



# Pegasus Mobile Sales

**User Guide**



**Pegasus Mobile Sales  
User Guide  
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## Overview

Pegasus Mobile Sales provides a secure way for sales representatives and other customer facing employees including senior management to take mobile sales orders and view customer information, special prices and stock details using Android tablets. Mobile orders can be processed on the move and uploaded to Pegasus Opera 3 using Pegasus Web Xchange technology. Employees working at Head Office then check them in Pegasus Opera 3 and process them as sales orders.

### Key features

- Intuitive and easy to use
- Secure sign in using Pegasus Web Xchange technology
- Mobile sales order entry
- Customer specific pricing
- Model sales orders
- Order confirmations by email (email configuration required)
- Upload mobile sales orders to Pegasus Opera 3
- View sales orders that were processed directly at Head Office
- Quick stock enquiry showing stock balances, sales and purchase order quantities, projected stock, and special prices.

### Details downloaded to the tablets from Pegasus Opera 3

Customer details	Name, address, email address and telephone number
	Account details and balances outstanding
	Order history
	Customer special pricing & discount terms
Stock details	Stock record information and pricing
	In-stock, sales and purchase order, and projected stock quantities
	Stock images

## Internet connection

Off line enquiries and mobile order processing can continue without a connection to the internet. These orders will be held on the tablet until it is connected to the Internet.

Internet connection is required for the following:

- Signing in to Pegasus Mobile Sales
- Downloading customer and stock details from Pegasus Opera 3
- Sending order confirmations by email
- Uploading mobile orders to Pegasus Opera 3.

## Getting started

### Before you start

Your administrator will have installed the necessary versions of Pegasus Opera 3 and Pegasus Web Xchange. There are a few steps that you need to complete on your tablet before you start using Pegasus Mobile Sales.

1. Set up email on your tablet if sales order confirmations will be emailed to customers.
2. Download and configure a Virtual Private Network (VPN) app. A VPN provides a secure link to your corporate network and connects your device to Pegasus Web Xchange. (This step is not necessary if your administrator has set up a publicly available website for Pegasus Web Xchange on the internet).
3. Open Pegasus Mobile Sales from the 'apps' folder and enter your website URL.
4. Support is provided by your accredited Pegasus partner. Make a note of your Pegasus partner's details in case you need support.

### Website URL

Before using the app you must enter either the address for the Pegasus Web Xchange website, or the name of the server where the Pegasus Web Xchange website is installed. This must include the virtual directory (website) name chosen when the Pegasus Web Xchange website was installed.

### Pegasus Web Xchange website address

If Pegasus Web Xchange is publicly available on the internet, enter the address name followed by the name of the virtual directory. The easiest way is to copy and paste the address from your web browser's address field.

#### Example:

1. your website address is 'www.ovl.co.uk'
2. the virtual directory name is 'webxchange'

For secure http, enter *https://www.ovl.co.uk/webxchange*

For unsecure http, enter *http://www.ovl.co.uk/webxchange*

## Pegasus Web Xchange website server name

If Pegasus Web Xchange is not publicly available but is available on an intranet after logging on to your corporate network, enter the name of the website server where Pegasus Web Xchange is installed - including the domain name - followed by the name of the virtual directory.

### Example:

1. the name of the website server is 'webserver'
2. the domain name is 'leasing.com'
3. the virtual directory name is 'webxchange'

Enter *http://webserver.leasing.com/webxchange*

Consult with your Pegasus Web Xchange administrator if unsure.

## Security

Your relevant customer data and stock data for Pegasus Mobile Sales is held on your tablet. It's important to keep this data secure.

- 1 Keep your tablet safe.
- 2 Secure your tablet with a screen lock.
- 3 Sign out of Pegasus Mobile Sales when it's not being used.

