

ESPocketBiz – User's Manual

Entersoft Business Suite® | Entersoft CRM® | Entersoft Mobile Suite®

Use guide

Ταυτότητα

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1 Pocketbiz New Era (Mobile)

1.1 General

This manual describes the functionality of the Pocketbiz New Era (Android version) for mobile devices (pda/tablet/phone).

1.2 Starting the application

To launch the application, from the home screen of the tablet, press the Pocketbiz icon, as shown in the picture.



1.3 Login screen



When the application starts, the user login screen is displayed. At this point we need to type the **username** and the **password** that has given to us.

When we fill in the username and the password, the «**LOGIN**» button will be enabled and by pressing it we will enter the main screen of the Pocketbiz.

We can also tick on the Show password [] option, to display the password we typed.

1.4 Main Screen and Dashboard

The home screen of the application has the following basic form layout:



header

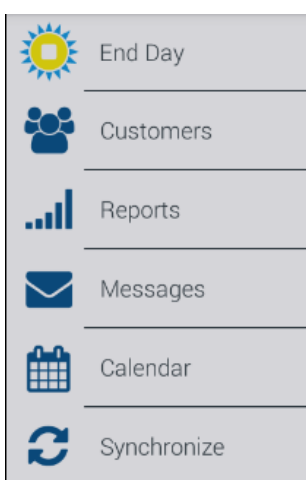
It consists of a **header** which has a message like «Good Morning», the current user's name and the current date.

On the right side, there are the **option icons** that will be analyzed below.

detail

In the **detail section** of the home screen, a customized **salesman dashboard** appears depending on the configuration of the installation.

Here we can see various Metrics, KPIs, messages, reports, charts, lists etc., and generally, information that concerns the salesman.



Apart from the icons on the right, we can press the **«Home»** button  on the top left, and the following options (Customers, Reports, Messages, Calendar, Synchronize) appear.

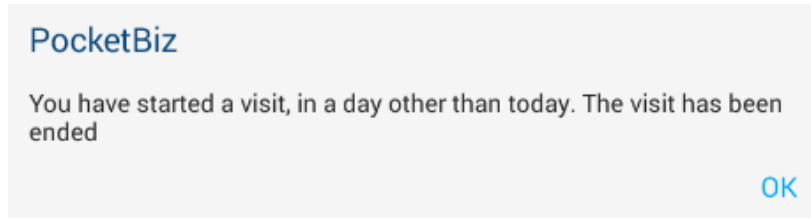
All the options are also available from the right side of the screen (header), with the same functionality but in reverse order.

In some installations, depending on their configuration, the first option is the «End Day», an option that we will explain later.

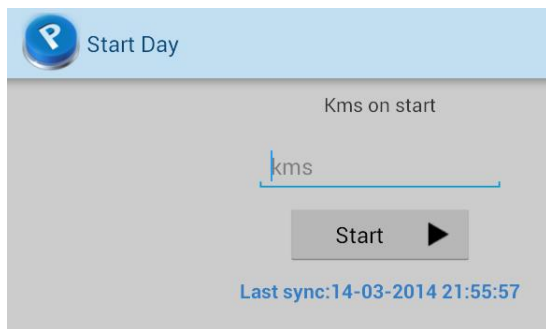
1.5 Start Day

In some installations, depending on their configuration, the first step we have to do is to start our (working) day.

Usually this is done automatically and a warning is displayed about.



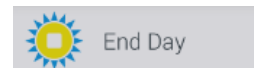
Then, the application prompts us to enter a proper value for the mileage (kms). This value can correspond to our vehicles dashboard kilometers when we begin our working route.



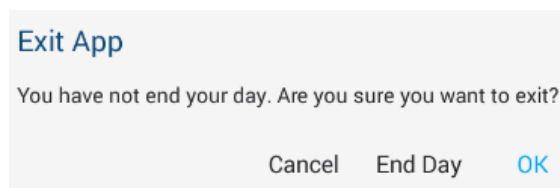
Also inform us when it has been the last synchronization.

After entering the number of kilometers, we have to press the Start button, and the main working screen will appears.

The button «Start day» at the Home menu then is replaced by the «End Day»



Then if we try to get out from the app without «End Day» being pressed, comes the following message



2 Customers

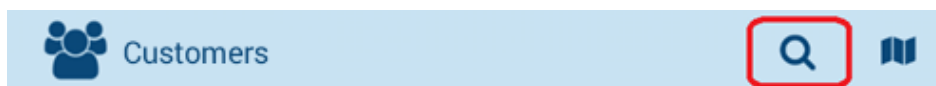
By pressing the «Customers» button, the following screen showing customers that are assigned to current salesman-user will appear:

Customers		
EXISTING	NEW CUSTOMERS	
CAFCO E.P.E Outlet Code: 0010176351 VAT Number: 095533940	25 IOANNINON ATHENS	FOOD & HOUSEHOLD ITEMS ● Revenue: 7500
DAILY ORANGE AE Outlet Code: 0010190981 VAT Number: 999841772	301 LAVRIOU AVE. ATHENS	FOOD & HOUSEHOLD ITEMS ● Revenue: 11500
KEEP & PICK AE Outlet Code: 0010198151 VAT Number: 998771190	NTOROVATEZA AREA MARKOPOULO	FOOD & HOUSEHOLD ITEMS ● Revenue: 21500
LIDL HELLAS Outlet Code: 0010197698 VAT Number: 093683423	14km THES/KIS THESSALONIKI	FOOD & HOUSEHOLD ITEMS ● Revenue: 6000
OK ANYTIME MARKET AE Outlet Code: 0010198139 VAT Number: 999309716	106 AFRODITIS ATHENS	FOOD & HOUSEHOLD ITEMS ● Revenue: 2500
SEA LEVANT Outlet Code: 0010197539 VAT Number: 099048125	54 FILONOS PIRAEUS	FOOD & HOUSEHOLD ITEMS ● Revenue: 1500

