Livestock Office – eSale CXM

26/09/2018

Contents

P.O. Box 78
CROMWELL
9342, NZ

Ph 64 3 445-1345
www.shebiz.nz

eSale CXM

With Livestock Office (LSO) eSale, in addition to your sale notes, you can also manage your CXM Logs from anywhere you can access the internet.
This means you can enter, edit and close your logs from home, from the farm gate, away from the office or even overseas.

No special equipment is required, simply log in via your laptop, iPad, mobile phone or any other device that can run a web browser.

General Notes

- In most browsers **<tab>** moves to the next field.

- In most browsers, when the focus is in a text box, the **<Enter>** key is the same as clicking the first button on the web page.

- Drop down boxes:
  - Enter the first letter/s to jump directly to a specific item.
  - Click the arrow at the side to display the list.
  - **<Enter>** or **Double-Click** selects the current list item.

- In multiline text boxes, such as Comments and Notes fields, **<Enter>** moves to the next line in the text box.

- Use **<Space Bar>** to enter/remove the ticks in check box fields.

- Date fields must be in the format D/M/Y
  - The separator can be / or . or -
  - D and M values can be 1 or 2 digits.
  - The year can be 2 or 4 digits.

- Website layout may show minor variations on different browsers but this does not affect the functionality.

P.O. Box 78
CROMWELL
9342, NZ

Ph 64 3 445-1345
www.shebiz.nz

eSale Menu

If you have purchased the Customer Experience Management optional module, in addition to Sale Notes, Logs will also show on the eSale Menu.

