THE ADMINISTRATOR'S GUIDE TO MANAGING PLAY

EVERYTHING
AN ADMINISTRATOR
NEEDS TO KNOW ABOUT
MANAGING PLAY FOR
MODERN SALES REPS

Play

Reach

Vision

Reward

Stream

Most retailers want to see what they are buying. Brandwise Play brings engaging imagery and digital order taking together in one enthralling application. Brandwise Play gives sales reps access to a supplier's complete product line while eliminating heavy and costly catalogs. Simply create brilliant product presentations, then effortlessly update and customize your presentation for any occasion.

Play on your iPad or Play on your laptop. Play offline or Play online. It's the way selling should be done.

Questions about this user guide? We're here to help! Call, click or email Brandwise Technical Support!

877-435-3225, option 1
support@brandwise.com
click here to check out our support page online!

LICENSE MANAGEMENT

Play

LICENSE USAGE

Your modern sales studio uses different licenses for different types of systems. All licenses include a code for your company, followed by a number. The number will allow you to recognize what type of system that license is for.

LICENSE NUMBER	USE
100	This is your main system; the brains of the operation. From this machine, you will be able to manage suppliers, products and users. This system can also access Brandwise Reward.
200-499	These are your Play for PC rep licenses.
500-599	These are show servers. These machines get all sales orders and can be used to connect Pocket PCs and PCs while you run your show.
1000-1999	These are your mobile devices (iPads or Pocket PCs)

We suggest labeling each device with its associated license number. That way, if you ever need to reorganize licenses or move them around from rep to rep, you know which device belongs to which license. Also, avoid naming any device with the same name (ex: Admin). Instead, name it Admin01 and the next Admin02 and so on. This will keep everything nice and neat and easy to reassign when necessary.

LICENSE MANAGEMENT

Play

LICENSE SETUP

To assign a user to a Play license, follow the instructions in your system administration on managing rep system licenses. For agency systems, you can do this in my.brandwise.com using your 100 login. For supplier systems, you can also use my.brandwise.com by logging in using your SFAM user name and password.

AGENCY LICENSE MANAGEMENT

1. Login to MyBrandwise by going to my.brandwise.com using the username and password for the 100 system.

2. On the toolbar, click on the rep systems tab to get started.

3. Click on the user's name for the license you'd like to assign. A small window will pop up allowing you to select the appropriate user.

4. Click "apply" in the bottom right to save your changes.

SUPPLIER LICENSE MANAGEMENT

1. Login to MyBrandwise by going to my.brandwise.com using the user name and password for the SFAM login

2. On the toolbar, click on Permission Setup->User Admin then Rep Systems tab

3. Click on the user's name (on a new license it says -- SELECT ONE --) for the license you'd like to assign. A small window will pop up allowing you to select the appropriate user.

4. Click submit in the bottom right to save your changes.

SHOW MANAGEMENT

SHOWROOM TYPES

Setting up your showroom means determining what type of showroom you are going to have. There are pros and cons for each type. Your showroom type just depends on your personal preference. Below are a few different kinds of showrooms that will help you decide how to take orders.

HYBRID SHOWROOMS

Hybrid showrooms have a combination of users on PCs, PocketPCs and iPads. When you are setting up this type of showroom, it is important to evaluate each user type to make sure all personnel will be able to offer your customers the highest quality of service, with the right user licenses. With this showroom type, you will need a show server (500) for PocketPCs and iPads (1000s) to connect to your show environment. You will also need printing technology for these devices.

Make sure you think about each device type independently to ensure all of your users have the most simple experience possible. Less difficult setups = more sales!

PC SHOWROOMS

PCs work best in showrooms where reps want to have a personal workspace and the most hands-free experience. If you choose to have a PC showroom, you may want to make carts available to your reps to keep their laptop, scanner and some other necessary items handy. When using carts, you will need to have some aisles between products so that reps can move around easily as their customers browse and order product. Selling fine china and one-of-a-kind crystal? The PC showroom might not be for you… Finally, take into consideration that PCs require a constant connection to the show server because they write to the same database. This means that changes are made instantly and orders are immediately accessible from your show server.

IPAD SHOWROOMS

iPad showrooms let your buyers create orders easily with the most cutting-edge technology available. Your reps make sophisticated first impressions when writing orders on one of the best-selling mobile devices of all time. Reps love using their iPads on the road and in the showroom and you will have the most up to date technology at your fingertips as your reps send orders quickly and effortlessly to the cloud. If you've never used iPads before, make sure you test everything in your showroom before Market begins. You will need to make sure that your reps can print and access the internet with ease from their iPads. When you have to make a change to settings or products, each device will have to sync independently. Make sure you are staying in touch with your team while they're writing orders on the showroom floor with their iPads!

