Merchant Mobile User Guide

EFC·SYSTEMS

The instructions in this document make no claim to describe or define all details, features, functions or variations since the software installed may have been specifically tailored to a given client site. The information contained is as current and accurate as possible at the time of its writing. EFC Systems, Inc. reserves the right to change any information contained in this document without prior notice. Refer to the Help menu in Merchant Ag for current information on features and functions.

Home

Arrive at Home after logging into to Mobile. Confirmation of the Location Name, User Profile signed in and Inventory Site appear first.
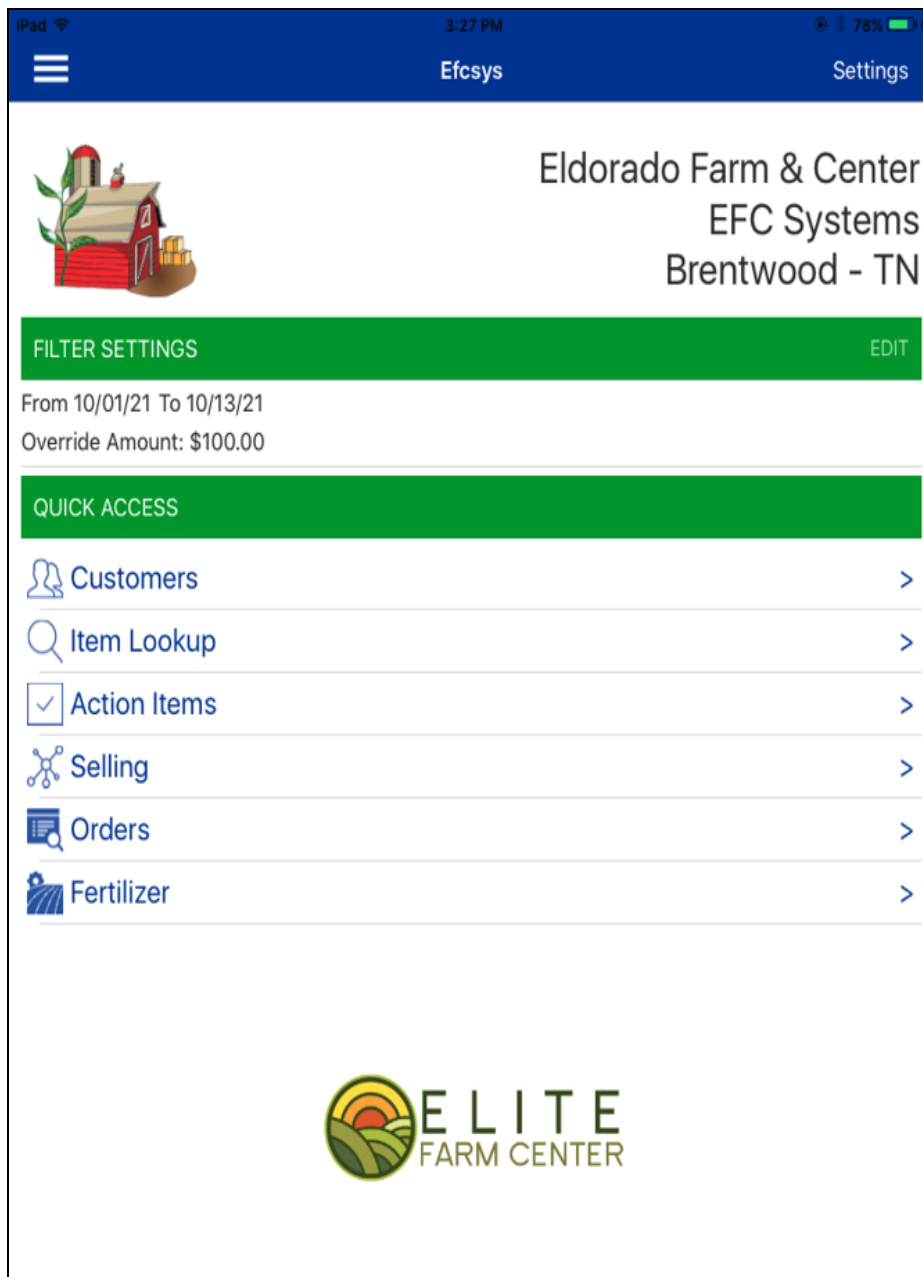
Filter Settings set the dates for viewing information and the override amount, and can be updated from the Home page by tapping Edit or Settings in the upper right hand corner.

Tap to access all available menus like Inventory, Customers, Orders and Fertilizer. See Basic Navigation for details.

Quick Access lists the most frequently accessed menu items. Tap on the option name to launch.

Basic Navigation
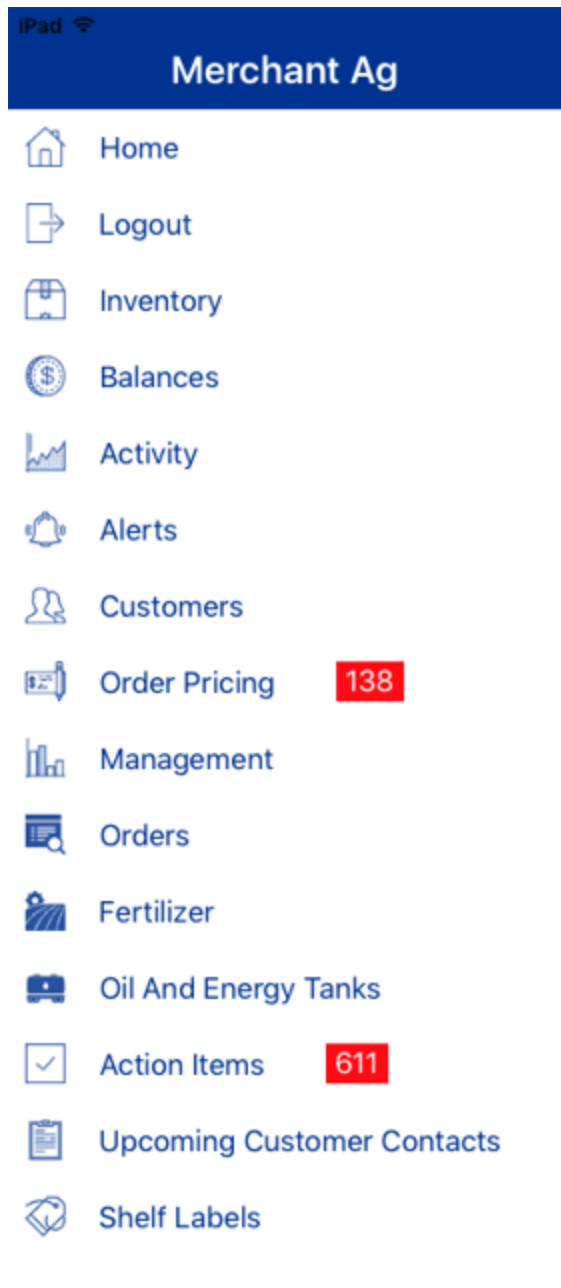
Use ☰ to select any available menu, some based on User security set in Merchant Ag FIN. The menus available include

- Inventory
- Balances
- Activity
- Alerts
- Customers
- Order Pricing
- Management
- Orders
- Fertilizer
- Oil & Energy Tanks
- Action Items
- Upcoming Customer Contacts
- Shelf Labels

How to Search

Tap into Search fields at the top of the window to access the keyboard and enter the search criteria. Each Search window will suggest the elements to use for effective searches.

Q Search by Name, UPC, or ID

⬭ Positive On-Hand Only
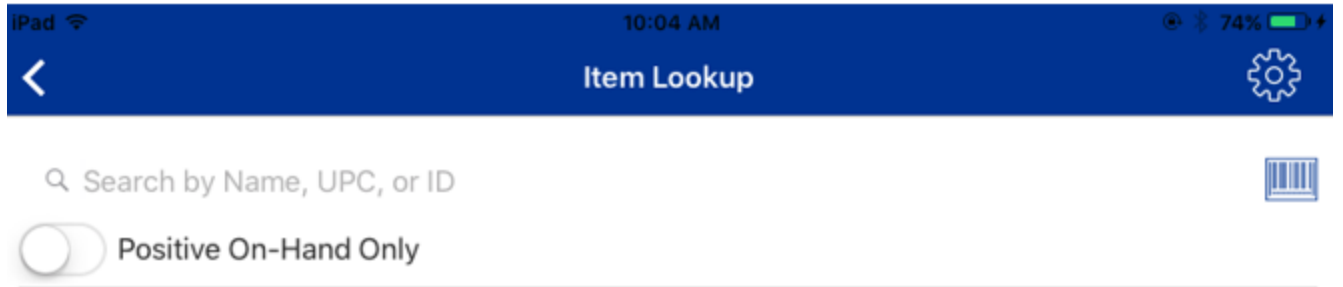
When the keyboard appears, enter search terms or information then tap Go or Search to begin. To access the number pad, tap the 123 button.

1	2	3	4	5	6	7	8	9	0	⌫
-	/	:	;	(	)	$	&	@	Go	
#+=	undo	.	,	?	!	'	"	#+=		
ABC						ABC	⌨			

Hide the keyboard by tapping the keyboard icon in the lower right hand corner.

Tap the icons to

< Go back one screen.   ▽ Access available filters

⚙ Access Settings

Settings

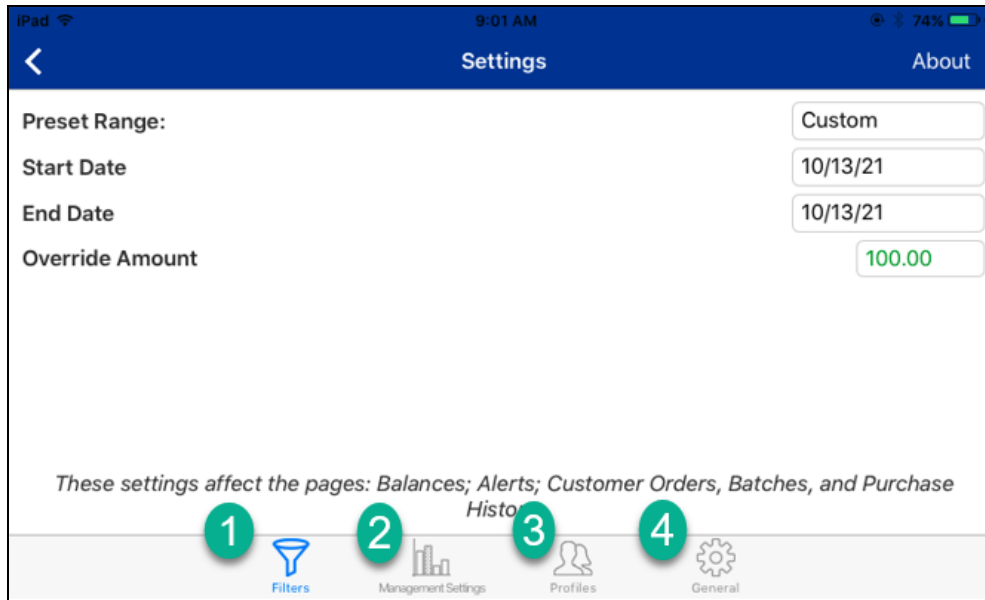Settings provides access to Filters, Management Settings, Profiles and General.

1. Filters

Tap the Preset Range field to select the date used for displaying balances, alerts, transactions and purchase history.

These fields update automatically based on the Preset Range selected. Create a Custom date range by entering a Start Date and End Date.

