

# iREP User Guide

## Device Requirements

Cookies must be enabled, regardless of your device.

Requirements by Device:

- PC—Use Firefox 9.0.1 browser
- Android OS—Use Firefox 10.0 browser
- iPad—Use native Safari browser  
Operating system must be iOS 5.1.1 or greater

**Warning:** Other browser/OS combinations have not been qualified.

## Login Page

To Login:

Select the company.

Enter your *Username* and *Password*.

Select *Login* or *Enter*.

The iREP Home Page displays.

**Note:** The *Username* and *Password* must be set up by your company's iREP Administrator.

Additional information can be accessed through the links at the bottom of the page:





[Tech Systems, Inc.](#)—Select to view the Tech Systems, Inc website.

[Help](#)—Select to access Help documents.

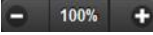

[Support](mailto:Support@techsystems.biz)—Select to e-mail [Support@techsystems.biz](mailto:Support@techsystems.biz)

## iREP Home Page

The Home Page displays when you first login and is the last page you access before you log out. Select one of the following buttons:

	Customers	Select to move to the Customer List Page. The Customer List Page allows you to view customer lists, drill down to more customer detail/history, and create a cart for a selected Customer/Ship To.
	Carts	Select to move to the Cart List Page. The Cart List Page allows you to view open carts (those which have not been submitted to the ERP application).
	Products	Select to move to the Product List Page. The Product List Page allows you to view product lists and drill down to more product detail.
	Help	Select to move to the iREP Help Documentation Page.






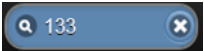


Two additional buttons display only at the bottom of the Home page:


	<p>Select the <i>Minus</i> or <i>Plus</i> to decrease or increase the size of the lettering throughout the iREP software.</p> <p>Select the center of the button to reset the size to 100%</p> <p><b>Note:</b> The size selection is retained for this user's future iREP sessions.</p>
	<p>Select <i>Log Out</i> when finished with your iREP session.</p> <p><b>Note:</b> You must log out of one device before you can log in on another device with the same <i>Username</i>.</p>

## General Page Layout for iREP

The Customers, Carts, Products, and Help buttons (detailed in the iREP Home Page section) display on each page. Use them to navigate between pages.

The following buttons display on the Customers, Products, and Carts Pages:

	Home	Select to move to the Home Page.
	All	<p>All customers/carts/products display.</p> <p>To sort the list, click on the title of one of the columns. An arrow displays at the top of the sort column. If you click the column a second time, the display order reverses.</p>
	Browse	Allows you to search specific groups. The browse options available are based on your company's request.
	Viewed	Displays the customers/carts/products that you have previously selected to view in detail.
	New Group	Select this button to create a new group of customers/carts/ products. The process of creating and managing a group is detailed later in this documentation.
	Search Box	<p>Enter a value in the Search Box. When your cursor leaves the Search Box, search results are returned to the page. (The fields that are used in this search have been selected by your company.) Once selected, use the x button in the Search Box to redisplay the original list.</p> <p><b>Note:</b> The Search will only search within the Group you have selected. If you wish to apply the search to the entire list, be sure you have selected the All group before applying the search.</p>
	Recently Entered	Select this button to display a drop down list of the previous 10 entries you have entered in the Search Box. To clear the previous search entry list, select <i>Clear Search History</i> at the bottom of the list.
	Switch View	Select this button to toggle between the list view and the tile view of the customers/products/carts.

	Page Navigation	The number of records on the current page and the total number of records in the view display. Use the arrows to select the previous or next page of records.
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General Scrolling—When the text does not fit within the window of your device:


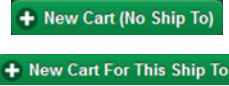

When using a PC, use the scroll bar. When a section needs to scroll both up/down and left/right, scroll to the bottom to locate the left/right scroll bar.

When using a mobile device, drag or swipe the text.

## Customer List Page

Use the Customer List page to view the customer list, drill down to more customer detail/history, and create a cart for a selected Customer/Ship To.

