



# **Sales Force Automation Manual**

Version – 1.0.0.87

Recibo Technologies Pvt Ltd  
#406, Elite Kempton Kourt, Anantapur Road, Yelahanka  
New Town, Bangalore, India | [www.recibotech.com](http://www.recibotech.com)

## Get Started

### Step 1 - Download Mobile App

1. Enter **User ID** – Registered Email id
2. Enter **Password** – 123456
3. Click on **Get Started**

[Click here](#)

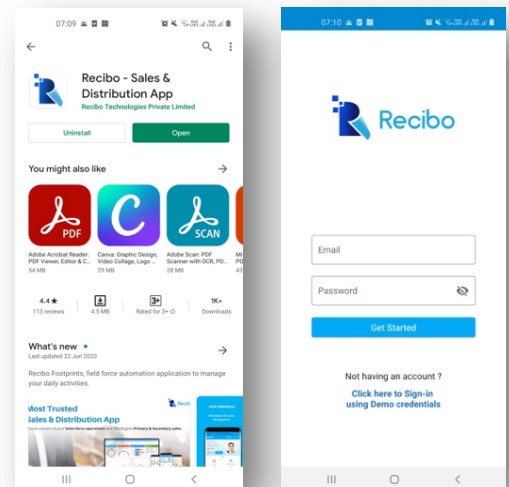


### Important

- Do not click on Sign-in using Demo credentials as it is meant for Demo purpose
- Registered email ID is the email id which has been shared with your company.

### Step 2 – Mobile App Permission Access for Login.

1. Allow Auto start from App permissions
2. Click on **allow** for **Device Location** per mission
3. Click on **allow** for Photo capture permission
4. Click on **allow** for stopping Battery Optimization

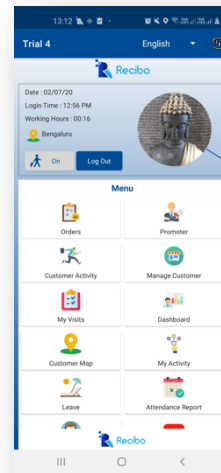


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### Step 3 – Capture Selfie Attendance

1. Click on Login Tab to Capture Selfie
2. Click on Sync once if Attendance Syncing is not completed



Sync Attendance

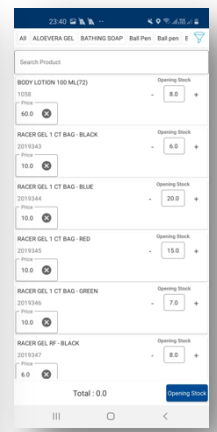
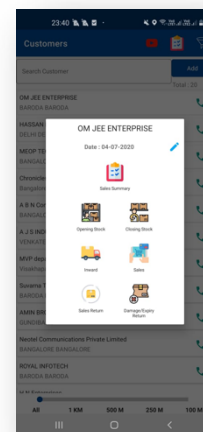
Selfie Attendance



### Promoter Module – Daily Sales & Stock

#### Step 1 – Update Opening stock of Store

1. Click on Store name
2. Click on Opening Stock Icon
3. Enter Opening Stock Quantity
4. Change Price to update store offer price (Only if applicable )
5. Click on update.



Note : Opening Stock & Closing stock to be captured for auto update of Sales & Inwards.

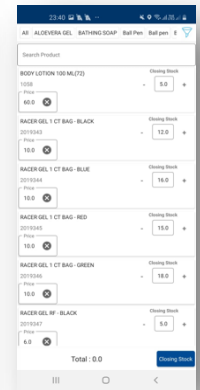
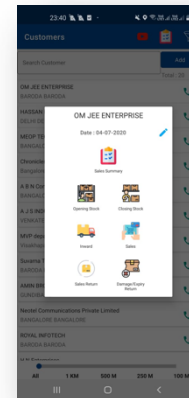
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## Step 2 – Update Closing stock of Store

