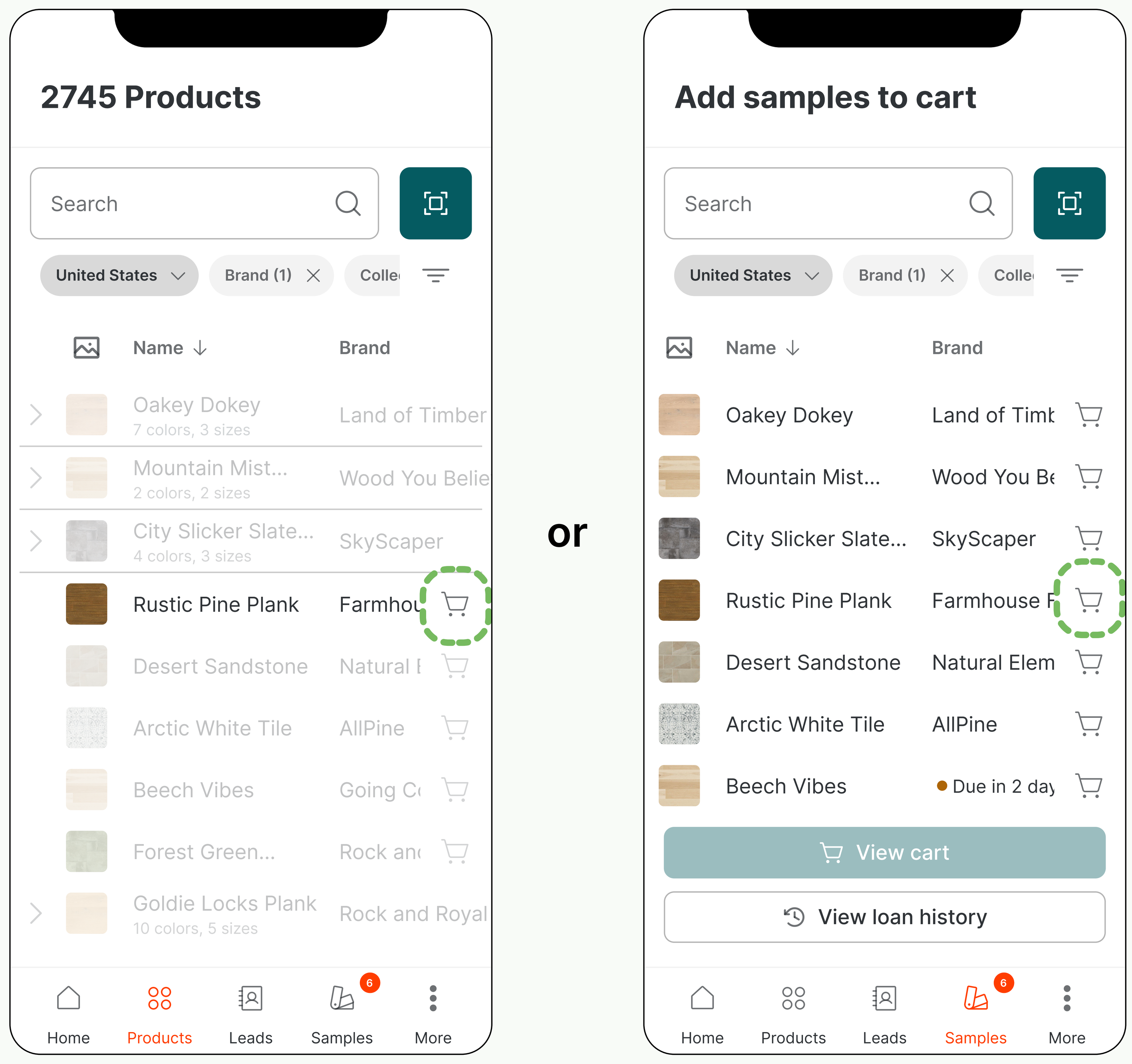
roomvo PRO for RSAs

How to add samples to the cart

This is the bread and butter of Roomvo PRO for RSAs. There are four simple ways to add a sample to the cart:

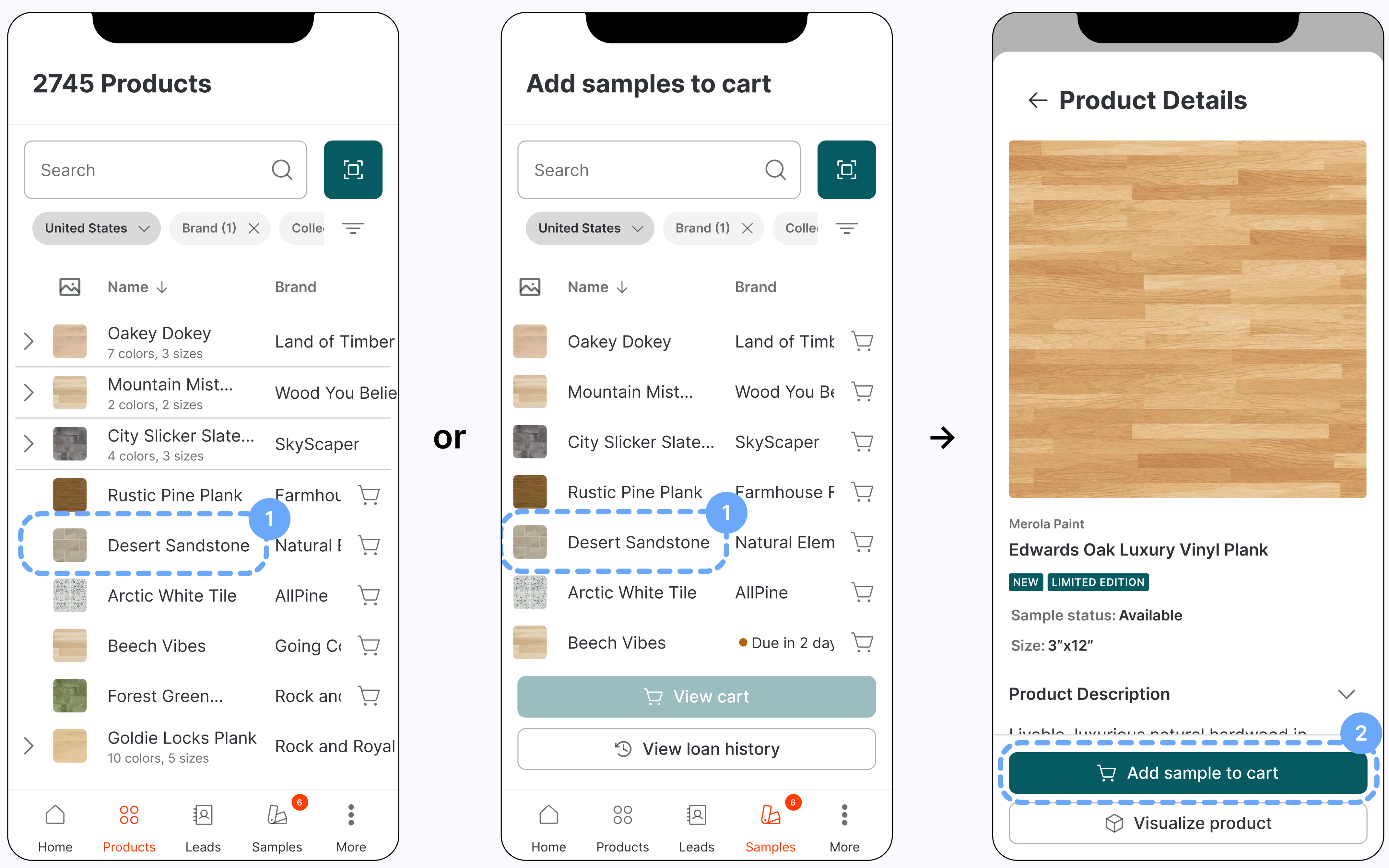
A Tap the cart icon

- On the **Product catalog** or **Samples** screen, simply tap the **cart icon** next to the product you want to add. It's quick and easy!



B Add from the Product Details Page (PDP)

1. Tap on a product row on the **Product catalog** or **Samples** screen to open the **PDP**.
2. Then, tap the **"Add to cart"** button at the bottom to include it in your cart.

