



Pan Agent Cloud Service and Sales Portal

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Pan Agent cloud and customer portal is a sales and inventory management system at the leading edge of technology innovation. We support mobile sales via sales reps as well as web-based customer self ordering.

Pan Agent Cloud can serve you in two ways:

- As a standalone cloud service

Pan Agent Cloud service is a consolidated operations centre covering sales reps, routes, customer accounts, products, sales, order collection and many more. It works around the clock and around the globe. Collect your orders any time day or night.

- As an online sales portal for your ERP or CRM system

Import customers, products, prices from your existing data sources. Our open API interface is an effective tool to help you setup a seamless data sync with your backend system. All orders, placed by online customers, will be sent straight into your enterprise resource platform for further processing.

Pan Agent API specifications: <https://docs.panagent.net>.

Getting started

Register at <https://account.panagent.net/register>.

Pan Agent – Account Login Register English ▾

Login

Not registered yet?

E-mail

Password

Remember me

[Forgot your password?](#)

Create a cloud of your own. Pick a name and an address for it.

 **Cloud** beta

 Licenses

Pan Agent cloud and customer portal is a sales and inventory management system at the leading edge of technology innovation. We support mobile sales via sales reps as well as web-based customer self ordering.

[Pan Agent Cloud can serve you in two ways >](#)

Create new cloud

Company name

Cloud address .panagent.net

[Create](#)

Your clouds

Name	Address	Created

Use the selected address to access your cloud.

Company structure

Choose Company menu to set up company settings that are applicable for all users throughout the Cloud.

Companies

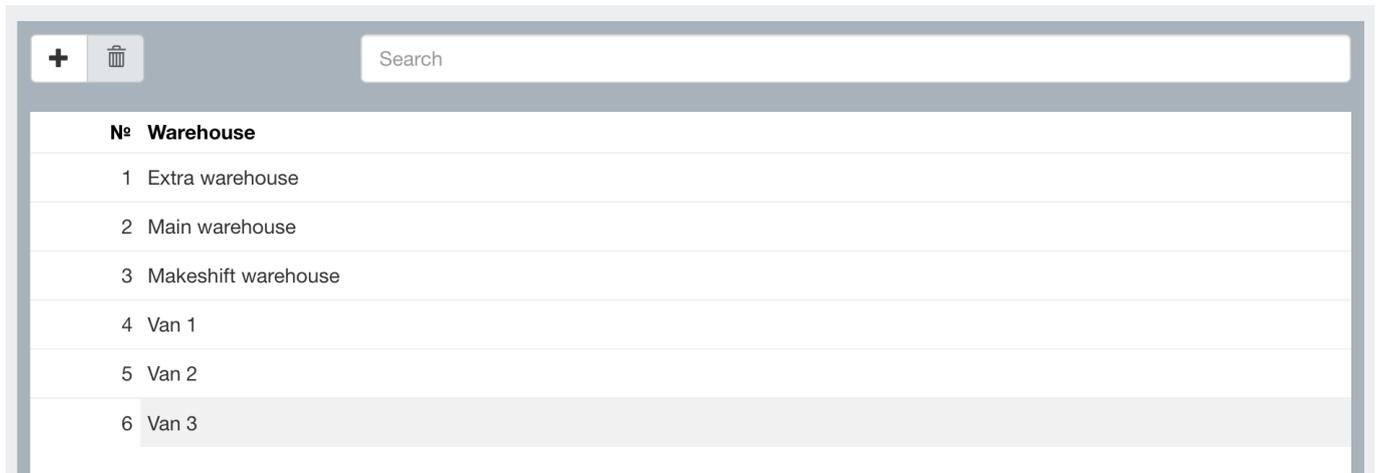
This tab contains the list of legal entities.

The tax rate determined for a company will be used in documents unless it is defined otherwise for a specific product.

Company	Full name	Billing address	Phone	TAX ID	TAX ID 2	Bank	Accountant	Tax rate
 		<input type="text" value="Search"/>						
Mellow supplies	Mellow supplies LTD	8612 Knutson Rd, Stanwood, WA 98292, USA	+1 431-4324-8542					No Tax
Prime brands	Prime brands LLC	4711 Desert Plateau Dr, Pasco, WA 99301, USA	+1 425-8786-4343					No Tax
Tower top	Tower top LTD	5626 NE Alameda St, Portland, OR 97213, USA	+1 203-3345-3285					No Tax

Warehouses

This tab allows for editing the list of locations used to purchase and sell products.



The screenshot shows a web interface for managing warehouses. At the top, there is a search bar with the text "Search" and two icons: a plus sign and a trash can. Below the search bar is a table with the following data:

Nº	Warehouse
1	Extra warehouse
2	Main warehouse
3	Makeshift warehouse
4	Van 1
5	Van 2
6	Van 3

Price types

General list of price kinds, used to calculate prices in documents. Price types can also be set for each customer individually in a customer master record.

