

entrée. PEN Driver's Guide



Print Cash Collection Sheet

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1 Driver's Guide - On the Road with entrée.PEN

The Driver's Guide covers these topics:

- [Driver Invoice Process](#)
- [Driver Cash Collection Sheet Process](#)
- [Trouble Shooting FAQs](#)

Important Reminder: Daily before your drivers leave the facility they should confirm that their Anoto digital pens are connected via Bluetooth to the Formidable App on their smartphones.

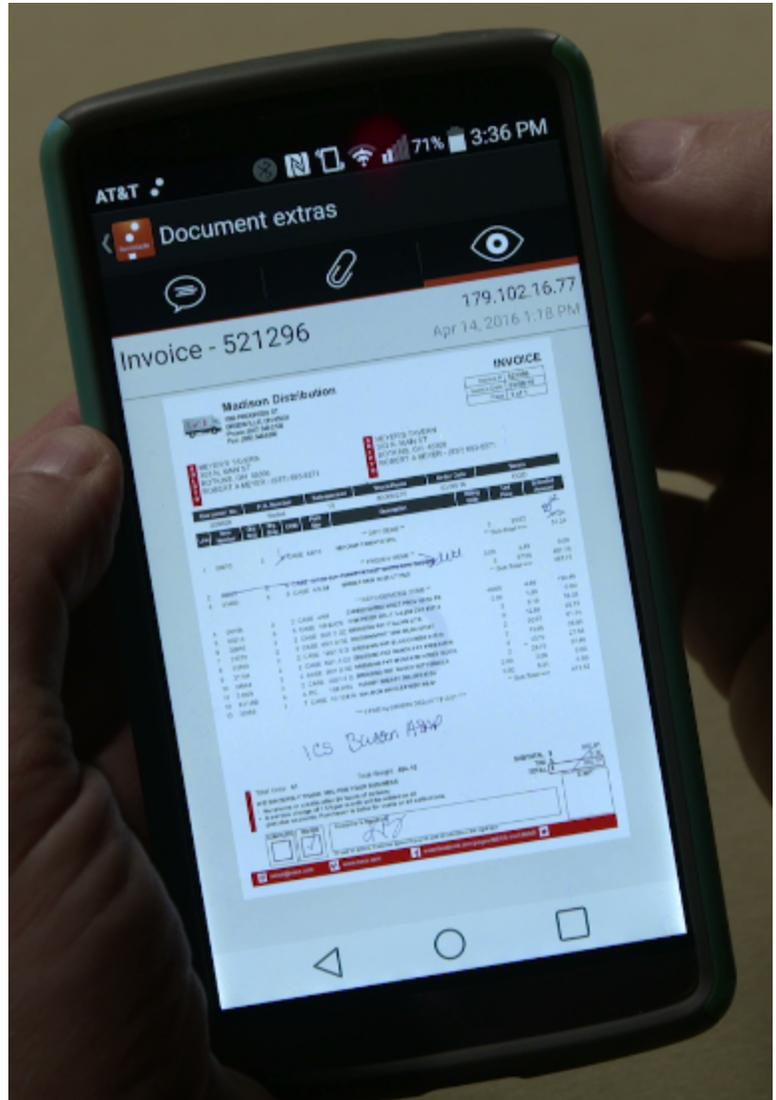
The **Formidable** App must be downloaded to each driver's and/or salesperson's smartphone and set to communicate via Bluetooth with the Anoto Live Pen 2 to send your electronic document data to the cloud server and **entrée**.

1.1 Driver Invoice Processing

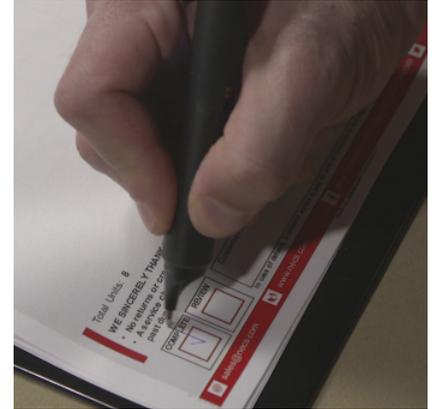
1. Each driver will be provided with digital invoices for every customer stop on their route by the dispatcher.
 - Remember each company has their own invoice design which will differ from the example below, but processing will be similar.
2. At the customer location the driver will turn the pen on and begin processing the digital invoice.