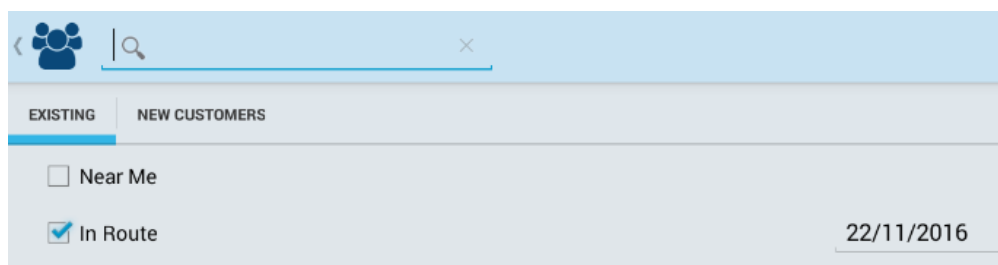
(The layout of this screen is depending of the configuration of the installation)

By default, it is set to show only the clients that exist on his planned route of the day. We could also change the date to see the route of the new one.

To disable the filter and display all the customers, we press the icon with the magnifying glass (as shown below)



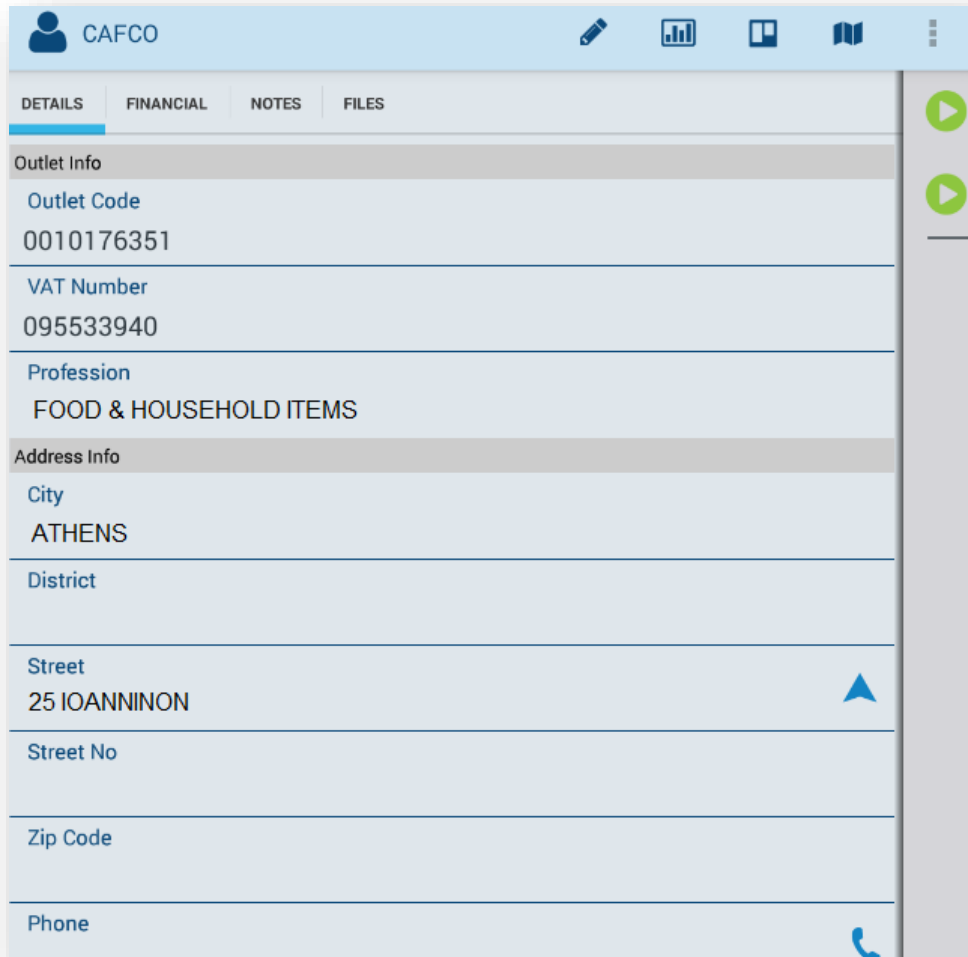
Then, we uncheck the «In Route» checkbox option and by using the search option above, we locate the desired customers.



The search can be done with all the available fields that appear in that list like name, customer code, VAT number, Address, City, Phone.

2.1 Customer details

Choosing a specific customer, we show its data details tab.



DETAILS	FINANCIAL	NOTES	FILES
Outlet Info			
Outlet Code 0010176351			
VAT Number 095533940			
Profession FOOD & HOUSEHOLD ITEMS			
Address Info			
City ATHENS			
District			
Street 25 IOANNINON			
Street No			
Zip Code			
Phone			

At this point, there are the following tabs that display information about the customer:

- the customer's details - DETAILS
- the financial elements - FINANCIAL
- the user's notes about customer - NOTES
- attached files about the client - FILES
- customer dashboard - More

2.1.1 Details

The DETAILS tab displays information about the customer, payment method and customer's discount. There is also information about the customer's address, email, phone numbers etc.

Address Info	
City	ATHENS
District	ATTICA
Street	25 IOANNINON 
Street No	
E-MAIL	
Phone	696867660 

By pressing the arrow at the Street field, opens navigation route from where we are to the customer's address.

If we press the phone icon at the phone field, app will make a phone call to the customer by using this specific number.

Even if the customer's email is completed, by pressing the envelope icon we can open the form for sending email to the specified email address.

Also there is more information about the customer according the configuration.

2.1.2 Financial

DETAILS	FINANCIAL
1-30 days	0.00
31-60 days	0.00
61-90 days	0.00
more than 90 days	0.00
Balance:	0.00

The FINANCIAL tab displays information about the economic progress made by the customer lately

DETAILS	FINANCIAL
Turnover	7,500.00
1-30 days	0.00

The balance shown relates to the balance that is right now (actual balance).