Additional buttons display on the Customer List Page:





	Current Customer	When a Customer has been selected, the customer number and name display.
	New Cart	After selecting a customer from the Customer List Page, the Customer Detail Page displays. From the Customer Detail Page, select the New Cart button to create a cart for the selected customer. Creating a Cart is detailed later in this document.
	Current Cart	When a cart is open, the current cart and the total of the products in the cart display.

## Product List Page

Use the Product List Page to view the product list and drill down to more product detail.

**Warning:** Prices display on this page. However, when you access the page before selecting a customer, the price that displays is the Base Price, not the customer-specific price. Before quoting a price to a customer, check that the *Current Customer* button at the bottom of the page displays the correct customer.




Additional buttons display on the Product List Page:

	Current Cart	When a cart has been created, this view is available to display products that are in the current cart.
	Purchased	When a customer has been selected, this view displays products that have been previously purchased by the specific customer. This display is the same as the <i>iWEB OE Last Bought Query</i> function.
	Current Customer	When a Customer has been selected, the customer number and name display. You may select this button to move to the Customer Detail Page for the customer. <b>Note:</b> If the customer button does not display at the bottom of the page, the Price that displays is the Base Price for the product.
	Current Cart	When a cart is open, the current cart and the total of the products in the cart display.

## Cart List Page

Use the Cart List page to view open carts (those which have not been submitted to the ERP application). When selected, the carts will be updated with the current pricing for the customer/product combination.

Additional buttons display on the Product List Page:

	Current Customer	When selecting the Cart List Page from a specific customer or cart, this view displays all carts for the current customer. (The number and name of the current customer displays at the bottom of the page.).
	Current Customer	When a Customer has been selected, the customer number and name display. You may select this button to move to the Customer Detail Page for the customer.
	Current Cart	When a cart is open, the current cart and the total of the products in the cart display.

## Help Page

Select to view additional help documentation. The Help documentation displays in a separate window.

## Create a Cart

1. Select your customer from the Customer List.

The Customer Detail page displays.

Customer Power Notes display in the Notes section of the page. If the note is required, the note section automatically expands and the required note is highlighted in yellow.

2. Select the customer ship to, if necessary, from the Ship To section of the Customer Detail page.

The Notes section of the Customer Detail Page displays any Ship To Power Notes. Required Power Notes are highlighted in yellow.

3. Select the *New Cart (No Ship To)/New Cart For This Ship To* button at the bottom of the Customer Detail page.

**Note:** The *New Cart (No Ship To)/New Cart For This Ship To* button will not display when the selected customer/customer ship to is Inactive.

4. The Product List Page displays. The Prices that display are specific to the customer/ship to.

Enter a quantity or use the *Minus* or *Plus* buttons to decrease or increase the quantity by 1.

As you enter quantities in the cart, the cart total at the bottom of the page is updated.

While entering products in the cart, if you change to a different Product List view, those products that have already been added to the cart will have the *Product Name* highlighted in yellow and the line number displayed to the left of the *Product Name*.

At any point during your entry process, the Current Cart tab in the Product List view will display all products in the cart.

#### Unit Conversion Products:

For a product with unit conversions, the *Unit* on the Product List is highlighted in green.

Select the product line to display the Product Detail page. All units that have been set up for the product display with their conversion factor and price. Enter a quantity for the desired unit of measure. You can order more than one unit of measure for a specific product.

#### OE Division Check Exception:

For a product set up with an OE Division Check, if the number entered is not divisible by the OE Division Check, the order quantity is rounded up to the next higher value that is divisible by the OE Division Check. Using the Minus or Plus buttons on this product will raise or lower the order quantity by the amount of the OE Division Check.

*Note:* When entering a negative quantity to return a product, the return quantity does not need to be a multiple of the OE Division Check.

#### Discontinued Products:

For a product that has been discontinued, the Quantity Available affects the ability to order the product.

If the Quantity Available is zero or less, the product cannot be ordered. The message displays: *Product Name Is Discontinued, Available Quantity Amount is Available for Sale.*

If the Quantity Available is greater than zero but less than the Quantity Ordered, only the quantity available can be placed on the order. The message displays: *Product Name Is Discontinued, Available Quantity Amount is Available for Sale.* The Quantity Ordered changes to the Quantity Available.

If the Quantity Available is greater than zero and greater than the Quantity Ordered, no message displays. The Quantity Ordered is not changed.

