

# RMPPro Mobile User Guide

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## Summary

### What is RMPPro Mobile?

RMPPro Mobile is an app for either iOS or Android devices, phones or tablets. It gives you the ability to access your live RMPPro system from a mobile device, allowing you to do basic point-of-sale operations. It does not give you access to the full RMPPro system – instead it only encapsulates minimal features where it makes sense to do remotely. The main purpose of using the app is for when you're on the sales floor with your customer, or on the road at your customer's location. Please note that the mobile app is not necessarily a replacement for the desktop software – but an extension.

### What can RMPPro Mobile do?

The core of the app is point-of-sale, along with required features associated with it. This includes, for example, inventory search and detail, customer search and detail, adding inventory to the cart, general and item related charges, customer items for services, payments, and more. Currently, it supports Sale, Approval, Consignment, and Service invoice types.

### How to create an invoice?

The mobile app is much more flexible than the desktop software. You can choose to assign customer at any time, collect payment information at any time, add items and charges at any time, and does not restrict you to the same step-by-step process of the legacy POS. Inventory items are added to the cart from within the inventory section, customers are assigned to the cart from within the customers section, customer's items for services are added to the cart from within the services section, and everything else such as payment is done from within the cart section. After you've added everything you need to the cart, you submit the cart in order to create an invoice. Specific details are explained later in this document.

## Logging In

You can login to the mobile app using the same credentials you use to login to the standard RMPPro software. When first opening the app, you are presented with the login screen, where you enter your username and password. Enter those credentials and tap “Login”. If successful, you’ll be taken into the app.

**NOTE:** When you first install the app, it does not have access to your live system yet. Instead, it’s connecting to a demo server so you can preview the app. Login to the demo using “admin” for both the username and password – which are automatically populated when switched to the “Demo” profile.

## Connection Profiles

You can set up the app to be able to connect to multiple RMPPro systems. However most of the time, you will only have one connection. By default, the app comes with a built-in “Demo” connection, which allows you to access a public sample system just to see how it works, test and learn with it, etc. When using this demo profile, the username and password are automatically filled out for you. But when you switch to your live system, you will need to use your own username and password. You could have more than one profile configured too – in case you need access to more than one RMPPro system. More on this topic is explained near the end of this document in the section **Connection Profiles**.

## Concurrent Licenses

You will need to have at least 1 concurrent mobile license activated on your RMPPro account in order to be able to use the Mobile app on your RMPPro system. Each device is monitored concurrently, meaning you can install the app on as many devices as you wish, but only a certain number of them can be opened and used at the same time. If you’re unable to login because you’ve reached your license limit, someone else will need to log out of their mobile device first to release a license for you to login.

**NOTE:** Mobile licenses are counted separately from standard Desktop licenses.



Demo ▾

Username  
admin

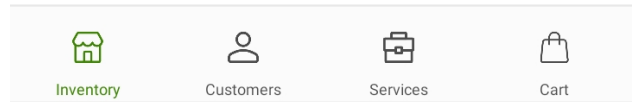
Password  
.....

LOGIN



## Main Buttons

On the bottom of the screen, there are 4 main buttons to navigate between major parts of the app. These are Inventory, Customers, Services, and Cart. You can freely switch between these sections of the app at any time. Inventory is where you can search for inventory, view item details, and add items to the cart for an invoice. Customers is where you can search or create customers, view customer details and history, and select for current invoice. Services is where you create customer items for service invoices such as cleaning and repair. Cart is where you manage all the items, charges, payments, and other invoice related information, and create the final invoice.



Each of these sections is explained in greater detail later in this document.

## Main Menu



On the top-left of the screen, there is a main menu button. This button has an image of 3 horizontal lines. This slides open the main menu on the left edge of the screen, which can also be opened by swiping your finger to the right from the left edge. From here, you can change location, change settings, log out, view current location, and view currently selected customer, if any.

## Changing Locations

From the main menu, tap on “Location”. You will be shown a list of all the locations registered in your system. Simply tap on the location you would like to switch to, and you will be prompted to confirm. Once you’ve changed location, the inventory list will be automatically refreshed to show inventory of the newly selected location. However, if you had explicitly chosen any specific location(s) in the inventory filter, it will retain your selection, and you will see a message letting you know the filter hasn’t changed.

**NOTE:** If you have already added any items to the cart, and you change location, you will be prompted whether you wish to clear the items from your cart. You cannot invoice items which are currently in a different location.

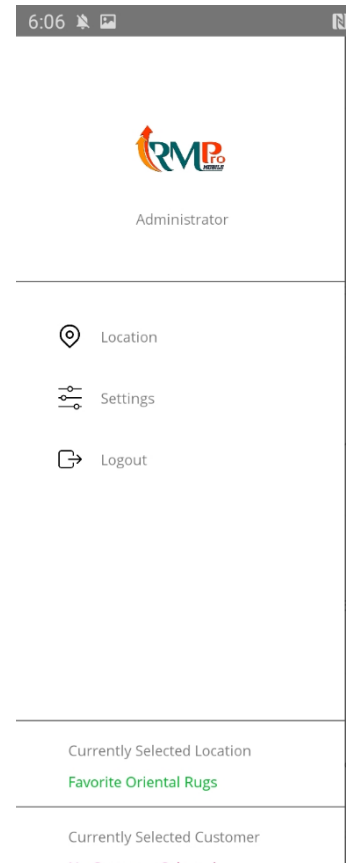
## Settings

From the main menu, tap on “Settings”. This shows a screen which allows you to change how the app behaves for you. Any changes you make are saved immediately to the device under your user profile. Different users on the same device may have different settings.

- **Customer Additional Info 1 and 2** allow you to choose what information is shown in the customer search results. These pieces of information show on the far right of each customer. Your choices are Phone #, Email, or Address.
- **Default Invoice Type** allows you to choose which type of invoice to automatically start out when on a new invoice. This is helpful if a majority of your invoices will be Services, for example.
- **Make “Vendor” Field Visible** allows you to choose whether to see the vendor of your inventory in the search results. This is disabled by default.

## Logout

From the main menu, tap on “Logout” if you wish to end your login session. This will return you to the login screen where you can login from another user, or switch connection profiles if needed. Note that completely closing out of the app will remember your credentials and log you in automatically the next time you open it, so you may wish to explicitly logout to prevent someone else from using your account on this device.



# Inventory

The inventory section of the app allows you to search inventory, view item details, and add items to the cart to invoice them to a customer. There are actually two different ways to search, each of which work together. You can perform a free-text search, and you can also tap on “Filter” at the top to open the advanced filter. Anything you choose on both will work together in the same search – so if you choose anything in the filter, and type in the search box, your results will be narrowed down together.

The app loads 10 items at a time, so as you scroll to the bottom of the list, it will further fetch the next 10 items.