The details displayed are customizable.

2.1.3 Notes

In the NOTES tab, we can keep text notes about the specific customer, which may prove useful to us in the future.

These notes are not stored in the ERP in the customer's data or share with other users (personal).

We do not forget to click Save.

DETAILS	FINANCIAL	NOTES	FILES
Enter your notes here Save			

2.1.4 Files

In the FILES tab, we have the ability to store a given file to be associated with this client. Such files can be: video, photography, word file, excel file, power point file or pdf file. Clicking on a picture will view this multimedia file.



TASTY FOODS

DETAILS

FINANCIAL

NOTES

FILES



PS Picture of Success.pptx



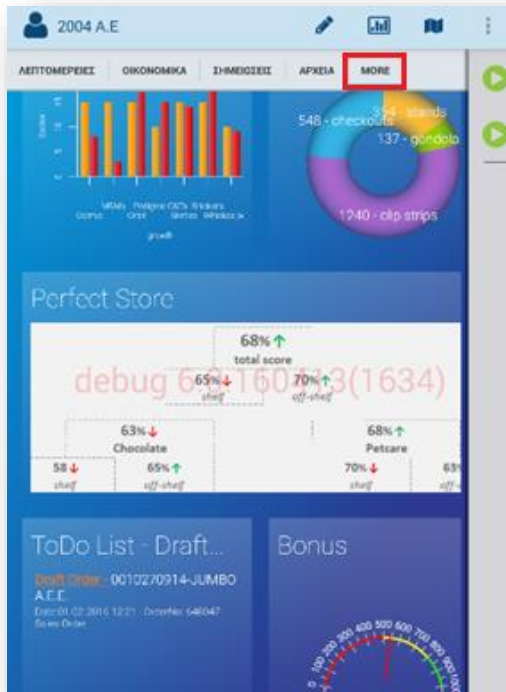
HealthyLiving_image.jpeg



freebies-mars-bar-mar2011.jpg

2.1.5 More (Customer Dashboard)

In the MORE tab, it appears a customizable dashboard for the selected customer.

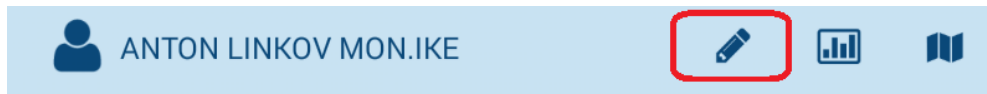


Notice in the screenshot that it has no header as the dashboard of the salesman placed at the home screen.

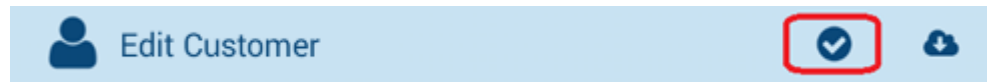
This dashboard contains KPI's, charts and reports about the specific customer.

2.2 Customer editing

By pressing the pencil button, we are able to make changes to customer data concerning contact info details.



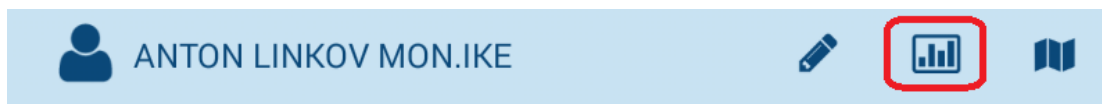
To save changes, we have to press the tick on the right side of the screen.



The data do not change automatically. The application creates a data change request that must be handled by the back office users of our company.

2.3 Customer reports

By clicking on the bars button open a list of reports associated with the customer.



For example, maybe included:



PocketBiz				
Customer Details				
Customer	Code	Date	Document	Debit
Total				1348.12
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	09-11-2015	11TΔA35355	162.84
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	30-10-2015	11TΔA35243	97.7
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	29-10-2015	11KTΔ08509	-97.7
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	29-10-2015	11TΔA35227	97.7
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	19-10-2015	11TΔA35091	97.7
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	12-10-2015	11EMΠ112783	0
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	12-10-2015	12TΔA06458	97.7
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	16-09-2015	11TΔA34707	162.84
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	11-09-2015	11ΠΣA05594	-140.27
ALL ABOUT FOOD & WINE M. ΕΠΕ	41625	10-09-2015	1030007830	0

Drill down reports are the reports that by clicking in a line, led to another report that displays the details for the specific record (e.g. header, detail of document).

For example:

Orders-30 days					
Date	Document	Tot. Doc.	Tot. GSV	Tot. Qty\CS	Tot. Qty\PC
<u>07-11-2016</u>	ORDER	1	9887.25	7.0	70.0

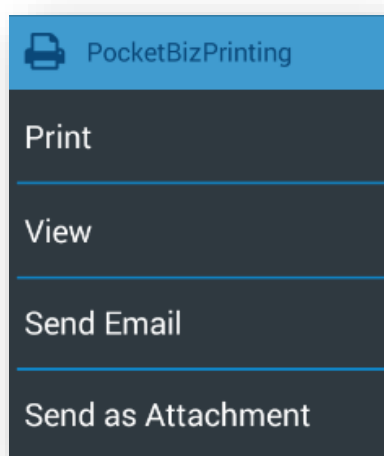
Clicking on the 7-11-2016 line, the day orders report appears for this day

Day orders					
Number	Time	Cus. Code	Value	Qty\CS	Qty\PC
<u>915002</u>	17:36	0010176351	12161.31	7.0	70.0

Clicking on the 915002 order number, the specific document detail appears

Document Detail						
Material	Mat. Code	Value	Qty\CS	Qty\PC	Weight	
P DUOFOLD NORMAN ROCKWELL L.E. FPen	1102.0002.	2412.8	2.0	20.0	1.0	
PARKER SNAKE SILVER L.E. FPen	1102.0003.	7474.4	5.0	50.0	2.5	