2. Management Setting

Setting Type allows selection of either Inventory Site or Profit Center by tapping into the field. Based on the Setting Type, select one, multiple or all Inventory Sites or Profit Centers from the displayed list.

Tap the Preset Range field to select the date used for displaying balances, alerts, transactions and purchase history, or create a Custom date range.

The Start Date and End Date fields updated automatically based on the Preset Range selected.

3. Profiles

Profiles allows you to confirm the current Profile logged in, the associated URL and Location. At the bottom of the device, the option to change the PIN and Add Profile are available.
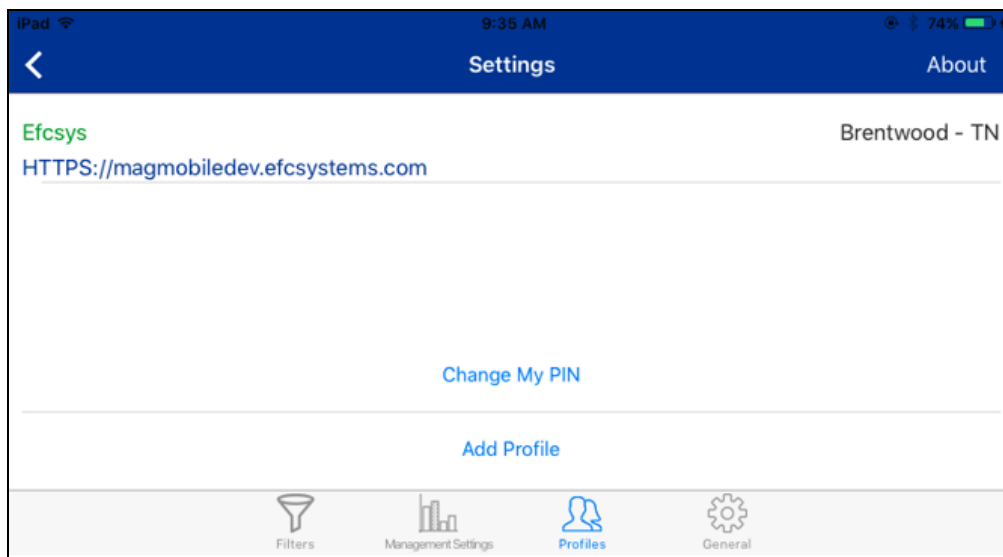
Change My PIN will prompt for the current PIN then require a new PIN to be confirmed.

Add an additional user to the device by using Add Profile. See Profile Setup for more details.

4. Settings

Use Setting to find scanner inputs and non-inventory options.
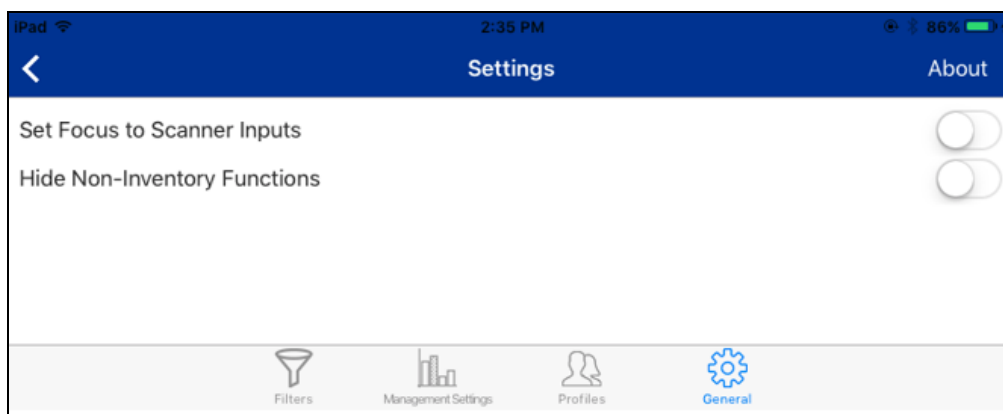

Slide the selector to the right to activate Set Focus to Scanner Inputs and/or Hide Non-Inventory Functions.

Inventory

The Inventory menu provides Item Lookup, two methods of inventory counting and the option to create a pull list. From the Main menu, tap Inventory to access the additional menus, Item Lookup, Category Count and Live Count and Pull List
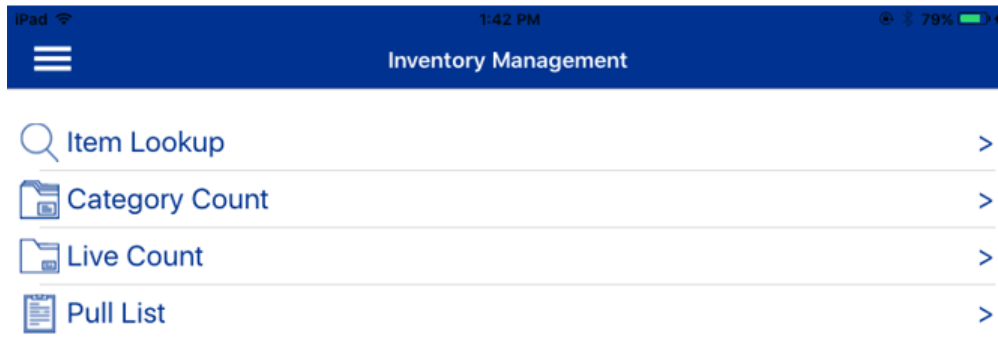
Click on the link to learn about Category Count, Live Count and Pull List.

Item Lookup

Tap Item Lookup and search manually or with a scan fob to search a Locations' inventory. If manually searching, use the Search bar and enter a keyword, an Item ID or description or UPC and tap Search. If using a Scan fob, scan an Items UPC to search the Site's Inventory. Tap the selector to search for Positive On-Hand Only.
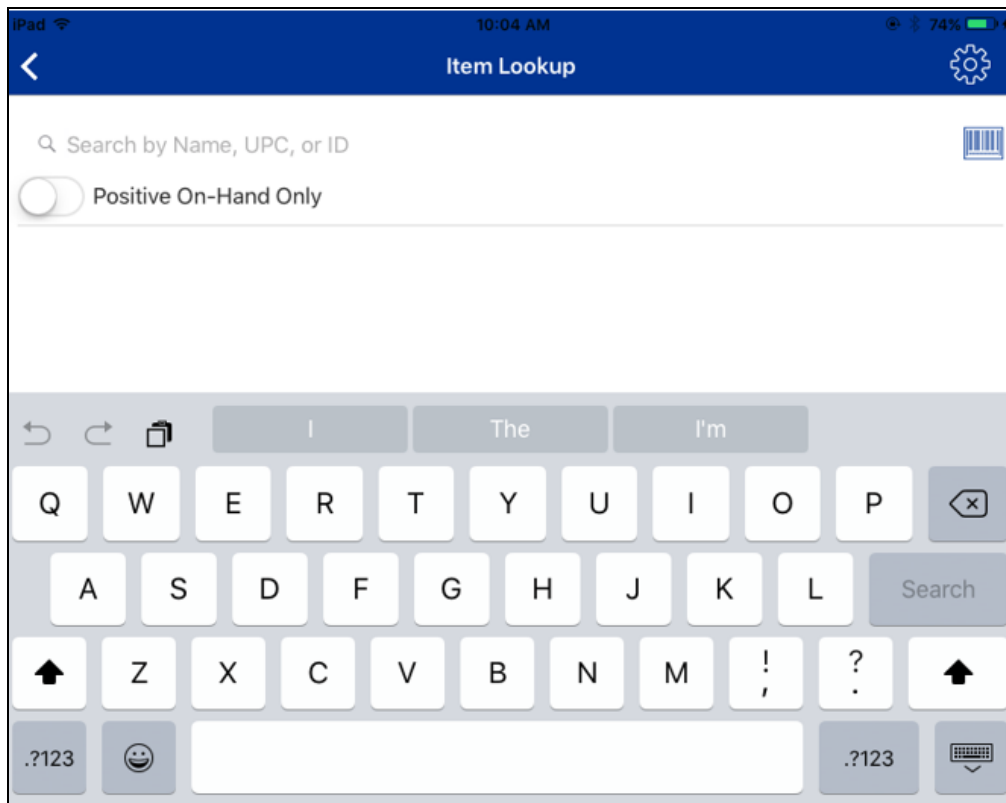
From the Search results , tap the Item to open.
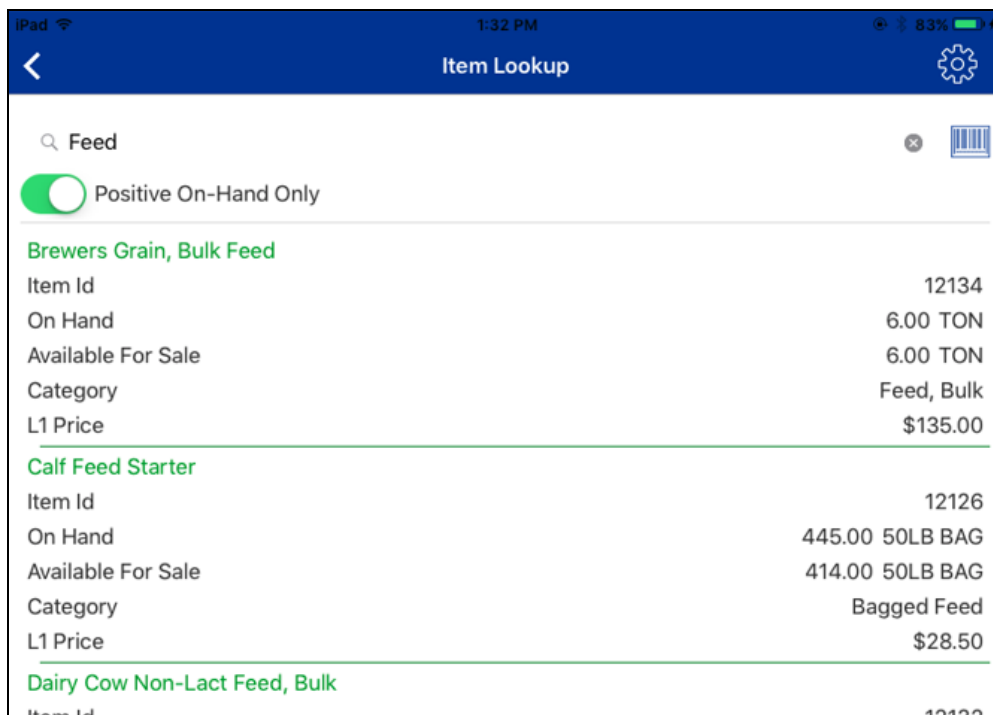
Tap

Location Stock to see detail for On Order, On Hand and Available for Sale.

If available, view Item Weighted Average Cost by tapping Cost which provides the following details for each location

- Weighted Average Cost
- On Order
- On Hand
- Available for Sale

Inventory Category Count

Perform a Category Count for a selected Inventory Site that's transferred to Merchant Ag PM.

The Inventory Site defaults to the Inventory Site set in the Profile Set an In-Store Location if applicable.

Tap into Category to select an Item Category.

In Last Counted, choose an option of

- Ignore Last Adjusted Count
- Uncounted
- Counted Today
- Counted Since when selected adds Counted Since to select a date

Choose Sort Items by Item ID or Description and tap Search tor retrieve Items in the Category selected.

Tap an item on the list then enter a quantity counted to the right of Item Description and tap Submit.