## Free-Text Search

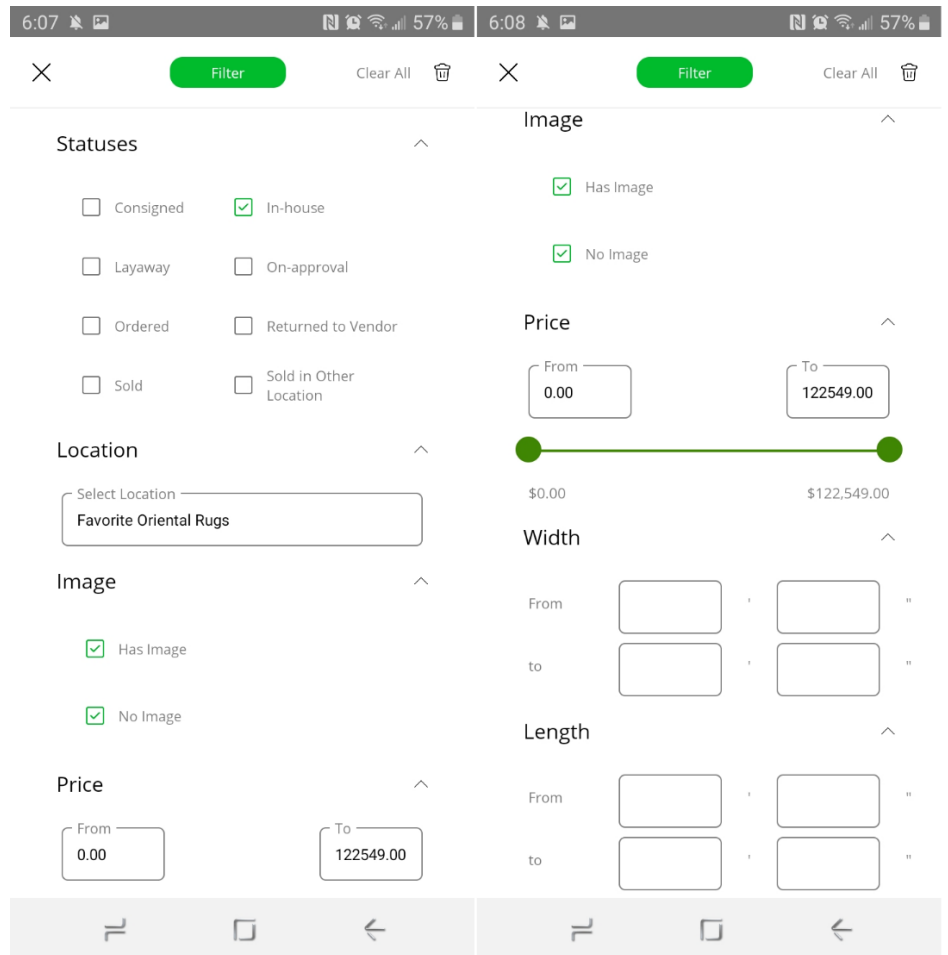
The free-text search box at the top of the inventory list allows you to search your inventory by any search phrase, whether it be an item number, SKU code, color, design, etc. Spaces separate keywords, so if you type “red india”, it will search for items which include both “red” AND “india”.



## Advanced Filter

Tap the “Filter” button at the top-right of the inventory list to open the advanced filter. This allows you to choose specific search criteria which you can’t do in the free-text search. This includes choosing status, location, whether images exist, price range, and size range. Make your selections, and tap the “Filter” button at the top to apply your search. To cancel, tap the “X” icon on the top-left. To clear the filter back to defaults, tap the “Clear All” button on the top-right.

- **Statuses** – By default, this will only include In-house inventory, but you may choose to filter by any given status.
- **Location** – By default, this will be your current location, but you may choose to filter by any given locations.
- **Image** – By default, this will include all items, but you may choose to filter by whether or not images exist.
- **Price** – By default, this will include all prices, but you may choose to filter by price range from and to.
- **Width/Length** – By default, this will include all sizes, but you may choose to filter by size range from and to.



**NOTE:** The prices which display on each item is relative to the current customer type. If you have a customer selected, it will show the price for that customer type – otherwise, if no customer is selected, it will use the default customer type of your current location.

## Item Details

Once you've performed an inventory search, tap on any item to open its details. From here, you can see all the basic information about the item, such as the image, price, status, size, and other specifics about the item.

This is also where you add an item to the cart, or otherwise pick an item to invoice to a customer. This is done using the "Add to Cart" button at the bottom of the screen.

The actions you can do from here:

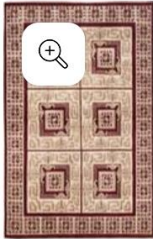
- **Go back** – Tap the left arrow at the top-left of this screen to go back to the inventory screen. This is the same if you press your device's hardware back button, if it has one.
- **View Images** – Tap on the image to open the full image view along with other images associated with this item.
- **Add to Cart** – Tap on the Add to Cart button at the bottom if you wish to invoice this item to a customer.

Other notes:

- The price which is shown is the price associated with the current customer type. If a customer selected, it will pull the price which is mapped to that customer type. Otherwise, if no customer is selected, it will use the price which is mapped to the current location's customer type.

6:08 57%

< Item 5707112



Customer Price \$399.00

In-house

Description

Hand Knotted India Contemporary

4' x 6'2" Red Rug

**General**

Item #	5707112
Category	Rug
Sub Category	
Type	Hand Knotted
Size	4' x 6'2"
Shape	Rectangle
Background Color	Red

ADD TO CART

Inventory Customers Services Cart

⌂ □ ←

## View Images

You can view a full-size image of an item by tapping on the image at the top of the item detail screen. From here, you can zoom into the image by using two fingers to “pinch-zoom”. This works by placing two fingers on the image close to each other, then sliding your fingers away from each other to zoom in. You can further zoom out by doing the opposite – sliding your fingers in towards each other.

You can also view other additional images of this item from down below. Swipe your finger across the bottom portion of this screen to scroll side to side, and then tap on the image you would like to see.

To exit the image screen and go back to the item details, press the “X” icon near the top-right of this screen.





## Add to Cart

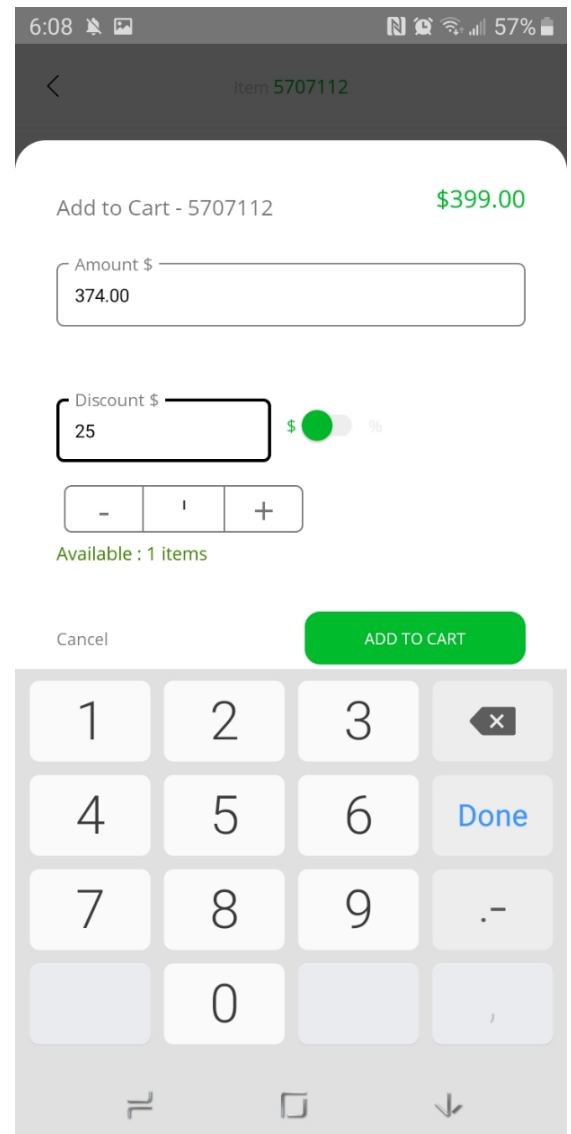
One of the more important features here is the “Add to Cart” button at the bottom of the item detail screen. This allows you to add this item to the current cart to be invoiced to the customer. This applies to Sale, Approval, and Consigned invoices.

When you press this button, a panel slides open for you to adjust the amount and quantity of this item. At the top-right, it shows the price of this item, as associated with the current customer type. Note: If no customer is selected yet, this will use the default customer type of your current location.

- **Amount \$** - By default, this is the same as the price above. From here, you can change the amount you’re invoicing this item directly to a straight amount. As you modify this amount, the discount down below will also change to reflect your new amount.
- **Discount** – By default, there is no discount. Just to the right, there’s a switch that you can toggle between either a dollar (\$) discount subtracted from the price, or a percent (%) discount off of the price. As you modify this discount, the amount above will also change to reflect your new amount.
- **Quantity** – By default, this has a quantity of 1, so long as item is available at all. Change quantity by either using the +/- buttons, or by tapping in the middle and using the keyboard to modify it. If this item is not available to add to the invoice, you will not be able to adjust the quantity, or add it to the cart. You are not able to add any more quantity than is available in your current location.
- **Add to Cart** – Once you have specified the amount and quantity of this item, tap the “Add to Cart” button at the bottom. This item will then be added to the items list in the cart section of the app. This panel will disappear and you’ll be returned to the item details.
- **Cancel** – Tap the cancel button at the bottom to abort adding to cart.