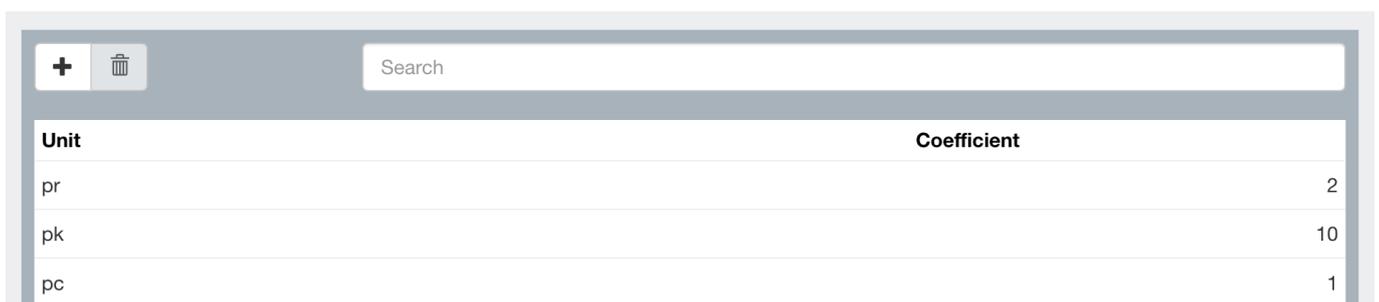


The screenshot shows a web interface for managing price types. At the top, there is a search bar with the text "Search" and two icons: a plus sign and a trash can. Below the search bar is a table with the following data:

Price type
Price type 1
Price type 2
Promotion
Vendor price

Units of measure

Units of measure represent the standard amount in which quantities of products are managed. Conversion ratios enable you to create basic conversions from one unit into another. Once defined here, these conversions may be used throughout the system. Each product may have its own conversion ratios.



The screenshot shows a web interface for managing units of measure. At the top, there is a search bar with the text "Search" and two icons: a plus sign and a trash can. Below the search bar is a table with the following data:

Unit	Coefficient
pr	2
pk	10
pc	1

Currencies

Multiple currencies are supported. Currencies are managed in the currency list. You can add them from a built-in world currencies table.

Currency	Code
£	GBP
€	EUR
US Dollar - \$	USD

Questionnaire designer

Use Questionnaire designer to devise new surveys, questionnaires for your customers along with tasks templates for your sales team.

Questionnaire	Comment	Order
Satisfaction	Customer satisfaction survey	1
Mystery shopper	Mystery shopping protocol	2
New product	New product pitch	3

Question groups	Full name	Type	Order	Values	Hint
All groups	Sales rep adheres to professional standards of conduct	Select from a list	1	Strongly disagree ,Disagree ,Neither agree, nor disagree ,Agree ,Strongly agree	
<input type="radio"/> 1. Interviewee	Sales rep responds to my inquires in a timely manner	Select from a list	2	Not at all ,No ,Not sure ,Yes ,Absolutely	
<input type="radio"/> 2. Sales rep	I find sales reps visits schedule convenient	Select from a list	3	Inconvenient ,So-so ,Okay ,Convenient ,Perfect	
<input type="radio"/> 3. Sales rep evaluation	Preferred number of visits per week	Number	4		
<input type="radio"/> 4. Company evaluation	Preferred time of visits	Text	5		
<input type="radio"/> 5. Orders					
<input type="radio"/> 6. Products					

Bonus cards

Bonus and discount cards can be linked to customers. Discount card grants a right to claim a discount of a certain percentage. Bonus card allows for receiving a discount corresponding to the number of collected bonus points.

Loyalty program rules for a bonus card are defined in the loyalty scheme.

Code	Type	Discount %	Customer	Bonus scheme
22343243253454350	Bonus	0.00	Rose mall Shoreline	Standard 1 for 100
31231232143434348	Discount card	3.00	Vogel market Wallingford	

Loyalty schemes

Multiple loyalty schemes can be set up to give customers special discounts once they have earned sufficient points.

A purchase value to collect one bonus point and a discount value corresponding to one bonus point are the attributes required to create a scheme.

Each qualifying purchase earns points or accumulates monetary value towards a reward.

Full name	One bonus points is granted for a purchase of	One bonus points equals to a discount of
Privileged	100	2
Standard 1 for 100	100	1.00

Settings

Cloud - Interface

Interface

Language: English

Enter edit mode: Double click

Time zone: (UTC+02:00) Windhoek

Truncate the text if it does not fit the cell:

Currency: € To add a new currency go to the "Company" / "Currencies" section

Interface options:

- Language. English, Russian, German and Spanish are currently supported;
- Enter edit mode for a cell in a table. Double click or single click.
- Time zone;
- Truncate the text if it does not fit the cell. You can either let the cell inflate and occupy several adjacent rows to accommodate the text or just have it cut down to size.
- Currency. Select the main currency to be used across the Cloud. Currencies can be added or modified in the Company section.

