



Superior Auto Extras Mobile App User Manual

Superior Auto Extras Mobile App User Manual

Superior Auto Extras' customers and sales reps use our app to connect with us, place orders, request returns, and track up to date inventory availability. Our app will allow you to streamline your communication with us, order products with ease, have comfort in knowing what is in stock, review your order's history/status as well as replicate past orders as new orders or drafts, send us your special requests/remarks, and receive a faster turnaround time for your orders or return requests.

The Mobile app is available on all IOS mobile machines (iPhone, iPad) on the following link: https://apps.apple.com/us/app/superior-auto-extras/id1584077693

and available for all android users (phones and Tablets) on the following link: https://play.google.com/store/apps/details?id=com.sae.superiorapp

1. After downloading the app from the app store, you will be required to log into your account. To do so – click on the menu option on your main screen as seen in the attached image on the left, and put your login credentials as seen on the right image – please make sure to click on the correct login option- Salesperson if you are a Salesperson, and Customer if you are a customer





New Customers:

Please <u>open an account</u> with us, once your account is open, please <u>Contact our Offices</u> to receive your login credentials.

Existing Customers:

* If you are working with our Memphis, TN facility, your Login ID is your customer number followed by the letter "m" (Example: 59866m), and your Password is your location Zip-code.

* If you are working with our California facility, your Login ID is your customer number (example: 59866), and your Password is your location Zip-code.

If you are unable to log in using those instructions, Please <u>Contact our Offices to</u> receive your login credentials please make sure to list your business name and address on the contact page.

For Sales Representatives:

Please <u>Contact our office</u> to receive your login Credentials.

We will get back to you with Login Credentials within 1 business day. If you need immediate assistance - please call us at: 866-445-9872

- 2. After Login your inventory and Customers' information will automatically be downloaded to your mobile device. You are now ready to use the app to place orders and Sales reps can also use it to request returns (Customers need to contact our office for return requests).
- 3. Your Menu allows you to:
 - a. View your customers list and start an order, or a return for each customer by clicking the three dots on the customer field, it also allows you to see all the customer sales history order history by clicking on dashboard See image on the right.
 - b. The setting's field on the menu will take you to see the status of your inventory, images, customers' specific prices, customers' list, customers' balance, order history backup, and restore order history backup Products, Images, and Customers are updated twice a day automatically (red arrow) and Specific Prices, Customer Balances, Backup Order History, and Restore Order History are updated once a day automatically (blue arrow), but you can update them anytime you want by going to this screen and clicking on the import option as seen in this image.



4. Customer List Last Order Date: A new function to the iPad App is viewing your customer list with the last order date. When you pull up your dashboard you can select Customer List w/ Last Order Date. You can now see that the first customer on your list is going to be the one you either have not visited or that you have not visited in a while and need to visit first. The customers you just placed orders for will now be at the bottom of your list so that you do not accidently place another order for them before it is time. See below images for reference.

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95	36. 5.58	28335.98	27.95 7920.60 11970eee	06298 Simoniz 6002 761-321-1933, 92146, MALDEN, MA	Last order date: 2021-12-15 Last order amount: \$417.68		As you can see h	ere, the Last Order	Date: for the	is \$68.64.
Zone	Customer List w/ Last Order Date	Update © Customer List	Update © Product List	07444 Simoniz 6005 603 898 1850, 3950, NASHUA, NH	Last order date: 2021-12-18 Last order amount: 8104.74		You would want have not had an	to visit this custon order taken in ove	ner soon sine er 3 months.	:e they
iales Comparis	on Month	Vier Codurts Uier Shortcut to *Open	Hea Poist Let Order History	12494 SPONGE BROTHERS CAR WASH AND LUBE 205-891-8910, 04477, ORANGE, CT	Last order date: 2022-1-2 Last order amount: \$36.37	•••	15310 FERNAND WASH 617-298-0524, 02126	Z XPRESS CAR Lai 20 Lai MATTAPAN, MA \$64	st onder date: 21-11-8 5 order amount: 8.64	
0,000				15444 SPLASH HAMDEN #51 UNLIMITED MARKETING 205-281-2274, 04514, HAMIPIN, CT	Last order date: 2022-1-2 Last order amount: \$152.50		06302 Simoniz #0 417-387-8545, 2149,	Lai 34 20 NFRETT, MA Lai SS	st ander date: 21-11-0 sl order amount: 2.54	
Current MontH	Selévionth Sale		e New Safe	15437 SPLASH DARIEN #49 UNLIMITED MARKETING 208-455-8778, 34500, DARIEN, CT	Last onder date: 2022 1 23 Last order amount: \$113.84	-	06299 Sonny's #0 781-598-2322, 01903	01 Lat 200 DYNN, MA Lat 823	st onder date: 21-11-6 sl onder amount: 312.25	
		_			_			-	_	_



