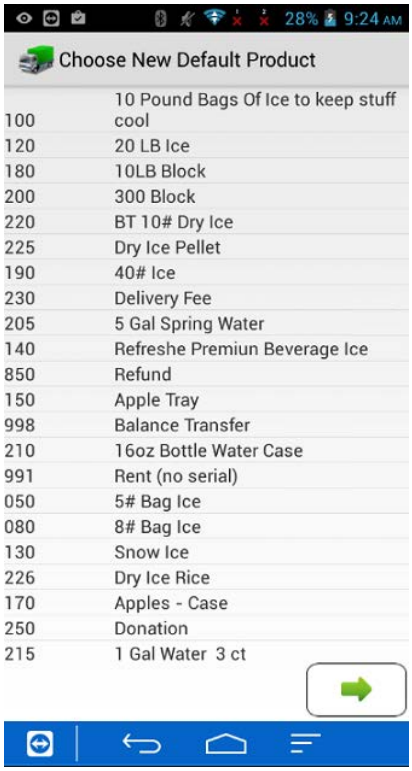
By tapping on this button, the driver will be shown the Default Product Management screen, as shown below. This screen will show all existing default product and price list items as well as their default quantity and price associated with each product. The products shown in red are the items that are assigned to a price list.



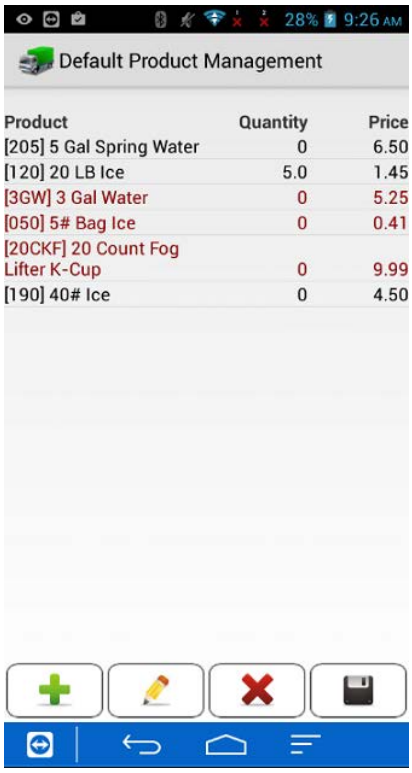
Below, we'll discuss what each of the options do that are available to the drivers.

Add Products

From this screen, a driver can those the *Add Product* button (green +) to pull up a list of products available to the driver, and choose one to add as a new default product to the account.



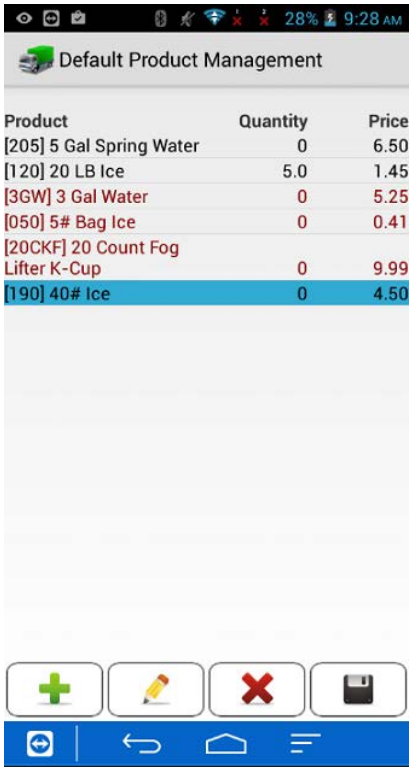
After they find and select the product they want to add, select the *Continue* button at the bottom (green arrow) to proceed. This will add the new product to the bottom of the Default Product Management screen, as shown below.



At this point, the driver is then free to service the stop as normal by hitting the *Save* button on the lower right of the screen or continue to make additional default product adjustments. The default product change(s) will be updated on the desktop during the Afternoon Upload, and future deliveries to this account will no longer show this product in the default product dropdown.

Modify Product Quantities and Prices

If the driver would like to modify the customers default quantity or price, they can simply select that product from the list, and then tap the Modify (Pencil) button at the bottom of the screen.