Cloud - Performance indicators

Performance indicators		
Time between two visits (target)	<input type="text" value="120"/>	Target time for a sales representative to pay a visit to a customer and move on to the next one.
Daily sales plan	<input type="text" value="1000"/>	
Planned average sales order value	<input type="text" value="50"/>	
Planned number of visits per day	<input type="text" value="10"/>	

Parameters for the dashboard indicators are set here. You can finetune them to the needs and requirements of your company.

Cloud - Default values

Predefined values are used to autofill document fields thereby accelerating the docflow.

The first group of values is applicable to the users of the cloud.

The «Customer» group contains values used in the orders placed in the Sales portal by external users.

Default values	
Default company	Mellow supplies ▼
Default warehouse	Main warehouse ▼
Default price type	Price type 1 ▼
Default sales representative	Jim Low ▼
Default customer	Asian foods Bagley ▼
Main unit	pc ▼

Customer	
Default company	Mellow supplies ▼
Default warehouse	Main warehouse ▼

Device - Default values

These values are applicable to Pan Agent mobile app users.

Default values	
Default company	Tower top ▼
Default warehouse	Makeshift warehouse ▼
Default price type	Promotion ▼
Default questionnaire type	Mystery shopper ▼

Device - Documents

This tab allows for granting or denying access to any of the document fields for different user roles.

Admin	
company	<input checked="" type="checkbox"/>
status	<input checked="" type="checkbox"/>
sales rep	<input checked="" type="checkbox"/>
warehouse	<input checked="" type="checkbox"/>
price type	<input checked="" type="checkbox"/>
customer	<input checked="" type="checkbox"/>
date	<input checked="" type="checkbox"/>
contract	<input checked="" type="checkbox"/>
delivery date	<input checked="" type="checkbox"/>
comment	<input checked="" type="checkbox"/>
type	<input checked="" type="checkbox"/>

Supervisor	
company	<input checked="" type="checkbox"/>

Administration - Users

This tabs contains the registry of users both for the Pan Agent Cloud and the Sales portal.

User roles allow you to organize your users and customers according to their access level.

Following roles are available:

- Owner - unrestricted access to everything;
- Administrator - managing users;
- Supervisor - access to master data, documents, reports, etc.;
- Customer - Sales portal external user.

A client from a customers list must be specified for each user with Customer role.

To invite a user, provide corresponding e-mail address and send out an invitation.

Email	User role	Customer	Status
admin@gmail.com	Admin		● Invitation sent 18.02.19 16:14
customer@gmail.com	Customer	Green village Woodlawn	● Invitation sent 18.02.19 16:12

Administration - Integrations

To access the Pan Agent API you must have a valid API key. The API key is a unique ID that is used to authenticate requests associated with your cloud.

Attention! API Key must not be passed on to third persons.

Pan Agent API specs: <https://docs.panagent.net>.

Here one can also find templates of the files used for batch data import.

Integrations		
API Key	I17YVZILwEholvzMuZMWyOcv	Attention! API Key must not be passed on to third persons.
Import file template – products	Download	Mandatory field – UniqueID
Import file template – product groups	Download	Mandatory field – UniqueID
Import file template – customers	Download	Mandatory field – UniqueID

Products

Products list contains basic information about each product.

Products are normally arranged in groups.

Groups can be hierarchical, i.e. you can put a group inside another group and so on.

Products can be moved from one group into another at any moment.

Product groups		Product list							
All products		Product	Price	In stock	Unit	Description	SKU Number	Barcode	Tax rate
<input checked="" type="radio"/> GROCERY		Assorted berries	0.95	0.000	pk	Hand-picked berries			No Tax
<input type="radio"/> Cereals		Barley grits	1.00	-5.000	pk				No Tax
<input type="radio"/> Cinnamon		Bay leaves	1.00	0.000	lb	3 months drying cycle			No Tax
<input type="radio"/> Cocoa		Bergamot blended black tea	2.75	0.000	pcs				No Tax
<input type="radio"/> Coffee		Bergamot blended green tea	2.70	0.000	pcs				No Tax
<input type="radio"/> Dried fruit		Black currants	3.15	0.000	pcs				No Tax
<input type="radio"/> Flour		Black pepper	1.25	0.000	pcs				No Tax
<input type="radio"/> Nuts		Black raisins	2.30	0.000	lb				No Tax
		Black tea	2.70	0.000	pk				No Tax

Name, SKU number, barcode can be specified for each product.

On-hand quantity is calculated automatically according to stock records.

Unlimited number of prices can be set for every item, each price is linked to a specific price type.