After an item has been added to the cart, the item detail screen will reflect this by showing the text “Added to Cart” in the same button that you used to initially add it. The inventory list screen will also show an indicator next to this item so that you can see it’s been added to the cart. If you tap the same button “Added to Cart”, it allows you to make changes to the amount or quantity of this item and update it in your cart.

Refer to the section **Cart > Cart Tab > Items** for more information on managing the items added to the cart.



# Customers

The customers section of the app is where you can search all of your customer, add new customers, view customer details, and select a customer for the current cart. By default, the customer screen shows an empty list, and you need to either add a new customer, or search for an existing customer from the search box at the top.

## Free-Text Search

To search for a customer, use the search box at the top of the customers screen. The search will be performed as you type, and customers will be listed down below. To the right of each customer, you'll see additional customer information, depending on your settings. This might be either phone, email, or address.

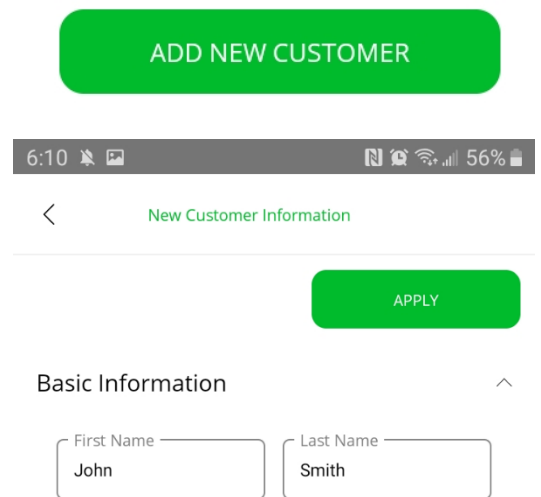
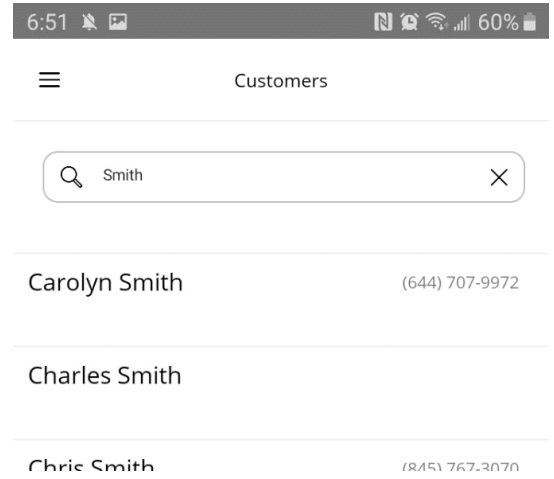
## Add New Customer

To create a new customer, tap the "Add New Customer" button at the bottom of the customer list screen. This will open the customer details screen ready for you to fill in information about this new customer. The information available for a customer is described in the next section "Customer Details". Note that the customer type and more address information will be populated with default values, depending on the customer defaults configured for your current location.

Once you've entered all necessary information for this new customer, tap the "Apply" button on the top-right of the screen to save your changes. If the customer you entered matches an existing customer already in the system, you will be presented with a list of possible matches. You may either choose to use the customer which is already registered, or continue creating a new customer anyway.

Important notes:

- Depending on which location you're currently switched to, the new customer's area code, city, state, and zip code may be populated to defaults.
- Customer type is required, and is automatically chosen depending on the current location's default.





## Customer Details

The customer details allows you to see information about any given customer. This is broken down into a few different tabs: Customer Info, Additional Info, Notes, and Invoice History.

### Customer Info

The Customer Info tab gives you access to basic information about this customer. This includes the customer's name, customer type, taxable option, contact info, and address. The information on this screen can be edited by first tapping the "Edit Information" button near the top-right corner of this screen. This unlocks the controls and allows you to make whatever changes you need. Once you've finished all your edits, tap the "Apply" button at the top to save your changes. If you need to cancel your changes, tap the back button at the top-left corner of the screen, or the device's back button if it has one.

Important notes:

- Changing the taxable option will update any items or charges in the cart on the fly upon saving the customer.
- Depending on your company's settings, each location may be configured to require phone number, email address, or tax exempt number. You won't be able to select a customer for cart without this.

6:51 60%

John Smith

Customer Info Additional Info Notes Invoice History

Edit Information

Basic Information

First Name John Last Name Smith

Middle Initial Salutation Mr

Company Name Customer Type Retail

Taxable

10:23 94%

John Smith

Customer Info Additional Info Notes Invoice History

Total Purchased 14,641.97 Last Purchased 9/27/2019 06:25 PM

Balance 280.23 Balance Consigned 0.00

Temp Balance 0.00 Credit Memo 0.00

Credit Limit 10,000.00

SELECT FOR CURRENT INVOICE

Inventory Customers Services Cart

### Additional Info

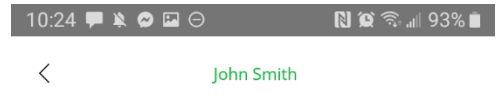
The Additional Info tab gives you basic account information of the customer. This is mainly balances.

- **Total Purchased** – The total dollar amount, before tax, which this customer has purchased overall.
- **Last Purchase** – The date/time of the customer's last sale transaction.
- **Balance** – The total dollar amount which this customer owes.
- **Balance Consigned** – The total dollar amount which this customer has worth of inventory consigned to them.
- **Temp Balance** – The total dollar amount which this customer temporarily could owe based on incomplete transactions such as Approvals or Back Orders.
- **Credit Memo** – The total dollar amount of credit this customer has which can be further used as payment.
- **Credit Limit** – The total dollar amount which this customer is allowed to have outstanding at any given time.

## Notes

The Notes tab gives you access to the customer's notes. Currently, these are only notes directly related to the customer account, and not transactions. However, this will be supported in the future.

If the customer has any notes, they will be listed here in their full detail, with a button "New Note" to add a new note. Otherwise, if customer does not have any notes, then it will be ready for you to immediately start typing a new note with an "Add Note" button to save it.



Customer Info   Additional Info   **Notes**   Invoice History

Subject  
Favorite colors

Description  
John loves blue and black.

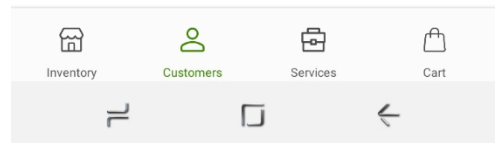
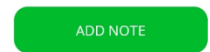


Customer Info   Additional Info   Notes   **Invoice History**

Sold 6604	9/27/2019 06:25 PM
Dodge, Jerry	Completed
Total : \$10,811.47	Balance : \$0.00   Paid : \$10,811.47
Sold 6581	9/10/2019 10:23 AM
Administrator, System	Pending
Total : \$105.89	Balance : \$105.89   Paid : \$0.00
Service 6573	9/5/2019 06:52 PM
System Administrator	Pending
Total : \$174.34	Balance : \$174.34   Paid : \$0.00
Sold 6572	9/5/2019 06:45 PM
Wards, Allen	Completed
Total : \$4,521.01	Balance : \$0.00   Paid : \$4,521.01

SELECT FOR CURRENT INVOICE

Inventory   **Customers**   Services   Cart



## Invoice History

The Invoice History tab gives you access to the customer's prior invoice history. You can view details of any given invoice by tapping on it. From any invoice, you can view items, charges, payments and otherwise specific transactions associated with it. You can also download a PDF copy of an invoice as needed. More information about PDF invoices are explained later in the section **Cart – PDF Invoice**.