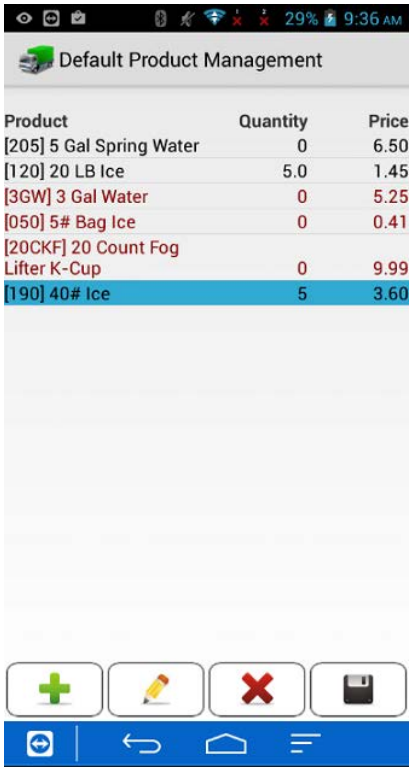


The drivers will then be prompted to enter a default quantity for the selected product:

After entering the quantity, and selecting the Done/Save option, if *Handheld Class* is enabled to *Allow Permanent Default Pricing Changes on Handheld* (Sales Rules Tab), it will prompt the driver with a screen to enter a Price:

OR if the sub option for *Restrict Pricing Changes to Price Levels* option is selected, they'll be prompted to choose a price based on Price Levels:

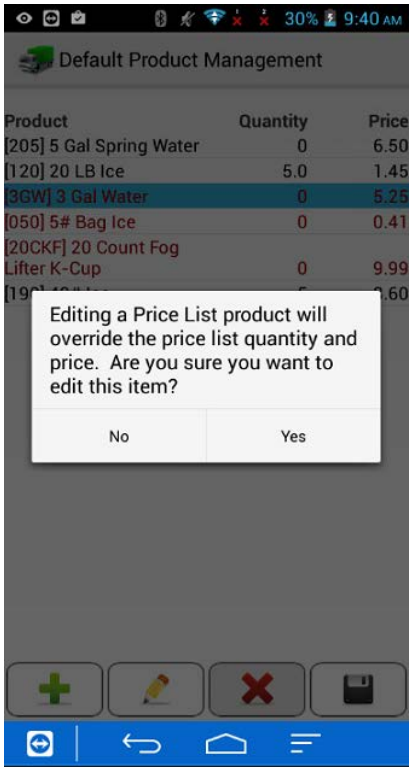
After choosing a new price (if enabled), the driver will then be taken back to the Default Product Management screen, with the new changes shown:



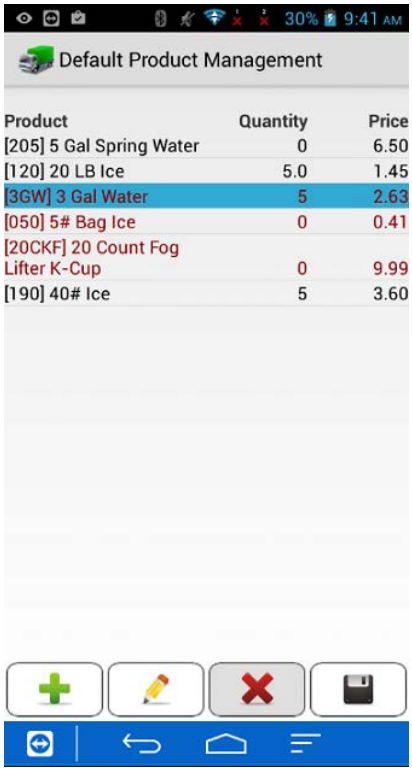
At this point, the driver is then free to service the stop as normal by hitting the *Save* button on the lower right of the screen or continue to make additional default product adjustments. The default product change(s) will be updated on the desktop during the Afternoon Upload, and future deliveries to this account will no longer show this product in the default product dropdown.