Buckwheat groats	
Price type	Price
Promotion	1.00
Price type 1	1.15
Price type 2	1.30
Vendor price	0.92

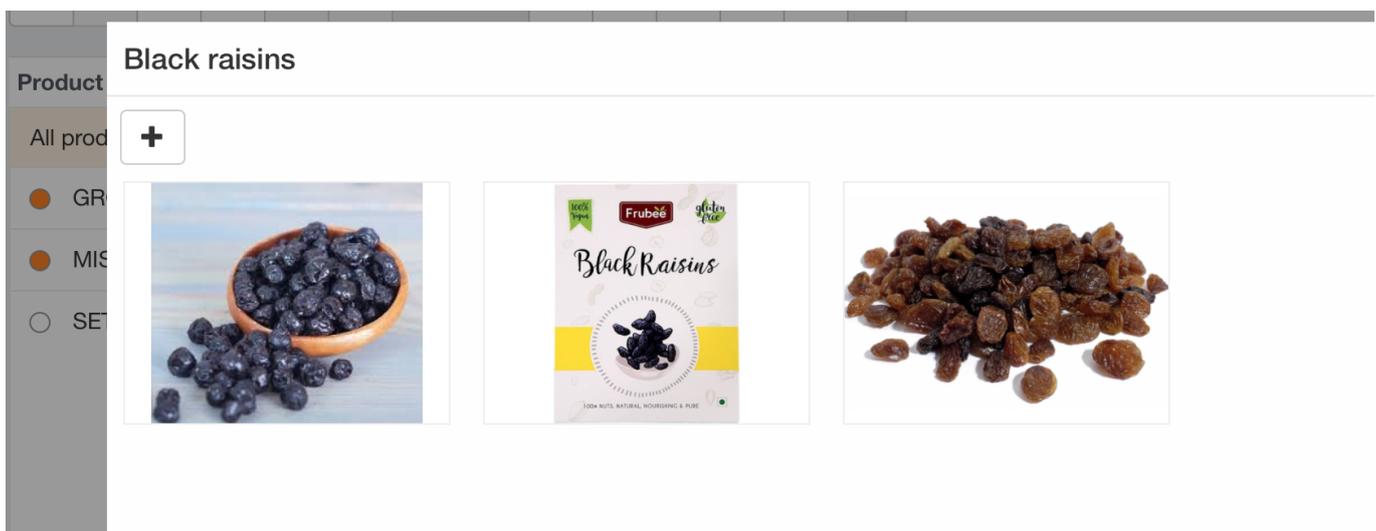
You can navigate to Settings - Price types to manage general price types list.

Products and product groups can be either imported from a file or added manually.

Recommended sequence is to import groups first, then products.

Please make sure that files with data to import comply with the format of templates that can be found in Settings - Administration - Integrations.

Various images can be attached to a product.



Each item can have several units of measure. Conversion ratios are crucial.

All units of measure that are used throughout the cloud are set here: Settings - Companies - Units of measure.

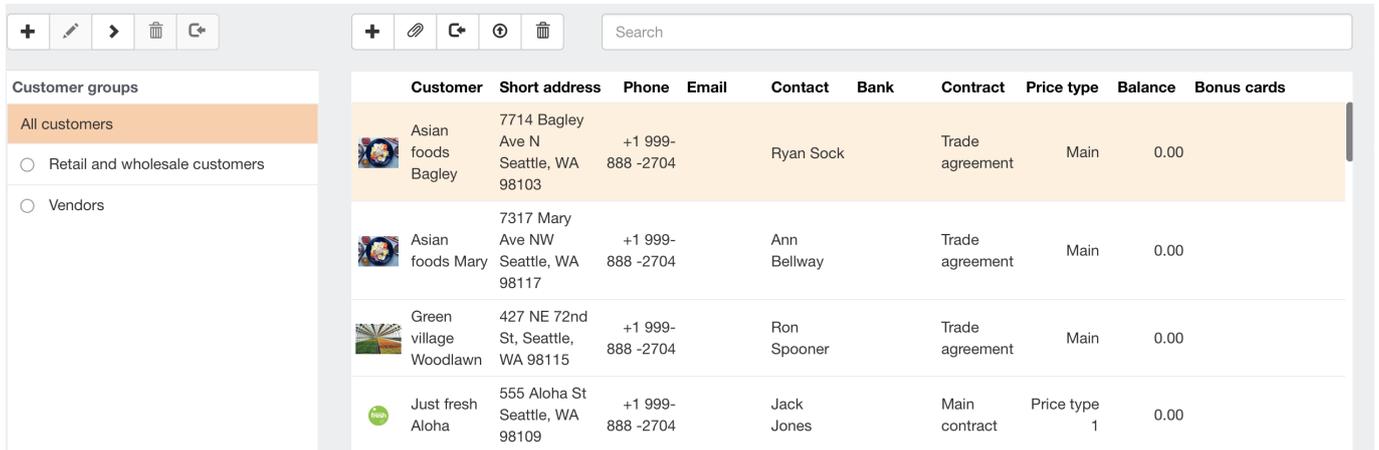
A separate tax rate can be specified for each product. In case it is not defined, the default tax rate of the company will be applied in documents.