Whatever the driver writes on the invoice sheet is captured by the camera in the pen and saved.

- Follow these steps to process an invoice using the Anoto Live Pen 2.
 - a. Mark the items delivered.
 - b. Write any item corrections, returns, shortages on the invoice.
 - c. Add notes about items or the order for the office clerk on the invoice.
 - d. **Signature Box** - Get the customer to sign their name in the box.



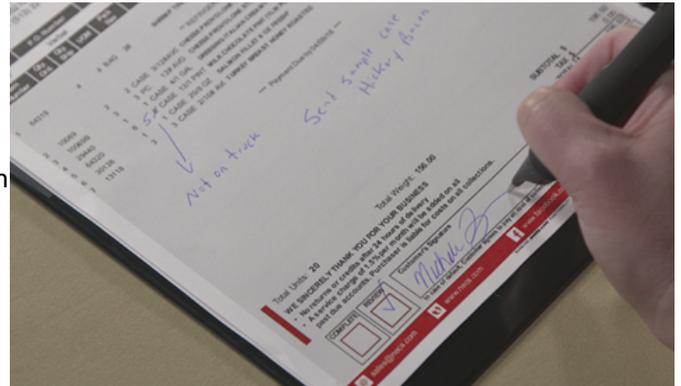
- 3a. Mark the **Complete** box to tell the office clerk there are no changes and to process the invoice.



- OR -

- 3b. Mark the **Review** box when you have written changes, shortages, returns, and correction notes on the invoice.

This tells the office clerk to verify the invoice and resolve the problems before the invoice can be processed.



4. In the **Customer Signature** box have the customer sign the document.

- 5a. Mark the **X-MIT** box when the invoice processing is completed to tell the pen to send the data collected to the cloud server. The pen will use Bluetooth and your smartphone to instantly send the data to the cloud server for storage until the data is imported into the **entrée** system. The pen will vibrate to indicate the data is being transmitted.

- OR -

- 5b. When the driver and/or salesperson gets back to the office they can connect the pen to the docking stand which is connected to a PC via USB port and transmit the data to the cloud server for storage until the data is imported into the **entrée** system.

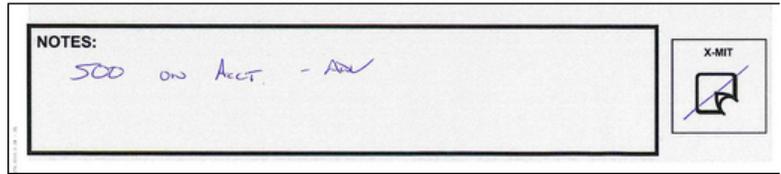
6. Once the data is imported in the main **entrée** system the document is updated. The office clerk will review the invoices and view the customer's electronic document with the driver's notes and written information to correctly verify what invoices are being paid and take actions relating to any notes.

7. The driver leaves the paper invoice document with the customer.

is completed you will check the box on the paper patterned surface designated for the pen as a “send” command.

Here the **X-MIT** in the lower right corner will be checked to send.

The pen will vibrate to indicate the data is being transmitted.



- OR -

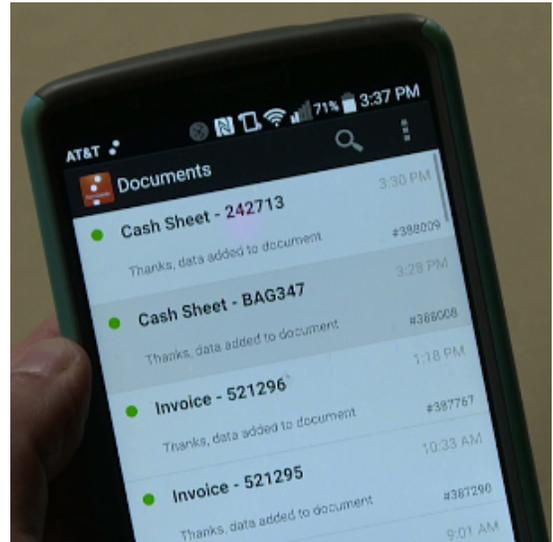
5b. When the driver and/or salesperson gets back to the office they can connect the pen to the docking stand which is connected to a PC via USB port and transmit the data to the cloud server for storage until the data is imported into the **entrée** system.

