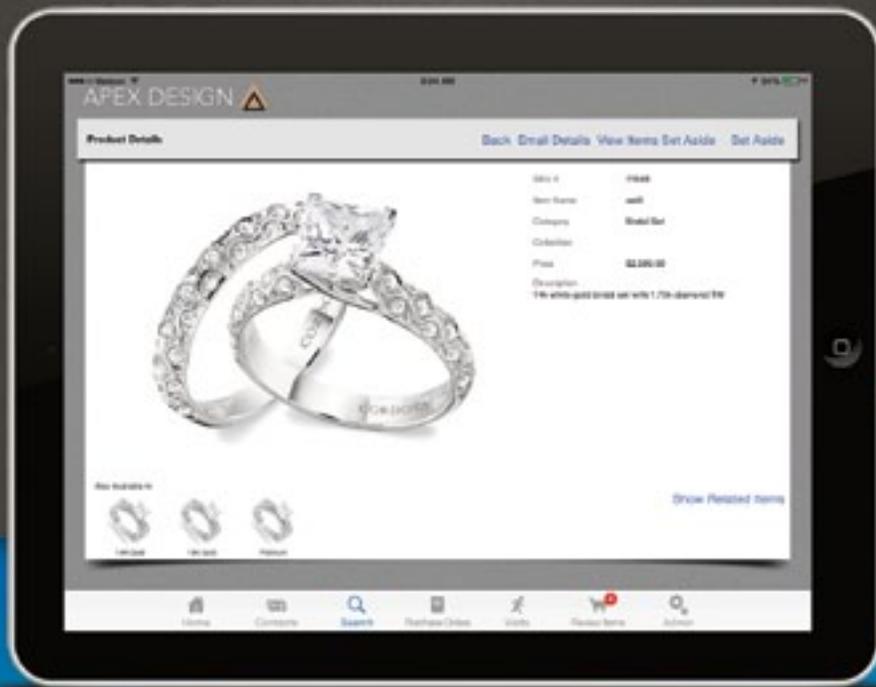


REPS[®]

RELIABLE ELECTRONIC PRODUCT SALES



USER GUIDE

Legal Notices

This guide is copyrighted © by the Harmon Group with all rights reserved. Under copyright laws, this guide may not be duplicated in whole or in part without the written consent of the Harmon Group.

REPS is a trademark or registered trademark of Harmon Group. This product and user guide includes intellectual property (including trademarks) owned, registered and/or licensed by/from respective third parties. Use of this product is subject to the acceptance of the license agreements included in this product.

Product features, specifications, system requirements and availability are subject to change without notice.

Harmon Group

807 3rd Ave. S Nashville, TN 37210

For company and product information, visit us on the web at www.harmongrp.com.

Technical Support (USA)

For technical support, visit jewelryreps.com.

Table Of Contents

- Chapter 1: Getting Started..... 4**
 - Program Concept..... 5
 - Reps Terms 6

- Chapter 2: Quick Start..... 7**
 - Opening Reps 7
 - Reps Home Screen 7
 - Create A Tray..... 8
 - Create A Visit 8
 - Start A Visit 9
 - Finalize Order And Edit Terms & Conditions, Or Apply A Discount..... 10

- Chapter 3: Home..... 11**
 - Reps Home Screen 11
 - Internet Connectivity 12
 - Update Reps..... 12

- Chapter 4: Contacts..... 13**
 - Add A Contact 13
 - Edit A Contact..... 13

- Chapter 5: Search 14**
 - Search For A Product 14
 - Scan A Product Barcode 14
 - Email Product Details 15

- Chapter 6: Purchase Orders 16**
 - Review Or Resend A Purchase Order..... 16
 - Check Order Status 16

- Chapter 7: Visits 17**
 - Create A Tray..... 17
 - Create A Visit 18
 - Manage Trays 18
 - Edit A Tray 19
 - Delete An Upcoming Visit..... 19
 - Reschedule An Upcoming Visit..... 19
 - Start A Visit 20
 - Finalize Order And Edit Terms & Conditions, Or Apply A Discount..... 21

- Chapter 8: Review Items 22**

- Chapter 9: Admin 23**

Program Concept

REPS is designed to mimic many of the processes that jewelry reps have been using for decades. Consider some of the following comparisons that show how intuitive REPS should feel to jewelry reps.

Jewelry Rep Without REPS

- Schedules appointments on a printed calendar
- Stores contacts in an address book
- Conducts visits by using a GPS to find the location
- Creates trays of products that are on-hand by carrying a large inventory of expensive products for the jeweler to review
- Allows customer to review items by looking at them closely
- Sets aside items from trays that the jeweler wants to consider
- Provides printed product information, when available
- Writes up a purchase order by manually entering all of the product SKUs, desired quantities, and order specifics, and obtains customer's signature
- Regularly checks purchase orders with the Home Office to ensure product has shipped and payment has been received

Jewelry Rep With REPS

- Schedules appointments on the REPS electronic calendar
- Stores contacts within REPS, complete with notes, reminders for birthdays, etc.
- Conducts visits by using REPS built-in Maps GPS system
- Creates digital trays from a limitless number of products loaded into REPS for the jeweler to review
- Allows customer to review items by viewing alternate product images and available metals, even at 360-degrees*
- Sets aside items from trays that the jeweler wants to consider in any available metal
- Provides emailed information on any product loaded into REPS
- Generates a purchase order based on what the jeweler has selected, obtains customer's signature, and prompts to email the purchase order to both the customer and the Home Office
- Regularly checks purchase orders within REPS, which are updated by the Home Office to provide an order status, indicating where the order is in process

These are just a few of the ways that REPS is designed to make the program easy to use and simple to adopt for jewelry representatives. Since we are always looking to improve REPS, we welcome your feedback. Visit jewelryreps.com to send us your comments and suggestions for the program.