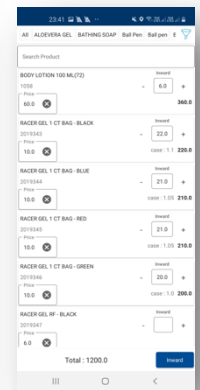
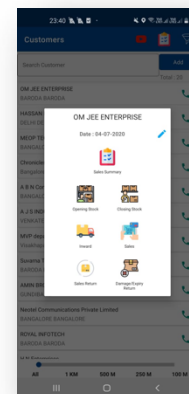
1. Click on Store name
2. Click on Closing Stock Icon
3. Enter Closing Stock Quantity
4. Click on update

Note : Opening Stock & Closing stock to be captured for auto update of Sales & Inwards.



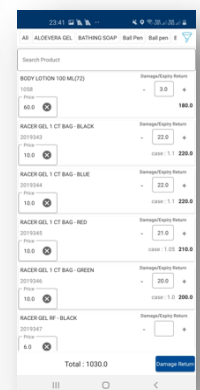
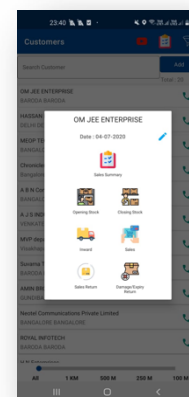
## Step 3 – Update Goods Receipt / Stock Inward

1. Click on Store name
2. Click on Inward Icon
3. Enter Goods receipt quantity
4. Click on update



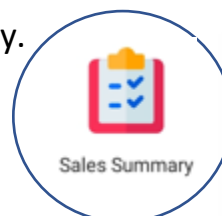
## Step 4 – Update Sales return / Damage Return

1. Click on Store name
2. Click on Sales Return / Damage
3. Enter quantity
4. Click on update



## Step 5 – Enter Sales & Check Sales Summary.

1. Click on Store name
2. Click on Sales Icon & Enter Sales Qty
3. Click on Sales Summary to see the daily sales summary



Date	Customer	SKU Code	Product	Opening Stock	Inward	Sales	Return Qty	Closing Stock
04-07-2020	OM JEE ENTERPRISE	1058	BODY LOTION 100 ML(2)	8	3	5		
04-07-2020	OM JEE ENTERPRISE	2019343	BACER GEL 1 CT BAG- BLACK	6	6	12		
04-07-2020	OM JEE ENTERPRISE	2019344	BACER GEL 1 CT BAG- BLUE	20	4	16		
04-07-2020	OM JEE ENTERPRISE	2019345	BACER GEL 1 CT BAG- RED	15		15		
04-07-2020	OM JEE ENTERPRISE	2019346	BACER GEL 1 CT BAG- GREEN	7	11	8		
04-07-2020	OM JEE ENTERPRISE	2019347	BACER GEL RF- BLACK	8	3	5		
04-07-2020	OM JEE ENTERPRISE	2019348	BACER GEL RF- BLUE	8	6	14		



## Customer Activities

### Track Competition Activity/Merchandising/Display Audit/ Survey

1. Go to Customer Activity
2. Click on Store name
3. Select Activity type from drop down
4. Start the activity
5. Input Activity Details in the Form
6. Capture Feedback or Remarks
7. Click on image icon for uploading pictures
8. End activity
9. Mark Visit/Check-in is Mandatory Incase Store is Closed

### Important



**Mark Visit/Check-in is mandatory if Order is not captured for the store**



**Click on WhatsApp icon for sharing activities in PDF or Text**

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Video Guide**

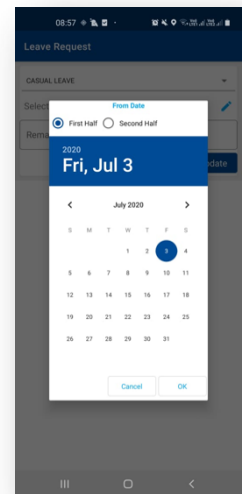




## Leave Management

### Step 6 – Apply Leave

1. Select Leave type from Drop down.
2. Click on Pen icon to select Date range
3. Select leave **from date** on Calendar
4. Click ok
5. Select leave to date on Calendar
6. Click ok
7. Enter Leave reason in remark & update.
8. For Half day leave – Select From date & Click ok, select first half & click ok.
9. Click on Attendance report to check daily working hour