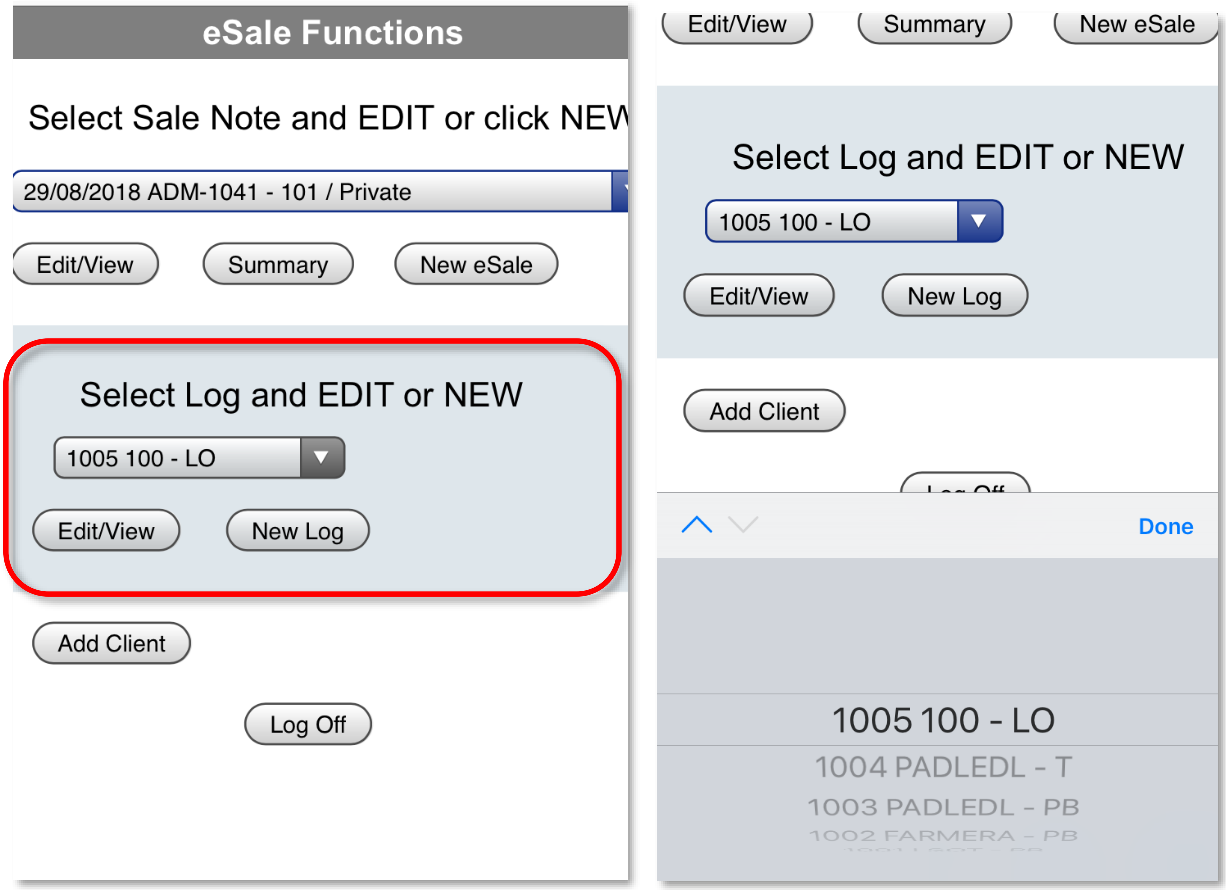

Figure 1: eSale Menu - Logs

Field	Description
Log Listing	Shows the Open logs assigned to the user currently logged in.
Edit/View	Pick the desired log from the list Opens the selected eSale for review and/or editing
New Log	Opens the Client Search page to create a new log for a client

P.O. Box 78
CROMWELL
9342, NZ

Ph 64 3 445-1345
www.shebiz.nz

Client Search

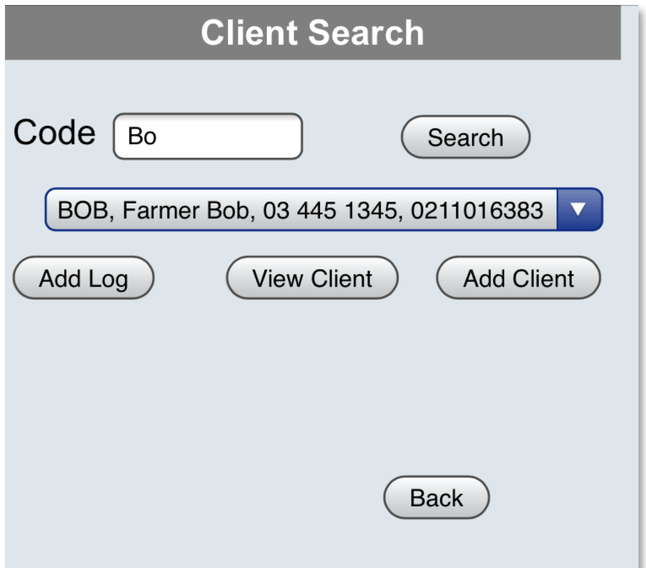

Figure 2: Client Search

Field	Description
Code	Enter the first letter/s in the **Code** field, then click/tap the **Search** button. Use the drop-down box to select the Client from the returned search matches. If no letters are entered, ALL clients will display in the drop-down box
Add Log	Enter a new log for the selected client
View Client	View the details for the selected client
Add Client	Add a new client

P.O. Box 78
CROMWELL
9342, NZ

Ph 64 3 445-1345
www.shebiz.nz

Log Details

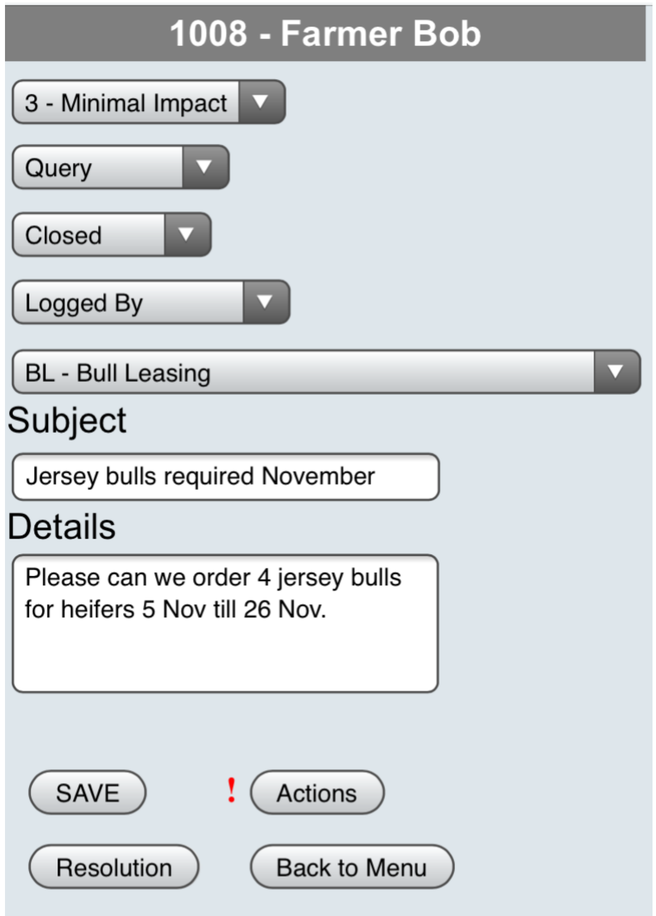

Figure 3: Log Details

Complete the details as applicable.