**Alternate product images, metal variations, and 360-degree photography must be loaded into REPS.*

REPS Terms

Dialog Box

Any box of information that appears as a pop up and requires a button press to close while interacting with REPS.



Tab Bar

The row of icons at the bottom of the screen, which consist of Home, Contacts, Search, Purchase Orders, Visits, Review Items, and Admin.



Picker

The scrollable wheels that resemble slot machine reels, Pickers allow you to make a selection from a list of available options by scrolling up or down until your desired selection is highlighted in the center of the Picker.



Popover

The box that appears from a button in a manner similar to a website drop down menu.

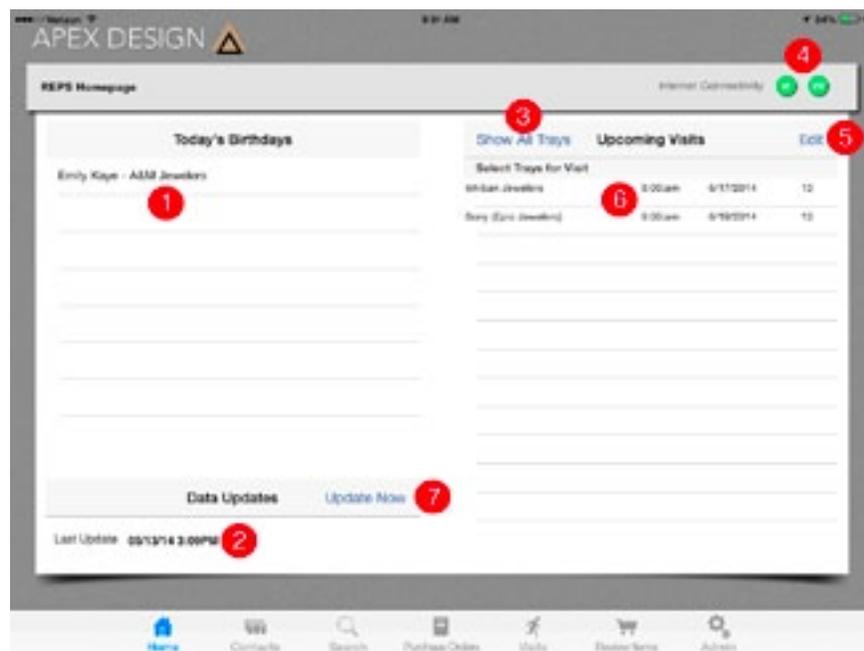
Chapter 2: Quick Start

If you want to jump straight into REPS, this chapter provides simple step-by-step instructions for the most common uses of the program.

Opening REPS

1. To open REPS, touch the REPS icon on your iPad. The REPS loading screen appears briefly before revealing the Login screen.
2. Touch within the Privacy Password field in the middle of screen. The keyboard appears.
3. Type in your password and touch the blue arrow, located on the right. The Home Screen appears.*

*These instructions apply if this is not the first time you are opening REPS, or if Harmon Group has preloaded the iPad.



1. Lists birthdays occurring today. Touch one to display relevant contact information.
2. Shows date of last data update received from the Home Office.
3. Touching the Show All Trays button allows you to browse through every tray that has been loaded into REPS.
4. The “e” and “W” symbols stand for email and Web, respectively. If they are green, this means REPS is connected to the Internet and you have an email account set up on your iPad.
5. Touching the Edit button allows you to edit or delete upcoming visits.
6. Lists upcoming visits you have scheduled, along with the client name, appointment time, date, and number of trays.
7. Update Now button turns red when a data update is available.
8. REPS program navigation referred to as the Tab Bar, which is accessible from anywhere within REPS—touching the Home button on the left side will return you to this screen.

Create a Tray

1. To create a tray, touch the Visits button in the Tab Bar. The Upcoming Appointments screen appears.
2. Touch the Create Tray button located at the top. The Create a Tray screen appears.
3. Enter a name for the tray in the Tray Name field by touching within the empty field.
4. Give the tray a group name by touching within the empty field marked Tray Group.
5. When finished entering a tray and tray group name, touch the save tray button, located on the right side of the keyboard.
6. Using the scrolling Picker that shows 2x Tray, 3x Tray, etc., scroll to the number of products you wish to display in the tray until the correct number resides in highlighted section at the center of the Picker.
7. Add products to the tray by scrolling to the desired product(s) on the right, under Available Products, and touching the Add button. The Added Dialog Box appears with the product SKU you selected. Touch OK. You can also search for products using the Filter by SKU, item name, category or collection field, located at the top right. To conduct a search, touch within the empty search field and type in the desired SKU, item name, category or collection number then touch the blue arrow, located at the top right.
8. If a product is added to the tray by mistake, touch the product's image in the tray window at the bottom left to remove it from the tray.
9. Once you have added all desired products and/or the tray is full, touch in the tray name space. The keyboard will appear. Type in the name you wish save the tray. Next touch in the tray group space and type in the tray group. Touch the Save Tray button, located at the bottom right. The Tray Saved Dialog Box appears. Touch OK.

Create a Visit

1. To create a visit, touch the Visits button in the Tab Bar, located at the bottom. The Upcoming Appointments screen appears.
2. Touch the Create Visit button, located at the top right. The Create Sales Visit screen appears.
3. Touch the Choose Client button, located at the top left. Your contacts appear in a Popover. (If no contacts appear, see Add a Contact on page 13.)
4. Touch the appropriate client name and touch the Close button, located at the top right of the Popover.
5. Use the scrollable Picker to select a visit date and time.
6. On the bottom left, enter any relevant notes into the Notes field by touching within the empty field. The keyboard appears.
7. When finished, touch the save visit button, located on the right side of the keyboard.
8. On the right side of the Create Sales Visit screen, all trays are automatically included in the visit in the default order.* To prevent trays from being added to the visit, touch the tray(s) you do not want to use. The tray(s) you do not wish to show will turn white.
9. To adjust the order of the trays, place your finger on the three horizontal lines located on the right and the associated tray will highlight. Without lifting your finger from the screen, drag the tray to the desired position.
10. When finished creating your visit, touch the Save Visit button, located at the bottom right.