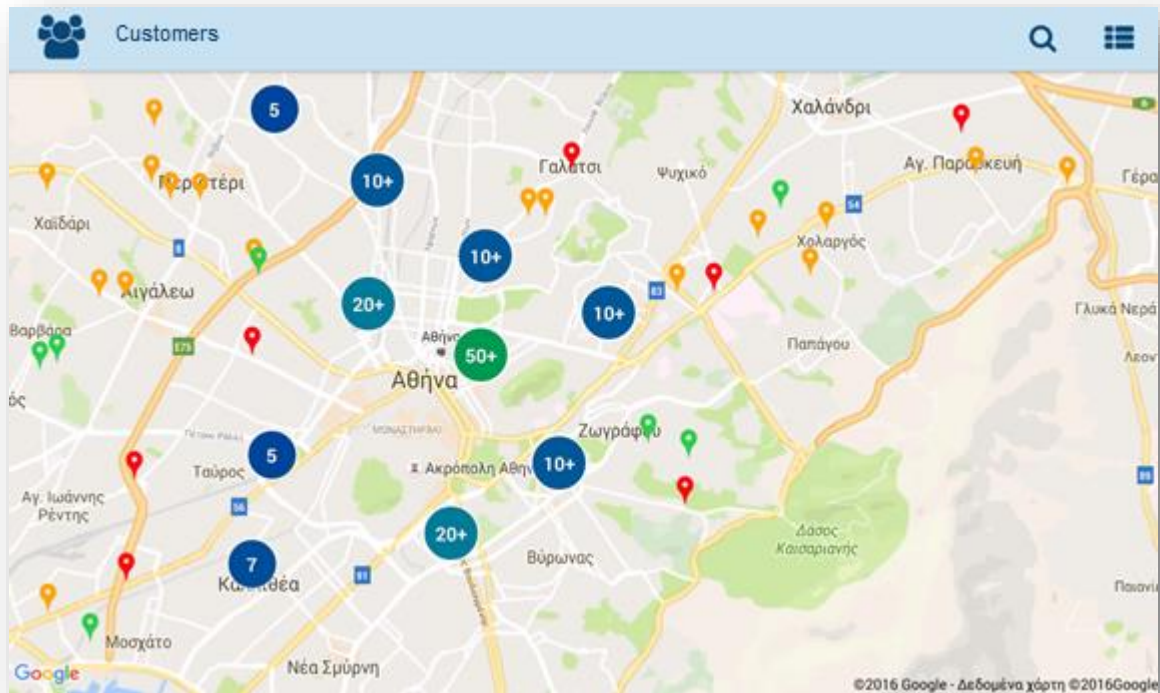
When we reach the final report we can press for example the «Send as Attachment» and the tab is sending as a Microsoft Word file.



2.4 Map



With the map icon , customers who have their coordinates fields completed, i.e. that are geocoded, can be displayed on a map of the tablet's customer list as below:



2.5 New customer (request)

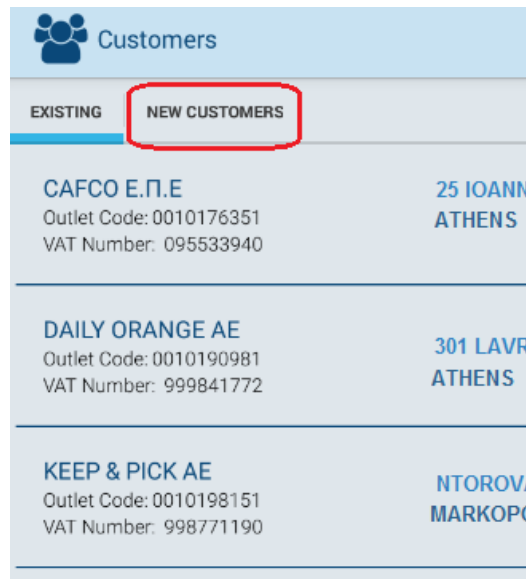
Depending on the configuration that has been done, the options for New customer are:

0: the creation of a new customer is not allowed

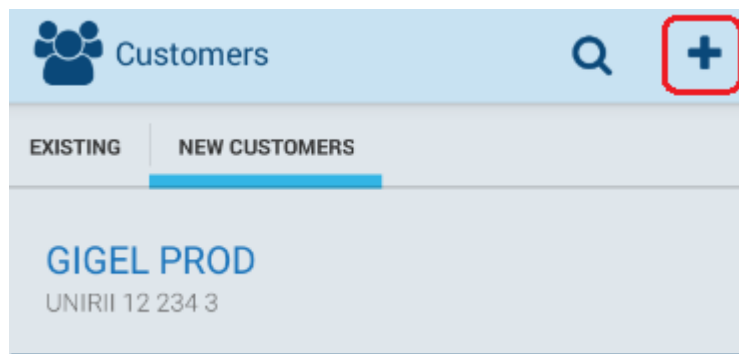
1: You may create a new customer but only the request form stored in, cannot be selected and started visiting

2: You may create a new customer and then can be selected and started visiting (default)

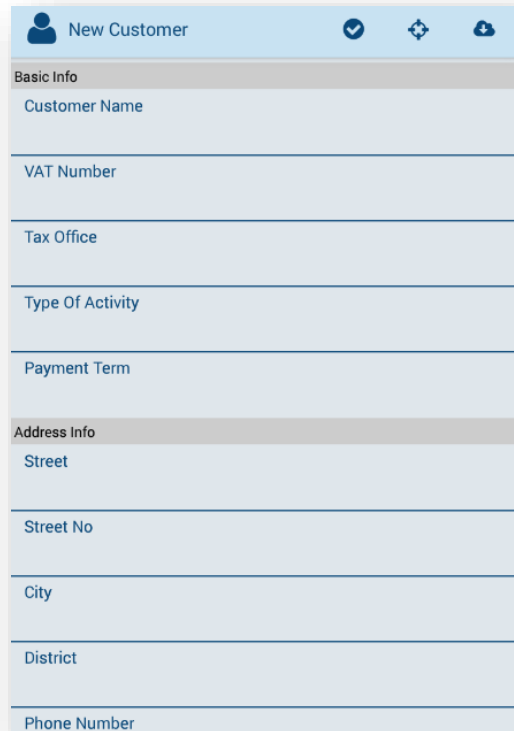
In case that new customer creation is allowed, a tab named «NEW CUSTOMERS» appears and we select it:



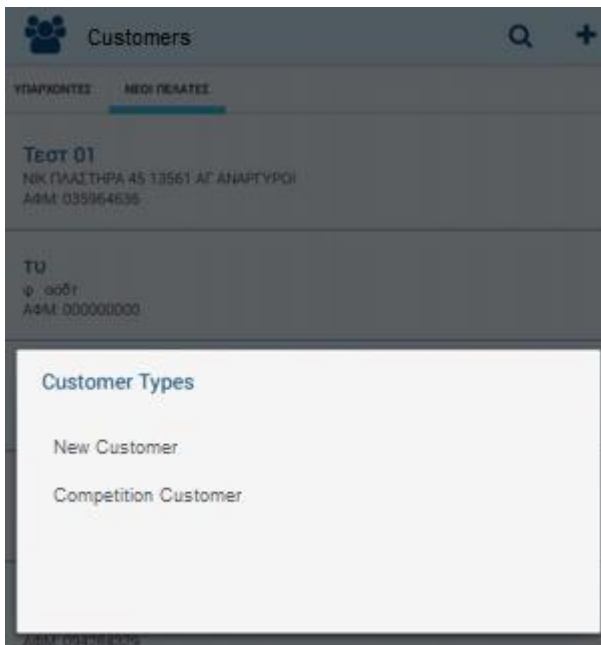
In the display list of the new customer screen, appears the pending requests of new customers' creation by back office users.



We press the + button and a form to record the details of the new customer (like below) opens.



Screen form of new customer



Depending on the configuration, a screen may appear similar to the left, where we select the appropriate client type, e.g. competitive customer.

Since then, we have completed the client data, an entry in the customer list is created. If we want to register an order for this customer, we select the new customer and start a normal visit as an existing customer.

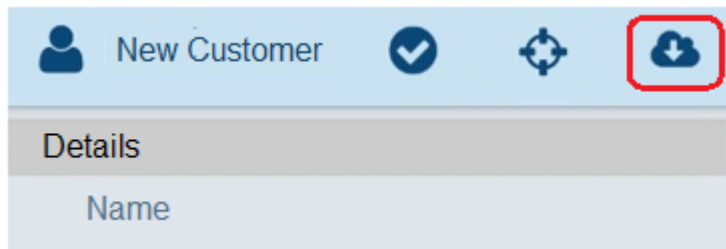
Orders relating to the new customer, will not go up in the ERP until the customer opened in the ERP and come back to Pocketbiz as an existing customer.

Optionally, an automated email is sent to users of Customer Service department (back office) when we make a sync including new requests of new customer.

2.5.1 Web Service Taxis

A value added tax identification number or VAT identification number (VATIN) is an identifier used in many countries, including the countries of the European Union, for value added tax purposes.

Pocketbiz uses this number, to access Greek Revenue Service to check the validity of it via a special web service (available in specific countries too). Except the validity of the given VAT, the service populates a lot of major fields of the form of the customer with accurate data, automatically without any keyboarding by the salesman.

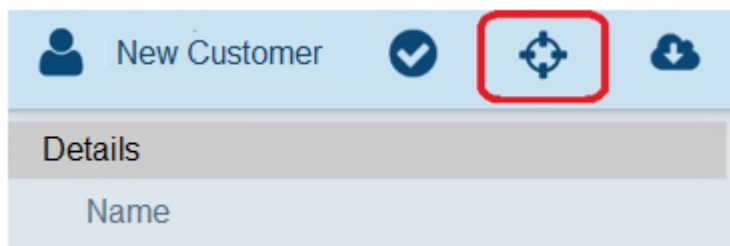


Taxis web service access button

The device needed to be connected to the internet and user have to press the icon cloud to call the web service.

2.5.2 Reverse Geocoding

It is possible to obtain positioning of the client automatically and fill in the fields of address, area, city, postal code etc. to form, basis of the stigma that has found the customer.

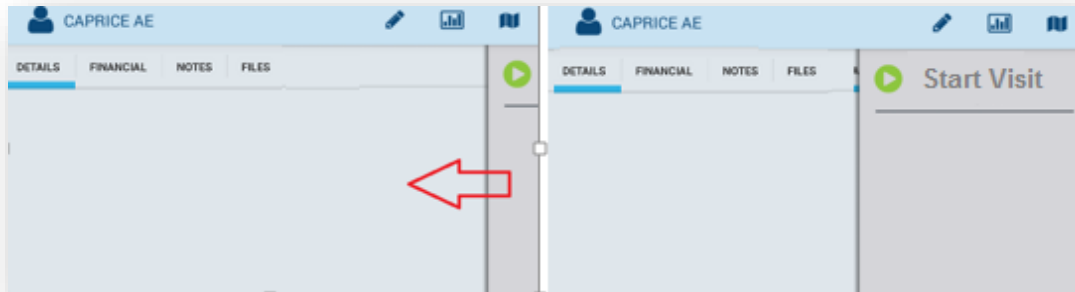


To download GPS stigma and Fields, we could press the button with the GPS icon.