Price List Products

Drivers are allowed to override the pricing on a price list as well. If they select a price list product (indicated in red) and then choose the modify button, they'll be prompted with the following warning:



If they choose No, they'll be taken back to the previous screen. However, if they choose Yes, they will proceed to the same quantity and price adjustments screens as discussed in the section just before this one. With the same rules and features. After saving the changes, they will be able to see them on the screen:

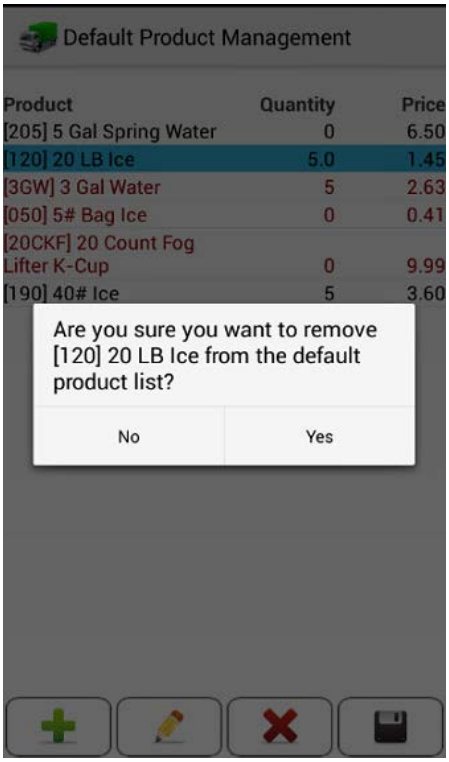


At this point, the driver is then free to service the stop as normal by hitting the *Save* button on the lower right of the screen or continue to make additional default product adjustments. The default product change(s) will be updated on the desktop during the Afternoon Upload, and future deliveries to this account will no longer show this product in the default product dropdown.

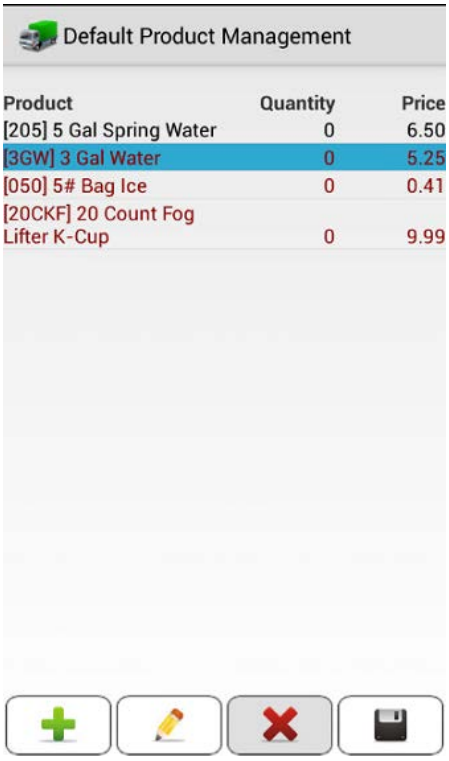
Removing Products

Last, the drivers can remove a product from this list, as long as it is not a Price List Product by selecting a product from the list, and then selecting the *Remove Product* (red X) button at the bottom. If they were to select a Price List item, the Remove Product button would be disabled.

After selecting a product and then selecting the *Remove Product* button, the driver will be prompted with the following confirmation:



If the driver selects the No option, they will be returned back to the Management screen.. If they choose Yes, the item will be removed from the Default Product Management window, and subsequently removed from the customers Default Product list once the driver saves and uploads their route.