**To change the default tray order, see page 18. (#3-#5 under Manage Trays)*

Start a Visit

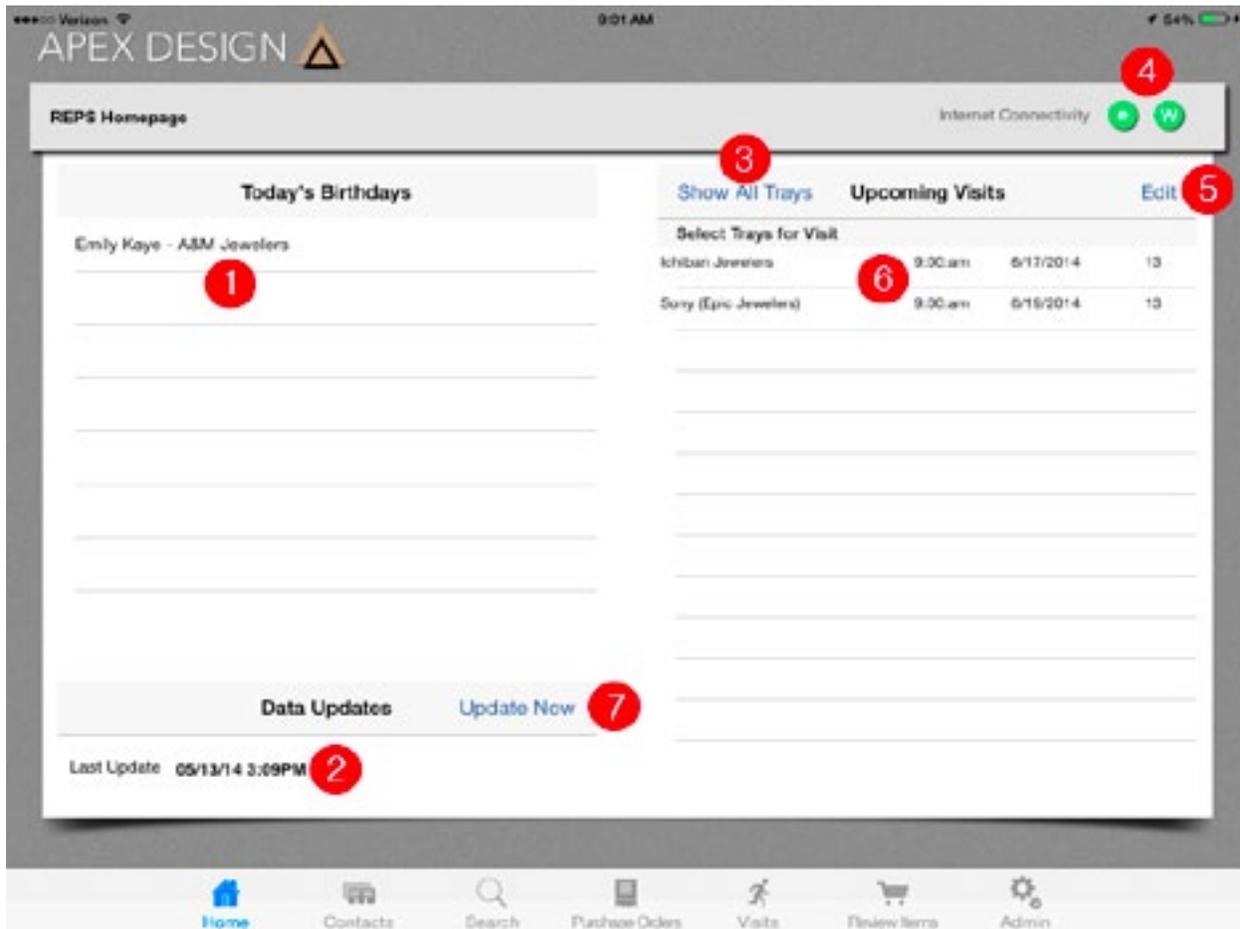
1. To start a prepared visit from the Home screen, touch the Client Name, located on the right, under Upcoming Visits (if no client names appear, see Create a Visit on page 8). Your first tray appears.
2. To move to the next tray, place your finger in the middle of the screen and swipe from right to left. Reverse this process to move to the previous tray.
3. To view product details or a large image, touch the image of the product you wish to view. The Product Details screen appears.
4. Touch the main image to see a larger version. Touch the image again to close the enlarged image.
5. If there are alternate product images, they will appear at the bottom left. Touch one of the images and it will appear in the main image space. If the product is available in different metals, those images will appear under the heading "Also available in" at the bottom left. Touch one of the images and the image will appear in the main image space and the product details will update on the right side. If there are items related to product, the Show Related Items button appears at the bottom right. Touch the Show Related Items button and a list of related items appears in a Popover.
6. If the client wishes to add the product to an order, touch the Set Aside button, located at the top right. This is equivalent to adding the product to a shopping cart. Once an item is set aside, a small number will appear next to the Review Items button in the Tab Bar, located at the bottom right. This number will increase as items are set aside. If your client does not wish to set aside the product you are viewing, touch the Back button, located at the top middle, to return to the tray.
7. Once the client is finished selecting products, touch the Review Items button, located within the Tab Bar at the bottom right. The Items Set Aside for Review screen appears.
8. If the client wishes to view larger images or product details, touch the Review Items Set Aside button located at the top right. The Please Review Your Selected Items screen will appear, allowing you to touch each product to access product details.
9. Review your selected items then touch the Back to Summary of Items Set Aside button.
10. To adjust product order quantities from the Set Aside screen, touch the quantity number in each product row. A Dialog Box appears. Touch the keypad to indicate the new quantity. When finished, touch the Done button, located on the keypad at the top right.
11. To complete the order, touch the Finalize Order button, located at the top right.