## Select Customer for Cart

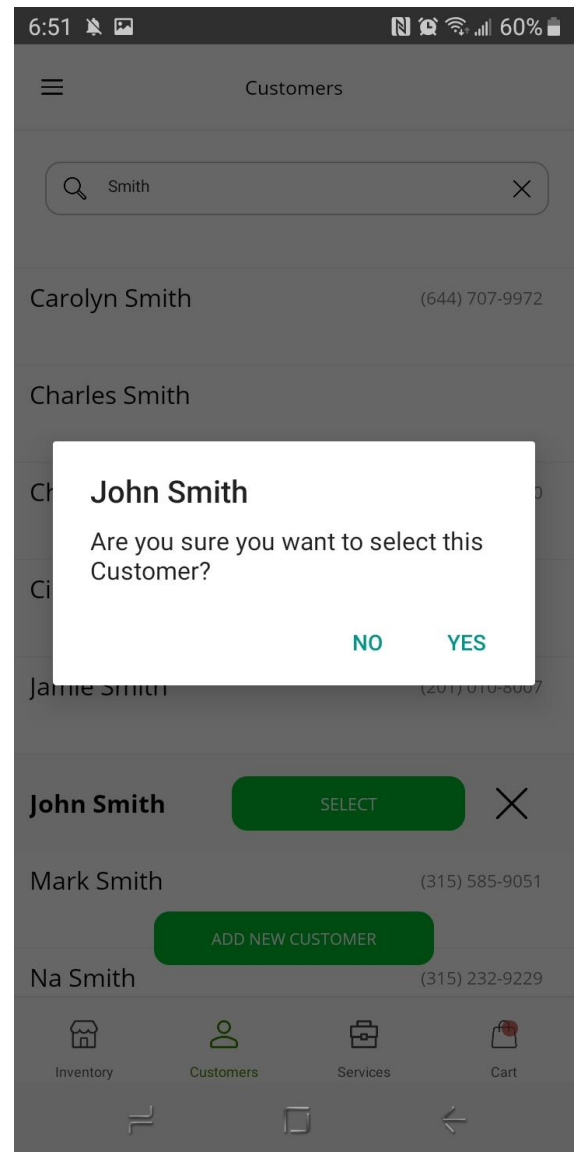
A critical step of the invoice process is to select a customer for the cart. This can be done at any point of the invoice creation process, but must be done prior to submitting the invoice. Without a customer selected, the app will assume the default customer type of the current location (used to identify which price to put on items), and will also assume the customer is taxable.

There are two ways to select a customer for the cart – either from the customer search results, or from the customer detail screen. From the customer search results, you can swipe a customer left to expose a “Select” button which you can tap. Or, if you’re in the customer detail screen, you can tap the button at the bottom of the screen labeled “Select for Current Invoice”. Once selected, this button will turn red, and the label will change to “Unselect”.

You may also “unselect” a customer from the cart, leaving it unassigned to any customer again. This is done using the same button(s) which were used to initially assign the customer. You could also select a different customer on the fly, replacing any customer which was already selected.

Important notes:

- Upon selecting or unselecting a customer, if there are already items in the cart, and the change of customer also changes the customer type, you will be prompted whether you wish to reload the prices on the items in the cart. If you choose not to, the prices will remain unchanged. But if you choose to, all items in the cart will be refreshed with the price associated with the newly selected customer type.
- Upon selecting or unselecting a customer, taxes on anything in the cart will be recalculated to reflect any change of customer’s taxable specification.
- Upon selecting a customer, depending on system settings, you may be required to first provide specific pieces of information before selecting the customer. This includes possible requirement of phone number, email address, or tax exempt number.
- You can see at any time who the currently selected customer is from the main menu. Tap the main menu button in the top-left corner of the screen, and you will see a section for current customer. You can tap on this customer name to open the customer’s detail screen.



## Services

The services section of the mobile app is where you enter information about customers' items which are to be serviced, such as cleaning or repair. When you first enter this screen, it's already prepared for you to immediately enter information about the first item – and after adding it to the cart, you can further add more items as necessary. Size is required, as it is used to calculate price based on square feet.

### Service Item Lookup

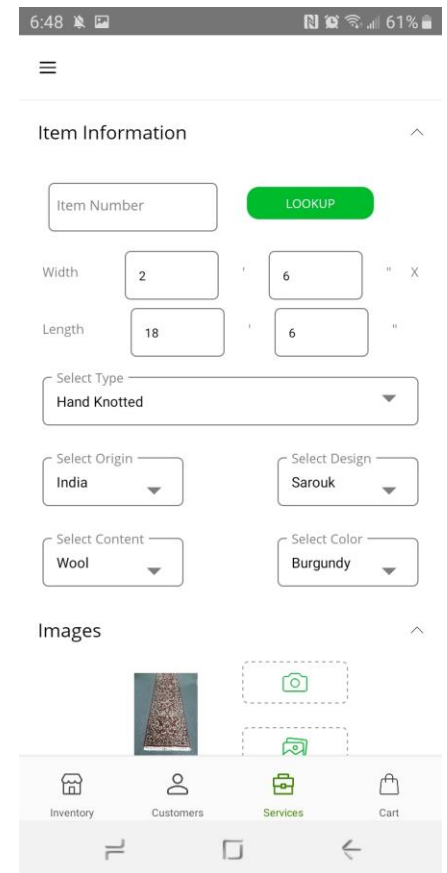
At the top, you can choose to enter an item number and tap “Lookup” to populate the item details with an existing item. Note that the item number is not saved – it's only used to quickly populate item information.

### Service Item Images

You can add up to 5 images for each customer item. This can be a picture either from your device's camera or one already saved to your gallery. To add an image from your camera, tap the button with the green camera icon, or to add an image from your gallery, tap the button with the green photo icon.

### Adding Service Charges

A single service item can have multiple item-related charges associated with it, just like the legacy POS application. At the bottom of the screen, tap the green button “Add New Services”. This will display a list of all item related charges for you to pick from. Tap on one of these charge types, and you'll further be prompted to enter information about that charge. Refer to the section **Cart > Cart Tab > Item Related Charges** for information about item related charges.



Services

ADD NEW SERVICES

### Adding Customer's Item to Cart

Once you have entered all the item details and added all the necessary item related charges to it, tap the green button at the bottom “Add to Cart”. This customer's item will then appear in the main cart section. Now you can proceed by adding any additional customer's items or anything else required for this invoice.