Inventory Live Count

Live Count

Tap Live Count from the Inventory menu to begin an inventory count. A Live Count. can be accomplished manually or by scanning Items.
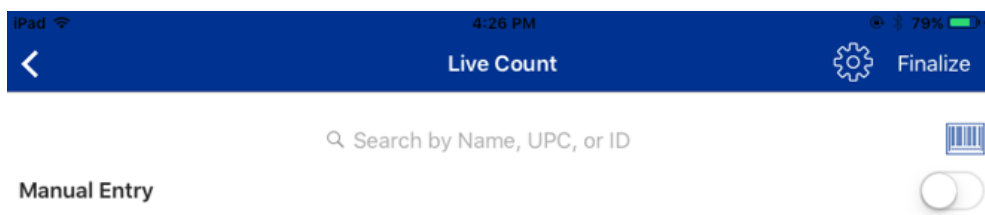
Live Count with Manual Entry

Search for items using the Name, UPC or ID then use the selector to indicate Manual Entry. Tap Search on the keyboard. tap the Manual Quantity Entry checkbox then using the keypad, enter an Item ID or search by Keyword and select an Item.
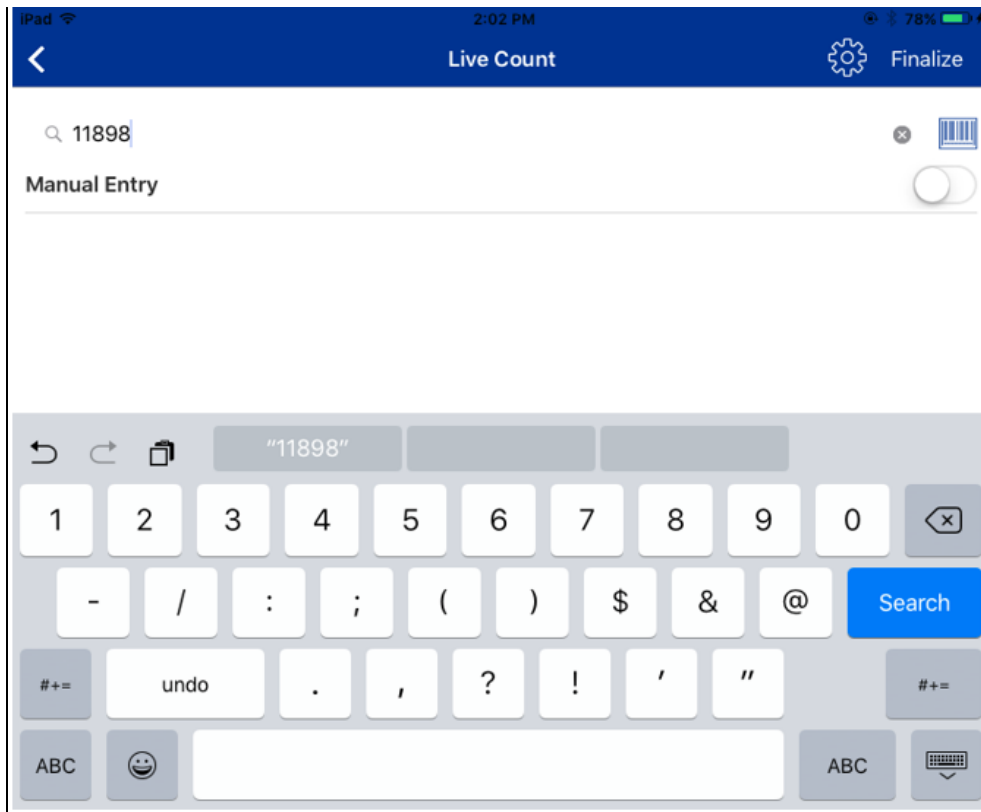
When the Item details display, enter the Quantity counted in the field right of the Item Description and tap OK.
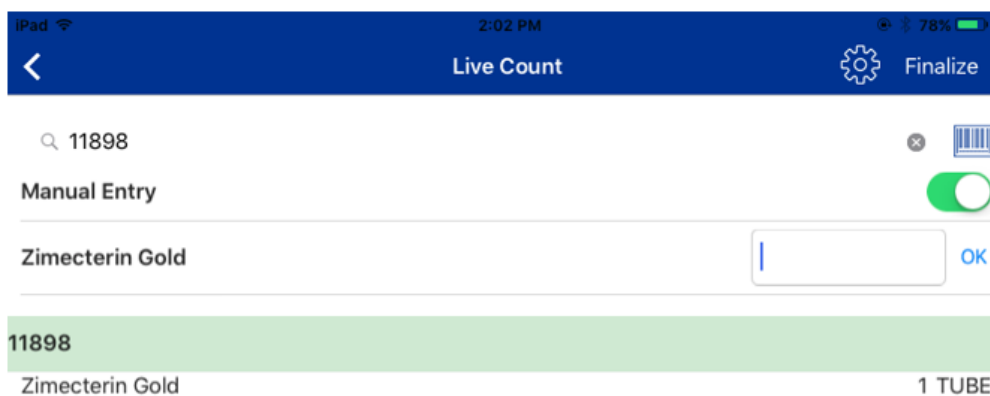
Additional Items can be added to the list as needed.

When all Items have been counted, tap Finalize which transfers the Item counts to Merchant Ag PM. In Merchant Ag PM, select either Adjust to Live Count from the Inventory Counting menu or select Sites | Live Count within Item detail to confirm updated Counts.

Live Count by Scanning

Select Live Count from the Inventory menu and scan the Item's UPC code or search by UPC, Item ID or description.

When using a scan gun, the quantity will be increased by one each time the item is scanned.

When all Items have been counted, tap the Finalize button which transfers the Item counts to Merchant Ag PM. In Merchant Ag PM, select either Adjust to Live Count from the Inventory Counting menu or select Sites | Live Count within Item detail to confirm updated Counts.

Inventory Pull List

Tap Pull List from the Inventory menu and search for an Item by Name, UPC or ID and tap the Search button on the keyboard or scan the Item. Individual or multiple Items can be added to the Pull List with an additional Note when needed.

Tap into the Quantity field to the left of the Item UOM and enter the quantity of the Item to be pulled.

Remove an Item or Clear the Pull List

Highlight an Item and tap the trashcan icon in the upper right corner to remove it or select X to clear all items from the Pull List.

Pull List

🔍 Search by Name, UPC, or ID

13043　Ammonium Nitrate, Dry　　　　　　　　　　5　TON

Note

12102　Imidan 70 Paks, 4#, Dry Insecticide　　　　30　PACK

Note

Balances

Select Balance to view the current Balances and Net Change by Location for the dates selected.

Tap into the Location field to select each available location.

Balances and Net Change for the dates selected are displayed for

- Accounts Receivable
- Accounts Payable
- Inventory
- Prepaid

Net Change indicates the difference in the Balance from the first to the last day of the date range indicated.

Activity

Tap the Activity menu to view totals for

- Order Entry Sales
- Order Entry Margin

- Oil & Energy Sales
- Oil & Energy Margin

- Fertilizer Sales
- Fertilizer Margin
- Fertilizer Tons

- Direct Order Sales
- Direct Order Margin

The countof locations currently selected are indicated above the date selection.
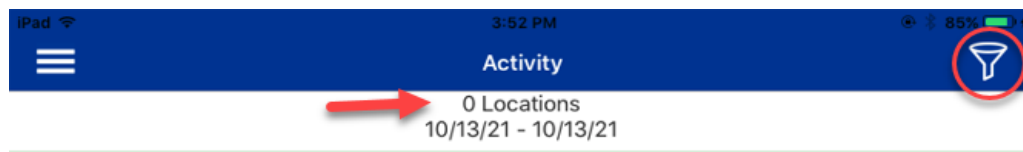
Use the Filter Icon to change the date to

Preset Range

- Custom
- Yesterday
- Current Month
- Fiscal Year

Use the Start Date and End Date fields to create a Custom date range.

Choose All Profit Centers by sliding the selector to the right or choose one or multiple Profit Centers and tap the back arrow in the upper left corner to load the Activity page.

1 Locations
10/01/21 - 10/19/21

OE SALES

Quantity	0
Current Period	$999.96
Date Range	$0.00

OE MARGIN

Current Period	($1,391.11)
Date Range	$0.00

OIL & ENERGY SALES

Quantity	0
Current Period	$1,455.00
Date Range	$0.00

OIL & ENERGY MARGIN

Current Period	$1,155.00
Date Range	$0.00

FERT SALES

Quantity	1
Current Period	$5,078.93
Date Range	($676.00)

FERT MARGIN

| Current Period	$3,039.42
Date Range	($286.38)

Any Sales Activity includes

- Quantity the quantity sold
- Current Period is the sales amount for the current Period
- Date Range is the sales amount for the date range selected in Preset Range

Margin displays for the Current Period and date range.

Alerts

Alerts provide a management tool for increased awareness regarding Customers, Transactions, Prices Overrides and Margin Exceptions. Access to Alerts begins by granting permission to a User Profile in Merchant Ag FIN then by setting date parameters and an Override amount in Settings on the Home page.
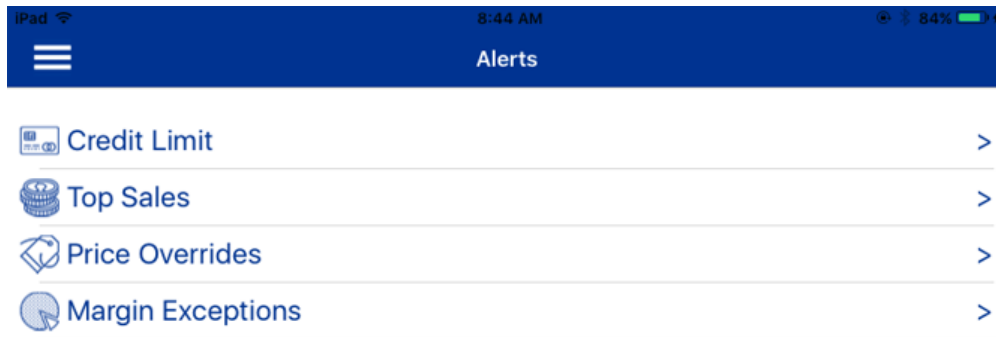
Alert

| Alert	Includes
Credit Limit	Includes • Customer ID and Name • Current Balance • Credit Limit and amount Used
Top Sales	■ Customer Name and ID ■ Amount ■ Transaction ID ■ Transaction Type ■ Date
Price Overrides	• Date, Type and Transaction number • Quantity, Old and New Price • Customer ID and Name • Operator Name • Reason for Override
Margin Exception	■ Date, Type and Transaction number ■ Customer ID and Name ■ Operator ■ Margin and Minimum Margin

Customers

Tap Customers to view account highlights that include basic contact details with pages for General, Credit Information, Commitments and More Info on the account. Control the information a Profile can view in Merchant Ag FIN | Admin | System Security | Access User Profiles | select a Profile | Security tab | MAgMobile to set security.