The button for taking stigma and reverse geocoding

3 Tasks

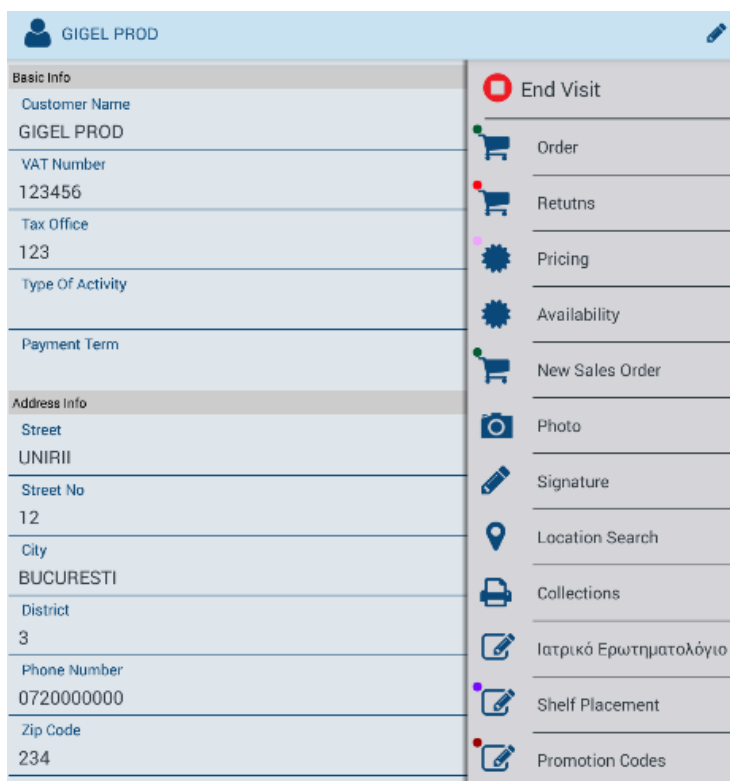
To display all the possible actions that are available for each client (task list), we touch with a finger the right side of the screen and drag it to the left, as shown in the following picture:



We notice that the «Start Visit» text appears.

3.1 Start Visit

Clicking the «start visit» button, begins the period of visit to count and a list (task list) appears with all the available actions (tasks) that the user can do (or must do), during the visit in that client.



This list always is different for each type of user, e.g. Salesman, Merchandiser.

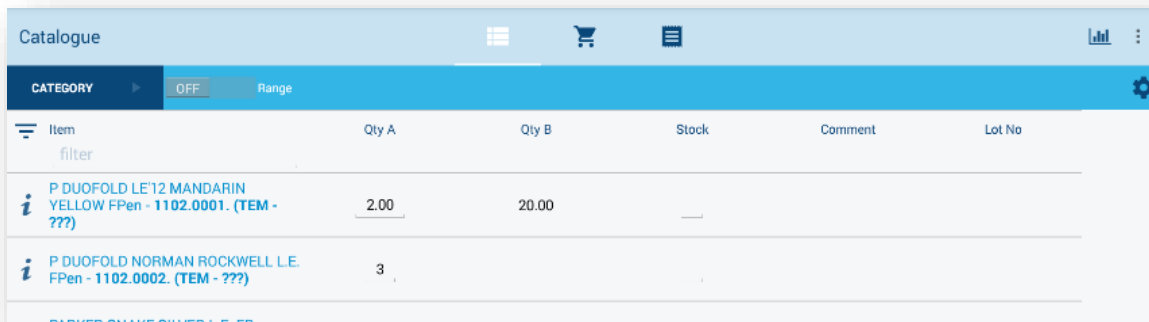
May contain mandatory and not mandatory actions.

The icons identify the type of action, e.g. the tasks for merchandising have the  symbol.

3.2 Sales Order

3.2.1 Catalogue

Sales order task will load the main screen of order taking, having the following format:

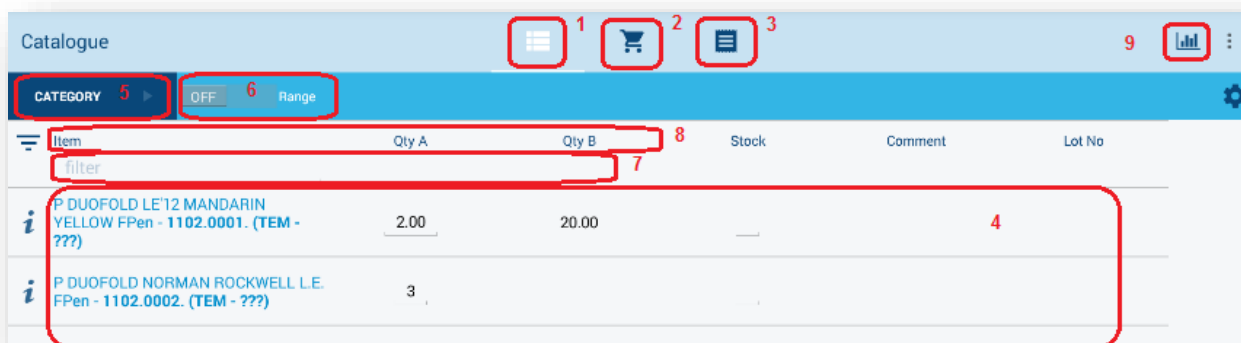


Item	Qty A	Qty B	Stock	Comment	Lot No
P DUOFOLD LE12 MANDARIN YELLOW FPen - 1102.0001. (TEM - ???)	2.00	20.00			
P DUOFOLD NORMAN ROCKWELL L.E. FPen - 1102.0002. (TEM - ???)	3				

By default the focus is on the catalogue screen (1st tab), in order to enter items and quantities in the order. Once the form is loaded, the application fetches automatically all the customer's materials' range. We can now apply filters or/and grouping to the data rows as described later.

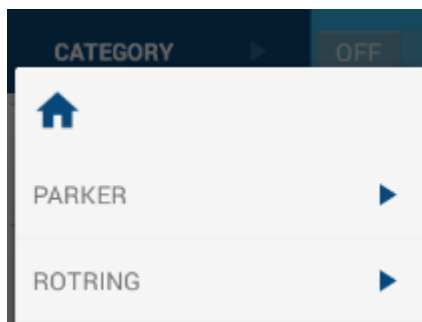
We can also scroll up/down on the list and also right/left and fill the desired editable cells.