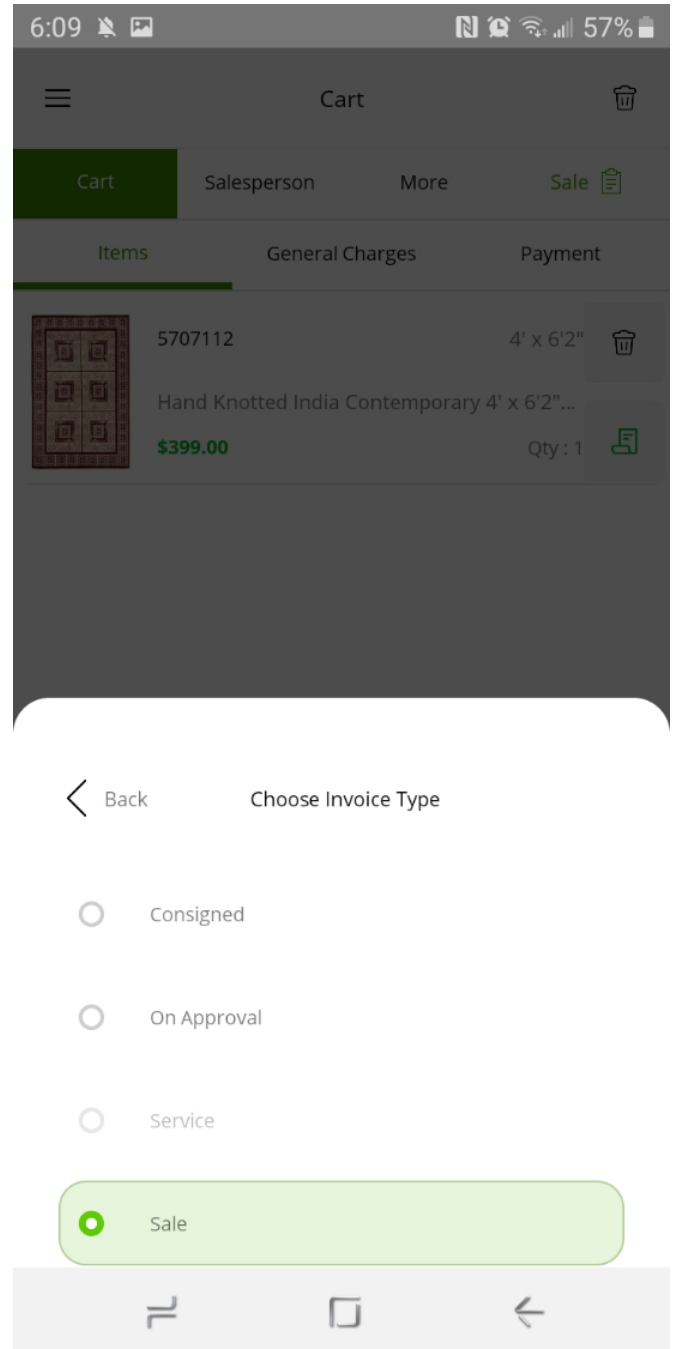
ADD TO CART

## Cart

The cart section of the application is where you manage all the details of the invoice you are creating. This includes reviewing and modifying items, charges, payments, salesperson, shipping, invoice notes, and more. Once you are ready to complete the current invoice, this is also where you will submit the invoice to the server to complete the transaction.

Note the following things which can also be done from here:

- **Changing Invoice Type** – Near the top-right of the screen, there's a button with green text which allows you to change the invoice type. This can either be a Sale, Approval, Consigned, or Service invoice. Depending on any items already in your cart, you may be restricted to either Sale/Approval/Consigned options, or Service option, as those types are not compatible with each other.
- **Clearing the Cart** – On the top-right of the screen, there's a button with a trash can icon which allows you to clear the current cart. This will clear out all items, charges, salesperson, shipping, and customer information and prepare the app to begin a new invoice.
- **Submit Invoice** – On the bottom-right of the screen, there's a green button labeled "Submit" which allows you to finally send the completed invoice to the server. At this moment, if there are any required things missing, you will be prompted to enter it as necessary. Otherwise, you will see a summary of the new invoice to confirm.



## Cart Tab

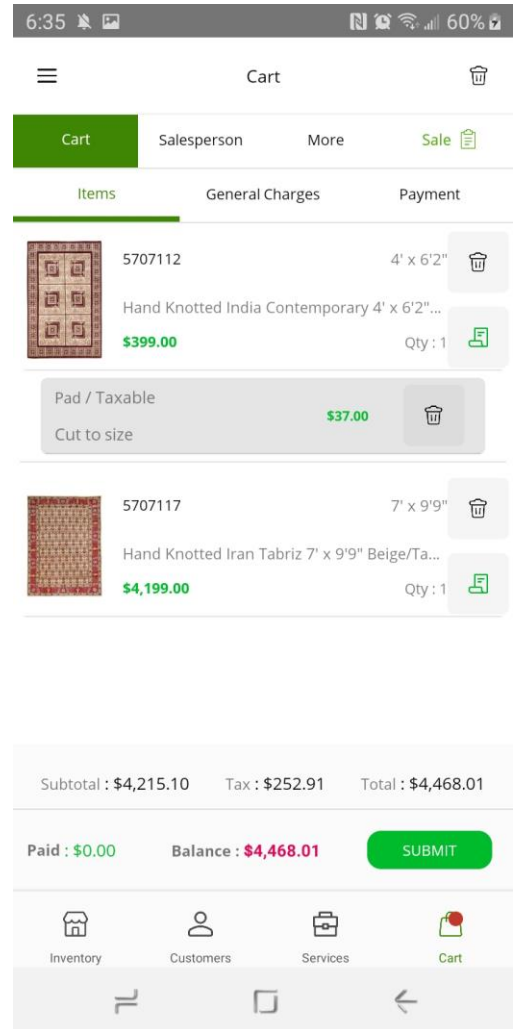
The Cart tab contains the most important lists within the cart section of the app. This includes Items (either inventory or customer items), item related charges, general charges, and payments. All of these can be modified from here.

### Items

The Items tab contains a list of either inventory items or customer items, depending on the invoice type you are creating. If this is a Sale, Approval, or Consigned invoice, this will be inventory items added from the inventory section of the app. But if this is a Service invoice, this will be customer items added from the services section of the app. In any case, you can edit and remove items from here, as well as add and manage item related charges.

Additional actions from this screen:

- **Adding Item Related Charge** – On the bottom-right of any given item, tap the green icon to add a new item related charge. This pops up a list of all available charge types to pick from, as configured for your company. Choose the charge type, and then you will be prompted to enter further information. Refer to the section **Cart > Cart Tab > Item Related Charges** for more information.
- **Removing Item from Cart** – On the top-right of any item, tap the trash can icon to remove that item from the cart. Any item related charges associated with that item will also be removed from the cart.
- Tapping on inventory item allows you to **modify price/discount and quantity**.
- Tapping on customer item allows you to **modify customer item details** such as size and images.
- Tapping on an item related charge allows you to **modify the price/discount, comments, and expected date**.



## Item Related Charges

An item related charge is a charge type which is directly associated with one of the items in the cart. This can be either an inventory item (for sale, approval, or consigned invoices), or a customer's item (for service invoices). There is not necessarily a dedicated screen for item related charges – they are listed within the same screen as items – nested just beneath the item it's related to.

You have 3 choices for how to enter the price of the charge. Just beneath the "Price" field, there are 3 buttons to toggle between these modes:

- **Total** – The price entered is the total amount of the charge.
- **Square Feet** – The price entered is the amount per square foot of the related item's area.
- **Length** – The price entered is the amount per linear foot of the related item's length.

You can also optionally apply a discount to the charge. Just to the right of the "Discount" field, there is a switch to toggle between these modes:

- **Percent (%)** – The discount entered is a percentage off of the calculated charge amount.
- **Dollar (\$)** – The discount entered is a dollar amount off of the calculated charge amount.

Additional information about this screen:

- **Comment** – These are brief notes about this charge related to the charge which needs to be applied.
- **Expected Date** – This is the date which the service is expected to be completed.
- **Subtotal** – This is the total amount of the charge, after discount and before tax.
- **Add to Cart** – Once you have entered all the charge information, tap the green "Add to Cart" button.

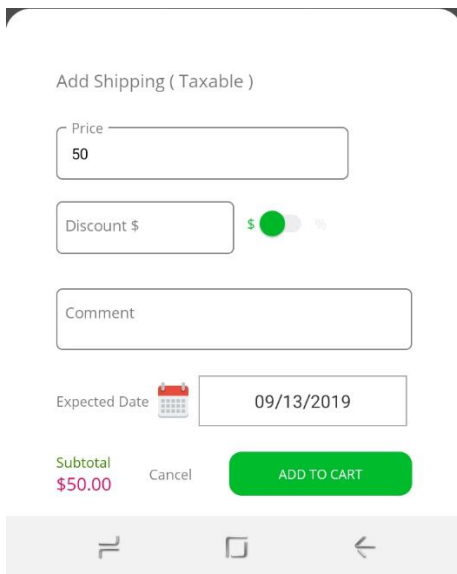
The screenshot shows the 'Add Item Related Charge' screen for item 5707112. At the top, there are six category buttons: Auction Fee (Taxable), Cleaning - Express Wash (Taxable), Cleaning - Premium Wash (Taxable), Cleaning - Select Wash, Miscellaneous, and Miscellaneous (No Tax). Below these is the 'Add Pad (Taxable)' section with a 'Price' field containing '2'. A summary bar shows 'Total', 'Square/FT = 24.67', and 'Length = 6.17'. The 'Discount %' field is set to '25' with a toggle switch for percentage. A 'Comment' field contains 'Cut to size'. The 'Expected Date' is set to '09/09/2019'. At the bottom, the 'Subtotal' is '\$37.00', and there are 'Cancel' and 'ADD TO CART' buttons.