Finalize Order and Edit Terms & Conditions, or Apply a Discount

- Once you have touched the Finalize Order button, the purchase order appears.
- Review the purchase order for accuracy then add any special notes by touching within the Special Notes field at the bottom left.
- To edit the purchase order's terms and conditions, touch the Edit Terms button, located at the bottom right. The Terms & Conditions screen appears.
- On the left, your company's various terms and conditions options are selectable. Touch the terms and conditions you wish to apply to the order. If the terms are correct, touch the Apply button, located at the top right. The selected terms have been applied to the order and the purchase order appears.
- If you wish to apply a discount to the order, place your finger on the screen at the top right, approximately one inch from the right, and then lift your finger. The discount picker appears (this is a hidden button so it may take a few tries to touch in the correct space).
- Scroll through the Picker until the desired discount percentage is highlighted in the middle of the Picker. Touch the Apply Discount button. The discount picker disappears and the Discount field is added to the bottom of the purchase order, containing the discount applied to the order.
- When finished, ask your client to review the purchase order for accuracy.
- When they are finished reviewing the purchase order, ask your client to sign with their finger in the blank box, which says, "Please sign below to confirm this order."
- After the client has signed the purchase order, touch the Finalize button at the bottom right. The email Dialog Box appears.
- The recipient's email address within the To: field defaults to the client's email address in your contacts. It will be blank if there is no email address associated with the client. To add an email address or replace the current email address, touch within the To: field and type the email address(es). If you wish to include a message, touch within the main field, just above the PDF icon, and type your message.
- When finished, touch the Send button, located at the top right. This sends the purchase order to the client and the home office. If you do not wish to send, touch the Cancel button at the top left. (You can then save the email draft by touching Save Draft, which saves the email draft to your iPad's email system. Or, you can delete the email draft by touching Delete Draft. Please note that deleting the email draft will not delete the purchase order.)
- The order details are also automatically uploaded to the REPS Cloud system as soon as an Internet connection is available.

Chapter 3: Home

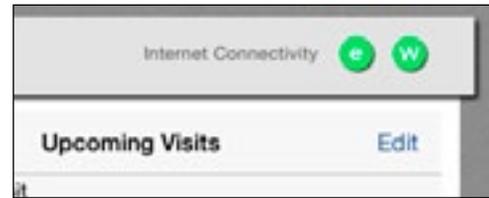
REPS Home Screen



1. Lists birthdays occurring today. Touch one to display relevant contact information.
2. Shows date of last data update received from the Home Office.
3. Touching the Show All Trays button allows you to browse through every tray that has been loaded into REPS.
4. The “e” and “W” symbols stand for email and Web, respectively. If they are green, this means REPS is connected to the Internet and you have an email account set up on your iPad.
5. Touching the Edit button allows you to edit or delete upcoming visits.
6. Lists upcoming visits you have scheduled, along with the client name, appointment time, date, and number of trays.
7. Update Now button turns red when a data update is available.
8. REPS program navigation referred to as the Tab Bar, which is accessible from anywhere within REPS—touching the Home button on the left side will return you to this screen.

Internet Connectivity

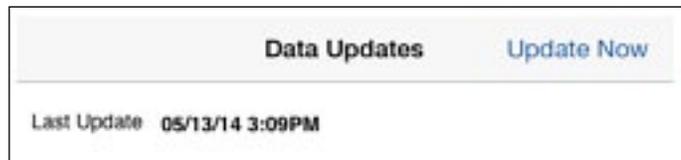
1. To see if REPS is connected to the Internet, reference the Internet Connectivity icons, located at the top right. The Internet Connectivity icons consist of an “e” for email, and “W” for Web.
2. If both of the icons are green, then REPS has both Internet and email access.
3. If the “e” icon is red, then there is no email account set up on the iPad.
4. If the “W” icon is red, REPS is not connected to the Internet.



Note: You can conduct a sales visit without being connected to the Internet. However, no purchase orders or information can be transmitted until REPS is connected to the Internet.

Update REPS

1. To update REPS product data, ensure you are on the REPS Home page by touching the Home icon, located in the Tab Bar at the bottom left. The Data Updates section is located on the left side. Updating REPS requires an active Internet connection. Check to ensure the two icons, located at the top right, next to Internet Connectivity, are green.
2. If an update is available, the Update Now button, located at the bottom left, will be red.
3. Touch the red Update Now button. The update process begins and a Dialog Box appears informing you that the update is occurring. Do not close REPS or turn off your iPad while the update occurs.
4. When the update is complete, the Update Now button will turn blue and the date next to Last Update, located at the bottom left, will reflect the current date and time.