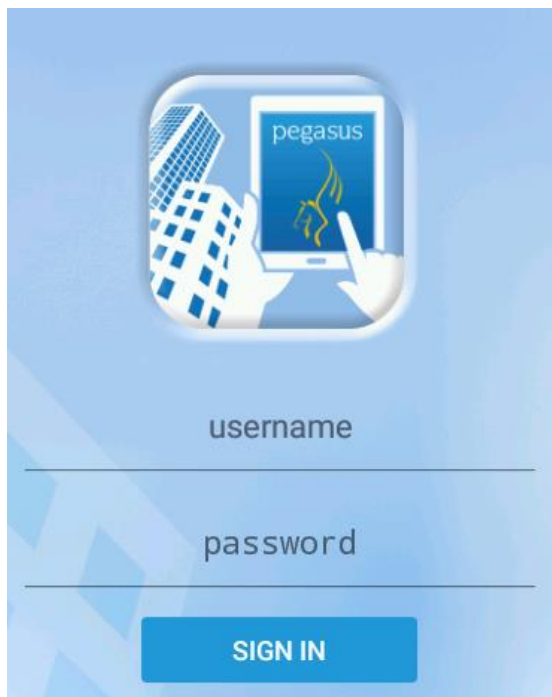
You will be automatically signed out after twenty minutes of inactivity in Pegasus Mobile Sales.



## Signing in and out


You must be connected to the Internet to sign in to Pegasus Mobile Sales. This allows your user name and password to be validated in Pegasus Web Xchange. Your user name and password will be emailed to you by your administrator.

Your data will be refreshed automatically once each day when you first sign in to Pegasus Mobile Sales.

The image shows a login form for Pegasus Mobile Sales. At the top, there is a circular icon with a blue background. Inside the icon, a hand is shown holding a smartphone. The smartphone screen displays the word 'pegasus' in white lowercase letters above a stylized yellow and orange flame-like logo. Below the icon, there are two input fields. The first field is labeled 'username' and the second is labeled 'password'. Both fields have horizontal lines indicating where to enter text. Below these fields is a blue rectangular button with the text 'SIGN IN' in white capital letters.

### Signing in

Enter your user name and password. These are provided by the Pegasus Web Xchange administrator.

To reset your password select the  menu in the top right corner and then select **Reset Password**. You will be sent an email with a new password.

### Signing out

Select the  menu in the top right corner and then select **Sign Out**.

You will be automatically signed out after twenty minutes of inactivity in Pegasus Mobile Sales.

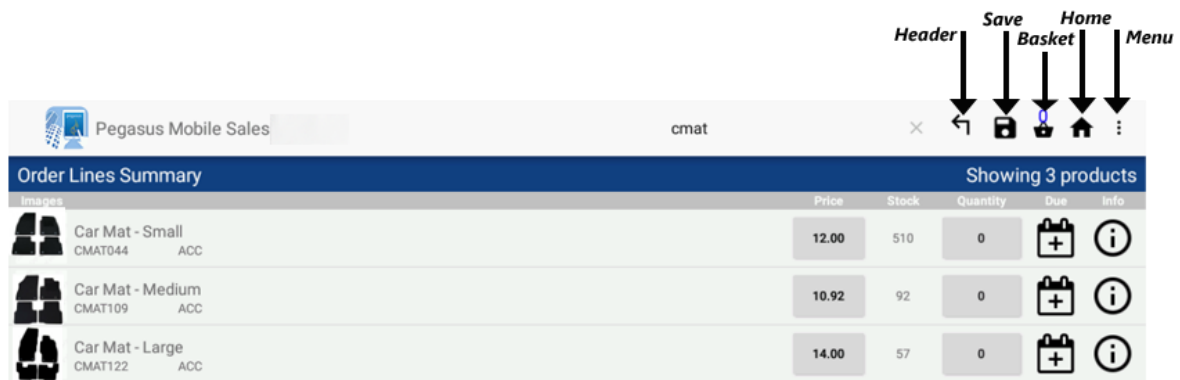
## Order Summary screen



Feature	
All orders	Displays all orders.
Model orders	Displays model orders only (not linked to a customer).
Incomplete orders	Displays incomplete orders only (saved for a customer but not submitted to Pegasus Opera 3)
Submitted orders	Displays submitted orders only (submitted but not imported into Pegasus Opera 3).
Rejected orders	Displays rejected orders only (submitted but rejected in Pegasus Opera 3).
Imported orders	Displays imported orders only (submitted and imported into Pegasus Opera 3).
Search filters	Filters the list by: <ul style="list-style-type: none"> <li>• order date</li> <li>• due date</li> <li>• between order dates</li> <li>• between due dates</li> <li>• Raised by you or anyone.</li> </ul>
Search	Searches in these fields: <ul style="list-style-type: none"> <li>• customer account</li> <li>• customer name</li> <li>• customer reference</li> <li>• document number</li> <li>• date.</li> </ul>