6. The driver can confirm the document transmission by opening the **Formidable app** on their smartphone and checking the Documents list.

The Invoice and Cash Collection sheet will be listed here with the comment "**Thanks, data added to document**"

7. The driver leaves the paper document with the customer as their receipt.

8. Once the data is imported in the main **entrée** system the document is updated and the office clerk will process the cash receipts and see the driver's writing on the document.



1.3 Trouble Shooting FAQs

- **The Anoto Digital Pen is lost or broken.**

1. The driver can use their smartphone camera to take a photo of the completed documents.

- OR -

2. If a copier is available, the driver can make a physical copy of the document to bring back to the office.

- **The smartphone is lost, broken or runs out of power.**

The driver can continue using the Anoto Digital Pen because the data is stored in the pen. When the driver returns to the office and docks the pen the data will be transmitted using the **Formidable for Windows** application.

- **The driver loses the ability to use both the Anoto Digital Pen and the smartphone.**

Complete the document with a regular pen. Tell the customer you must keep the completed document and will send them a copy of the document.

- **Attempt to Connect the Anoto Digital Pen to the Formidable app on the Smartphone Fails.**

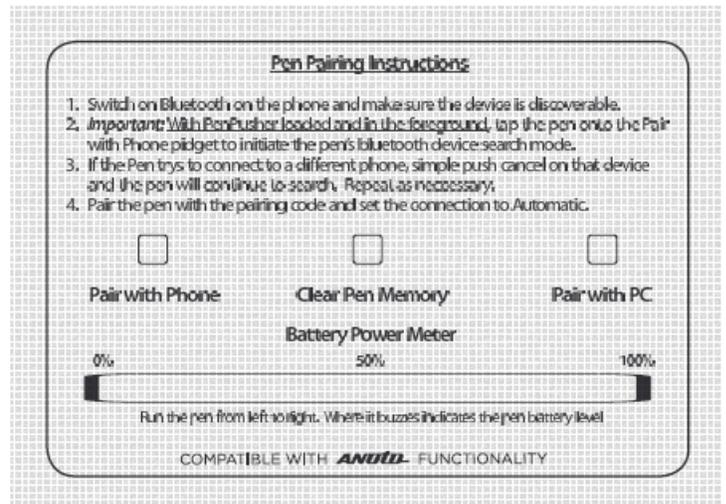
1. Check the smartphone settings to be sure that Bluetooth is enabled.

2. Put the Anoto Digital Pen in pairing mode by tapping the "Pair with Phone" pairing pidget on the Pen Pairing Instructions sheet with your pen.

3. Use the "Scan for Pens" option in the **Formidable app** on your smartphone to find your pen.

4. Select "Live Pen 2" for the pen type.

5. Select the Anoto Digital Pen name when displayed in the Formidable app and you should reconnect.



- **Document does not Transmit**

1. Check your Bluetooth connection between the smartphone **Formidable app** and the pen. If the connection has been dropped complete steps 1 - 5 above to reconnect.

- OR -

2. Check your smartphone Internet connection and the number of bars displayed.

- OR -

3. If all else fails the driver can use their smartphone camera to take a photo of the completed documents.

- **How to Handle Delivery Exceptions**

1. If there are shortages, returns, or other exceptions during delivery the driver must write notes on the document in the gray shaded area on the invoice with the Anoto Live Pen 2.
2. The driver will make a check mark in the "Review" box on the document with the pen. This tells the office to review the invoice.
3. The customer signs the invoice using the Anoto Live Pen 2.