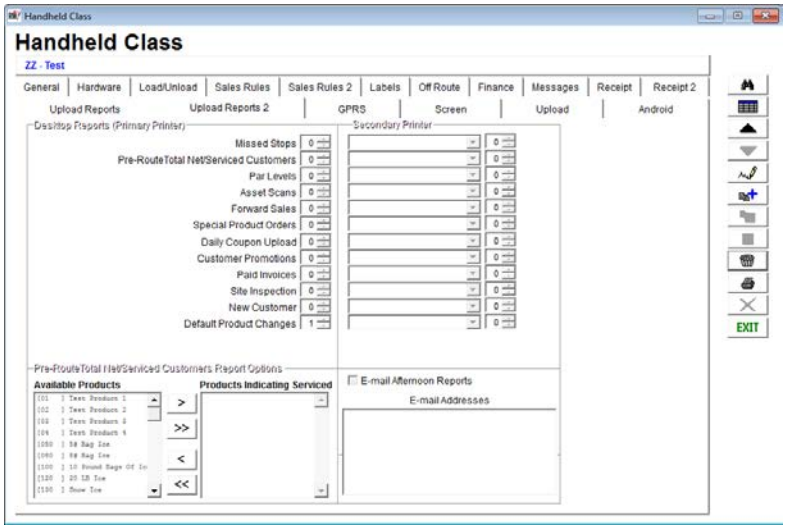
At this point, the driver is then free to service the stop as normal by hitting the *Save* button on the lower right of the screen or continue to make additional default product adjustments. The default product change(s) will be updated on the desktop during the Afternoon Upload, and future deliveries to this account will no longer show this product in the default product dropdown.

Desktop Notifications of Changes

There are 3 different locations in which the users on the desktop can find out what changes have been made and by whom; Afternoon Reports, Contact Messages, Log Messages. We'll discuss each below.

Afternoon Report

In *Handheld Class*, on the *Upload Reports 2* tab, there is a new option for the *Default Product Changes* report. If you are using this feature, and would like the changes to be printed during afternoon upload, make sure and set this to print at least 1 copy of the report.



Example Report:

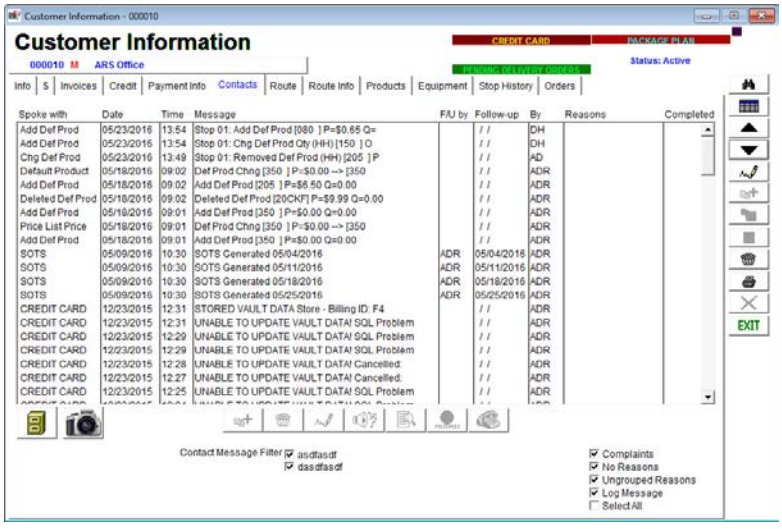
Default Product Changes(Upload)

ROUTE 0 DAY B13'DA
DATE 01/29/2016

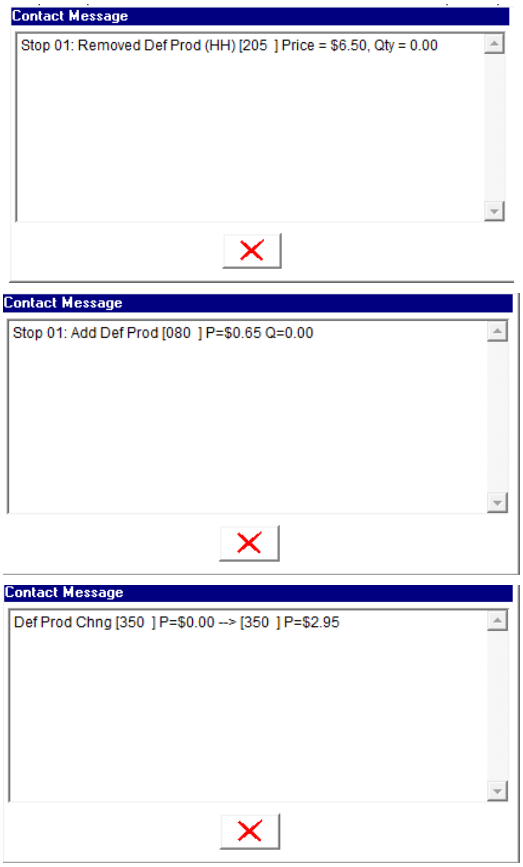
Account No.	Name	Status	Product Code	Description	Old Price	New Price	Old Qty	New Qty
000010 / 01	Advantage Route Systems, Inc.	Removed	120	20 LB Ice				
000010 / 01	Advantage Route Systems, Inc.	Modified	205	5 Gal Spring Water				3.00