POCKET PC SHOWROOMS

Pocket PCs offer a convenient, hand-held device for your reps to use with a constant connection to your show server. This means that you will need to have some supporting hardware, as well as a network. PocketPCs can easily print through your show server to any printer in your showroom. Make sure you test your showroom's network to ensure there aren't any dead spots where your hand-helds will disconnect and cause your reps unnecessary frustration!

SHOW MANAGEMENT

Play

WAIT A SECOND, THIS ISN'T MY SHOWROOM!
Can I still use my iPad to write this order?

AGENCY IN A SUPPLIER SHOWROOM

If you bring your Play for iPad (agency application) to a supplier's showroom, you will be able to write orders and scan product. Any supplier barcodes scanned using an agency iPad application must have the corresponding UPC loaded into the agency system. We strongly recommend testing this prior to the show. If you have any problems, request a new product file from that supplier and make sure your Agency gets it imported before you need to scan the product in question.

When writing orders in a supplier's showroom, orders will be transmitted to the supplier electronically or by fax depending on the system's configuration.

Licenses to use a supplier iPad application may be provided to agency sales reps at the supplier's discretion.

SUPPLIER IN AN AGENCY SHOWROOM

Suppliers who have been set up with an agency's license for an iPad can be limited to that supplier's information on the personnel record. Only that supplier's data will be downloaded to the device. This includes:

- Supplier's Catalogs
- Supplier's Product
- Orders from other iPads for that supplier only

IPADS

Play

iPads are the fastest selling mobile devices ever made! Their versatility and simplicity makes the iPad and Play perfect for each other! This device will let your reps take orders without needing the constant network connection that PC's and Pocket PCs need, allowing your reps to continue writing orders under even the most stressful conditions. As with all new technologies, there are a few important things to keep in mind about the iPad.

WHAT KIND OF IPAD SHOULD WE USE? HOW MUCH STORAGE?

Play for iPad is a lean application allowing most companies, to include multi-line agencies, to run on the baseline model with only 16 GB of storage. If you're using your iPad for Play only, the 16 GB should be more than enough. If you want to keep videos and music on your iPad while you're on the road, you may want to go a little larger. Brandwise requires the 16 GB iPad model, at a minimum. Larger multi-line agencies with over 100,000 products will require a minimum of 32 GB.

WHAT SIZE IPAD?

The iPad mini or the full size iPad? It's all about personal preference. If you're on the road, the full size display on the iPad Air is tough to beat. If you're in the showroom, the simplicity and portability of the iPad Mini with Retina Display may be more your speed. Seeing is believing, so we suggest that you go to the store and try them out to find the one that's right for you.

brandwise
Your Modern Sales Studio

Play   Vision   Reward   Reach   Stream

IPAD SCANNERS

WHAT SCANNER SHOULD I BUY?

There are several scanner models on the market that are compatible with Play for iPad. A bluetooth scanner, that is compatible with the iPad is usually compatible with Play. When you're looking at scanners, make sure it has a bluetooth, HID or keyboard mode. **Scanners that only support batch mode will not be compatible.** If you are looking to buy a new type of scanner, buy one from a company with a good return policy!

Need help deciding which scanner to use? You're in luck! Brandwise has used all of the top bluetooth-enabled scanners to give you an insider's look at which are the best. Click here to check out our findings and decide for yourself!