Search for a Customer

Search by Name, Phone or Customer ID and add a Customer Code to filter. Most Recent lists most recently accessed customer accounts.
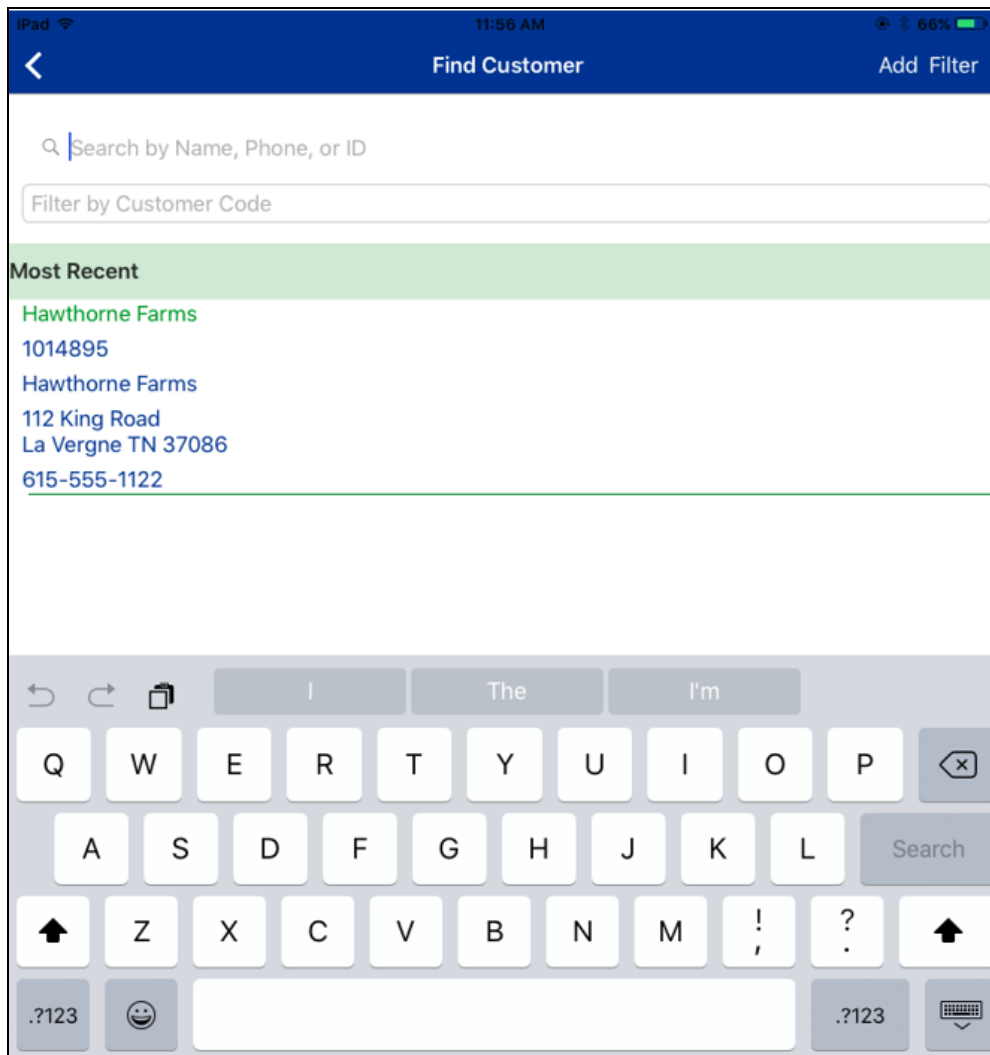
Tap the needed account from the search results.

General

General Customer details include the primary address, Contact names, pricing tier information, Fields and Other.

Address

Tap All Ship To Addresses when multiple Ship To Addresses are available.

1014895 Hawthorne Farms

00: Hawthorne Farms	
Address	112 King Road La Vergne TN 37086
Phone	615-555-1122
01: Hawthorne Farms	
Address	115 King Road La Vergne TN 37086
Phone	None

Contact

View the primary Contact information for the account including phone numbers.

Pricing

Any Pricing or Discount Tier assigned to the Customer will be indicated.

Fields

Indicates the count of fields associated with the account. Tap All Fields to view fields.

1014895 Hawthorne Farms

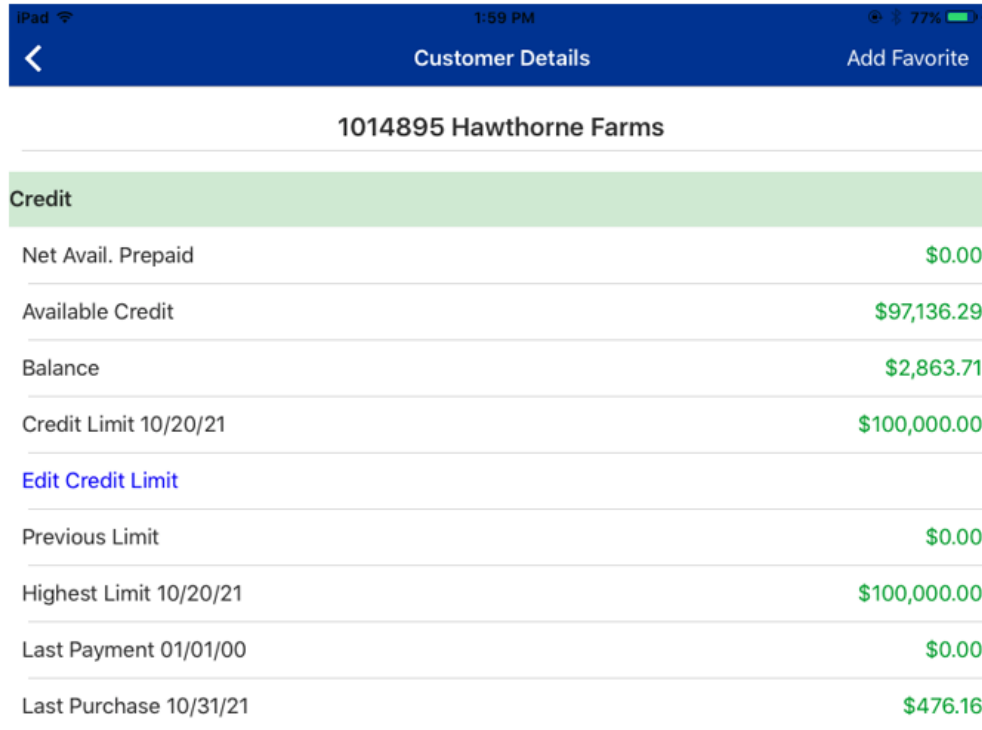| CORN001 Corn Field	
Field Acres	500
Field Location	
Government ID	
SOY001 Soybean Field	
Field Acres	300
Field Location	
Government ID	

Credit Information

View the current credit status of a customer account including available Prepaids, amount and date of Last Payment and amount and date of Last Purchase.

iPad	1:59 PM	⊕ ⅛ 77%
‹	**Customer Details**	Add Favorite

1014895 Hawthorne Farms	
Credit	
Net Avail. Prepaid	$0.00
Available Credit	$97,136.29
Balance	$2,863.71
Credit Limit 10/20/21	$100,000.00
Edit Credit Limit	
Previous Limit	$0.00
Highest Limit 10/20/21	$100,000.00
Last Payment 01/01/00	$0.00
Last Purchase 10/31/21	$476.16

If available, tap Edit Credit Limit to enter a new Credit Limit.

iPad	2:09 PM	⊕ ⅛ 77%
‹	**Update Credit Limit**	

| 1014895 Hawthorne Farms	
Current: 100,000	
New Amount	100,000
	Save

Commitments

Tap into the selector field beneath the Customer ID and Name and choose to view

- All Open Commitments
- Open Bookings
- Open Prepaids

- All Historic Commitments
- Historical Bookings
- Historical Prepaids

When All Open Commitments have been selected, all open Bookings and Prepaids for the customer are listed.
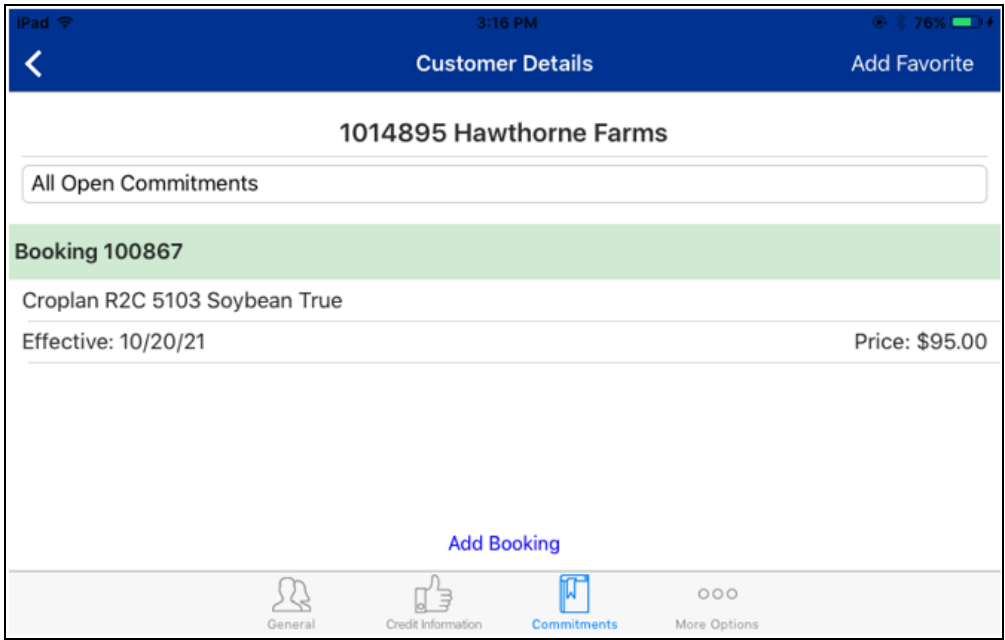
Add Booking is available to User Profiles with adequate permissions. Tap Add Booking then add an Item, an Effective and Expires date, choose a price of L1 or set a Booking price and enter the Quantity.

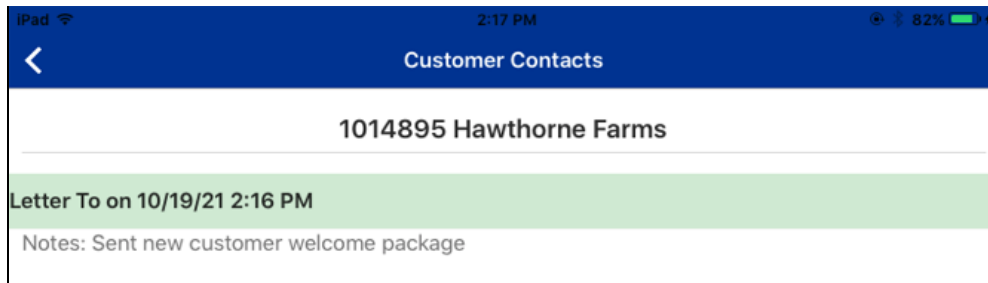Capture a Customer signature by tapping Capture Signature and Save the new Booking.

New Booking -- 100850 Baker Farms LLC

Customer Signature

More Options

Use More Options to view additional components of the customer account.

- Customer Contacts
- Account Aging
- Customer History
- Open Orders
- Documents
- Buyers

- Licenses
- Demographics
- Open Batches
- Relationships

Customer Contacts

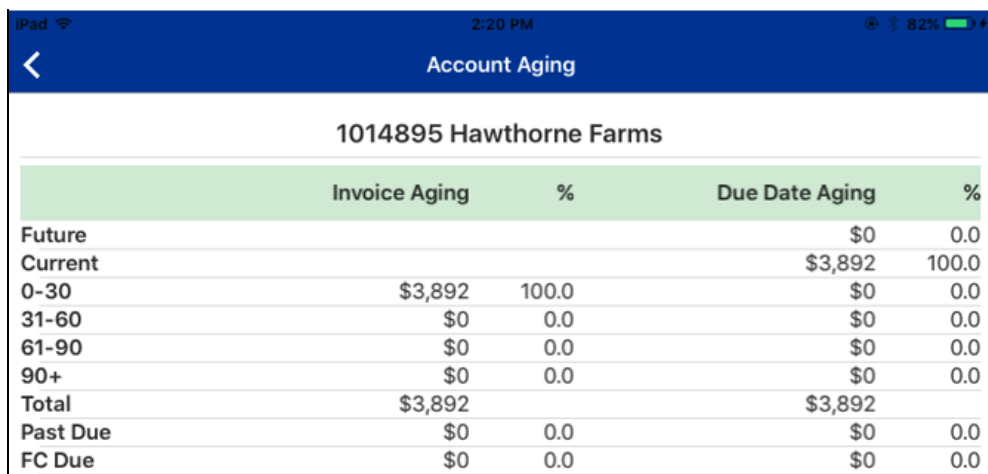View or Add communication with a Customer by using Contacts.