5. Order History by Date Range: Another new function to the iPad App is viewing your order history within a specific date range. When you pull up your dashboard you can select Order History at the bottom right. On the next screen you will see a list of orders, In Process Order (if you have any you have not submitted) and Completed Order; if you look right beside the search bar you will see a filter sign, click the filter sign and it will take you to a calendar. On the calendar page you will then select the date range. This would be useful if you wanted to double check how many orders you placed for a customer in a month, duplicate a specific order from a previous month, or find an order with a specific product that a customer may be asking about. The first month it is going to show is the current month if you take your finger and scroll down you will see the previous months. Once you find the month and date range click on the days as seen in the images below. Click save. Then a list of the orders/credits will pull up from that date range from newest to oldest. See images for reference.

12:25 🛄	12;25 🗓 🛛 📾 🔹 🎕 橡 🕸 🗐 58% 🚔	12;26 🗓 🕲 🔛 💩 📽 🕸 🌾 🖬 58%	12;26 🗓 🛛 🖬 🔹 🖄 🕸 🏶 🗐 🗐	12:26 🗓 🕲 🖬 🔹 🎕 🕸 🕸 🕈 🗘 🌾 🗐 58% 🛢
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* -40.64	06299 Sonny's M001 2022-1-27 781-595-2822, 01505, LTHN, MA	December 2021	December 2021	Completed Order
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Total Orders Total Sales Sales Last % This Month MTD Month to Date	16097 SPLASH WESTPORT #70 UNLIMITED MARKETING 2022-1-23 201-36/-5665, 0858, WESTPORT, CT	5 6 7 8 9 10 1	5 6 7 8 9 10 11	e 17-337-0915, 2146, EDWE MARKED EVERITT, MA
e 27.95	15340 CEBMANDEZ VBDERE PAD WARH	12 13 14 15 16 17 1	8 12 13 14 15 16 17 18	You will see above; Filtered by date from 2021-12-1 to 2021-12-15. The first item is an order that was placed on 12/15/21, 56 line items, for a total of \$1474.30.
95 36256.58 28335.98	13310 FENGANDEZ KINESS CAR WASH 2022.1-22 617.0936004, 02126, MATTAPAN, MA	19 20 21 22 23 24 2	5 19 20 21 🔶 23 24 25	The one below is a credit taken back on 12/13/21, 3 line items, for \$7.78.
Customer Customer List Update Q Update Q Dudut	Completed Order	26 27 28 29 30 31	26 27 28 29 30 31	You can view these by clicking view. These are in numerical sequence from the newest date chosen to the
Date List List	12402 SPLASH HAMDEN #51 RETAIL	January 2022	January 2022	oldest date chosen.
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Sales Comparison Month Shortcut to Order History	13403 CRI ACH	2 3 4 5 6 7 8	2 3 4 5 6 7 8	SOUTHBURY #73
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BA	HANDEN, CT	16 17 18 19 20 21 2	2 16 17 18 19 20 21 22	
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P D O	New Return Transmit all New Service New Order orders Report	30 31	30 (31)	New Return Orders Report New Order

6. To start a new order, you can click on the "New Order" icon at the bottom part of your main screen called "Dashboard" – see image on the left or go from the menu to your customers list and click on the three dots and select New Order –see image on the right.

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5. Once you clicked on new order you will see the order entry screen showing the items you can order and the items availability – you can use the "List Mode" that is the default that this screen comes at, or you can click on the Gallery/Grid View option on the right of the search bar to change to the Gallery.

List View

Gallery View







A. Tracking Your Inventory and Order Pricing:

1. Real Time Inventory – When using your iPad, you are connected directly with our inventory in real time therefore, you will see exactly what we have in our warehouse at any given time. This should help with ordering out of stock items and making sure orders are sent complete.

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,	Customer ID:	16055 PERSONAL TOUCH	H I	Item 1	No.	Ianual 01443						Inventory It	em	
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2. Display to Each – If you see that the display is out of stock, but we have multiples of the each or the each is out of stock but we have the display, you can order this item and we will send them complete. The out of stock is internal and not true inventory for displays and each only.

SUPERIOR AUTO EXTRAS



- 3. Tracking Pricing Budget When ordering on the iPad, pricing is accurate for each customer. You will no longer need to order more than you normally would because of discounts. Each customer's price list is automatically uploaded to the iPad so when you are given a budget for a customer, and you place an order with all in stock items, the customer will receive the entire order complete. This helps the customer to keep from having bare walls, they can sell more, you will have a better commission, and you will have a much happier customer!
- 4. Just a side note Please check your customer's balance on the customer's dashboard prior to placing the order. If you have a good report with your customer, you could mention to them any open balances that are past due and see if you can obtain payment. This helps the office to immediately process the new order you are taking instead of having to place the order on hold and contacting the customer and you. This will speed up the process for the customer of receiving the order, get your commission on time, and usually helps with the communication between you and your customer.