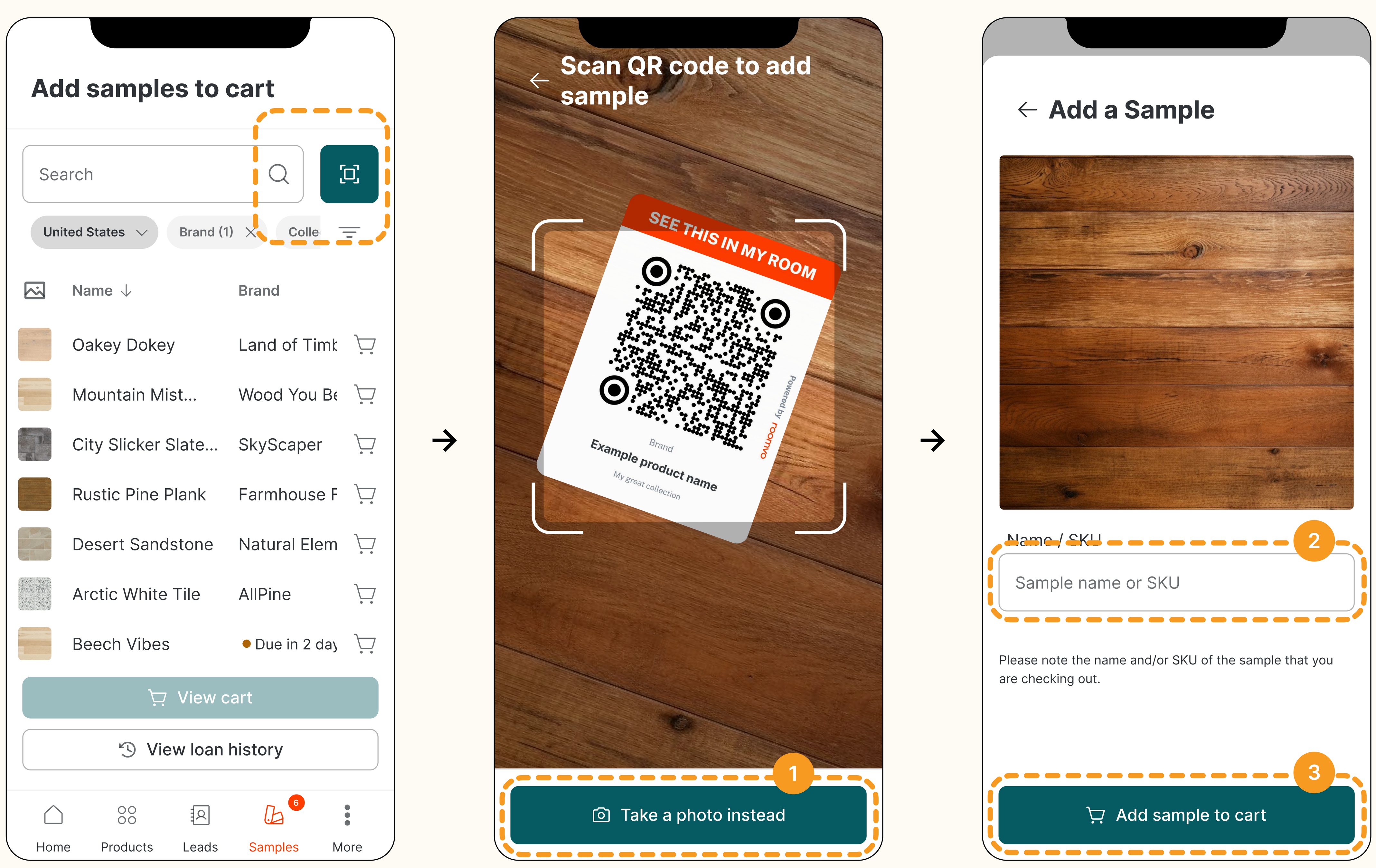


C Use QR scanner/camera

There are two ways to add a sample with the camera

- First, tap the **QR scanner** button on the **Samples** screen.
- You can either scan a product's QR code, which automatically adds it to your cart, or take a picture of a product that's not in the database:

1. Tap **"Add sample to cart"**.
2. Enter the product **name or SKU.**
3. Tap **"Add sample to cart"**



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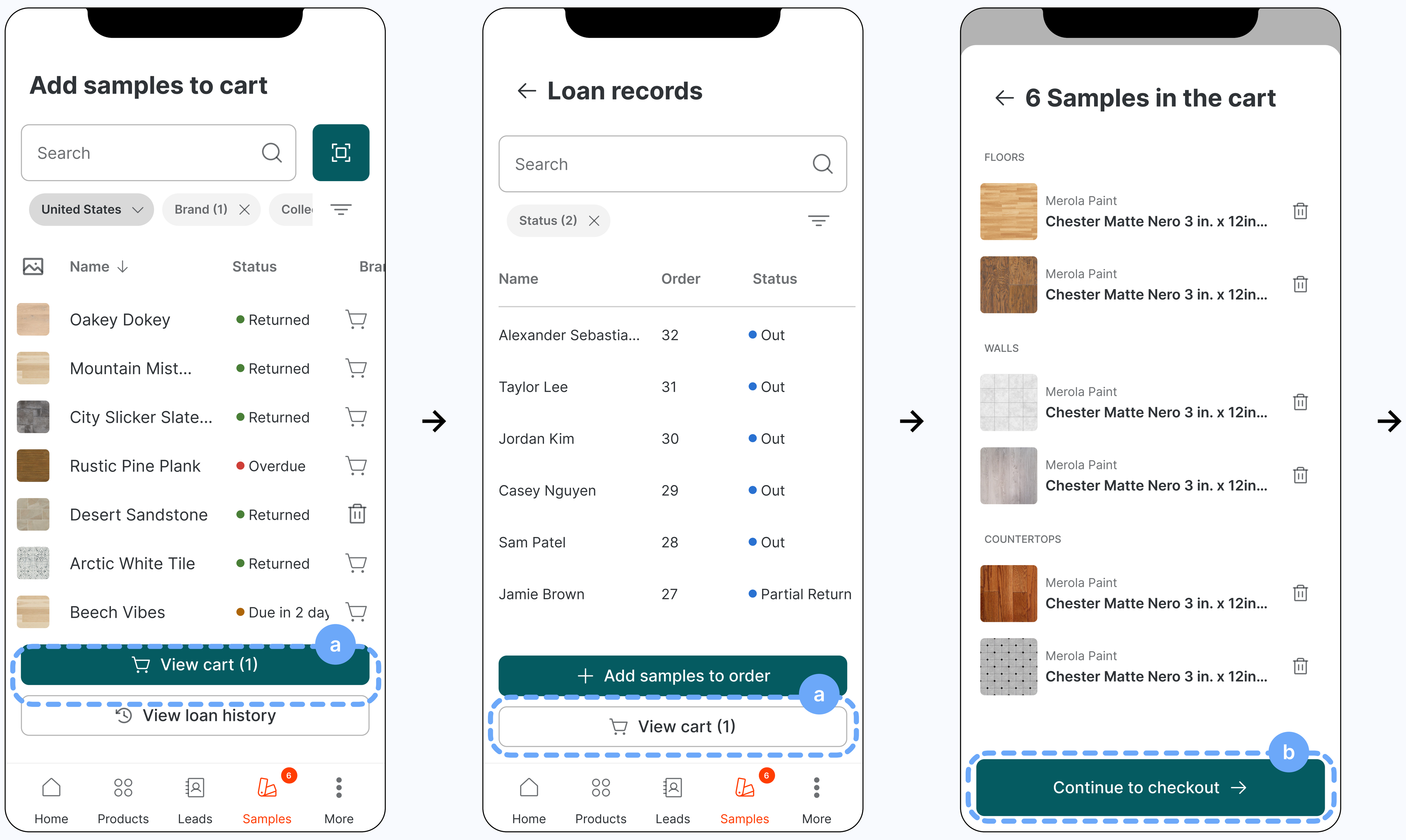
How to check out samples

Checking out samples is quick and intuitive. Here's the 3-step process.