All existing Contacts will display the Contact Date, Entered by, Next Contact date and any Note included.
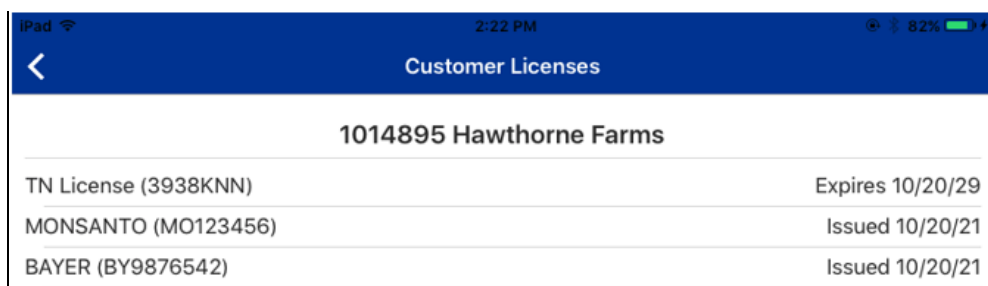
Account Aging

View details on the aging break down of the account balance by Invoice and Due Date Aging.

1014895 Hawthorne Farms

	Invoice Aging	%	Due Date Aging	%
Future			$0	0.0
Current			$3,892	100.0
0-30	$3,892	100.0	$0	0.0
31-60	$0	0.0	$0	0.0
61-90	$0	0.0	$0	0.0
90+	$0	0.0	$0	0.0
Total	$3,892		$3,892	
Past Due	$0	0.0	$0	0.0
FC Due	$0	0.0	$0	0.0

Licenses

Tap Licenses to view all current Licenses associated with the Customer account.

Customer Licenses

1014895 Hawthorne Farms

TN License (3938KNN)	Expires 10/20/29
MONSANTO (MO123456)	Issued 10/20/21
BAYER (BY9876542)	Issued 10/20/21

Chemical and Technical licenses with Expiration or Issued date are listed.

Demographics

Informational fields that can be used to record the amount of commodities for a customer. Tap into the quantity field and enter the acres for applicable line items.

Customer History

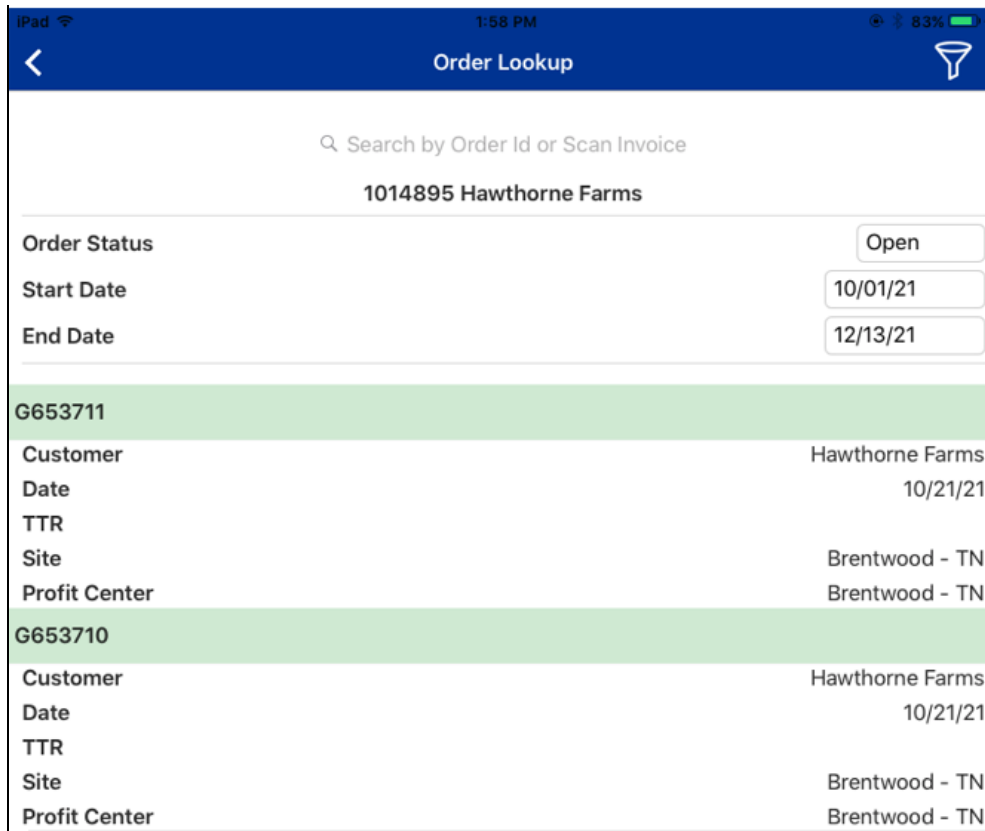View the Customer History for a date range for Purchase Summary, Item and Category.

The Start Date and an End Date default from Setting but can be updated by tapping into the field.

Tap Change in History Option to select Purchase Summary, Item or Category.

Open Orders

View details of Open or Closed Customer Orders.

Tap into Order Status to choose Open or Closed and set a Start Date and End Date to create a date range.

Each order is divided by the Order ID and includes

- Customer Name
- Date, the transaction date
- TTR will be displayed for Closed Orders and blank for Open Orders.
- Both the Inventory Site and Profit Center names are included.

Open Batches

View details of Batches.

Tap into Batch Status and choose Open or Closed. Create a date range by entering dates in Start Date and End Date.

Relationships

In this informational section to view possible credit exposure by viewing the customer accounts that have a Relationship set on the account.

Each customer listed includes

- Customer ID and Name
- Credit Limit
- Current Balance
- The available Prepaid Balance

Documents

View scanned images of Documents or attach a new document to the account.

Tap Select Image to attach a new Chemical License or Tax Certificate which opens Launch Camera or Launch Gallery.

Buyers

View who can settle Orders and Batches to any credit account for the customer.

The Buyer name and any associated Note are displayed.

Order Pricing

Order Pricing provides product pricing and margin control strategy for Field Salesmen, Sales Managers, and Management. When a price is changed and approved for an order in Order Pricing, the item price on orders, direct orders and batches is updated.

Access to Order Pricing is set using User Profile permissions in Merchant Ag FIN.

Use one or multiple options on the Order Pricing Filter to limit the orders listed. Tap the Filter icon in the upper right hand corner to access.

Order

On the Order filter tab, select an Order Status.

Tap on the Order Types of All, Orders, Batches, or Direct Orders.

Choose an Order by of Customer or Margin

Limit the search results by Entered or Delivered Date by sliding the selector and enter a single date or create a date range.

Prices

On the Prices tab, the Price Filter defaults to All with options Only missing Price and Only with price available.

Use the selector Show only needing Approval to display only price changes needing Approval.

Available with adequate permissions, limit orders by entering an Order Margin % and click Operator to indicate Margin will =>, =< or <>.

Field Rep

On the Field Rep filter, the available Field Reps are set by the level of access granted to the User Profile, Level 1 and 2 shows related Field Reps only with Level 3 listing all Field Reps. Slide the selector to the right to choose one, multiple or all Field Reps.

Tap Apply when all filters selected to receive the Order Pricing list based on the filters selected.

Tap into the Price field and enter a price. When a price has been approved, tap the arrow to apply the price to choose to apply the price to all orders of the item for the customer or just the individual Order.

- 101477800

98022 – 46% Urea – Bulk

Qty   0.4135 TON

Cost $395.0000

Price `3.03` ▶

Margin % -12936.3

107419 Batch

Delivered

10/06/2021

Last Sold

05/24/2021

Last Sold Price

$10.00

`Approve`

- 101477800

96024 – 60% Potash – new

Qty   0.317 TON

Cost $161.2441

Price `1.24` ▶

Margin % -12903.56

107419 Batch

Delivered

10/06/2021

Last Sold

05/24/2021

Last Sold Price

$10.00

`Approve`

When the Price is set as expected, tap Approve.

Management

Use the Management menu to view metrics for Selling, Customer & Treasury, Inventory & Purchasing, Oil & Energy Deliveries and Oil & Energy Inventory. Customize the information presented by selecting the Settings menu and specifying the Setting type, and the date range used. Use the selectors to choose the Inventory Site or Profit Centers. Tap Filter any time to change Location or date selections.
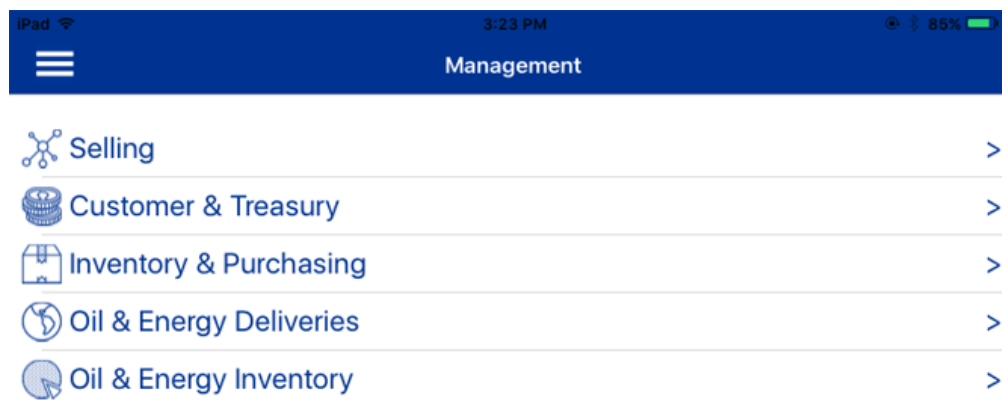
Selling

Tap Selling and based on the Dates and Locations selected in Settings, Sales Metrics will display the name of the Sales Metric displaying the Revenue Amount followed by quantity. A Total for Quantity and Revenue Amount is also included.

Sales Metrics

Tap Commodity Metrics or Group Metrics to open the Trans by Commodity or Trans by Group section which adds a Revenue, Gross Margin amount and Gross Margin Percentage.

Customer & Treasury

Select Customer & Treasury to view metrics on Settlement, AR Transactions, Customer Metrics and Payment Metrics based on the Dates and Locations selected in Settings.

Settlement Metrics

All settlement methods are listed with total amounts for the Dates selected in Settings.

AR Transactions

Provides information on Debit and Credit Memos, Finance Charges, and the Quantity of each and the Total Amount.