#### Prices & Costs Are Per:

For a product set up with *Price And Cost Are Per* value other than 1, the Price that displays is the Price for that number of units. After entering the quantity, the extension displays the correct value based on the product setup.

For example: A product is set up with *Price And Cost Are Per* value of 2 and a Price of 10 (2 units will sell for \$10). The Price that displays is \$10. When you enter a quantity of 8, the extended line total is \$40 (calculated as  $10/2$  times 8).

#### Related Products:

For products set up with related products, the Product Detail page for the parent product lists the related products, their quantities, and prices.

For products that are not set up to automatically explode their related products on the order, the related products can be selected for the cart from the parent's Product Detail page. After entering the quantity of the parent product, select the *View Full List* button in the Related Products section of the Product Detail page. The related products with the related quantities display. When you select the *Add* button or the *Add All* button, the products will be added to the cart (based on the quantity of the parent product) and the Prices added to the cart total.

For products set up to automatically explode their related products on an order, the *View Full List* button in the Related Products section does not contain any input fields. The related products will not display in the cart and the price of these related products will not be included in the cart total. When the order is created, however, the related products and their prices will be added to the order and print on the acknowledgment.

## Create the Order

1. When finished adding products to the cart, select the *Checkout* button.
2. The Cart Checkout page displays.

The products are detailed in the Products in Cart section of the page.

Use this page to enter any Order Notes, Purchase Order Number, Shipping Information, and e-mail address (if none defaults) before the order is finished.
3. When all order information has been entered, select the *Submit Order* button. A box displays: *Are you sure you want to submit this order. Select OK to continue.*
4. The order has been created and messages display:

The Order *specific order-release* created message displays

Acknowledgement for order *specific order-release* message displays.

*View the document* button displays. Select this button to view the acknowledgment.

If the order has been placed On Hold:

A message displays that the order has an On-Hold status. The message may display the reason it has been placed On Hold.

An acknowledgement cannot be created for an order that is On Hold, so e-mailing or viewing the order is not possible from this page.

To view the order, select customer button at the bottom of the page. The Customer Detail page displays. When you select the order number from the orders displayed in the Open Orders section, the Order Card page displays information for the order.
5. E-mail messages depend on user setup and whether the customer's e-mail has been entered for order.

If user and customer have e-mail addresses:

E-Mail sent to *specific e-mail address* message displays.

E-Mail the document section displays to allow you to send the acknowledgement to additional e-mail addresses.

If user has an e-mail address, but the customer does not:

An e-mail cannot be automatically sent.

E-Mail the document section displays for entry of an e-mail address for the acknowledgement.

If user does not have an e-mail address, but the customer does:

No e-mail address found for this login message displays. An e-mail must be set up for the ERP user to have the option of sending e-mail acknowledgments.

If neither the user nor the customer has an e-mail address:

No messages regarding e-mail will display.
6. To enter another order, select the customer button to display the Customer List page and begin the selection process.

## User-Created Group (for Customers, Carts, or Products)

### Creating a New Group

- Select the *New Group* button to create a new group of customers/carts/ products.
- After entering the group name, the customer/cart/product list displays. Select the *Plus* button to the left of a customer/cart/product or the *Add All* button at the bottom of each page to add to the group. **Note:** When the list displaying consists of multiple pages, the *Add All* button adds products from all the multiple pages to the new group.

You may use the Search Box to assist in selecting your products.

- Select the *Done* button when you are finished selecting products.

### Modifying/Deleting a Group

- To modify/delete an existing group, select the *Edit Group* button. The group being edited displays in yellow. Additional buttons display to assist your editing.
- Select the *Minus* button to the left of a customer/cart/product to delete an individual item. Select the *Clear Group* button at the bottom of each page to remove all items from the group.
- To add an entry to the group, select one of the other list buttons (*All*, *Browse*, *Viewed*, or another Group). When the products display, you can use the *Plus* button or the *Add All* button to add items to the group.
- Select the *Delete Group* button at the bottom of each page to delete the entire group.
- Select the *Done* button at the bottom of the page when you have finished.

## Log Out

To log out of your session, select the *Home* button to move to the iREP Home page.

Select the *Log Out* button on the bottom.