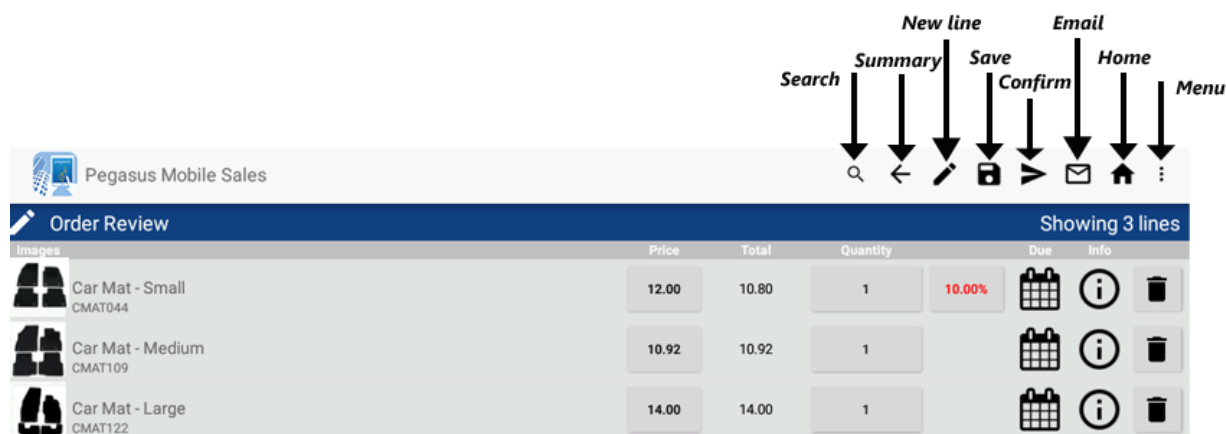
New	Creates order.
Lines	Opens order lines summary screen.
Save	Saves order.
Basket	Displays items in the basket with totals.
Copy	Copies selected order.
Bin	Deletes order.
Home	Returns to the home screen.
Overflow menu	<ul style="list-style-type: none"><li>• Sign out</li><li>• Refresh (refreshes customer and stock information using the latest data in Pegasus)</li><li>• Settings (for email, data and image download options; and for clearing the error logs)</li><li>• Help</li><li>• Show error log</li><li>• Send pending data (orders not yet downloaded to Pegasus Opera 3)</li><li>• Create confirmation (PDF order confirmation)</li><li>• Email confirmation (order confirmation)</li><li>• About</li></ul>

## Order Lines Summary screen



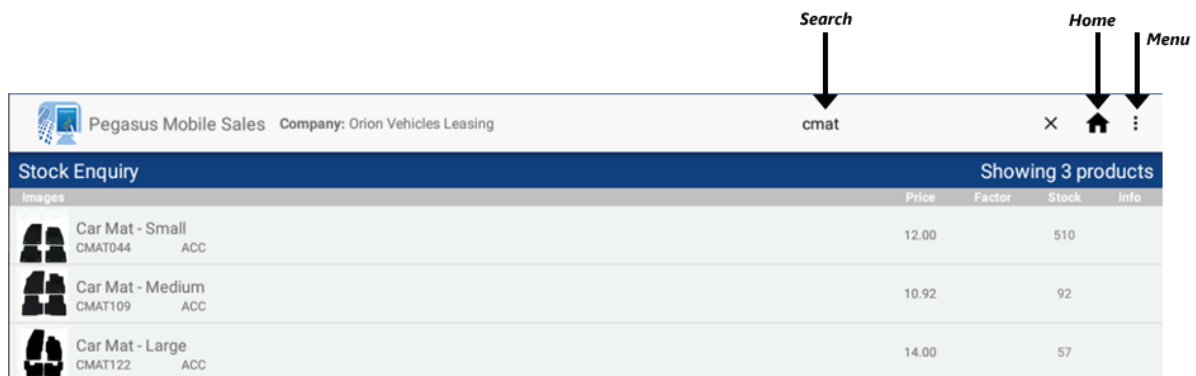
Feature	
Search	<p>Searches in these fields:</p> <ul style="list-style-type: none"> <li>• stock reference</li> <li>• description</li> <li>• category</li> <li>• search ref 1 and 2</li> <li>• retail barcode.</li> </ul>
Header	Returns to the order summary screen.
Save	Saves order.
Basket	Displays items in the basket with totals.
Home	Returns to the home screen.
Overflow menu	<ul style="list-style-type: none"> <li>• Sign out</li> <li>• Refresh (refreshes customer and stock information using the latest data in Pegasus)</li> <li>• Settings (for email, data and image download options; and for clearing the error logs)</li> <li>• Help</li> <li>• Show error log</li> <li>• Send pending data (orders not yet downloaded to Pegasus Opera 3)</li> <li>• About.</li> </ul>