## General Charges

The General Charges tab is where you add charges to the invoice which are not related to any items, but to the invoice as a whole. These charges correspond with the general charges configured from within the desktop system.

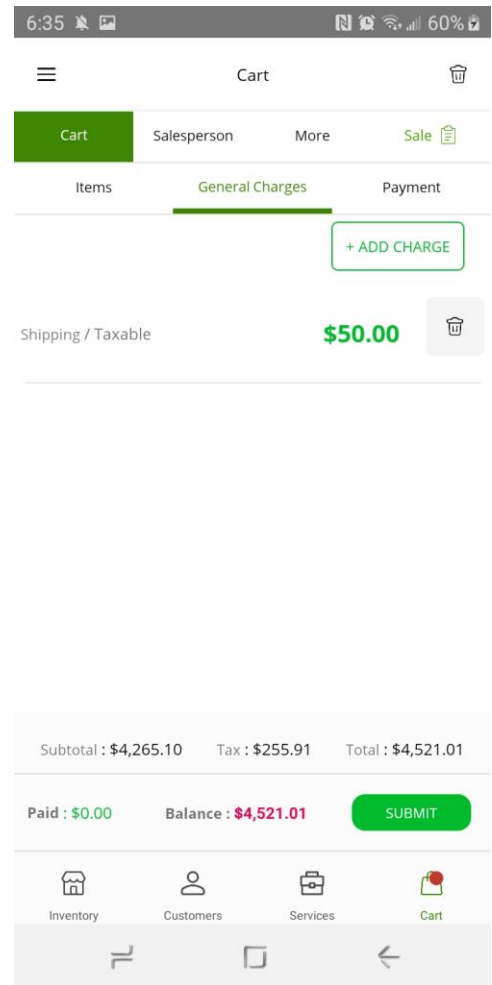
Tap on “Add Charge” to add a new general charge. You will be prompted with a list of all general charges configured in your system. Choose the charge you need to add, and then you will be prompted to add more information about that charge.



- **Add Charge** – Tap the green “Add Charge” button to add a new general charge. You will be prompted with a list of all general charges configured in your system. Choose the charge you need to add, and then you will be prompted to add more information about that charge.

- **Edit Charge** – After a charge has been added, you can tap on that charge to edit its details.

- **Delete Charge** – To delete a charge, tap the trash can icon to the right of the charge in the charge list.



When entering charge information, you have the following fields to populate:

- **Price** – This is the price which you apply to the charge.

You can also optionally apply a discount to the charge. Just to the right of the “Discount” field, there is a switch to toggle between these modes:

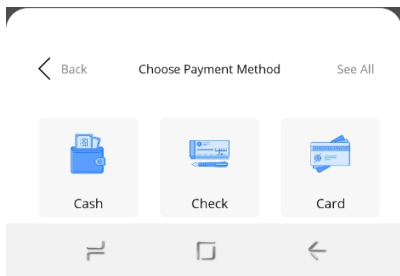
- **Percent (%)** – The discount entered is a percentage off of the charge amount.
- **Dollar (\$)** – The discount entered is a dollar amount off of the charge amount.

Additional information about this screen:

- **Comment** – These are brief notes about this charge related to the charge which needs to be applied.
- **Expected Date** – This is the date which the service is expected to be completed.
- **Subtotal** – This is the total amount of the charge, after discount and before tax.
- **Add to Cart** – Once you have entered all the charge information, tap the green “Add to Cart” button.

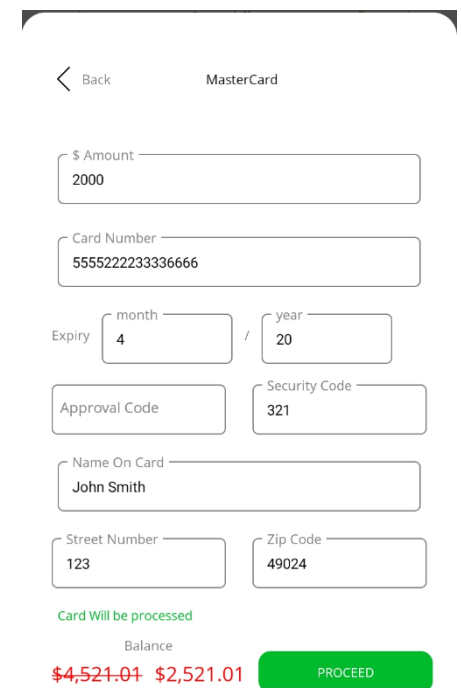
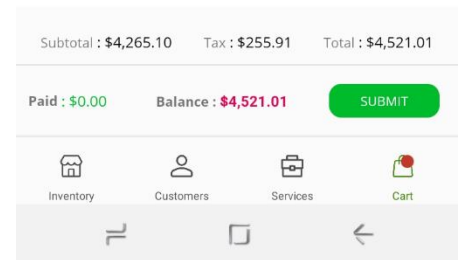
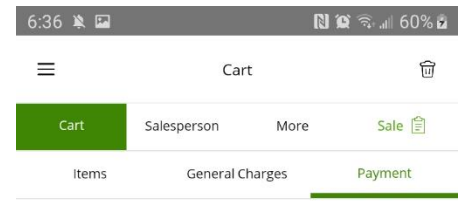
## Payment

All payments made by the customer are entered under the “Payment” tab of the cart. Depending on your user privileges, you may or may not be allowed to create an invoice without full payment. You can also split it into multiple payments if needed, just like the legacy desktop Point-of-Sale allows.



To add a payment, tap the green “Add Payment” button. This will pop up a smaller screen from the bottom for you to choose the payment method. Upon choosing Cash, Check, or Card, you will see a list of specific payment methods, if you have more than 1 configured. If the customer has a credit on their account, you will also see an option to use that.

- **Cash** – When choosing to enter a cash payment, the only thing you need to enter is the amount of money which was collected.
- **Check** – When choosing to enter a check payment, you will need to enter the amount of money collected, as well as the check number.
- **Card** – When choosing to enter a card payment, you will need to enter the amount of money charged, as well as additional card information.
  - **Card Number (Required)** – The actual account number of the card. Note that if you have payment processing enabled, you will need to enter the full card number. Otherwise, you can enter just the last 4 digits – the full card number won’t get saved anyway.
  - **Expiry (Required)** – The expiration month and year of the card.
  - **Approval Code (Optional)** – If this card was already charged externally, then enter the approval code here. Note that if you have card processing enabled, entering any value for Approval Code will NOT process the card, assuming that it already has. Otherwise, just leave this blank in order for the card to be charged.
  - **Security Code (Optional)** – The CVV code (or security code) which is typically found on the back of the card. This is only necessary for better rates with payment processing.
  - **Name on Card (Optional)** – The cardholder’s name as it appears on the card. This is only necessary for better rates with payment processing.
  - **Street Number (Optional)** – The address number (without street name) of the cardholder’s address. This is only necessary for better rates with payment processing.
  - **Zip Code (Optional)** – The postal code (or zip code) of the cardholder’s address. This is only necessary for better rates with payment processing.



Once you have entered all the payment information, tap on the green “Proceed” button at the bottom. Note that if you are entering a card which is meant to be processed, and you have card processing enabled, the card will not be processed until the moment you submit the invoice for completion.

## Salesperson Tab

From the salesperson tab, you can choose a specific salesperson or multiple salespeople along with their commissionable percentage. This step is optional – without choosing a salesperson, the current user will automatically be the salesperson. Note that if you do choose salespeople, the total percentage of all combined must equal 100%.