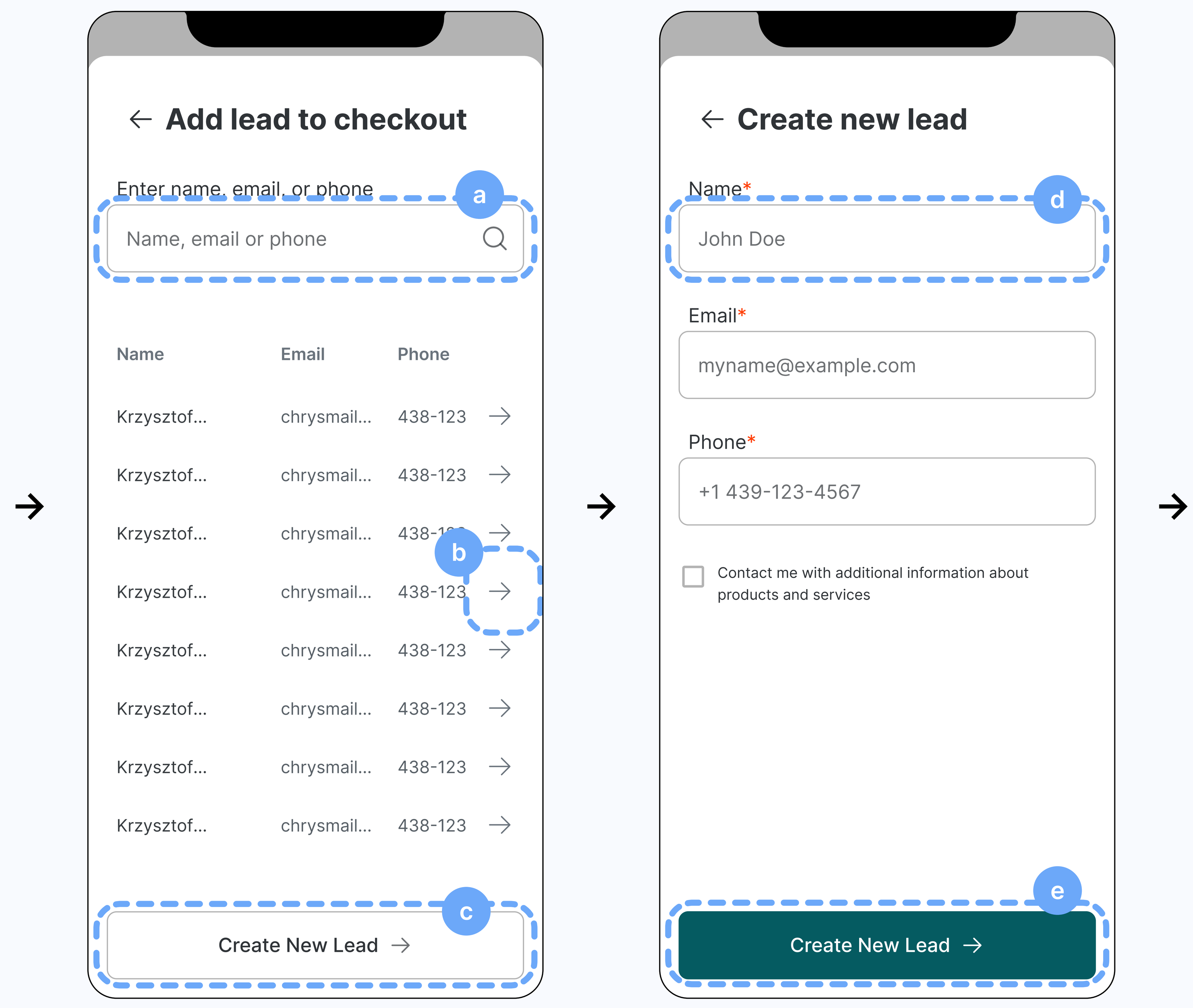
1. Open the cart:

a. Tap **"View cart"** on the **Samples** or the **Loan records** screen.
b. On the **Cart** screen, tap **"Continue to checkout."**