## Order Review screen



Feature	
Search	Searches the stock items on the order review screen.
Back	Goes back to the order lines summary screen.
Text line	Adds a text line to the order.
Save	Saves order.
Order Confirmation	Marks the order as complete to upload to Pegasus Opera 3.
Email Confirmation	Email confirmation (Email software must be set up on the device beforehand).
Home	Returns to the home screen.
Overflow menu	<ul style="list-style-type: none"> <li>• Sign out</li> <li>• Refresh (refreshes customer and stock information using the latest data in Pegasus)</li> <li>• Settings (for email, data and image download options; and for clearing the error logs)</li> <li>• Help</li> <li>• Show error log</li> <li>• Send pending data (orders not yet downloaded to Pegasus Opera 3)</li> <li>• Create confirmation (creates PDF order confirmation)</li> <li>• Email confirmation (Email software must be set up on the device beforehand)</li> <li>• About</li> <li>• Discounts</li> </ul>

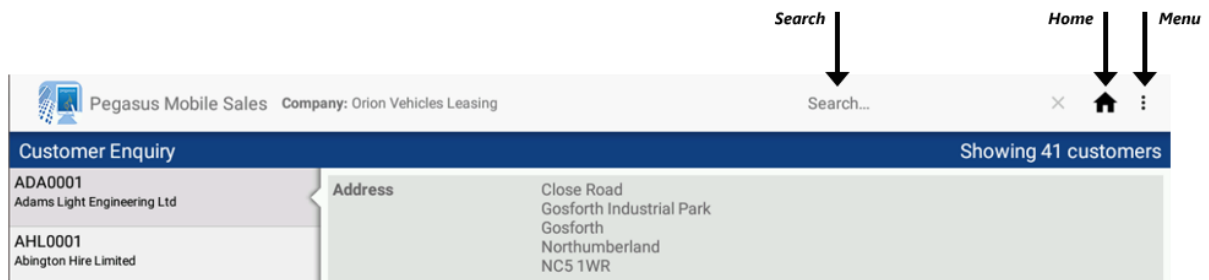
## Stock enquiry screen



Prices and Stock figures are those for the main warehouse only.  
The price shown reflects any relevant quantity break discounts.

Feature	
Search	<p>Searches in these fields:</p> <ul style="list-style-type: none"> <li>• stock reference</li> <li>• description</li> <li>• category</li> <li>• search ref 1 and 2</li> <li>• retail barcode.</li> </ul>
Home	Returns to the home screen.
Overflow menu	<ul style="list-style-type: none"> <li>• Sign out</li> <li>• Refresh (refreshes customer and stock information using the latest data in Pegasus)</li> <li>• Settings (for email, data and image download options; and for clearing the error logs)</li> <li>• Help</li> <li>• Show error log</li> <li>• Send pending data (sends data to Pegasus Opera 3)</li> <li>• About.</li> </ul>

## Customer enquiry screen



Feature	
Search	<p>Searches in these fields:</p> <ul style="list-style-type: none"> <li>• customer account</li> <li>• customer name</li> <li>• customer reference.</li> </ul>
New order	<p>Opens the Order Summary screen for the selected customer so that a new order can be created.</p>
Home	<p>Returns to the home screen.</p>
Overflow menu	<ul style="list-style-type: none"> <li>• Sign out</li> <li>• Refresh (refreshes customer and stock information using the latest data in Pegasus)</li> <li>• Settings (for email, data and image download options; and for clearing the error logs)</li> <li>• Help</li> <li>• Show error log</li> <li>• Send pending data (sends data to Pegasus Opera 3)</li> <li>• About</li> </ul>