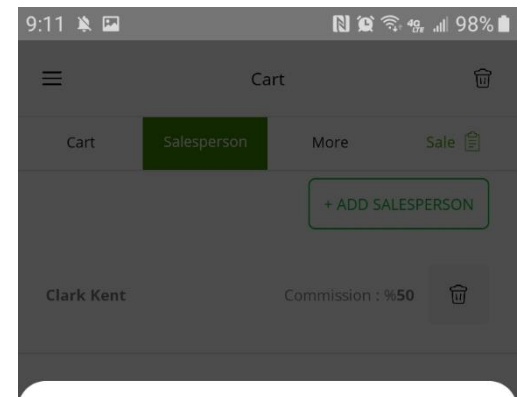
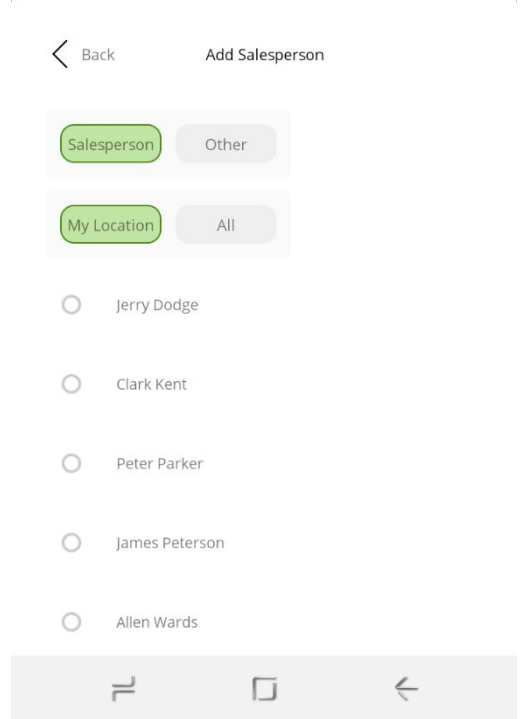
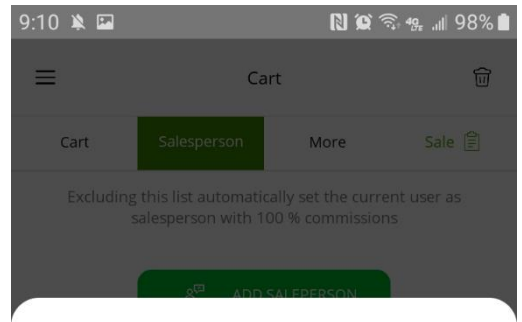
Tap the green “Add Salesperson” button and you will be prompted to pick from a list of salespeople. There are two filters that allow you to narrow down the list:

- **Participates in Sales** – Filter by whether users are flagged to “Participate in Sales”.
  - **Salesperson** (Default) – Users which are explicitly flagged to “Participate in Sales”.
  - **Other** – All other users which are not flagged to “Participate in Sales”.
- **Location** – Filter by whether users are flagged as being associated with your current location.
  - **My Location** (Default) – Users which are explicitly flagged as being associated with your current location or with all locations.
  - **All** – Any user regardless of current location.

Tap on a salesperson to assign them to the current cart/invoice. You will further be prompted to enter their commission percentage towards this invoice. By default, this number will be whatever percentage is remaining to total 100%. You can enter any smaller percentage than the amount it prompts. For example, you *could* have 3 salespeople, where 1 of them is 50% and 2 of them are 25% - totaling 100%.

**NOTE:** The first salesperson added of multiple ones will be considered the primary salesperson of this invoice.

Finally, tap the “Add” button to add this salesperson to the list with the selected commission percentage.



## More Tab

The More tab in the cart is where you enter further information about this invoice. Depending on your company settings, and the type of invoice you're making, some of this information might be required.

- **Media Type** – This is how the customer was brought to your company, or how they heard about you. Also known as “Source”. Each location may or may not require this information, so when you try to make an invoice, and this is not supplied, you may be stopped in order to enter this field.
- **Use Customer's Default Shipping Address** – This switch controls whether or not to use customer's default shipping address. If switched on, the shipping address will be automatically populated with the customer's default shipping address on their account. If switched off, you can type any other shipping address for this invoice as necessary.
- **Shipping Address** – The next few fields are for the shipping address of the current invoice. Depending on the previously described switch, this may show either the customer's default shipping address, or be open for you to enter any address for shipping. This includes Address (Lines 1 and 2), City, State, Zip, and Country.
- **Expected Date** – The Expected Date field applies to Approval, Consigned, and Service invoice types. For Approval and Consigned invoices, it is the date the items are expected to be returned. For Service invoices, it is the date which the services are expected to be completed.
- **Invoice Note** – Tap the green “Add Note” button to add a note to the invoice. This will prompt you to enter a “Subject” and “Note” as pictured below. Enter this information, and then tap “Confirm” to save the note.

Back Cart Note

Subject

Note

Confirm

6:43 60%

Cart

Cart Salesperson More Sale

Media Type

Use Customer's Billing Address

Address

City

State

Zip

Country

Subtotal : \$4,265.10 Tax : \$255.91 Total : \$4,521.01

Paid : \$4,521.01 Balance : \$0.00 SUBMIT

Inventory Customers Services Cart

## Submit Cart

The final step of creating any invoice is to submit the cart to your RMPPro server. At this point, no invoice has actually been created in your live RMPPro system yet – it's still temporarily on your device. You need to submit the cart in order to complete the transaction.

From anywhere within the Cart section of the app, tap the green "Submit" button on the bottom-right of the screen. If there are any changes required, you will be stopped and prompted to fix whatever needs to be fixed (such as customer not selected, or missing required media type). Otherwise, if all requirements are met, you will see a brief summary of the invoice you're about to create, so you can confirm just before creating this invoice.

- **Done** – Finally sends the current cart to your RMPPro server to create the invoice.
- **Cancel** – Allows you to abort creating this invoice and go back in case you need to change something.

Once the cart has been submitted to your RMPPro server, you may have to wait a little bit before getting a response. If you're creating a service invoice, and have attached pictures to any items, this may take longer because it needs to upload those images.

If there were any problems with the information which was sent, you may get an error message. This could be multiple situations, such as the item you are trying to invoice is no longer available, or your user account might not have privileges to do certain things such as leave an invoice with an outstanding balance without payment. In any case, this error will explain one or more things that need to be fixed, and then you can try to submit the cart again.

After your RMPPro server has successfully created the invoice, you will see another screen summarizing the invoice result. From here, you have the following options:

- **Download PDF** – Tap the green button at the bottom labeled "Download PDF" if you wish to get a copy of the actual invoice as a PDF file. Refer to the next section "PDF Invoice" for more information about this screen.
- **Close** – Tap the "Close" button on the top-left to close this prompt. At this point, the entire cart is cleared and ready to begin another new invoice.