Customer Metrics

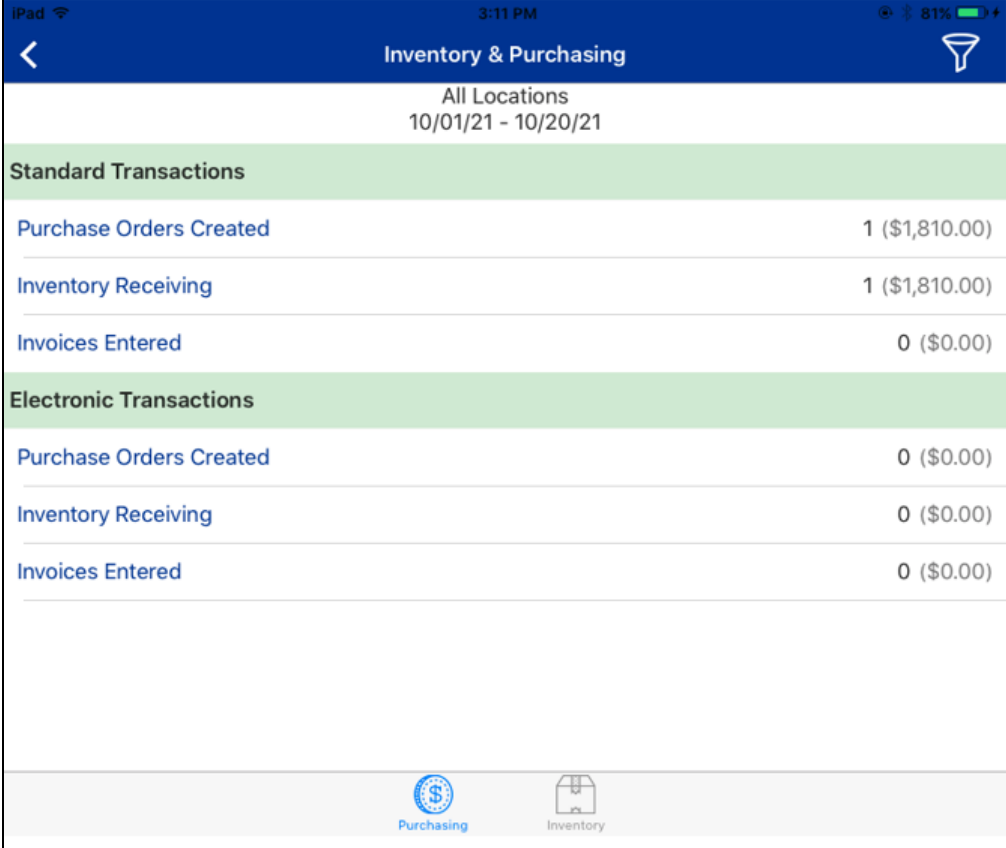View the Quantity of Customer Adds and Customer Changes or Deletes.

Payment Metrics

Review the Quantity of Accounts Receivable and JDF Multi-use Payments received and the total amounts of each.

Inventory & Purchasing

Gain an overview of Standard and Electric transactions for the Location and Dates selected. Tap the icons at the bottom of the screen to view either Inventory or Purchasing metrics.

Purchasing Metrics

Inventory Metrics

Metrics are provided for the following Inventory & Purchasing based on the Dates and Locations selected in Settings.

Purchasing Transactions Standard	Purchasing Transactions Electronic
Purchase Orders Created	Purchase Orders Created
Inventory Receiving	Inventory Receiving
Invoices Entered	Invoices Entered

Inventory Metrics	Transfer Metrics
Physical Adjustments	Transfers Shipped
Non-Sale Withdrawals	Transfers Received
Expense Transfers	
Non-PO Receipts	

Inventory Valuation	
Current	

Prior	

Oil & Energy Deliveries

Locations also utilizing the Oil & Energy module can obtain O&E Delivery metrics.

Tap into Driver and select an individual driver or retain the default of All.

Oil & Energy Inventory

View Oil & Energy Inventory details based on the selection in Fuel Type.

<   **O & E Inventory**   ▽

All Locations
10/01/21 - 10/20/21

Installed	539
Inventory	34
Fuel Type	Distillate

Residential Heating Oil
Item Id	11869
WAC	$0.00
On Hand	989,348.7999

2-K Kerosene
Item Id	11871
WAC	$1.89
On Hand	1,229.0000

Fuel Oil
Item Id	11873
WAC	$0.98
On Hand	-13,897.0000

Diesel
Item Id	11887
WAC	$0.00
On Hand	-30.0000

Fuel Oil Off Highway
Item Id	11899
WAC	$10.00
On Hand	-90.0000

Kerosene
Item Id	11931
WAC	$2.75
On Hand	79.0000

Orders

Tap Orders on the Main Menu to view the additional menus available.
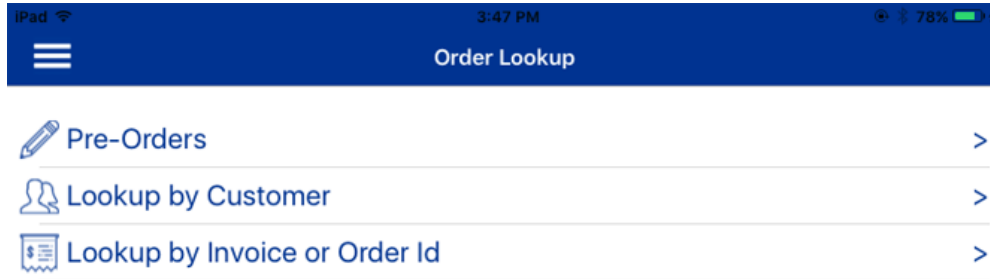
Pre-Orders will be used to create orders that transfer to Merchant Ag PM to be settled.
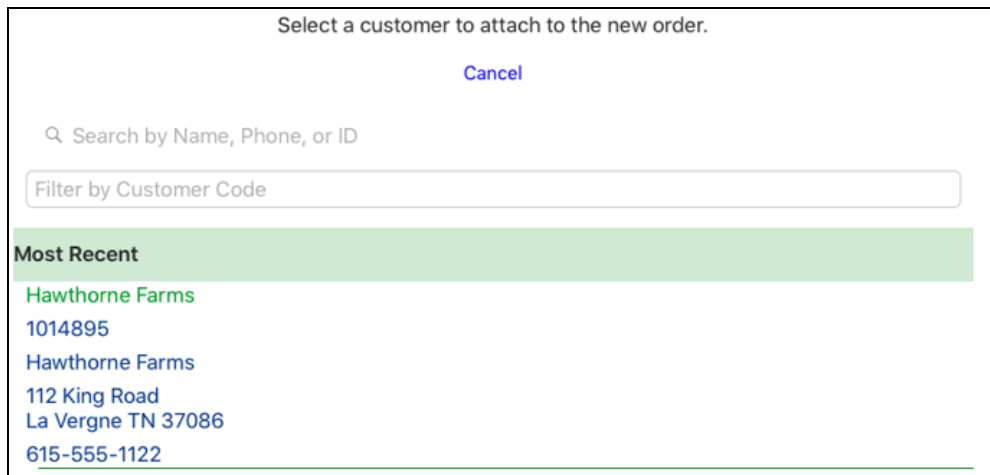
View Open and Close Orders for a customer by using Lookup by Customer.

Lookup by Invoice or Order Id can be used when the Invoice or Order ID is known.

Pre-Orders

Create a Pre-order to be submitted and settled in Merchant Ag PM. Existing Pre-Orders that have not been finalized can be edited.

Begin the Pre-Order by searching for a Customer by Name, Phone or ID.

The Pre-Order is divided into

- Customer Info
- Order Info

- Credit
- Comment
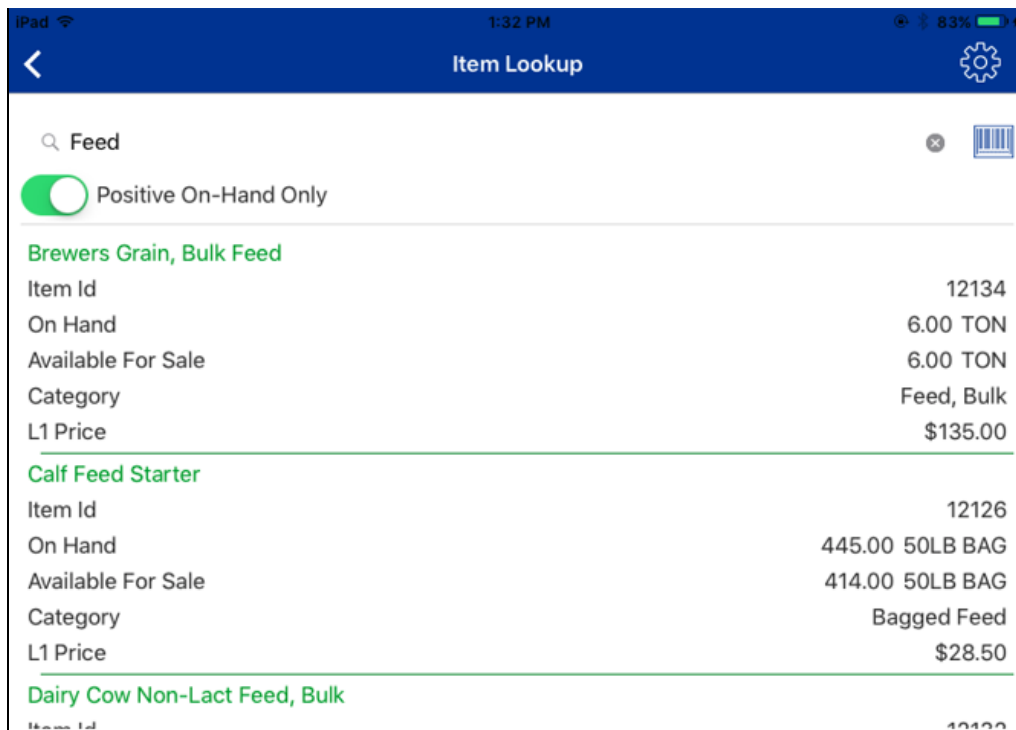

Once the Customer is selected, tap Items.

Search for Items

Tap into the search field and search by an Item Name, UPC or ID or scan the item.
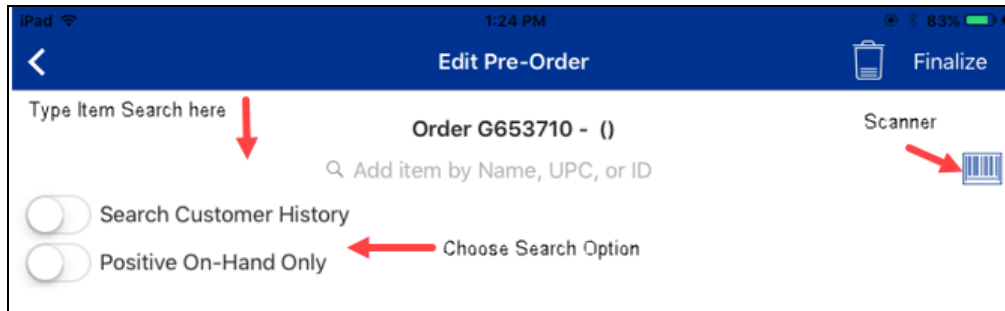
Filter the items returned by using the selector to choose Search Customer History or Positive On-Hand Only or both.

Select an Item

From the returned search results, tap the item to add to the order.

Add Quantity to the Item

Enter the Quantity for the Item and enter any New Price and the Reason for the price change then tap Save. Multiple Items can be added to the Pre-Order.

Tap after adding the item quantity and adjusting price if needed to confirm the item was added to the order.

Capture Signature

Tap Capture Signature then Capture which opens the space for a Customer Signature. Allow the customer to sign and tap Capture in the lower right corner.