Customers

Customers are usually arranged in groups.

Groups can be hierarchical, i.e. you can put a group inside another group and so on.

Customers can be moved from one group into another at any moment.

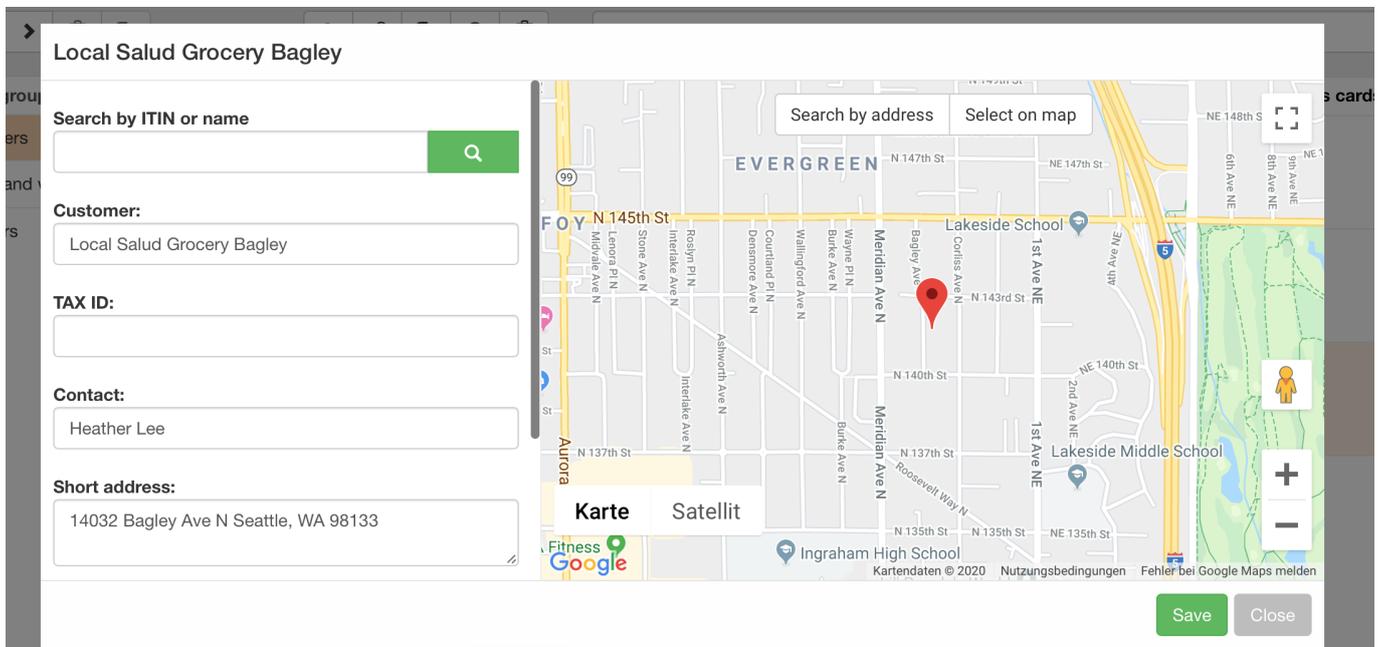


The screenshot shows a software interface for managing customers. On the left, there is a sidebar with 'Customer groups' including 'All customers', 'Retail and wholesale customers', and 'Vendors'. The main area displays a table of customer records with the following columns: Customer, Short address, Phone, Email, Contact, Bank, Contract, Price type, Balance, and Bonus cards.

Customer	Short address	Phone	Email	Contact	Bank	Contract	Price type	Balance	Bonus cards
Asian foods Bagley	7714 Bagley Ave N Seattle, WA 98103	+1 999-888 -2704		Ryan Sock		Trade agreement	Main	0.00	
Asian foods Mary	7317 Mary Ave NW Seattle, WA 98117	+1 999-888 -2704		Ann Bellway		Trade agreement	Main	0.00	
Green village Woodlawn	427 NE 72nd St, Seattle, WA 98115	+1 999-888 -2704		Ron Spooner		Trade agreement	Main	0.00	
Just fresh Aloha	555 Aloha St Seattle, WA 98109	+1 999-888 -2704		Jack Jones		Main contract	Price type 1	0.00	

Customer's location can be identified through its address. In this case location on the map will be defined automatically via geocoding.

Alternatively, you can identify location simply placing a pin on the map. That will in turn allow Pan Agent to decipher the correct address.