Contact Messages

Default Product Changes are also added as *Contact Messages* for each account, so there is a record of any changes made. Simply navigate to the *Contacts* tab of any account in question, and find the various entries in the Contacts section for the *Default Product Changes*.



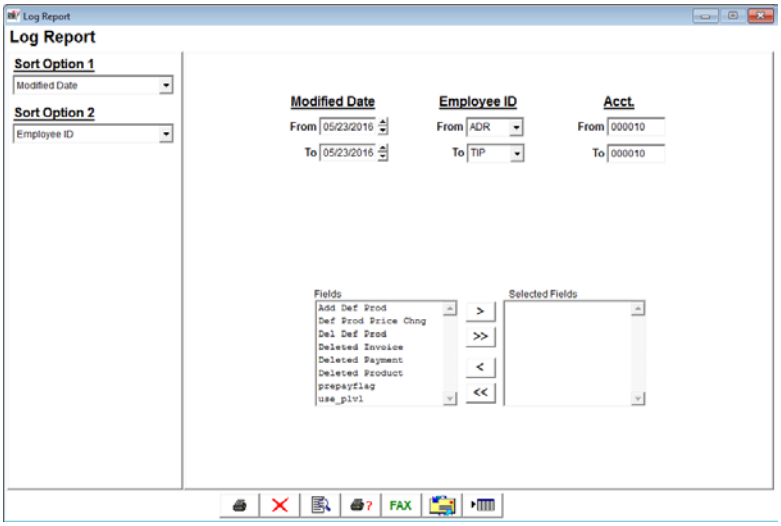
Example Messages:



Log Report

Another place you will find the default product changes documented is the system Log Report. This can be found under Reports > Communication Reports > Log Report.

Once you're in the Log Report screen, enter the Date Range, Employee Range, Account Number range and the Fields that were modified.



Example Report:

Log Report

Criteria Modified Range 01/29/2016 to 01/29/2016
Employee ID Range ADM to ADR

Account No.	Field Name	Value Before	Value After	Employee	Modified Date
000010	Deleted Product	080		ADM	01/29/2016 08:07:06 AM
000010	Deleted Product	080		ADM	01/29/2016 08:07:08 AM
000010	Deleted Product	20CKF		ADM	01/29/2016 08:07:09 AM
00001000	Add Def Prod		[205] P=$6.50 Q=0.00	ADM	01/29/2016 08:07:18 AM
00001000	pkgid	5RES		ADM	01/29/2016 08:07:32 AM
0	Del Route Data	Deleted Route '0 ' for 01/25/2016		ADM	01/29/2016 08:09:23 AM
0	Del Route Data	Deleted Route '0 ' for 01/27/2016		ADM	01/29/2016 08:09:24 AM
00001000	use_plvl	.F.	.T.	ADM	01/29/2016 09:20:32 AM
00001000	price_lvl	100	21	ADM	01/29/2016 09:20:32 AM
00001000	Def Prod Price	[120] P=$1.55	[120] P=$1.45	ADM	01/29/2016 09:20:53 AM
00001000	Def Prod Qty Chng	[120] Q=0.00	[120] Q=5.00	ADM	01/29/2016 09:20:53 AM
00001000	use_plvl	.T.	.F.	ADM	01/29/2016 10:55:38 AM

Summary

Allowing the Drivers the ability to manage their customers default products on the handheld can be a big time saver for the office staff. With this Default Products Management feature, Drivers can now do this on their own. Saving time and money.

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