IMPORTANT: For new scanners or scanners that have been discharged for an extended period of time, you will need to program them to work with Play for iPad. Scan each barcode on the left side of the Brandwise programming sheet to complete this process.
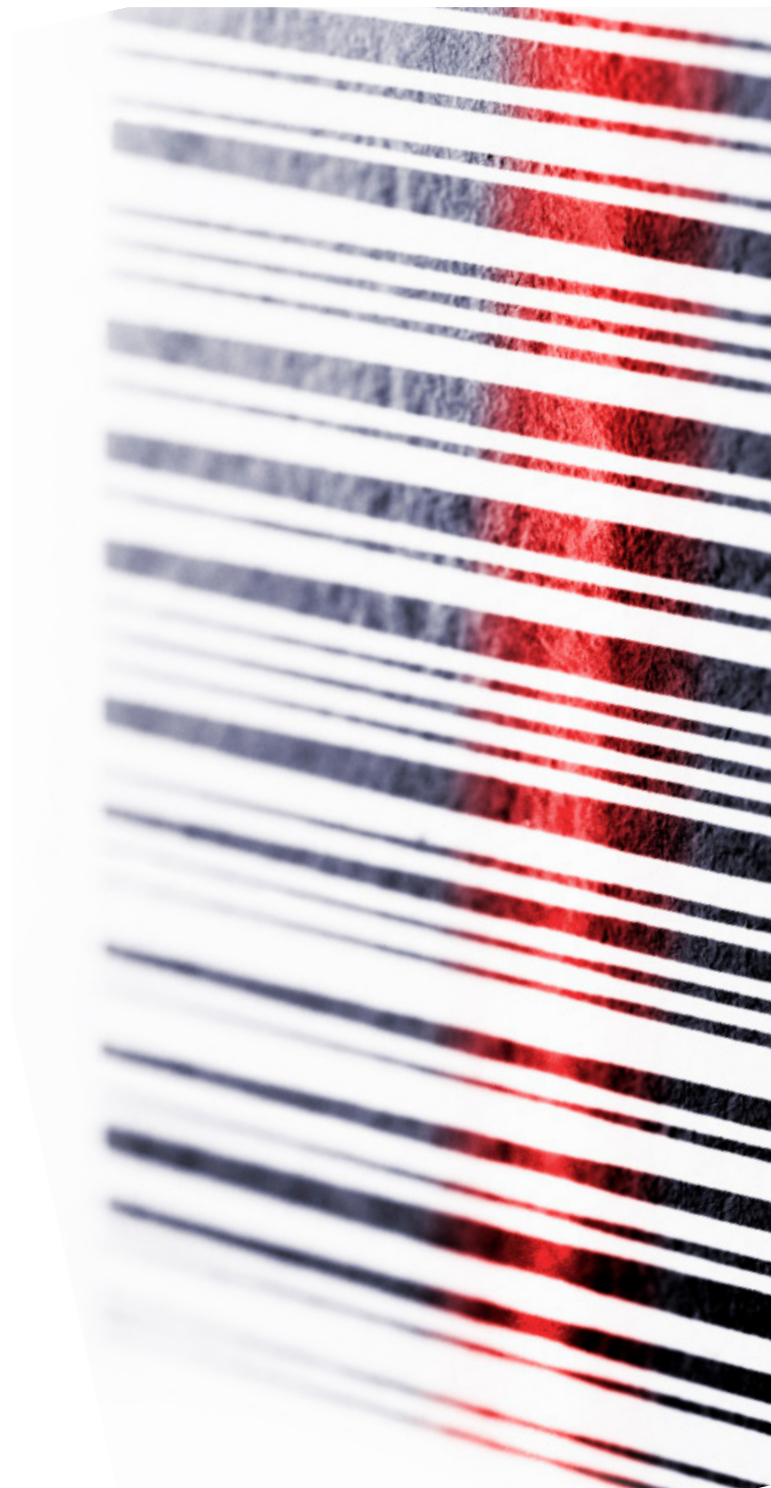
PRINTING FROM THE IPAD

Play

Several solutions allow the iPad to print orders for your customers. Brandwise and Apple recommend using AirPrint.

AIRPRINT

AirPrint is an Apple technology that will allow you to print without the need to download or install drivers. AirPrint is built in to many printer models from most popular printer manufacturers. Just select an AirPrint printer on your local network and print from your favorite iOS app.

A Wi-Fi capable AirPrint printer must be connected to the same home Wi-Fi network as the iOS device.

Important: Some AirPrint printers listed in this article will require a firmware update out of the box, to become AirPrint-enabled. See the manufacturer's documentation or website for details.

AirPrint iOS Requirements

To print from your iOS device using AirPrint, you need one of the following devices using the latest version of iOS:

- iPad (all models)
- iPhone (3GS or later)
- iPod touch (3rd generation or later)

AirPrint Setup

Viewing the Print Queue on your iPad

You can check the Print Queue by double-tapping the Home button to show the recently used apps. Then tap the Print Center.

Connecting to your printer

Verify Wi-Fi is enabled and that you are connected to the same Wi-Fi network as your printer.

1. Open an application that supports AirPrint, including Safari, Mail, and Photos. Apps from the App Store may require an update to use AirPrint.

2. Choose the content you want to print and tap the appropriate icon to display the option to Print.

3. Select your printer and tap Print.

IPAD SHOW MODE

Play

Access the Rep Systems tab on my.brandwise.com to see all of your devices that can be set into Show Mode. Simply check the show mode box next to each device that needs to be set into show mode.

Then, Play for iPad uses an internet connection to verify that the device should be in show mode. When the app recognizes a change, the devices will be switched automatically into show or road mode.

Use the data sync to set the device into show mode and to ensure all of the data on the device is updated.