Finalize the Order

Tap Finalize in the upper right hand corner to transfer the Order to Merchant Ag PM.

Orders Lookup by Customer

Find customer orders by customer by tapping Lookup by Customer and search by Name, Phone or ID and tap Search on the keyboard. Customers may also be listed in Most Recent. Tap on the customer name to open.

All unsettled orders for the customer are listed. If no orders are found tap into Order Status and choose Open or Closed, Start Date and End Date and adjust the values entered.
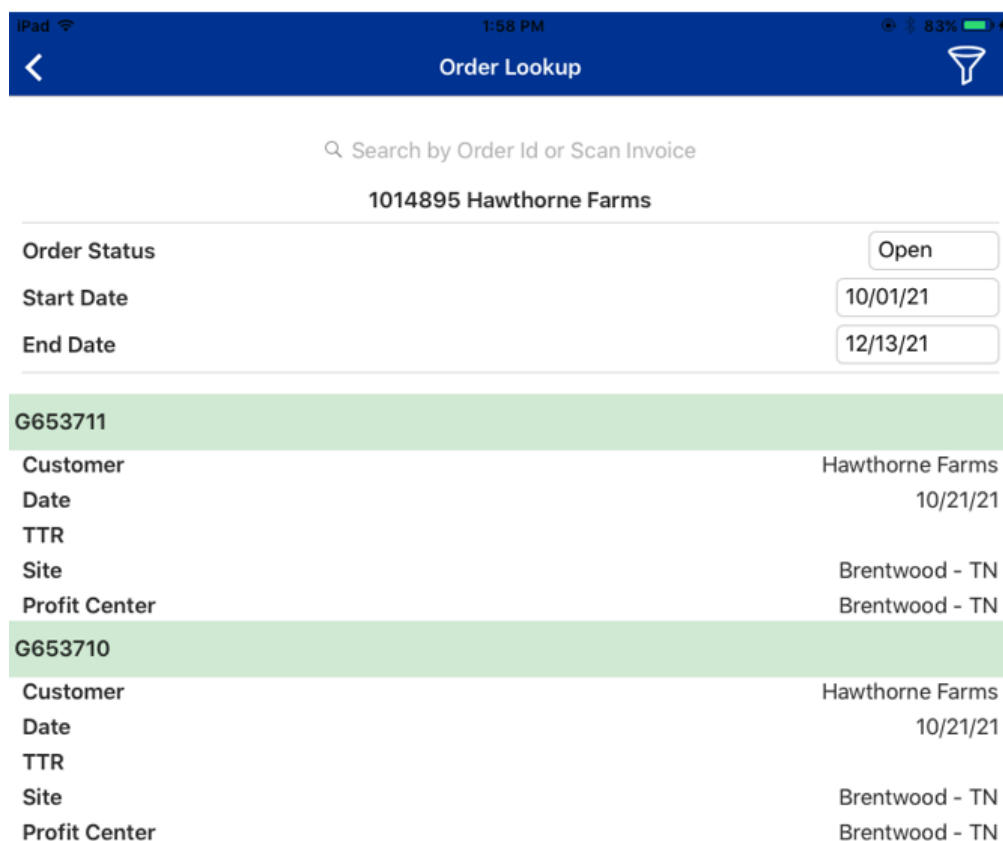
The listing sorts by Order ID and includes the customer name, transaction date, TTR, Site and Profit Center for the Transaction.

Tap any order to view the Item(s) and quantity purchased, the price for one Stocking Unit of Measure and the extended price of the item. The order totals divide out the Product Total and Sales Tax and providews the Invoice Total.

Order Lookup by Invoice or Order Id

Tap Order Lookup and enter the Order Id or scan the invoice. The filters of Order Status, Start Date and End Date can also be added.
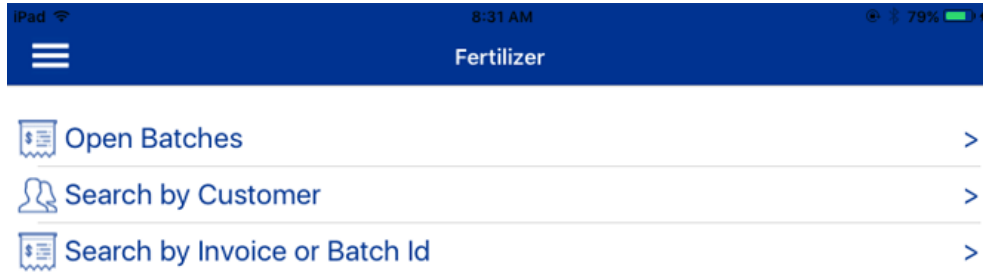

A partial value can be used as the Order Id to return multiple invoices in the search results.

Fertilizer

Select an option from the Fertilizer menu to review Batches.

See Open Batches lists all open Batches for a Location.

Access Search by Customer to find Batches for a specific Customer.

Search by Invoice or Batch ID is a search tool when the invoice or Batch ID are known.

Fertilizer Open Batches

View the list of all Open Batches for your Location. View the Customer Name, Batch ID, Dispatch status, Date of Batch, Site and Profit Center Name.
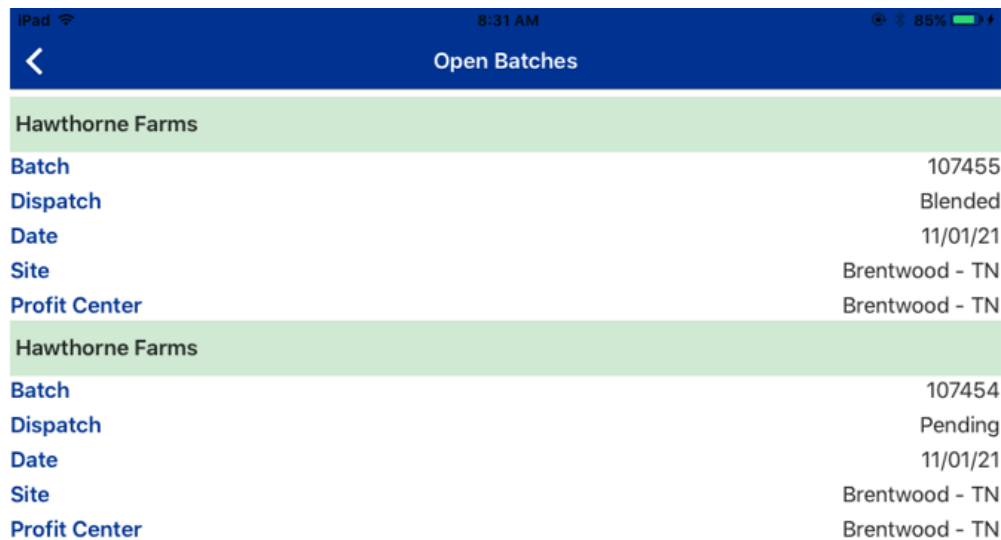
Tap a Batch to view the Summary, Nutrients and Ingredients in Batch Details.

Summary

107453 (Sale)
Garfield Farmers Co-op

Summary

Batch	107453
Date	11/01/21
Customer	1014311
Name	Garfield Farmers Co-op

Nutrients

107453 (Sale)
Garfield Farmers Co-op

N

Requested	19.000
PFU/Acre	5.70
PFU/100lbs	2.918

P

Ingredients

107453 (Sale)
Garfield Farmers Co-op

Ingredient Type

Ingredients

Lime Bulk

Unit	TON
Pounds	60,717
Unit Price	$12.00
Extended Price	$364.30

18-46-00

Unit	TON
Pounds	4,337
Unit Price	$600.00
Extended Price	$1,301.10

60% Potash

Unit	TON
Pounds	3,325
Unit Price	$490.00
Extended Price	$814.63

Fertilizer Search by Customer

Search for a customer first r then search for the customers' Batches. Tap into the Search field to find a customer by entering a Name, Phone or Customer ID. Add a Customer Code by tapping into the field to filter.

A list of all recently accessed Customer accounts appear in Most Recent.

Tap to select the customer from the search results to open the Batch Search window.

Choose a Batch Status and Start and End Dates which returns Batches for the Customer. Tap the batch to access Fertilizer Batch details including Summary, Nutrients and Ingredient information.

Fertilizer Search by Invoice or Batch ID
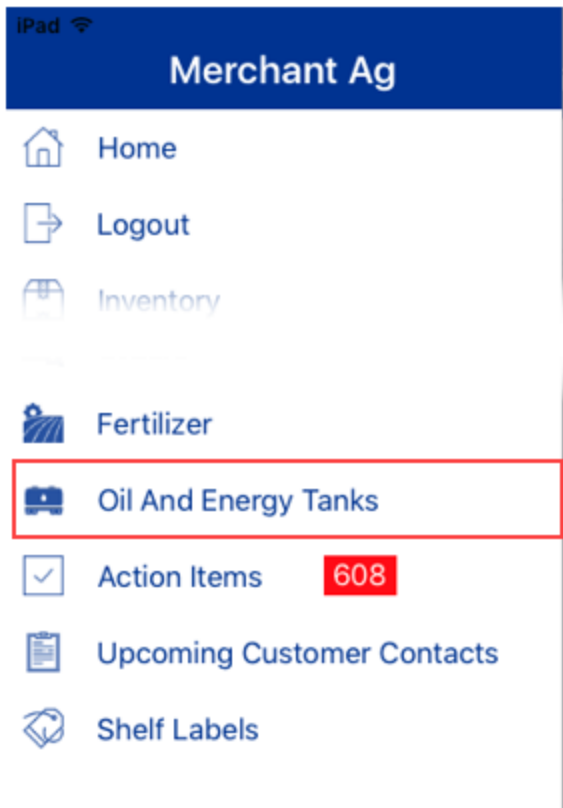
Search for a Batch by entering the ID or scan the invoice.

All Batches that meet the selection in Batch Status will be listed. Limit the list by entering a Start Date and End Date.

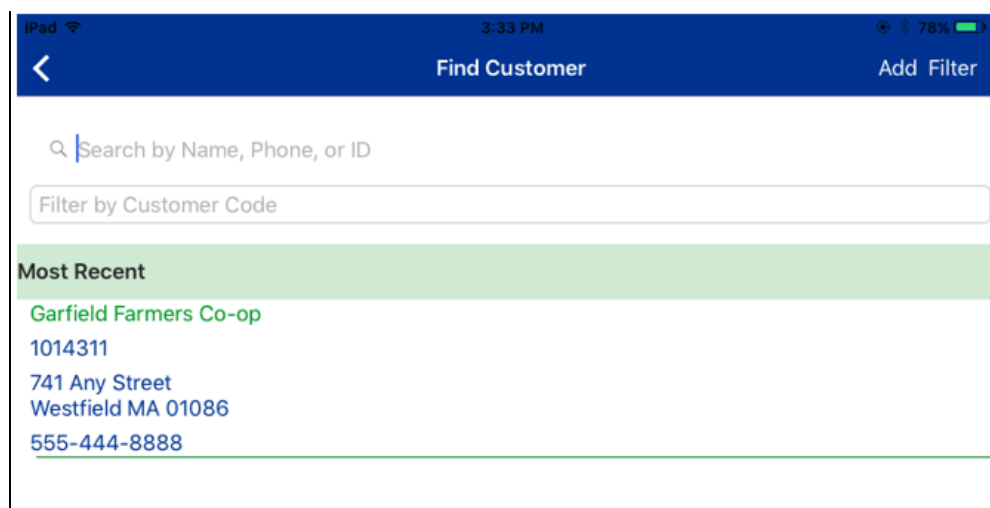Tap on any Batch to access Batch Summary, Nutrients and Ingredients.