Let's explore the following options:



Item	Qty A	Qty B	Stock	Comment	Lot No
P DUOFOLD LE12 MANDARIN YELLOW FPen - 1102.0001. (TEM - ???)	2.00	20.00			
P DUOFOLD NORMAN ROCKWELL L.E. FPen - 1102.0002. (TEM - ???)	3				

1. Catalogue tab option
2. Shopping cart tab option
3. Elements of Invoice Document tab option
4. The Items List with ability to record volume, stock, distribution, etc. per item row
5. The grouping menu of categories and subcategories of items (for faster and specific item mining)



Tapping the dark blue button named **CATEGORY**, the user can select a group of items, and to display only these items belongs to the selected group.

- By clicking on the Category, a window with the available types of categories opens.
- Clicking the  right arrow of a category, we can show its subcategories and so forth.

- After final selection, the selected value is displayed in place of the word «category».



Clicking the X symbol, user can reset the group selection to default (none).

- The toggle button to enable/disable the range (variety of items) of the customer (default value: OFF). Tapping on it, it toggles to ON and vice versa.

OFF returns all materials, ON returns only the materials with values already given by the user.

- Search Filters in the corresponding fields of the headers

In the «Item» field we can look for the desired item by typing its name, and in the «Code» field based on its code, etc.

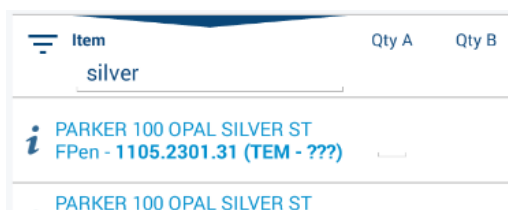


The search is dynamic and fast. This means that each letter we type it creates a text filter that is contained in the search.

So if we type in the letter «S», will appear immediately all the items having the letter «S» in their description. Then, if we type the letter «i», will displays immediately all the items having in their description the text «Si», (and so on), if then we type the letter «r», e.g. so at last if we wrote the word «Silver», it would display only the items that the word «Silver» contained in their description.

There is also the possibility of dictionary use that accelerates our typing process.

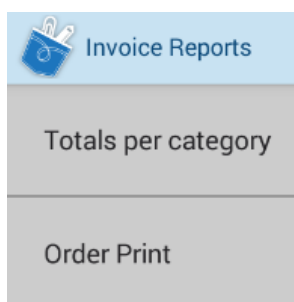
8. Sort options based on the respective field of title



By clicking on a field name we sort the list based on this field in ascending order. With a new click, the order now is descending and the relevant arrow indicating the current order is displayed.

9. Reports inside the order screen

Displays the Invoice reports menu, with reports related to this order.

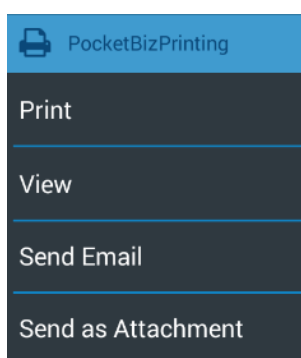


Totals per category			
Sector	Qty	GSV	Weigth
PARKER	1.5	196.78	0.75
ALL Sectors:	4.6	541.8	0.8

Totals per category: a summarized order report according to the current details of the order by Sector

Order Print				
Customer Code	Customer Name	Date	Invoice Nr.	Comm
0010176351	CAFCO E.P.E	2016-07-13 13:33:24	671003	
0010198139	OK ANYTIME MARKET AE	2016-01-12 12:17:24	775004	
0010103458	ΜΑΡΙΝΟΠΟΥΛΟΣ Α.Ε	2015-10-07 11:00:20	819009	

Order print: a list of latest orders. Choosing one of them to print, view, and send by email or as an attachment.



SIEBEN E.P.E ΚΑΙΝΟΤΟΜΕΣ ΛΥΣΕΙΣ ΠΛΗΡΟΦΟΡΙΚΗΣ ΑΦΜ:099457037 ΔΟΥ: ΔΟΥ ΠΑΛΛΗΝΗΣ Αριστομένους 3 Γέρακας Αθήνα ΤΗΛ:2130 179 000							
ORDER ???10 22				Ημ\ν\α:13-07-2016			
ΣΕΛΙΔΑ:1/1				ΕΠΩΝΥΜΙΑ : CAFCO E.P.E			
ΚΩΔΙΚΟΣ : 0010176351							
ΠΟΛΗ : ΑΘΗΝΑ							
ΟΔΟΣ/ΑΡΙΘ: ΙΩΑΝΝΙΝΩΝ 25							
Α.Φ.Μ. : 095533940							
ΤΗΛΕΦΩΝΟ :							
ΤΡΟΠΟΣ ΠΛΗΡΩΜΗΣ:Cash							
ΚΩΔΙΚΟΣ	ΠΕΡΙΓΡΑΦΗ	ΠΟΣ.	ΤΙΜΗ	ΕΚΠΤ	ΚΑΘΑΡΗ	ΦΠΑ	
1102.0001.	P DUOFOLD LE'12	1.0	786.80	0.0	786.80	180.96	
1102.0008.	P DUOFOLD TRUE B	4.0	432.73	0.0	1730.92	398.11	
1102.0801.1	P DUOFOLD BLACK	4.0	230.79	0.0	923.16	212.33	
1102.1101.1	P DUOFOLD PINSTR	7.0	314.71	0.0	2202.97	506.68	
1102.1503.0	P DUOFOLD PEARL	1.0	149.49	0.0	149.49	34.38	
ΣΥΝΟΛΑ: Ποσότητα: 17.0 ΚΑΘ. ΑΞΙΑ:5793.34 ΑΞΙΑ ΦΠΑ:1332. ΤΕΛ. ΑΞΙΑ: 7125.8							
ΕΥΧΑΡΙΣΤΟΥΜΕ ΠΟΥ ΜΑΣ ΠΡΟΤΙΜΗΣΑΤΕ							

Sample of final report (invoice document)

To add an item to our invoice document, we type the desired quantity in the cell of the item line and the column of cases. We put in the amount we want and then we have to click «ok» or move to another cell.