LoginID	Password	Assigned To	Show Mode	Head Office Transmits Orders	Head Office Transmits Reach Orders	Device Type	Machine Name	Send Rep Portal Intro
BWW1000	368295	Griffin, Peter			☐	PPC	381B0...	Full
BWW1001	213078	Does Know. So The	☐		☐	iPad	C0A54...	Full
BWW1002	310684	Gilgenbach, Eddie	☐		☐	PPC	381B0...	Full
BWW1003	763905	Weaver, Drew			☐			
BWW1004	683124	Westfall, Taylor	☐		☐			
BWW1005	730416	Sundby, Tyler	☐	☐	☐			
BWW1006	484725	Brungardt, Sean		☐	☐	iPad	8246A...	Full
BWW1007	867909	McClellan, Chris	☐	☐	☐			
BWW1008	134359	Gilgenbach, Eddie	☐	☐	☐			
BWW1009	731733	Panetta, Steve	☐	☐	☐	PPC	1C0C1...	Full
BWW1010	116234	Daniels, Anthony	☑	☐	☐			
BWW1011	322620	Guinness, Alec	☑	☐	☐			
BWW1012	102910	Hamill, Mark	☑	☐	☐			
BWW1013	172016	Farnsworth, Hubert	☑	☐	☐	iPad	76278...	Full
BWW1014	669780	Farnsworth, Hubert	☐	☐	☐	iPad	FF055...	Full

Submit Cancel

SALES LOCATION

Play

Setting the default sales location is very important for reporting purposes. When you set the sales location on your device, all orders are marked with that location.

Use the information page to set a default sales location on each iPad in the showroom. By tapping the sales location, you will be able to see all currently active sales locations and choose the one for your showroom.

SYNCING ORDERS

Play

When in show mode, auto send orders is enabled by default. As long as an active internet connection exists, your orders will upload to the Brandwise Cloud as soon as you close them (by clicking on the done button).

When show orders are available in the Cloud, you are able to download them and edit them with other iPads in show mode. You can also pull in iPad orders with a status of HFC, allowing you to edit and confirm them on the show server. Please note that any confirmed orders on the iPad that need editing must be edited on the iPad. This keeps your entire team connected throughout the Brandwise Cloud.

Electronic orders must be sent to suppliers using MyBrandwise. All orders written on iPads, Pocket PCs and PCs will be available from the Cloud to be sent to suppliers. See the Send Orders to Suppliers section of this document for more details on sending show orders to your suppliers.

SENDING ORDERS

Play

SENDING ORDERS TO SUPPLIERS FROM IPADS

Show orders generated and confirmed within Play for iPad will be processed as follows to the supplier.

ELECTRONIC SUPPLIERS (SUPPLIERS ON BRANDWISE STREAM) - SHOW ORDERS

All orders for suppliers who receive orders electronically will be processed using a new web-based DataXchange to process the orders to the supplier. This tool will allow you to pick and choose the orders that are ready to be sent to the supplier.

The web-based electronic DataXchange is available via your my.brandwise.com administrator login, which can be accessed through ShowroomElite under the help section from your 100 or 500 systems.   If you do not have a ShowroomElite system then Brandwise can provide your user name and password to you.

NON-ELECTRONIC SUPPLIERS

All orders for suppliers receiving orders via fax or manually emailed will be available via your 100 system DataXchange. These orders can be sent to the supplier as your normal process via Fax or email.

SHOW ORDER FLOW

It is important to understand order flow in a show environment.

1. All show orders written on PC's and Pocket PC's will need to be sent to the supplier through the web based DataXchange tool. In order for you to release them to the online dataXchange tool, you must first run a data transfer on the show server. The only exception is for suppliers who do not receive orders electronically. Those still need to be sent through DataXchange on the PC.

2. All iPad confirmed orders need to be sent through the online dataXchange tool. If any of these orders require editing before they are sent, those edits need to be done on an iPad.

3. Any HFC orders written on an iPad can be pulled down to the show server via a data transfer. In some showrooms the preferred method of editing is done on a PC, so Brandwise has allowed for this.

4. All show orders that have been released from the online DataXchange tool are available to pull down to the show server via a data transfer.

SEND ORDERS	ORDERS TO BE FAXED	IPAD HFC ORDERS	IPAD PENDING ORDERS		
SALES LOCATIONS	**SUPPLIERS**	**ORDERS**			
☑ Dallas Show	☑ Webinars		Customer	Order Date	PO Num	Order Taker	Total		SEND
Total: Orders: 1	Total: Orders: 1	☑ A AND H TRADING PTY. LTD 85-89 CHAPEL STREET ERVING, MA 01344	06/22/2010	100-1188	Administrator .			1

PCs

Play

When rep's laptops connect to a show server, the laptop is running the program, showing the visuals of Play as orders are written. The server is providing and collecting all of the order data. All orders written during a show are written to the server and updates happen simultaneously from all devices.

This allows all users to work together, using the same data and ensuring everyone has the most updated information.