Oil & Energy Tanks

Tap the Oil & Energy Tanks menu for view only details on Customer tanks.

Search for a Customer

Search by entering a Name, Phone or ID and tap Search on the keyboard.

Tap on a customer name to view the Tanks associated with the account.

☰　　　　　　　　　　　　**Tanks**

Garfield Farmers Co-op

100327 | Propane

Capacity	1,450
Serial Number	1520091547
Placement	Above Ground
Last Delivery	02/10/21
Next Delivery	04/22/19
Owner	Yes
Bill To	Yes
Location	Yes

1004905 | Propane

Capacity	1,800
Serial Number	20109848
Placement	Above Ground
Last Delivery	
Next Delivery	02/12/21
Owner	Yes
Bill To	Yes
Location	

This provides the basic details on a Tank as found in Merchant Ag PM | Oil & Energy | Access Tanks.

Action Items

Action Items can be created using Merchant Mobile or Merchant Ag PM and are Tasks assigned to a User or Operator for a Customer. The count of Action Items assigned to the user will appear on the menu. Tap the Action Items menu from the Main menu or the Quick Access section on Home.

Create a new Action Item

Tap the New in the upper right hand corner of the device to create an Action Item. All new Action Items begin with an ID and Status of Pending.

The Priority is set to Low can be changed to Medium or High by tapping into the field and selecting a new priority.

Enter a Description, of up to 40 characters which becomes the title of the Action Item.

In Customer, use Change Customer to select a Customer for the Action Item.

Tap into the Assigned To field and choose the User to assign the Action Item.

Contact populates with the name from the selected account. Enter a Contact Phone.

Keep or change the Location shown in the Location field by tapping the drop down menu.

Tap Add Due Date field which defaults to the current date. Select a new Due date from the cal-endar and accept by tapping Done.
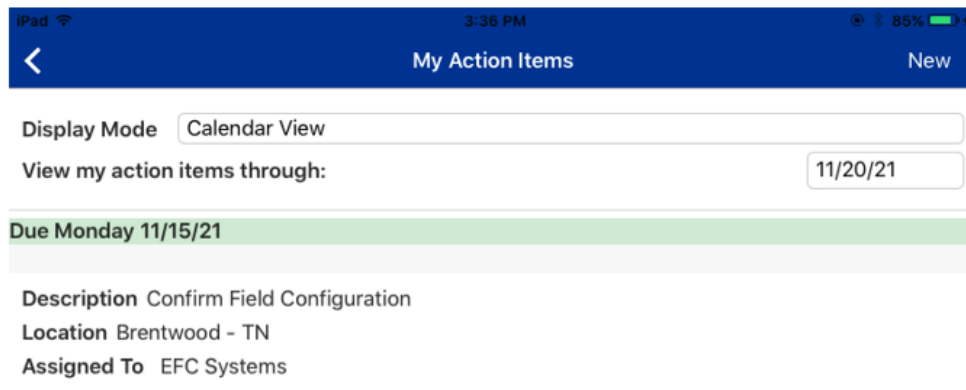
Use the Task Details section to include all the necessary steps and information needed to complete the Action Item.

Resolution Details will be filled in when the Action Item is completed.

Tap Save to create a New Action Item which assigns the ID number and adds it to the Pending Action Item List. All Action Items are also available in Merchant Ag PM.

Complete an Action Item

Use Display Mode to choose the Calendar View or Status View to load the list of Action Itemsn. Details includes Description, Location, Due Date and Assigned To. Tap to open any Action Item to view additional details.
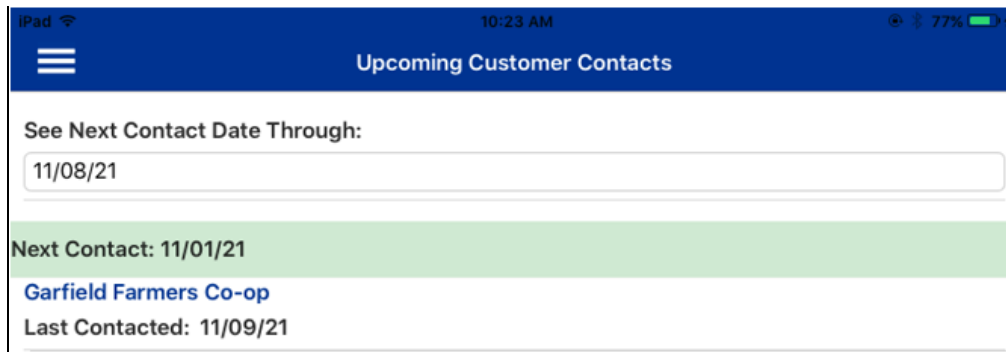

Tap the Action Item to open to update any of the fields or complete by changing the Status.

Enter the Resolution Details, add an Image if needed change the Status to Completed or Canceled and tap Save.

Upcoming Customer Contacts

View and edit all upcoming customer contacts by tapping into the See Next Contact Date Through and selecting a date.
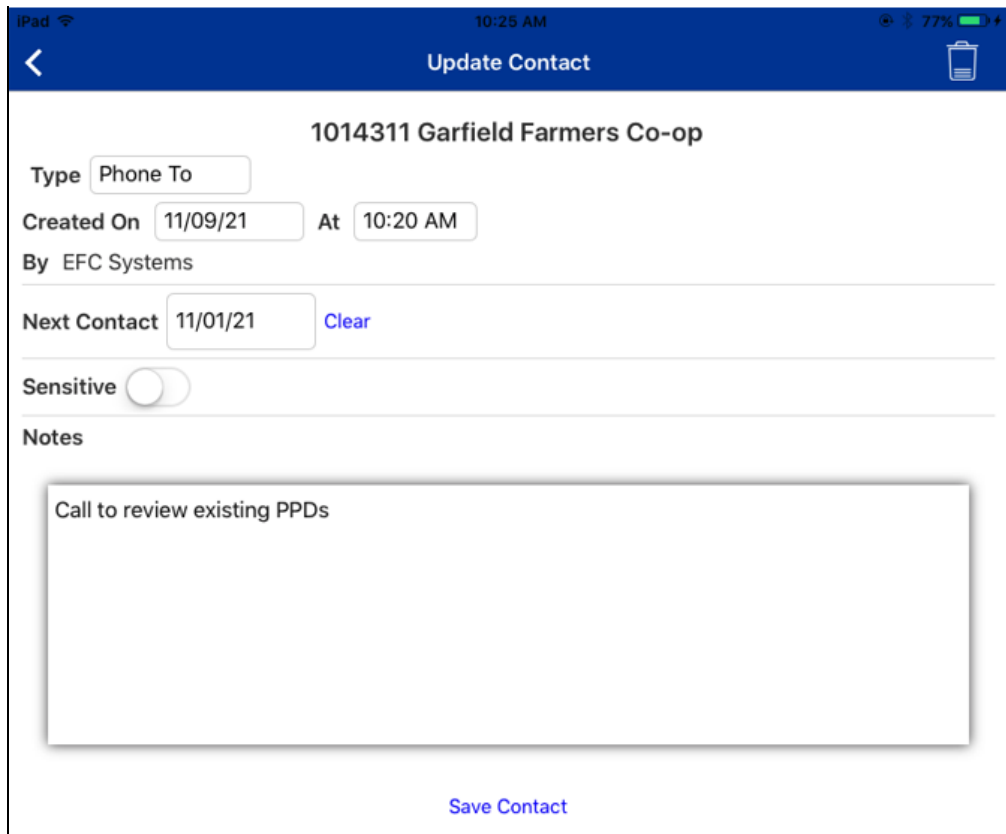
All Customers with an upcoming Contact will be listed.

Tap a Contact to open Update Contact.

Details on the Contact are displayed and can be updated by tapping into any field. Tap Save Contact when finished.
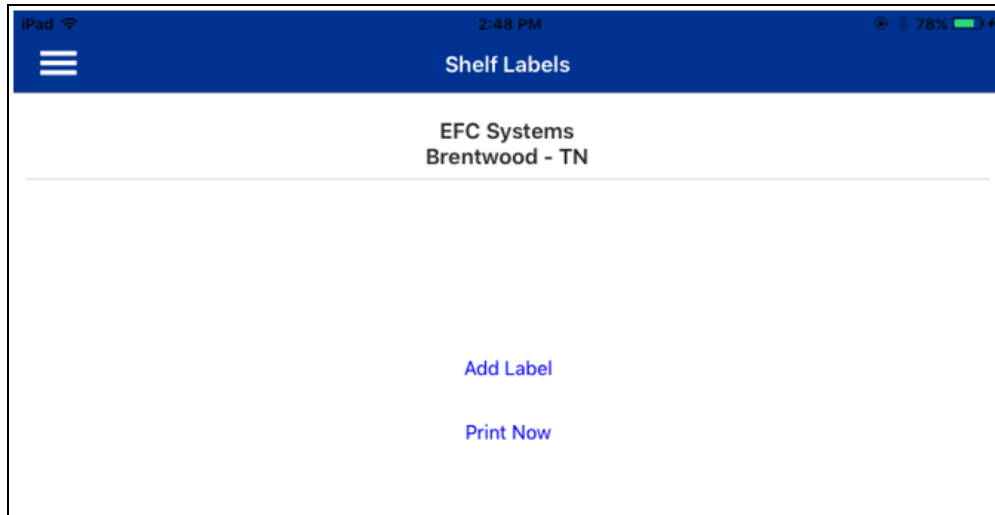
A Contact can be deleted by tapping the Trash can icon in the upper right hand corner.

Shelf Labels

Tap the Shelf Label menu to add Items that need a Shelf Label. Items must have a UPC and be marked for Shelf Labels in Merchant Ag PM on the Sites tab.
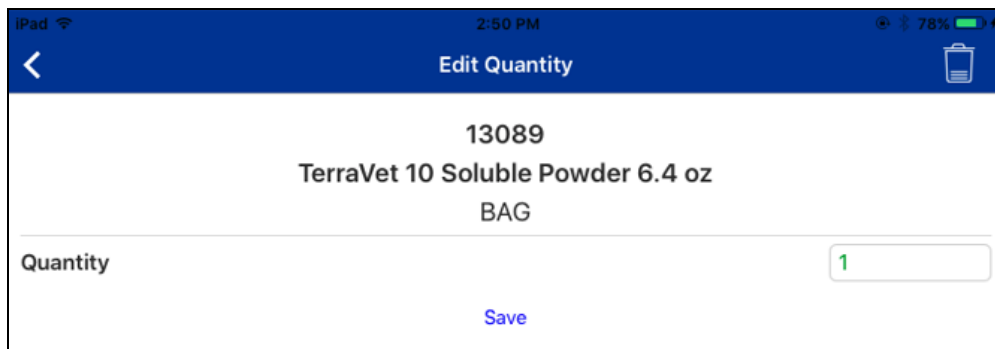
Add an Item

Tap Add Label and search for Items to be added to the Shelf Label Export list.

Tap the Add Label to search for an Item by Item Name, UPC or ID and limit the items by using the selector to indicate Positive On-Hand Only.

Tap into the Quantity field and provide the number of Shelf Labels to be printed.

Items can also be added to the Shelf Label list by scanning the UPC.

Update or Remove an Item

Tap into Quantity of Shelf Labels and enter the updated number of labels needed or tap the Trash can icon to remove the Item from the list.

Tap Print Now to print the labels.