Chapter 4: Contacts

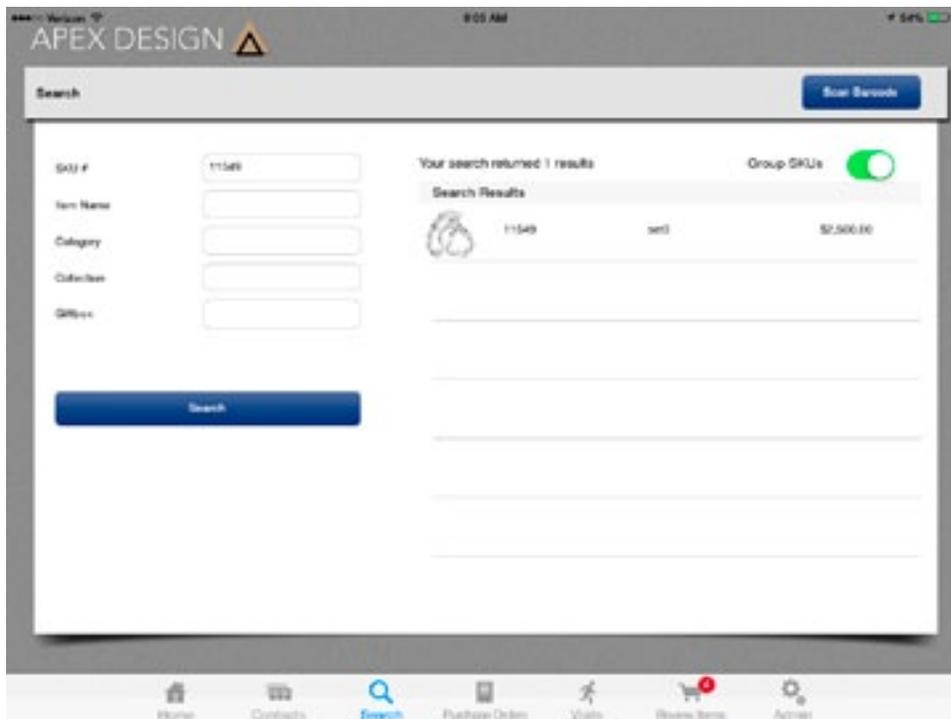
Add a Contact

1. To add a new Contact, touch the Contacts button, located on the bottom left of the screen in the Tab Bar. The Contacts screen appears.
2. Touch the Add New Contact button, located at the top right. The Contact Information screen appears.
3. Enter all contact information by touching within the empty fields, typing in the information, and then touching the various tabs at the top, which include Business Information, Contact, Business Address, Billing Address, Shipping Address, and Terms & Conditions. Some fields have a blue box with three lines next to the field. Touch the blue box to choose the appropriate data from the list that appears in a Popover for the associated field.
4. The Terms & Conditions button allows you to establish the terms and conditions that apply to the contact you are adding. Simply touch the Terms & Conditions button, located at the top right. The various terms your company offers will appear on the left side. Touch the terms you wish to apply to the contact you are adding.
5. When finished entering contact information and terms, touch the Save Contact button, located at the top right.

Edit a Contact

1. To edit a Contact, touch the Contacts button, located on the bottom left of the screen. The Contacts screen appears.
2. Find and touch the Contact you wish to edit then touch the Full Details button, located at the bottom right. The Edit Contact Information screen appears.
3. Edit all contact information by touching within the fields, typing in the information, and then touching the various tabs, located across the top, which include Business Information, Contact, Business Address, Billing Address, Shipping Address, and Terms & Conditions.
4. The Terms & Conditions button allows you to establish the terms and conditions that apply to the contact you are editing. Simply touch the Terms & Conditions button, located at the top right. The various terms your company offers will appear on the left side. Touch the terms you wish to apply to the contact you are editing.
5. When finished editing contact information, touch the Save Contact button, located at the top right.

Chapter 5: Search



Search for a Product

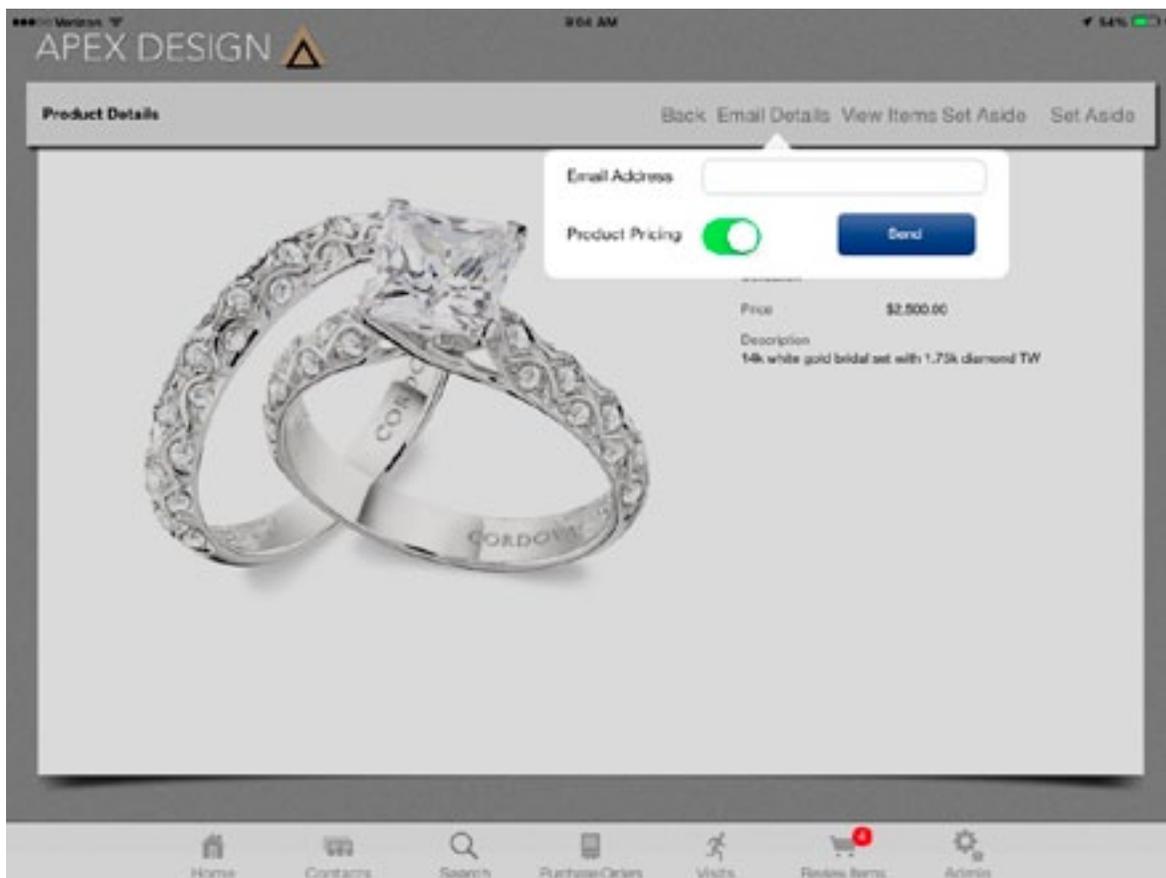
1. To search for a product, touch the Search button in the Tab Bar at the bottom of the screen. The Search screen appears.
2. You can search for a product using any of the search criteria located on the left. For example, to search by SKU, touch within the empty field next to SKU #. The keyboard appears.
3. Type in all or part of the SKU number you wish to find.
4. When finished, close the keyboard by touching the keyboard icon, located on the right side of the keyboard.
5. Touch the Search button on the left. All products with SKU numbers that match your search criteria will appear on the right. By default, the search will group SKUs together. For example, if a ring that is available in three different metals appears in your search, only one available variation of that ring will appear. If you want the ring to appear in the search results with all of the various metals, touch the green toggle at the top right next to Group SKUs. The toggle will switch to white and your search results will automatically update to include all product variations relevant to your search criteria.
6. If the product you are searching for appears on the right, touch the product to view product images and details, email product details, or set the product aside.