Make sure you have a good network connection to write orders. While creating orders and adding items, you may experience problems if the internet is disconnected, but you will not lose a sales order.
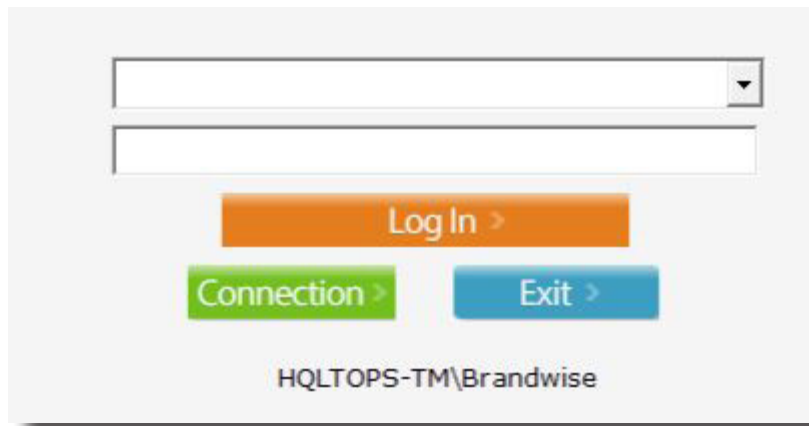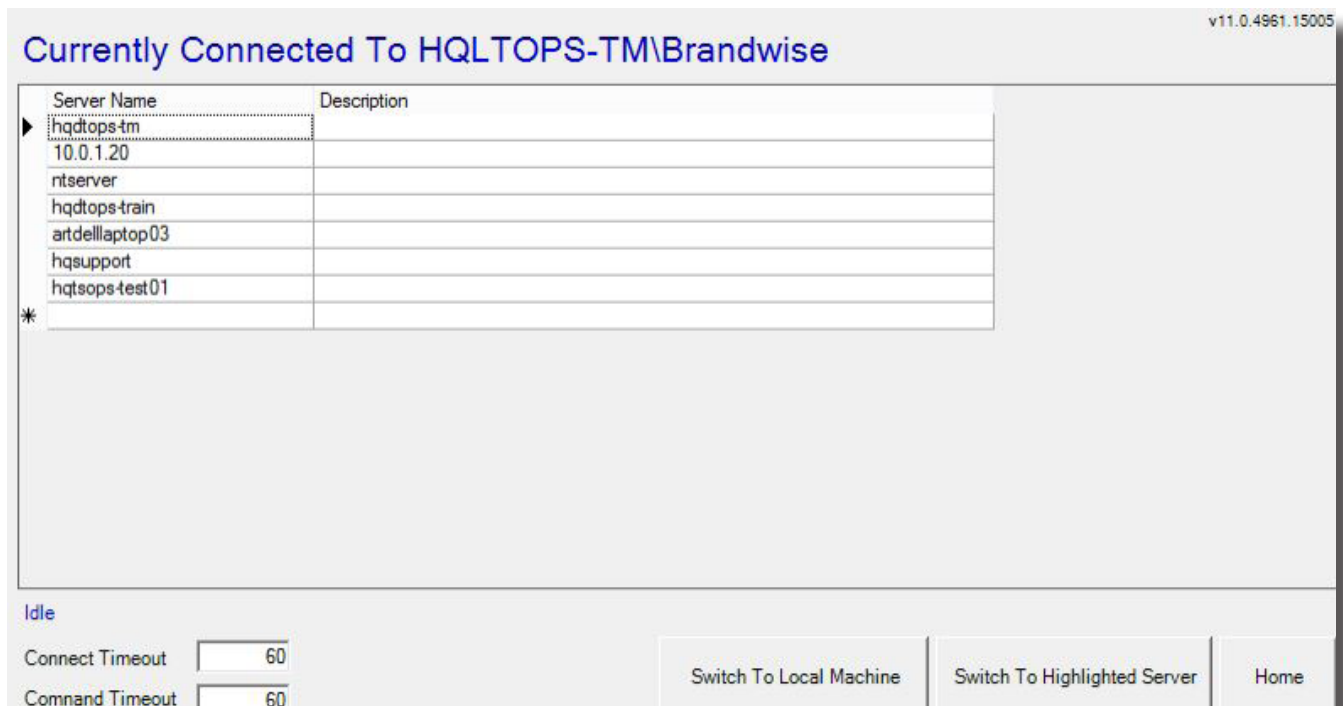
PCs & SHOW SERVERS

CONNECTING TO A SHOW SERVER

Before logging in, use the connection button below the login button to switch to a show server.

Type in the name of the show server and select "Switch to Highlighted Server"

Before leaving the showroom, select "Switch to local Machine" to return to road mode.

TRANSFERRING ORDERS

Running data transfers on the primary show server will keep the entire showroom up-to-date. Be sure to run data transfers before your show to update your showroom to the latest product, customer and order information.

Running frequent data transfers also keeps your showroom data backed up. When you run data transfers during the day, your orders are backed up to the Brandwise Cloud, allowing you to report on show orders written across all types of devices. Previous issues with running data transfers while there are open sales orders have been resolved - so your showroom will continue to operate as usual when you run your transfers.