The screenshot shows a customer detail form on the left and a map on the right. The form fields are: 'Search by ITIN or name' (with a search icon), 'Customer:' (Local Salud Grocery Bagley), 'TAX ID:', 'Contact:' (Heather Lee), and 'Short address:' (14032 Bagley Ave N Seattle, WA 98133). The map shows a red pin on Bagley Ave N, with labels for 'Lakeside School' and 'Lakeside Middle School'. The map interface includes 'Search by address' and 'Select on map' buttons, and a 'Save' button at the bottom right.

Fill in all corresponding fields for the customer: name, price type, contract, contact person.

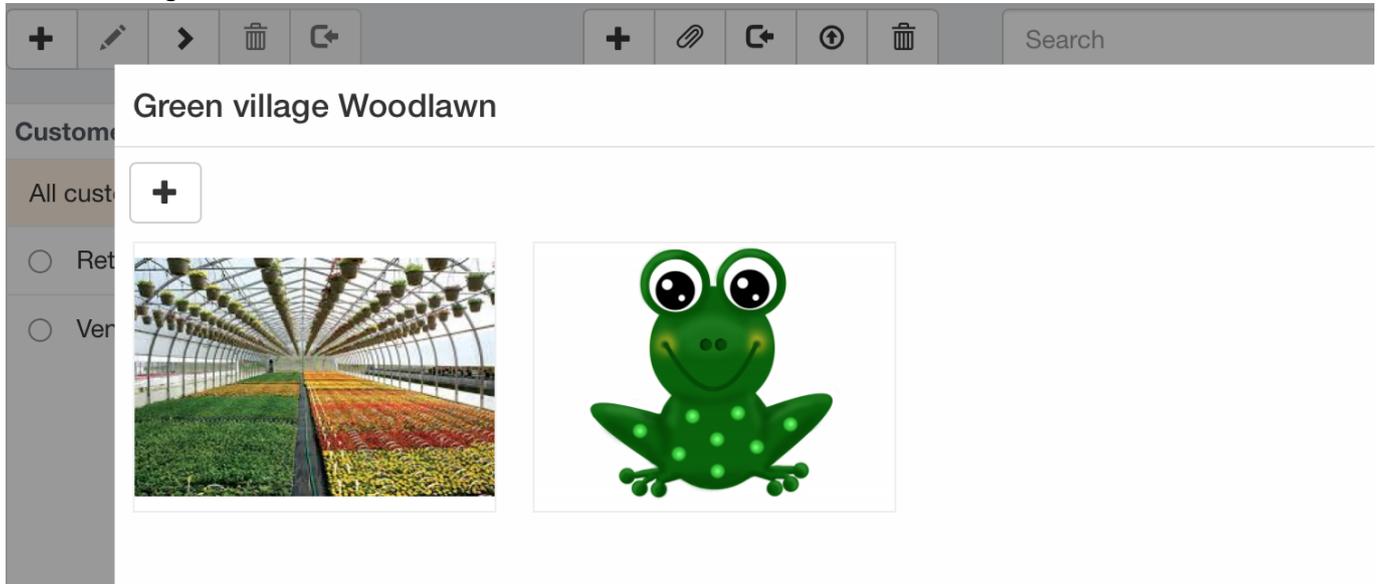
You can navigate to Settings – Price types to manage general price types list.

One of the price types should be marked as the main price type. It will make it a default value for all of the documents concerning this customer.

Customers can be either imported from a file or added manually.

Please make sure that files with data to import comply with the format of templates that can be found in Settings - Administration - Integrations.

Various images can be attached to a customer.

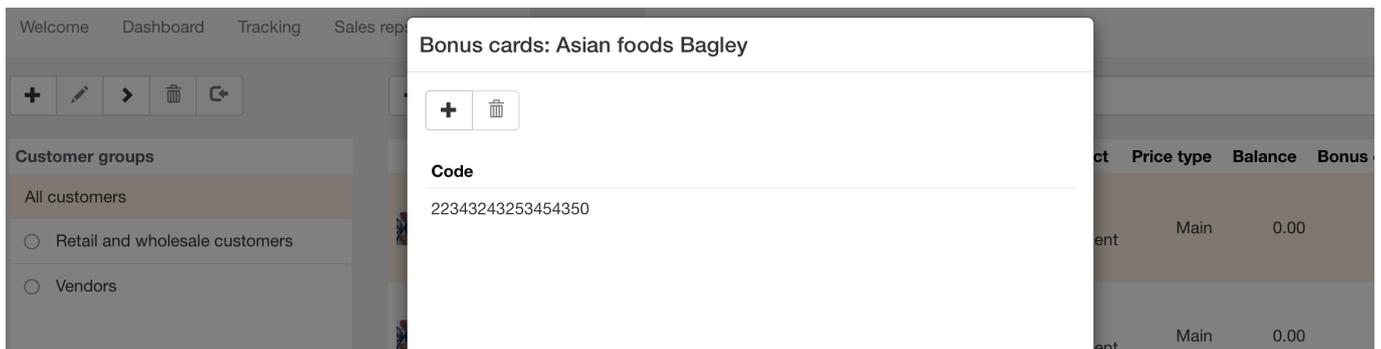


Unlimited number of contracts can be registered for each customer. One of the contracts should be marked as the main contract. It will make it a default value for all of the documents concerning this customer.