**Confirm New Sale Invoice**

Customer Name: **John Smith**

#	Quantity	Subtotal	Tax	Total
Items	2	\$4,178.10	\$250.69	\$4,428.79
Charges	2	\$87.00	\$5.22	\$92.22

Total Price: **\$4,521.01**

Paid: **\$4,521.01**

Balance: **\$0.00**

Cancel Done

< Close **New Sale Invoice Created Successfully**

Number : **6572**

Date and Time : **9/5/2019 06:45 PM**

Status: **Completed**

Total Price: **\$4,521.01**

Paid: **\$4,521.01**

Balance: **\$0.00**

Customer Name: **John Smith**

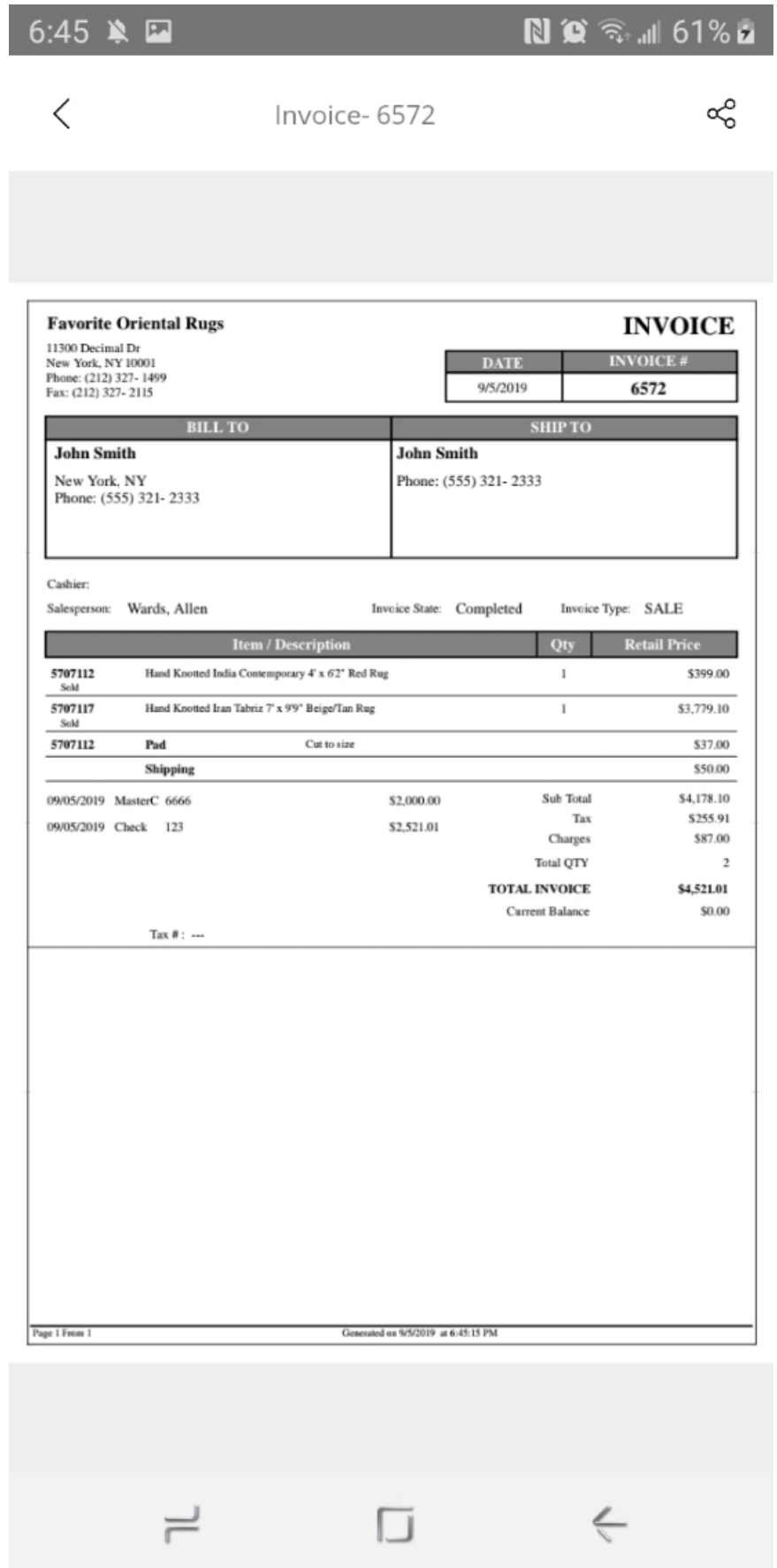
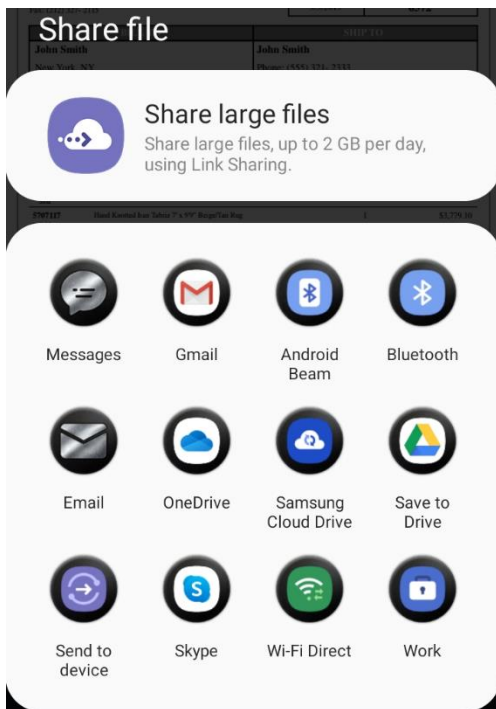
Download PDF

## PDF Invoice

The Mobile App allows you to obtain a PDF copy of a customer’s invoice. The file is displayed from within an embedded PDF viewer (inside the RMPPro Mobile app). Keep in mind that this is not the same template as the one you use from the desktop software – it’s a simplified template just for mobile.

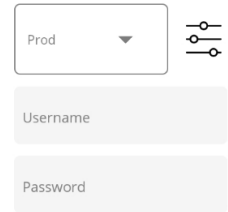
From the PDF view, you can use pinch zoom (using 2 fingers) to zoom in and out, and pan around to see a closer look at the details.

On the top-right of this screen, tap the button with the share icon to do something further with this PDF file. Depending on your device and the apps you have installed, you will get a different set of options, which may allow you to save, print, email, or otherwise share this PDF invoice however you need.



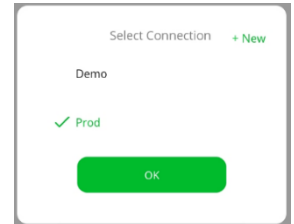
# Connection Profiles

A connection profile is the app’s configuration to which RMPPro server to connect to. Most of the time, you will only have one connection profile for your main RMPPro system – but it is possible to have more than one. Before logging into the app, you will need to be sure you are switched to the desired connection profile.



## Demo Connection

By default, when you first install the mobile app, you will automatically have access to a “Demo” connection profile. This is a global shared server which allows you to practice using the application with sample data. When you’re logged into the demo connection, you will see a red border around the edges of the screen, as well as a red “DEMO” label at the top. This is to make sure you realize you’re in the demo mode, so you don’t accidentally ring up transactions in the wrong place. The username and password for this demo connection are both “admin”, but the app automatically puts these for you.



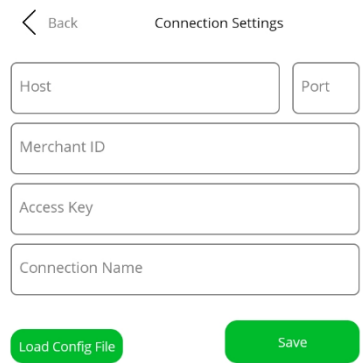
## Switching Connections

Just above the Username and Password fields, there’s a drop-down box for the current connection profile. Tap this and you will see a box pop up showing you a list of all the connection profiles to pick from. Simply tap on the connection you need, and then you will be able to login to that server.

## Add New Connection

From within the connection list (when tapping on the drop-down as described previously), tap on the green “New” button on the top-right of this box. This will pop up another box where you populate all your connection information, as pictured to the right.

- **Host** – The IP or DNS name of your RMPPro server
- **Port** – The port number of your RMPPro server (default 8080)
- **Merchant ID** – The unique account number of your RMPPro system
- **Access Key** – The GUID token (with brackets) as issued by RM Innovation
- **Connection Name** – Any user-friendly name for this connection



## Load Configuration File

It may be tedious to enter connection information as described above, so you have an additional option of loading a premade config file which contains all this information. First, make sure this file is somewhere on your mobile device, such as in the “Downloads” for example. Then, tap the green “Load Config File” button, then locate and open that file.

The file can have any name, but must not contain spaces, and it must have extension “.txt” and must be in this format:

```
{
  "name" : "My RMPPro",
  "host": "RMPPro.MyDomain.com",
  "port": 8080,
  "mid": 1234,
  "key": "{12345678-1234-4321-0123-1234567890AB}"
}
```

## Editing Connections

If you need to make changes to any connection profile, first make sure you’re switched to that connection, and then you will see an button to the right of this drop-down with an icon of 3 sliders, indicating “settings”. Tap this button, and it will open the same connection detail screen as previously described.