## Settings screen

<b>General Options</b>	
Default CC Address	The default carbon copy email address used when order confirmations are emailed to customers. This may be useful to make the sales department aware of new orders.
Display and capture of Additional Information (Memo)	Switches on the <b>Additional Information</b> section of the order summary screen (for memo information).
<b>Data Download Options</b>	
Automatic downloading for x days	Controls the number of days for which documents are downloaded to Pegasus Mobile Sales. This is automatically set to 28, so by default documents for the previous 28 days will be downloaded. All documents are downloaded for the relevant customers (documents, quotes, proformas, orders, deliveries, invoices and credit notes).
<b>Image Download Options</b>	
Automatic image downloading	Controls whether stock images are downloaded from Pegasus Opera 3. Images are shown on the Order Lines Summary screen (.JPEG or .JPG files).
Image refresh frequency in x days	Controls the automatic refresh frequency for stock items that already have images downloaded to the tablet. This is automatically set to 28, so images on the tablet will be refreshed 28 days after they were downloaded from Pegasus Opera 3.
Clear all images	Removes all stock images.
<b>Error Log Options</b>	
Clear error log	Removes all error logs.
<b>Administration Options</b>	
Clear all data	<b>Caution.</b> This removes all the Pegasus Mobile Sales data from the tablet.



## FAQs

### *I've forgotten my password, what do I do ?*

To reset your password select the  menu in the top right corner and then select **Reset Password**. You will be sent an email with a new password.

### *Why can't I see all my customers ?*

The customers that are downloaded to the Pegasus Mobile Sales are those linked to your Sales groups in Pegasus Opera 3.

If you can't see a customer ask your Pegasus Opera 3 administrator to check that the customer is linked to one of your Sales groups.

### *Why can't I see all the stock items ?*

These stock items are not downloaded to Pegasus Mobile Sales:

- items marked as dormant
- items that are not marked as available for including on sales orders
- items without a stock profile.

### *What about multi-warehousing ?*

Sales orders are processed independent of warehouse details. Head Office can then decide which warehouse the goods are to come from.

Sales Representatives will see the full stock availability across all warehouses.

### *Why can't I upload sales orders or download customers and stock items ?*

You must be logged on to your corporate network or have access to Pegasus Web Xchange on the Internet before you can upload or download data.

You can use a VPN (Virtual Private Network) to access your corporate network remotely. A VPN makes it possible for you to securely connect to your company's network to send and receive data.

### *When is my data refreshed ?*

Your data is refreshed automatically when you sign in to Pegasus Mobile Sales for the first time each day.

You can also refresh your data by using **Refresh** on the  menu in the top right corner.

### *Why can't I see my product images ?*

The **Image Download Options** on the **Settings** screen must be selected before product images are downloaded.

### *How is my data held on the tablet ?*

Pegasus Mobile Sales uses an SQLite database. No set-up or administration is needed.

### *Which Pegasus Opera 3 applications work with Pegasus Mobile Sales ?*

These Pegasus Opera 3 applications are needed for Pegasus Mobile Sales:

- Sales Ledger
- Sales Order Processing
- Stock Control
- Pegasus Web Xchange (with the Pegasus Mobile Sales service).

All mobile orders are posted using the tablet, not from the Pegasus Web Xchange website.

### *Does it handle foreign Currency ?*

Pegasus Mobile Sales works with the home currency only.

### *Can sales orders be processed for two or more companies ?*

Pegasus Mobile Sales can be configured so that a sales representative can choose which Opera 3 company they want to process for.

### *How fast is the download of the information to the tablets ?*

A company with seven representatives, two companies with 500 customers in each, and 3000 stock items, synchronises in minutes.

## Technical information

### Tablets

Pegasus Mobile Sales is designed for Android tablets used in landscape orientation. It is available for download from the Google Playstore. Screen sizes must be at least 8 inches wide. 9.7/10 inch screens are recommended.

Pegasus Mobile Sales is not available for the iPad so it is not available on the Apple App Store.

### Android Versions

Pegasus Mobile Sales works on Android tablets running at least version 4.4 KitKat.

### Database

Pegasus Mobile Sales uses an SQLite database. No set-up or administration is needed.

### Opera 3 edition

Pegasus Mobile Sales works with Pegasus Opera 3 (VFP edition).

### Pegasus Opera 3 Applications

These Pegasus Opera 3 applications are needed for Pegasus Mobile Sales:

- Sales Ledger
- Sales Order Processing
- Stock Control
- Pegasus Web Xchange (with the Pegasus Mobile Sales service).

All mobile orders are posted using the tablet, not from the Pegasus Web Xchange website.