Always make sure you run a data transfer at the end of each show day, so you can see and report on all of your orders. You can send all of your orders to your suppliers from my.brandwise.com.
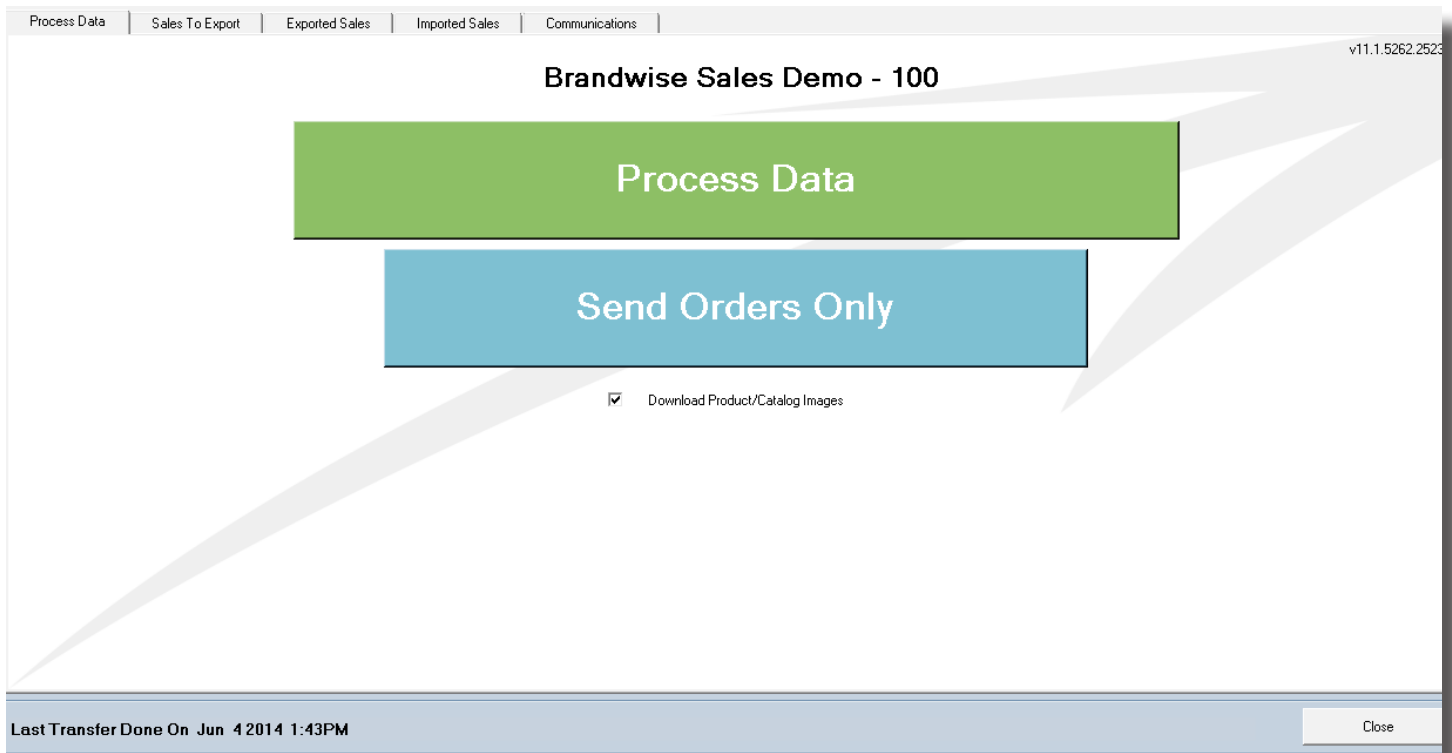
PC SHOW MODE SETUP

Play

On the show server, under the setup menu, open Pre/Post Show Setup.

Begin by checking the box labeled "Show Mode". This sets your show server and any connected workstation or rep laptop into show mode. When in show mode, different permissions apply, orders are sent to suppliers differently and your orders are set to show orders for reporting and commissioning.

Next, set the default sales location. Sales locations will set for orders written during that show for reporting purposes.

You can also set special terms for suppliers during the show.

That's it, you're ready to go!
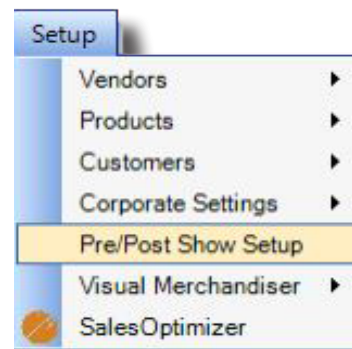
POCKET PCs

Pocket PCs: the dinosaur of order writing tools. Although they have been very useful for quite some time, Pocket PCs are being phased out of the world of technology. While Pocket PCs will continue to be a convenient, portable order writing tool for years to come, manufacturers have all but stopped producing new PocketPC devices.

When writing orders with PocketPCs in show mode, the server is providing and collecting all of the data. All orders during the show are written to the server and updates happen simultaneously across all devices.