2. Add a lead:

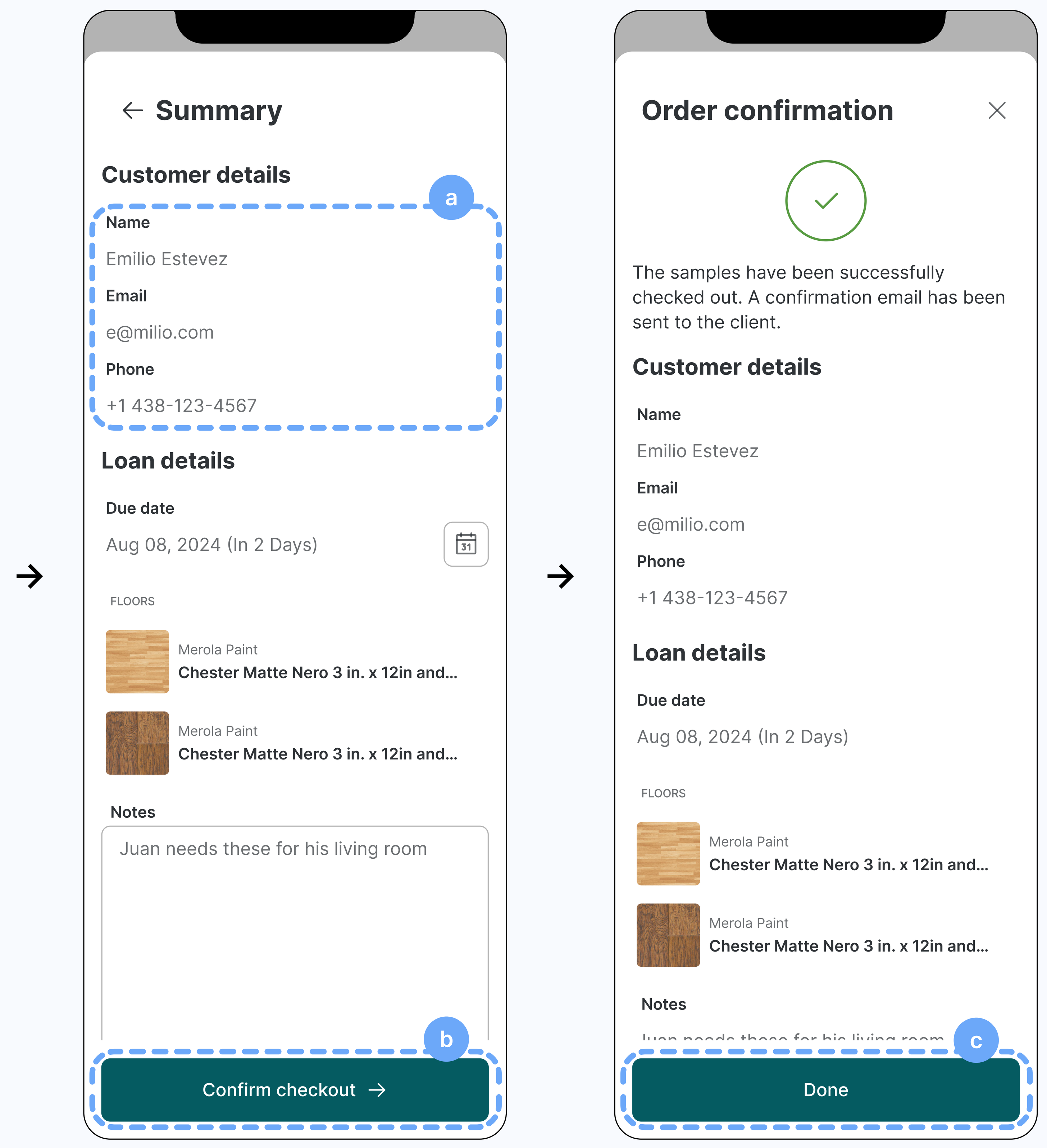
a. Search for an existing lead.
b. Tap the **arrow** next to the lead to add them to the order.
c. If you can't find the lead, tap **"Create new lead."**
d. Enter the name, email, and phone number, and opt in for product updates if desired.
e. Tap **"Create lead"** when ready. This lead is now added to the order.



3. Confirm checkout:

a. Verify customer details, review the due date, and cofirm the samples. Add any notes if needed.
b. Tap **"Confirm checkout"** to finalize the order.
c. Tap the **"Done"** to exit the checkout. You've just checked out samples!

Remember you can tap the calendar icon to change the due date!