Scan a Product Barcode

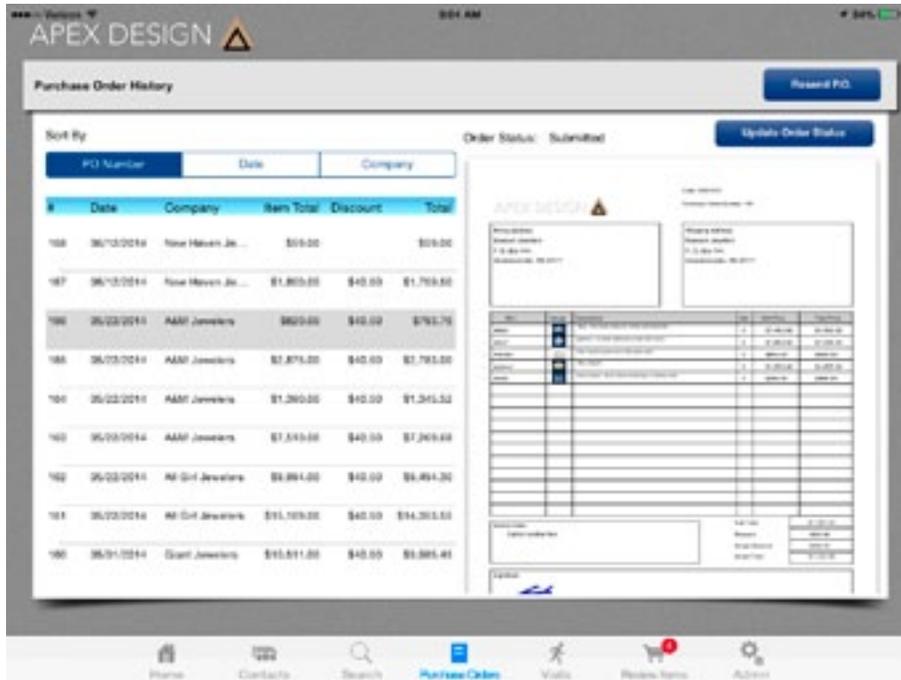
1. To scan a product barcode, touch the Search button in the Tab Bar at the bottom of the screen. The Search screen appears.
2. Touch the Scan Barcode button, located at the top right. The iPad's camera view appears.
3. Place the barcode on a flat, well-lit surface and position the iPad above the barcode so the barcode is clearly visible on the iPad screen.
4. Hold the iPad in place until the Search screen appears, listing the relevant product(s).
5. Touch the product to view product images and details, email product details, or set the product aside.

Email Product Details

1. To email product details, navigate to the product you wish to send.
2. Touch the Email Details button, located at the top right. A Dialog Box appears.
3. Touch within the Email Address field and type in the recipient's email address.
4. To include pricing, leave the toggle switch ON. To remove pricing, touch the switch to toggle it OFF.
5. Touch the Send button and the email Dialog Box appears, allowing you to enter a message into the body of the email.
6. Touch the Send button when finished.