B. Order entry: you can use several methods to enter the requested quantities:

- 1. Click on the + sign to add 1,
- 2. Click on the "Pack" option to add the pack quantity appearing in purple.
- 3. Click on the item line to open an "Onscreen" keyboard that will allow you to enter different quantities and see a large image of the item as seen in the image below.
- 4. Some users like to mark items that they chose NOT TO ORDER so they won't order them later by error to do so you can use the √ mark that can be entered to the item quantity and will indicate that you checked this item and decided not to order it – you can input the √ sign to the item by clicking on the (-)

symbol on the order entry main screen when the quantity is 0 – this will change the quantity to $\sqrt{-}$ or by clicking on the $\sqrt{-}$ sign on the item "Onscreen" keyboard – this will mark the $\sqrt{-}$ button Green and input the $\sqrt{-}$ sign to the item quantity.



See examples on the following images:



7. Once you completed order entry you can save the order or transmit it directly to our system. -

- a. Click "Done"
- b. Answer the "Service Questions" on your Screen.c. Click "Save&Exit" or click "Transmit to Office"

2:23 🗉 🖬 🖄 🕸 🖏 🔍 🔊 5	G 🗐 48% 💩
Customer ID: 06299 Sunny's #001 Customer Dataile: 200 (XNNWAY 781,528	2022-1-2
Order Summary: 36 Items \$23.76	PARTY.
Customer ID: 06299 Sonny's #001	
Customer Details: 700 LYNNWAY, 781-598-2302	
Customer Details:	
700 LYNNWAY, 781-598-2302	
cwm001@washdepot.com	
P/O Number	
	~
Instructions to Office	
	0/240
Notes to customer	
	0/150
Met with owner/manager	
Suggested item to add	
C	
Suggested item to remove	
Processed returns	
l eft catalog	
Save & Exit Transmit to Office	Quit



- d. Before transmitting to office make sure you are connected to the internet this will send the order in and give you a green bar notice that the order was transmitted.
- e. If you are not connected to internet Save the order and transmit it later when you have solid internet connection.
- f. Orders are automatically saved if you transmit them to the office in your orders screen (Access it from your menu) as "Completed orders", orders that were not yet transmitted to the office are saved on the same screen as "In Process Orders" – you can get back to them and display them or edit them before sending them to the office.

= •	6	Orders		?	å
Search				C	2 7
n Process	s Order				
	16207 Patrick Al 901-794-2988, 3814	malem New 1, Memphis, TN			1
	16207 Patrick Al 901-794-2988, 3814	malem New 1, Memphis, TN			-
	06330 Sparkling 901-377-9693, 3813	Image #023 4, BARTLETT, TN			1
Complete	ed Order				
	16207 Patrick Ali 901-794-2988, 3814	malem New 1, Memphis, TN	2021-9-17	1 line items Total: 0.85	View
	16207 Patrick Al 901-794-2988, 3814	malem New 1, Memphis, TN	2021-9-17	3 line items Total: 2.55	View
	16207 Patrick Al	malem New	2021-9-14	1 line items	View
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Orders Screen

"Orders In Progress" Screen

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I	01018 LF \$0.85	ttle Tree Air Freshener - I	lubble Gum	24	\$20.40
100	01019 LP \$0.85	ttle Tree Air Freshener - I	Rainforest Mist	24	\$20.40
		1 - 11 - 1	<		
Order 5	ummary:	5 Items \$102.00			-
Custom	er ID:	16207 Patrick Almalem	New	(6	dit
Custom	er Details: !	5678 Distribution Dr, 9	01-794-2988	See. 2	
Dele	te Order	Send email	Done	Transmit	



	Order Summary	0	2
Search		Q	•
	01000 Little Tree Air Freshener - Royal Pine \$0.85	1	\$0.85
1	01011 Little Tree Air Freshener - Cinnamon App \$0.85	ole 1	\$0.85
	01015 Little Tree Air Freshener - New Car \$0.85	1	\$0.85
Order Su	mmary: 3 Items \$2.55		
Customer	Details: 5678 Distribution Dr, 901-794-2988		
Duplica	ate to Draft Send email Done	Transmi	



- h. You can also email your complete order by clicking on the email option at the bottom of the completed order screen.
- Please note an automated email is being sent to your customer on any order or return you are doing in case the email address field on the service report has an email address – if we have an email address in our system – it will automatically populate this field – you may change it if you want or add a new email if this field is empty.
- 8. Returns: For Salesperson only same logic and instructions as orders please not your returns screens will have the text in RED to make sure you are aware that you are making a return and not an order.