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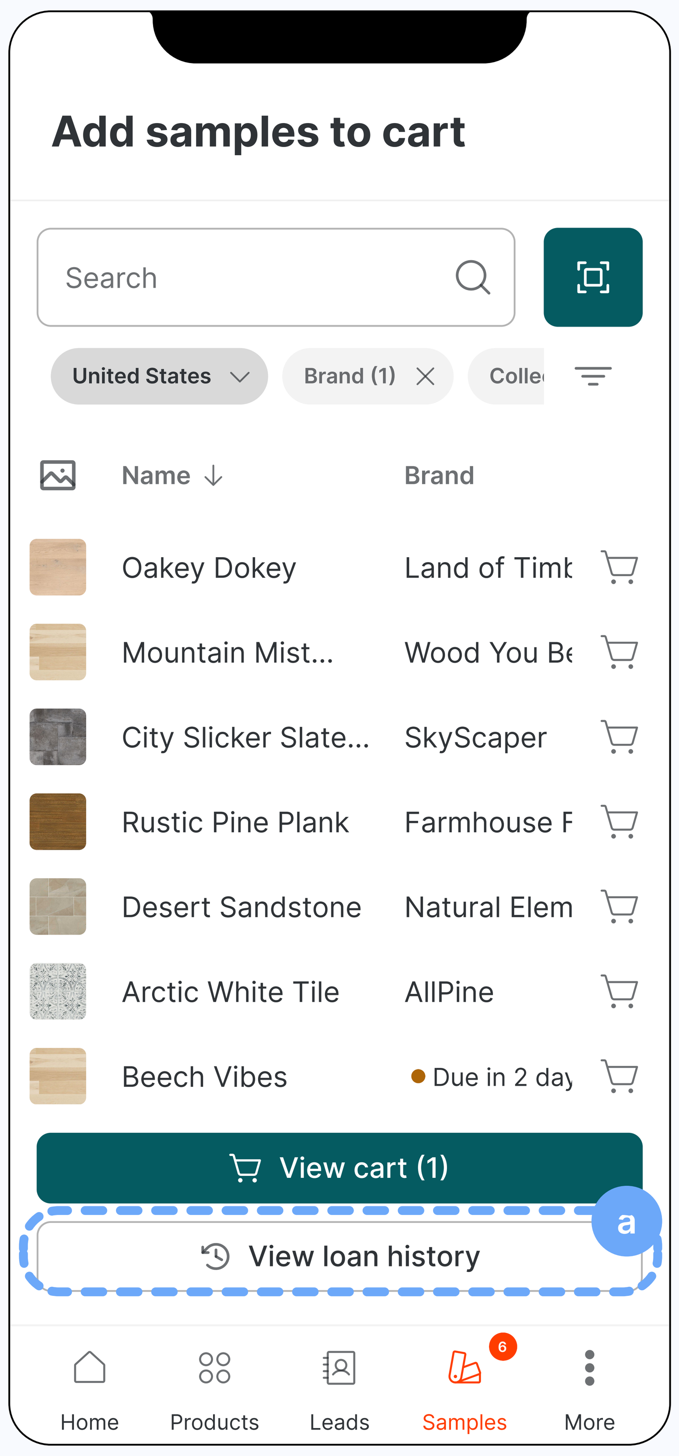
How to check in samples

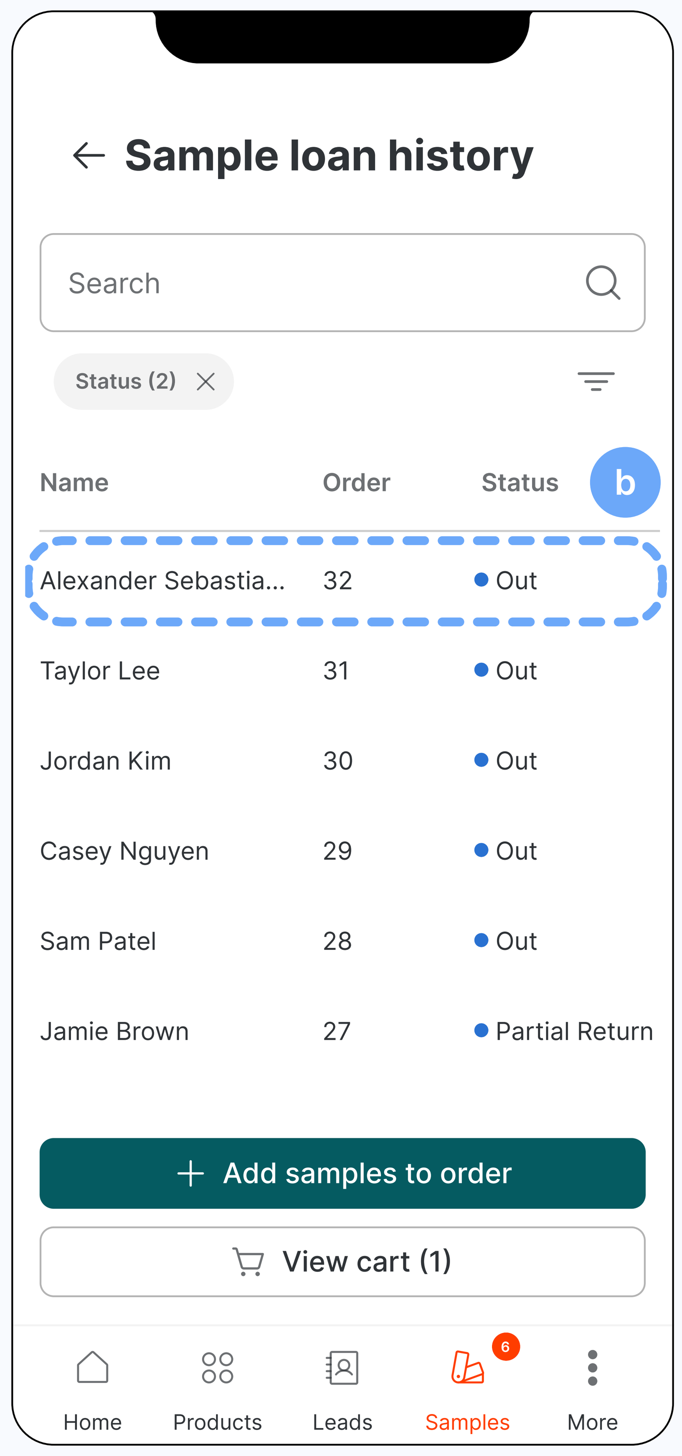
Checking in samples is quick and intuitive. Here's the two-step process.