You can optionally fill in all the bank data.

In case you have issued a discount or a bonus card for a customer, choose it in the Bonus card field. You can navigate to Settings - Bonus cards to manage general bonus cards list.



Customer balance is calculated automatically according to the records.

Routes

Visit plan is drawn up for every sales rep for each day of the week.

Click on a customer to add it into the visit plan. After that just click through squares to paint green the days on which visits are to be made.

Customer	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Asian foods Bagley 7714 Bagley Ave N Seattle, WA 98103	Green	Green	Green	White	Green	White	White
Green village Woodlawn 427 NE 72nd St, Seattle, WA 98115	White	White	White	Green	Green	White	White
Just fresh Boston 356 Boston St Seattle, WA 98109	Green	Green	White	Green	White	White	White
Just fresh East Green 6305 East Green Lake Way N Seattle, WA 98103	Green	White	Green	White	Green	White	White
Just fresh Newton 1220 E Newton St Seattle, WA 98102	White	Green	White	Green	White	White	White
Just fresh Halladay 360 Halladay St Seattle, WA 98109	Green	Green	Green	Green	Green	White	White
Just fresh Mercer 1200 Mercer St, Seattle, WA 98109	White	White	White	Green	White	White	White
Just fresh Palatine 5211 Palatine Ave N Seattle, WA 98103	Green	Green	Green	Green	Green	White	White

Navigate to Route tab to get a visualized route on the map. The route can be shown for any day of the week. Use a switcher above the map to jump to the desired day.

Click a marker on the map to popup a callout with customer contact data and address.

To change the order of visits simply drag and drop a customer up or down.

Tracking

Tracking tab allows for controlling sales team whereabouts, obtaining actual route information as well as keeping an eye on all activities throughout the day,

Click a marker on the map to pop up a callout with all of the sales rep's activities at a certain location. Select a link in a call out to drill down to the originating document.

Tracking can be shown for any desired period.

To the right of the map there's a section with performance indicators:

- Visits – number of visits actually made;
- Sales – sales orders total;
- Efficiency – actual visit duration to planned visit duration ratio;
- Plan – sales plan completion rate.

Navigate to Settings – Cloud – Indicators to set up plan values.

Documents

Following document types are available in Pan Agent cloud:

- Sales order;
- Cash receipt;
- Cash payment;
- Merchandising;
- Questionnaire;
- Purchase order;
- Inventory adjustment.

With regard to their origin, documents can be:

- received from mobile devices, linked to the cloud;
- placed by external customers in the Sales portal;
- created directly in the cloud.

Document is characterized by its status. There are four of them:

- Draft – an unfinished document, displayed with a red pic in the journal;

- Ready – a finished, yet not verified, document, displayed with a yellow pic in the journal;
- Posted – a finished and verified document, displayed with a green pic in the journal;
- Sent to a device - a document created in the Cloud and exported to a mobile device, displayed with a blue pic in the journal

You can filter documents by period, a sales rep or a bunch of sales reps.

Fast search can be performed by a customer or a document number.

Navigate to Settings – Administration – Documents to adjust the visibility of different fields in the document.

Sales order

Nº	Product	Qty	Unit	Price	Total
1	Barley grits	25.000	pk	0.90	22.50
2	Cashew	10.000	pk	3.15	31.50
3	Ginger root	15.000	pk	12.30	184.50

3 rows. TOTAL AMOUNT 238.50 €

Sales order is a confirmed order from a client.

It can be registered in the Cloud, imported from the mobile app or created by an external user in the Sales portal.

Prices in the products table are calculated according to the price type in the header.

Once the document is posted, the Cloud records a decrease in inventory and an increase in accrued cost and revenue of products sold. Customer balance is debited.

Cash receipt

company Mellow supplies ▼ status Ready ▼

agent Jim Low ▼ customer Asian foods Bagley ▼

contract Trade agreement ▼ date  14.01.2020 13:48:32

Comment

Nº	Document	Date	Balance	Total
1	Sales order 23/1	12.01.20 12:53	20.00	20.00
2	Sales order 25/1	13.01.20 15:09	238.50	200.00

2 rows. TOTAL AMOUNT 220.00 €

Cash receipt is used when you receive a payment from your customer.

The payment can be applied to one or several sales orders.

Once the document is posted, customer balance is credited.

Cash payment

company	Mellow supplies	status	Ready	
agent	Jim Low	customer	Vendor	
contract	Purchase agreement	date	19.01.2020 13:50:09	
Comment				
+				
Nº	Document	Date	Balance	Total
1	Purchase order 7/1	05.01.20 12:14	714.50	550.00
1 rows.				TOTAL AMOUNT 550.00 €

Cash receipt is used when you make a payment to a vendor or a refund to a customer.