This allows all users to work together, using the same data and ensuring everyone has the most updated information.

Make sure you have a strong network connection to write orders. While creating orders and adding items, you will experience problems if the internet is disconnected.

Furthermore, Pocket PCs do not offer any of the visuals that Play can offer. For an upgraded experience while maintaining portability, try the iPad mini - you'll love it!
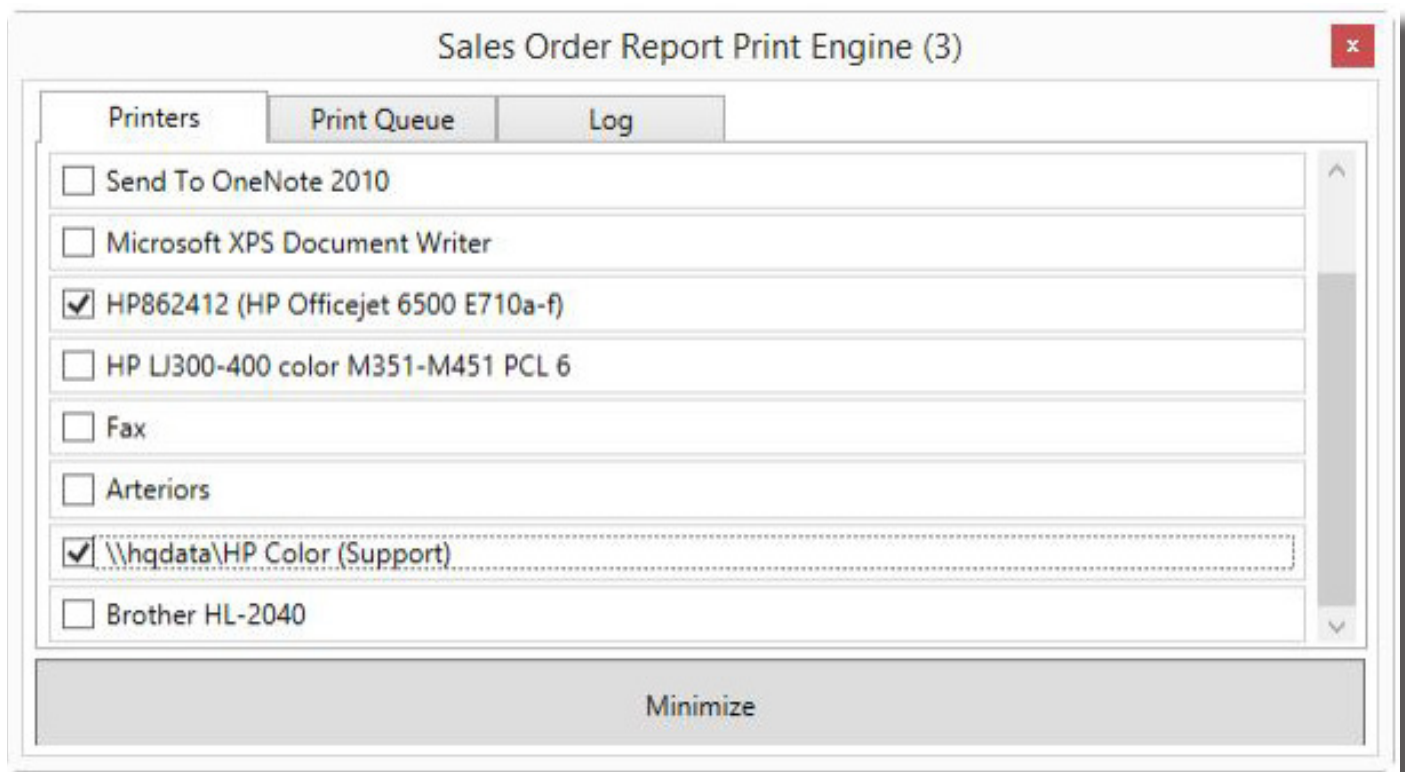
PRINTING – PCs & PPCs

Play

Pocket PCs and PCs use the Sales Order Print Engine, a Brandwise product that runs on a workstation or server that allows all PocketPCs and PCs to print orders to any printer connected to the machine running the SO Print Engine.

The Sales Order Print Engine can be found at c:\showroomsolutions\soprintengine.exe

When running this application, only one system in the showroom can run it at a time. You can check the boxes for the printers you want to share. If you want to change the names of those printers, you can do it from Windows Printer Management found in your PC's control panel.

Sales Order Report Print Engine (3)

| Printers | Print Queue | Log |

☐ Send To OneNote 2010

☐ Microsoft XPS Document Writer

☑ HP862412 (HP Officejet 6500 E710a-f)

☐ HP LJ300-400 color M351-M451 PCL 6

☐ Fax

☐ Arteriors

☑ \\hqdata\HP Color (Support)

☐ Brother HL-2040

Minimize

SHOW ORDER REPORTS

Play

You can report on show orders in one of two ways:

1. Your 100 or 500 system will download all orders as long as they are in a status of HFC or they are confirmed and sent to the supplier. You can run sales analysis reports from either your 100 or 500, after data transfers have been completed.