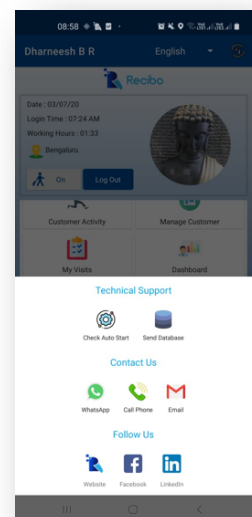


## Support

1. Click on WhatsApp to send msg to Recibo Support.
2. Click on Phone icon to call us directly.
3. Click on Send Database if your not able to explain us the problem

Support Number - 8553-9553-33 /43

Email – support@recibotech.com



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## **Frequently asked questions ( FAQs )**

1. Does Mobile App work offline without internet?
  - a. Yes, Mobile App works offline without Internet. Only for Selfie Attendance internet connectivity is required. Sync & sign-out of App after-market working end of the day is mandatory if working offline.
2. I am not able to Download App from Google Play store
  - a. App doesn't download if other Apps are in Queue for Download in Google Play store and has not been downloaded due to Internet Connectivity. In such case go to Google Play Store Settings and stop existing App downloads.
3. Can I work on Mobile App by turning off my GPS / Location ?
  - a. No, Location/ GPS is mandatory for App to work as all the activity inputs are captured with Location coordinates & time stamp.
4. Does the battery drain out due to Mobile App ?
  - a. No, Recibo App is just 4.6 MB, hence a very minimal battery power is required to sync the data. However GPS/Location has a standard battery consumption rate. Incase Mobile Phone has less battery capacity is suggested to carry a Power bank.
5. Is it possible to Geo Tag Store from a different Location?
  - a. No, Its not possible to Geo tag a store from a different location. Geo tagging to be done in front of the store.
6. What should be the Mobile Phone Specification for using the Mobile App
  - a. Recibo App works seamlessly on any Mobile Phone with Android Version 5 ( Lollipop ) and above.
7. Does the Mobile App work on Apple (IOS) phones ?
  - a. Recibo Mobile App functionalities has been structured for real time data capture on Google Maps, WhatsApp, PDF, Gamifications etc hence the App works seamlessly on Android phones. Web App can be accessed on IOS for Dashboard/reports.
8. I logged out for the day, How can I relog in for same day.
  - a. Once logged out there is no option for Re login for the same day. Dashboard and visit details can be checked.
9. Can I use same Phone numbers for creating multiple stores?
  - a. No, Phone numbers has to be unique & duplication is not allowed which will lead to Sync error. It is suggested to input Store manager contact number incase Store has multiple branches.

## **Error Notifications & Trouble Shooting**

1. **User ID & Password Mismatch** - Check your User ID from your admin team. User ID is your registered email id & default password is 123456.
2. **App already installed on other device with this User ID** - Mobile App is locked to be used in only one Device at a time. In case of any Mobile handset changeover contact your admin team to reset the device from backend.
3. **No Active Session Found** – This error is shown If the App is downloaded for more than 1 hour and not logged in. Please close the App completely from Phone history and try again. If problem persists uninstall the App and reinstall again.
4. **Attendance Not Synced** - Check your internet connectivity & Click on Sync icon. Still problem persists restart your phone once.
5. **Syncing data from Server. Please wait** - Check your internet connectivity is it is taking too long. Restart your phone once if problem persists.
6. **Something went wrong** - Enable your Auto start from Support module. If problem persists click on “Send database” and share it to Recibo support through WhatsApp.
7. **Validation Error** - Validation error is due to duplication of phone number or Customer code. Go to manage customer to edit the details. If problem persists reach out to admin team.
8. **Other Error Messages** – If you have any other error messages, WhatsApp the screen shot to Recibo Support.

**Click here for Support**