Chapter 6: Purchase Orders



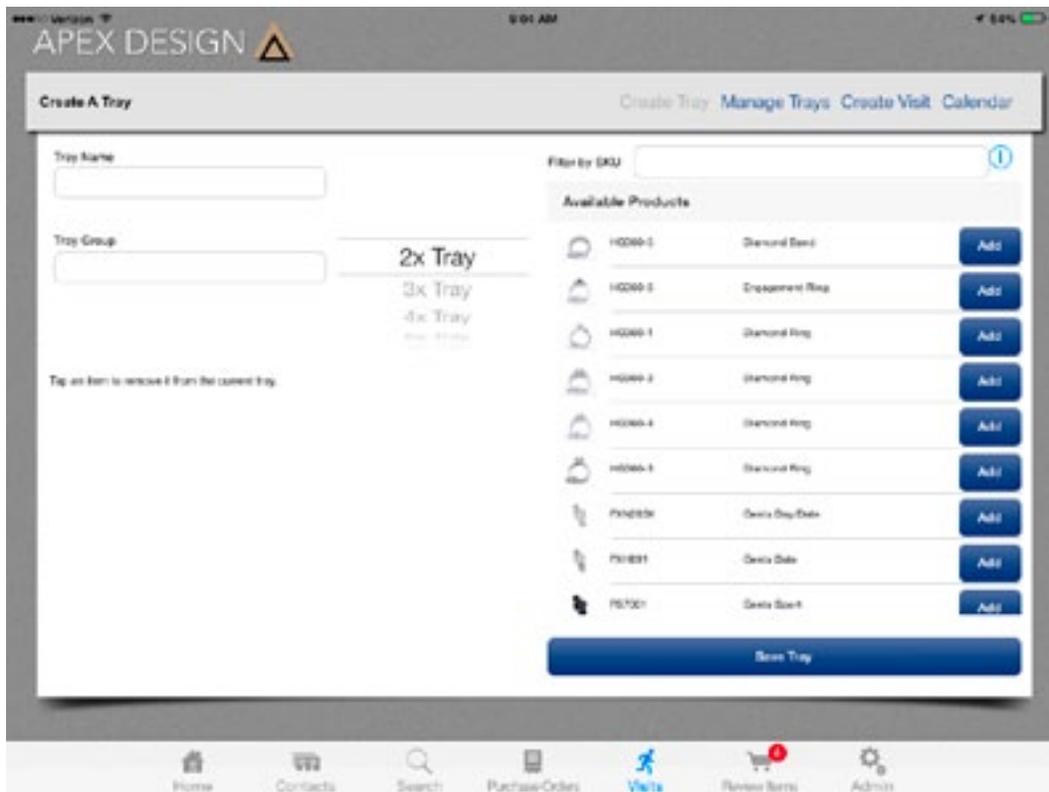
Review or Resend a Purchase Order

1. To review a purchase order, touch the Purchase Orders button in the Tab Bar, located at the bottom of the screen. The Purchase Order History screen appears.
2. By default, all purchase orders are sorted by PO Number. To sort by date or company, touch the Date or Company buttons, located at the top left.
3. When you have located the desired purchase order on the left, touch it. The purchase order appears on the right.
4. To resend the purchase order, touch the Resend P.O. button, located at the top right. The email Dialog Box appears.
5. Enter the desired recipient's email address by touching within the To: field and typing the email address(es). If you wish to include a message, touch within the main field, just above the PDF icon, and type your message.
6. When finished, touch the Send button, located at the top right. If you do not wish to send, touch the red Cancel button, located at the top left. You can then save the email draft by touching Save Draft or delete the email draft by touching Delete Draft. Please note that deleting the email draft will not delete the purchase order.

Check Order Status

1. To check the status of an order, touch the Purchase Orders button in the Tab Bar, located at the bottom of the screen. The Purchase Order History screen appears.
2. By default, all purchase orders are sorted by PO Number. To sort by date or company, touch the Date or Company buttons, located at the top left.
3. When you have located the desired purchase order on the left, touch it. The purchase order appears on the right.
4. The "Order Status:" text is located at the top. To update the status, touch the Update Order Status button, located at the top right. If the order status has been changed by the Home Office, it will now update in REPS.

Chapter 7: Visits



Create a Tray

1. To create a tray, touch the Visits button in the Tab Bar at the bottom. The Upcoming Appointments screen appears.
2. Touch the Create Tray button, located at the top. The Create a Tray screen appears.
3. Enter a name for the tray in the Tray Name field by touching within the empty field.
4. Give the tray a group name by touching within the empty field marked Tray Group.
5. When finished entering a tray group name, touch the keyboard icon, located on the right side of the keyboard.
6. Using the scrolling Picker that shows 2x Tray, 3x Tray, etc., scroll to the number of products you wish to display in the tray until the correct number resides in highlighted section at the center of the Picker.
7. Add products to the tray by scrolling to the desired product(s) on the right, under Available Products, and touching the Add button. The Added Dialog Box appears with the product SKU you selected. Touch OK. You can also search for products using the Filter by SKU, item name, category or collection field, located at the top right. To conduct a search, touch within the empty search field and type in the desired SKU, item name, category or collection number then touch the blue arrow, located at the top right.
8. If a product is added to the tray by mistake, touch the product's image in the tray window at the bottom left to remove it from the tray.
9. Once you have added all desired products and/or the tray is full, touch the Save Tray button, located at the bottom right. The Tray Saved Dialog Box appears. Touch OK.

Create a Visit

11. To create a visit, touch the Visits button in the Tab Bar, located at the bottom. The Upcoming Appointments screen appears.
12. Touch the Create Visit button, located at the top right. The Create Sales Visit screen appears.
13. Touch the Choose Client button, located at the top left. Your contacts appear in a Popover. (If no contacts appear, see Add a Contact on page 13.)
14. Touch the appropriate client name then touch the Close button, located at the top right of the Popover.
15. Use the scrollable Picker to select a visit date and time.
16. On the bottom left, enter any relevant notes into the Notes field by touching within the empty field. The keyboard appears.
17. When finished, touch the keyboard icon, located on the right side of the keyboard.
18. On the right side of the Create Sales Visit screen, all trays are automatically included in the visit in the default order.* To prevent trays from being added to the visit, touch the tray(s) you do not want to use. The tray(s) you do not wish to show will turn white.
19. To adjust the order of the trays, place your finger on the three horizontal lines, located on the right side and the associated tray will highlight. Without lifting your finger from the screen, drag the tray to the desired position.
20. When finished creating your visit, touch the Save Visit button, located at the bottom right.

**To change the default tray order, see page 18. (#3-#5 under Manage Trays)*

Manage Trays

1. To manage your product trays, touch the Visits button in the Tab Bar at the bottom. The Upcoming Appointments screen appears.
2. Touch the Manage Trays button, located at the top right. The Manage Trays screen appears.
3. To edit the order of the trays or to delete a tray, touch the Edit button, located at the top. Red circles with a minus symbol in the middle appear to the left of the trays while three horizontal lines appear to the right of the trays.
4. To delete a tray, touch the red circle with the minus symbol in the middle and the red Delete button appears on the right side of the tray. Touch the Delete button to delete the tray.
5. To edit the order of the trays, place your finger on the three horizontal lines located on the right side and the associated tray will highlight. Without lifting your finger from the screen, drag the tray to the desired position.
6. When you are finished managing the trays, touch the Save Order button, located at the top left.