The payment can be applied to one or several orders.

Once the document is posted, customer or vendor balance is debited.

Merchandising

company	Mellow supplies	status	Posted			
agent	Jim Low	customer	Green village Woodlawn			
contract	Trade agreement	price type	Price type 2			
date	15.01.2020 15:09:40					
Comment						
+						
Nº	Product	Price	Qty	Unit	Facing	Planogramm
1	Bergamot blended green tea	2.70	12.000	pcs	3.000	<input checked="" type="checkbox"/>
2	Black tea	2.70	25.000	pk	4.000	<input checked="" type="checkbox"/>
3	Green tea set	2.70	7.000	pcs	2.000	<input type="checkbox"/>
4	Bergamot blended black tea	2.75	27.000	pcs	3.000	<input checked="" type="checkbox"/>
4 rows.						

Merchandising audits allow for regular check ups of points of sale, ensuring their compliance with the

agreements regarding items location, shelf space, planograms, prices, and promotion.

Each line in products table has following fields:

- Product;
- Retail price in the point of sale;
- On-hand quantity;
- Number of facings (displayed products);
- Planogram compliance checkbox.

Purchase order

company	Mellow supplies	status	Posted
agent	Jim Low	warehouse	Main warehouse
price type	Price type 1	customer	Vendor
date	05.01.2020 12:14:05	contract	Purchase agreement

Comment

+

Nº	Product	Qty	Unit	Price	Total
1	Assorted berries	40.000	pk	0.90	36.00
2	Black currants	50.000	pcs	3.00	150.00
3	Buckwheat groats	30.000	pk	1.15	34.50
4	Cane sugar cubes	80.000	pk	1.30	104.00
5	Cinnamon in bottles	10.000	pk	39.00	390.00

5 rows. **TOTAL AMOUNT 714.50 €**

Purchase order is a receipt of products from a vendor.

Prices in the products table are calculated according to the price type in the header.

Once the document is posted, the Cloud records an increase in inventory and accrued liability.

Inventory adjustment

Sometimes, it's necessary to modify inventory on-hand to reflect alterations in the actual inventory count that might not be in the records. Inventory adjustment refers to adjustment entries intended to account for discrepancies between recorded and actual inventory items.

There can be different adjustment reasons. Positive inventory quantity adjustments are often due to the excess inventory. Most common negative adjustment are due to wreckage, write-off, loss or

waste.

Apart from those, you can also use this document to register initial stock levels when starting to work with the cloud.

Positive adjustment:

company Mellow supplies status Ready

warehouse Main warehouse date 31.12.2019 12:10:49

Initial stock

+ -

Nº	Product	Qty	Unit
1	Assorted berries	1 000.000	pk
2	Barley grits	2 000.000	pk
3	Bergamot blended black tea	3 000.000	pcs
4	Black currants	2 500.000	pcs
5	Black raisins	2 100.000	lb
6	Dried organic apricots	500.000	pk
7	Ground red pepper	40.000	pcs

Negative adjustment:

company Mellow supplies status Posted

warehouse Main warehouse date 26.01.2020 13:58:57

Loss

+ -

Nº	Product	Qty	Unit
1	Bay leaves	-5.000	lb
2	Black tea	-3.000	pk

Questionnaire

Questionnaire is actually a kind of a universal document that you might find yourself using in a vast variety of business situations.

To create your own questionnaire types navigate to Company - Questionnaire designer.

The most popular questionnaire types are Customer satisfaction survey, Mystery shopper, New product marketing and Lost customer survey.

The screenshot displays a questionnaire form with the following fields and values:

- Type:** Satisfaction
- status:** Ready
- agent:** Jim Low
- date:** 28.01.2020 15:11:44
- customer:** Lee culinaria Roy
- Comment:** (empty text box)
- 2. Sales rep:**
 - Sales rep name:** Low, Jim
- 3. Sales rep evaluation:**
 - Sales rep adheres to professional standards of conduct*:** Agree
 - Sales rep responds to my inquires in a timely manner:** Absolutely
 - I find sales reps visits schedule convenient:** Convenient
 - Preferred number of visits per week:** 2

You can create as many as you please.

As soon as the questionnaire is designed it becomes available both in the cloud and in mobile apps of registered sales reps.

All documents are validated by the system and their status is changed accordingly.

Questionnaires are frequently used as tasks templates for the sales team. To send a task just create a questionnaire of a desired type, for example «Go through audit routine» and change its status to «Send to a device». Once it's done the task is sent into sales rep's mobile app.

As soon as the task is fulfilled and the document is ready in the mobile app, it is seamlessly transferred into the Cloud, where it can be verified and analyzed.