1. Open the order:

a. Start by tapping **"View order history"** on the **Samples** screen.
b. On the **Loan record** screen, tap the row of the specific order you want to access.

> To find overdue loans, filter by status or search by lead name or order number to locate the specific orders you need quickly.





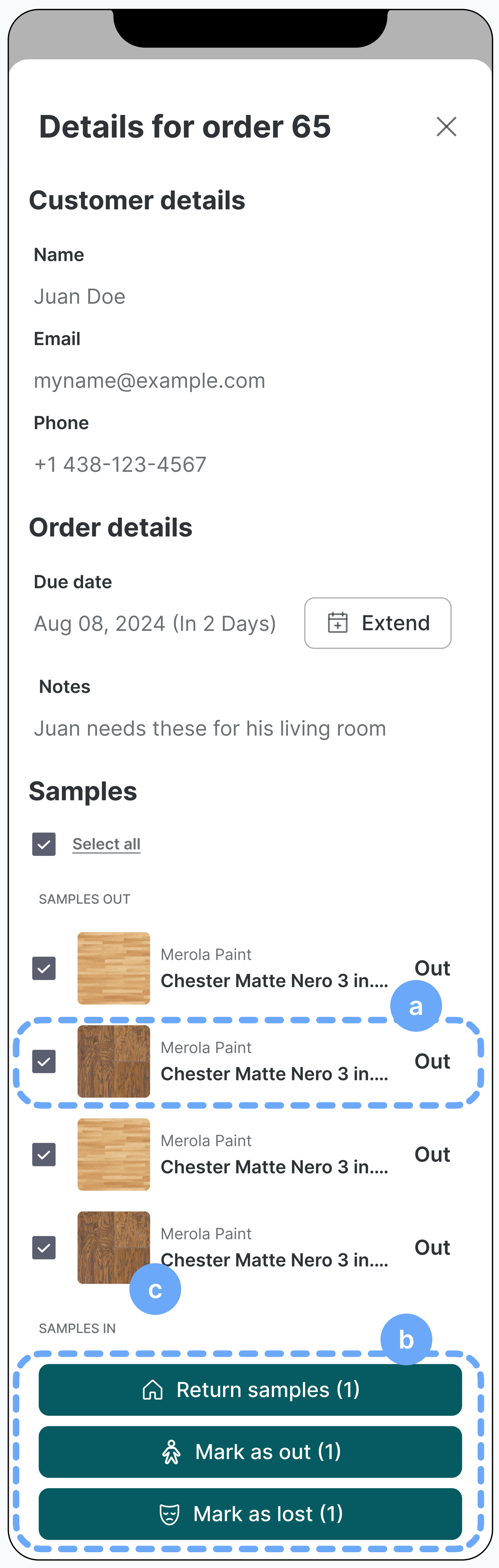
2. Select & change status of samples:

When you open the **Order detail** screen, the samples are selected by default. This allows you to quickly update their status.

a. If needed, adjust the selection to include only the samples you want to update.
b. With the desired samples selected, use the available buttons at the bottom of the screen to change their status accordingly:
   - **Out** for samples that are still with customer
   - **In** for samples that have been returned
   - **Lost** for damaged or lost samples
c. You'll see returned samples stack up under the **Samples in** heading.

No further action is needed. Orders with all samples returned will automatically close within a few days.

> Made a mistake? No worries—you can easily revert a sample's status to its previous setting.
>
> Need to extend the due date? Simply tap 'Extend' and select a new date.



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