Edit a Tray

1. To edit a tray, touch the Visits button in the Tab Bar. The Upcoming Appointments screen appears.
2. Touch the Manage Trays button, located at the top right. The Manage Trays screen appears.
3. Touch the Edit button, located at the top. Red circles with a minus symbol in the middle appear to the left of the trays while three horizontal lines appear to the right of the trays.
4. Touch the tray you wish to edit. The Create a Tray screen appears.
5. On this screen, you can modify the Tray Name, Tray Group, number of products the tray should contain, and you can also add or remove products to or from the tray. (If specific instructions are needed, see the Create a Tray instructions on page 17.)
6. When you are finished editing the tray, touch the Save Tray button, located at the bottom right.

Delete an Upcoming Visit

1. To delete an upcoming visit, touch the Home icon, located at the bottom left in the Tab Bar. The list of Upcoming Visits will then be located on the right.
2. Touch the Edit button, located at the top right. Red circles with a minus symbol in the middle appear next to the upcoming visits.
3. Touch the red circular symbol next to the upcoming visit you wish to delete. A red Delete button appears on the right side.
4. Touch the Delete button to delete the visit. The visit has been deleted.
5. If finished deleting upcoming visits, touch the Cancel button, located at the top right.

Start a Visit

1. To start a prepared visit from the Home screen, touch the Client Name, located on the right, under Upcoming Visits (if no client names appear, see Create a Visit on page 18). Your first tray appears.
2. To move to the next tray, place your finger in the middle of the screen and swipe from right to left. Reverse this process to move to the previous tray.
3. To view product details or a large image, touch the image of the product you wish to view. The Product Details screen appears.
4. Touch the main image to see a larger version. Touch the image again to close the enlarged image.
5. If there are alternate product images, they will appear at the bottom left. Touch one of the images and it will appear in the main image space. If the product is available in different metals, those images will appear under the heading "Also available in" at the bottom left. Touch one of the images and the image will appear in the main image space and the product details will update on the right side. If there are items related to product, the Show Related Items button appears at the bottom right. Touch the Show Related Items button and a list of related items appears in a Popover.
6. If the client wishes to add the product to an order, touch the Set Aside button, located at the top right. This is equivalent to adding the product to a shopping cart. Once an item is set aside, a small number will appear next to the Review Items button in the Tab Bar, located at the bottom right. This number will increase as items are set aside. If your client does not wish to set aside the product you are viewing, touch the Back button, located at the top middle, to return to the tray.
7. Once the client is finished selecting products, touch the Review Items button, located within the Tab Bar at the bottom right. The Items Set Aside for Review screen appears.
8. If the client wishes to view larger images or product details, touch the Review Items Set Aside button located at the top right. The Please Review Your Selected Items screen will appear, allowing you to touch each product to access product details.
9. Review your selected items then touch the Back to Summary of Items Set Aside button.
10. To adjust product order quantities from the Set Aside screen, touch the quantity number in each product row. A Dialog Box appears. Touch the keypad to indicate the new quantity. When finished, touch the Done button, located on the keypad at the top right.
11. To complete the order, touch the Finalize Order button, located at the top right.

Finalize Order and Edit Terms & Conditions, or Apply a Discount

1. Once you have touched the Finalize Order button, the purchase order appears.
2. Review the purchase order for accuracy then add any special notes by touching within the Special Notes field at the bottom left.
3. To edit the purchase order's terms and conditions, touch the Edit Terms button, located at the bottom right. The Terms & Conditions screen appears.
4. On the left, your company's various terms and conditions options are selectable. Touch the terms and conditions you wish to apply to the order. If the terms are correct, touch the Apply button, located at the top right. The selected terms have been applied to the order and the purchase order appears.
5. If you wish to apply a discount to the order, place your finger on the screen at the top right, approximately one inch from the right, and then lift your finger. The discount picker appears (this is a hidden button so it may take a few tries to touch in the correct space).
6. Scroll through the Picker until the desired discount percentage is highlighted in the middle of the Picker. Touch the Apply Discount button. The discount picker disappears and the Discount field is added to the bottom of the purchase order, containing the discount applied to the order.
7. When finished, ask your client to review the purchase order for accuracy.
8. When they are finished reviewing the purchase order, ask your client to sign with their finger in the blank box, which says, "Please sign below to confirm this order."
9. After the client has signed the purchase order, touch the Finalize button at the bottom right. The email Dialog Box appears.
10. The recipient's email address within the To: field defaults to the client's email address in your contacts. It will be blank if there is no email address associated with the client. To add an email address or replace the current email address, touch within the To: field and type the email address(es). If you wish to include a message, touch within the main field, just above the PDF icon, and type your message.
11. When finished, touch the Send button, located at the top right. This sends the purchase order to the client and the home office. If you do not wish to send, touch the Cancel button at the top left. (You can then save the email draft by touching Save Draft, which saves the email draft to your iPad's email system. Or, you can delete the email draft by touching Delete Draft. Please note that deleting the email draft will not delete the purchase order.)
12. The order details are also automatically uploaded to the REPS Cloud system as soon as an Internet connection is available.

APEX DESIGN

My Info
William Jewellers
P.O. Box 123456
Atlanta, GA 30333
United States

Shipping To
William Jewellers
P.O. Box 123456
Atlanta, GA 30333
United States

Item	Description	Price	Qty	Total
1	PLATE	\$10.00	1	\$10.00
2	BRACELET	\$1,000.00	1	\$1,000.00
3	RING	\$1,000.00	1	\$1,000.00
4	NECKLACE	\$3,204.00	1	\$3,204.00

Sub Total: \$6,204.00
Grand Total: \$6,204.00

Please sign below to confirm this order.

Finalize
Cancel
Send Order

Chapter 8: Review Items

The Review Items button in the Tab Bar functions as the shopping cart for orders. To see specific instructions on how the Review Items works, see Start a Visit on page 20.

Chapter 9: Admin

The Admin button is used to access an additional password protected section of REPS for administrative functions. If you need to use the Admin section, contact your Harmon Group account representative.