Button	Description
Save	Click or tap to save the record
Actions	Saves the record and opens the Actions page to enter details. If actions have already been entered a ! will display beside the Actions button.
Close Log	Saves the record and opens the Close Log page.
Back to Menu	Returns to the eSale menu without saving any changes.

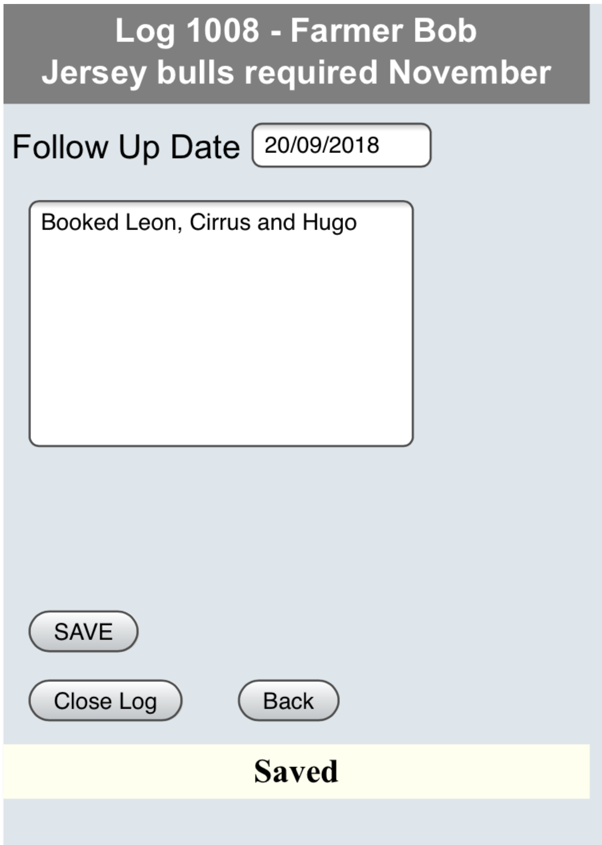

Figure 4: Log Actions

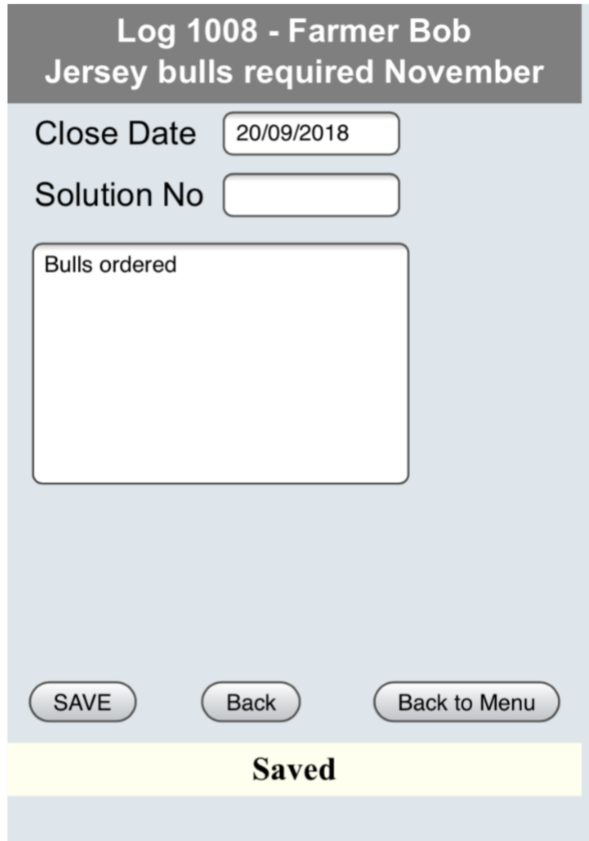

Figure 5: Close Log

Notes:

- *The Close Date will default to the current date.*
- *The Assigned To user defaults to the user currently logged in.*
- *New logs and changes to existing will be accessible in the main system as soon as the record is saved.*