2. You can run reports in the Brandwise Cloud from my.brandwise.com using the visual show reporting dashboards. These reports will allow you to see visual representations of your sales for the day or for the entire show. After logging into MyBrandwise for a 100 or 500 level system, you can select reports to access the dashboards. (need to include a screenshot of this dashboard)

ROAD MODE

Play

When managing your users on the road, you should familiarize yourself with a few tools to keep tabs on your road users more efficiently.

ACTIVE USER STATS

Active User Stats on MyBrandwise will allow you to see when your users are running data transfers. Running data transfers ensures your reps have everything they need, that their orders are being submitted, and that their products are up to date.

POCKET PCS

Use of Pocket PCs on the road has been discontinued. The replacement going forward is Play for iPad.

IPADS IN ROAD MODE

Road mode is the default setting for Play for iPad. If show mode is enabled, you can disable that setting in the local settings.

Be sure to set your default sales location back to road before writing orders on the road.

ORDER SYNCING

Orders can be written on the road with or without an internet connection.

   With an internet connection: If auto-send is enabled, the order will be automatically sent to the Brandwise Cloud. HFC orders will be made available to the sales rep's laptop as well as the head office. Confirmed orders will be ready to be sent to the supplier.

   Without an internet connection: Run a data sync once a connection has been established to send those orders to the Brandwise cloud and other systems.

SENDING ORDERS TO SUPPLIERS

Road orders generated and confirmed within Play for iPad will be processed as follows to the supplier:

   Electronic Suppliers – Road Orders: As soon as a confirmed order has been uploaded to the Brandwise Cloud, the order will be sent electronically to the supplier.

   Non-Electronic Suppliers – Road Orders: Once confirmed orders have been uploaded to the Brandwise Cloud, they will follow these rules:

   • If head office transmits for that sales rep, the order will be sent to the 100 system to be faxed or emailed

   • If head office transmits for that supplier, the order will be sent to the 100 system to be faxed or emailed

   • If the sales rep transmits, the order will be sent to that sales rep's 200 system to be faxed or emailed.

CREDIT CARD ORDERS

Play

For the protection of all stakeholders, Version 11 of Brandwise Play on any device (PC, Laptop, iPad or Web), Brandwise has improved functionality related to PCI compliance with regards to credit card management (for more details on Brandwises' efforts to strengthen our industry's standards for PCI compliance, check out the my.brandwise.com home page for documentation and helpful downloadables). All credit card numbers are captured, tokenized and stored securely within the Brandwise Cloud.   The only credit card information available on any local device is the tokenization and last 4 digits of the card.   All credit card data will be tokenized at time of entry of a new card. When new credit cards are captured they are tokenized immediately and only the tokenized information is transmitted and stored on any local devices.

Brandwise has developed the following process to keep you from having to maintain secure information on any devices using Play.   For a complete walk through of how to choose existing and add new credits see the Play Rep User Guides for each Play application (iPad or PC).

USING A SAVED CREDIT CARD FOR YOUR CUSTOMER'S ORDER

Play only downloads the last 4 digits and the token portion of your customer's credit card so that you can select the card you want to use. The last four digits of your customer's credit card will be available for selection. The expiration date and the full card number are confidential and cannot be downloaded to any device.

When you have finished your order, you can select any credit card that has already been saved for that customer. A prompt will ask you to enter the CVV number, if it is required for that order.

When the order is finished, and sent to be processed through the Brandwise servers, the appropriate credit card information will be sent to the supplier based on how the supplier is receiving their orders via the Brandwise Stream application.   Full credit card information is not available to fax or email from within the Play applications as the data does not reside on the local device.

ADDING A NEW CREDIT CARD FOR YOUR CUSTOMER

When opening the drop-down of credit cards for your customer, you will have an option to add a new credit card. This will require an internet connection allowing you to securely enter the credit card information.

This will tokenize the credit card information to your customer record securely within the Brandwise Cloud before downloading the tokenized information to your device. The new credit card will then be available to apply to your order.

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- Presentation & Order Entry: Play
- Online Retailer Ordering: Reach
- Sales & Territory Reporting: Vision
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Blog posts on industry news, tips & tricks, selling success stories and more!

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ADDITIONAL RESOURCES

Brandwise makes it easy so you can sell more. You'll love our electronic order submission, online and mobile catalogs, and sales reporting tools for managers and sales reps.

All Brandwise solutions work together so everyone in your organization gets the tools and information they need to make selling easier.

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www.brandwise.com

SCHEDULE A DEMO

Vision   Reward   Reach   Stream

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