: hides / shows, the bar of search filters



: displays extra information, photos and related files for that item

no image



INFORMATION

Code	1102.0001.	 ParkerSpacePen05.jpg 2014-03-05 21:09:36
Description	P DUOFOLD LE12 MANDARIN YELLOW FPen	
Extra	0	
Quantity	10	



: displays the following menu

Enter Multi-choice mode
Edit
Delete
Copy

With «enter Multi-choice mode» option, we can enable the multi-choice state, which we can select / deselect many noncontiguous items by clicking on their lines. The selected lines are painted in a dark color. To return to the «simple select mode» option, from the same

menu choose «Enter single choice mode».

 DUOF CENT FPen 18ct FRONT END AS/BLY - 9101.0001.1 (TEM - ???)	1.0
 DUOF INTL BPen RATCHET FRAME AS/BLY - 9102.0080.3 (TEM - ???)	—
 DUOF INTL FPen 18ct FRONT END AS/LY PT - 9102.1801.1 (TEM - ???)	—

In case we want to put a specific quantity on many items, select «Edit» and after typing the desired value (as in the right screen), press «OK». That will update the quantity of all the selected items with this value.

With the «Delete» option we can immediately clean up the values of all columns of the selected line.

Edit Products

Qty A	-	7	+
Stock	-		+
Comment			
Lot No			

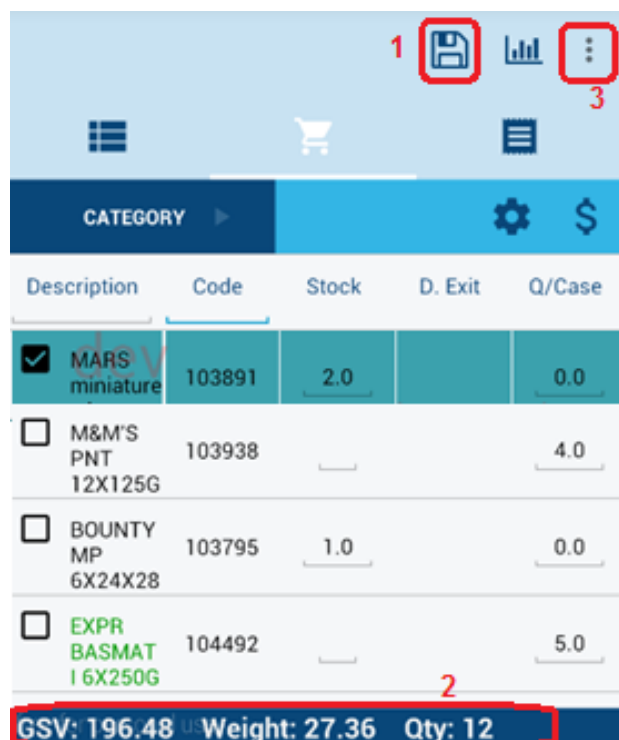
CANCEL OK

3.2.2 Shopping cart

Once we completed the order taking with the desired items and quantities, by pressing the basket icon we move to the second tab of the order in which we can view the summary of the order.

The screen is similar to that of the catalogue, except that the items shown are only what has become the order entry, stock etc.

Of course we can go back to the catalogue (1st tab) to modify our order.



1. Save the Order

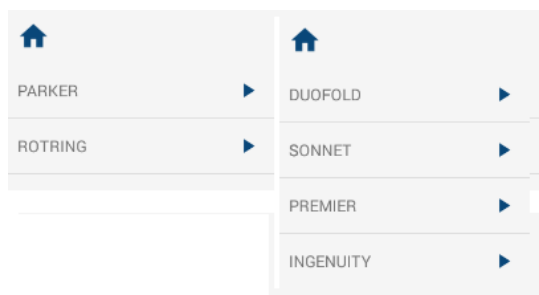
Clicking the  save order button, the following message appears:

With the «Save» button, we save the order, with «Return to Edit» button we return to the editing of the Order.

Saving the Order, the screen returns to the visit's task list having gray out the current finished task.

2. Order Summary (total quantities and values)

3. Order Cancellation menu (delete order)



Except the «delete order», there is also the «**add from pdf**» option. This is an alternative more easy and visual way to add items to our shopping cart from a pdf product catalogue. Choosing this option and selecting the desired item category and subcategory, a pdf catalogue (with all available products) opens. We can scroll up & down and

after find the photo of the desired product, we tap on the item code under the photo. The app automatically recognizes the product and asks for the quantity we want to order. We type the amount and the app stores our input as a new order line.

3.2.3 General info

The 3rd tab concerns in the invoice document data, e.g. order customer, order comments, delivery date etc. (general information).

General Info

CUSTOMER DETAILS

Name *

CAFCO E.

Code *

10176351

ORDER DETAILS

Name

CAFCO E.

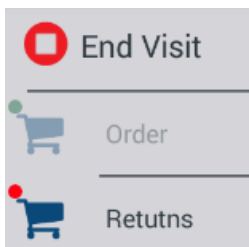
Code

0010176351

Qty A: 10.00 Qty B: 100.00

Net Value: 7868.00 Vat Value: 1809.64 Gross Value: 9677.64

Fields with red asterisk are required to complete the order (mandatory). If it is not already filled in, must be completed.



After we save the order (order taking task is completed) we can note that the task «Order» is greyed out. That means that we do not need to select it again. However, if we do it, a message in the form below will appear.

By clicking the X at right and after answering the relevant protective message, we can delete the order we have already taken.

The app help us to find the desired order by showing the basic order data such as date time. We could also add a new one using the «New Document» option (another order under the same visit).

Select Document

12/10/2016 15:51:35
ORDER - 890.51

X

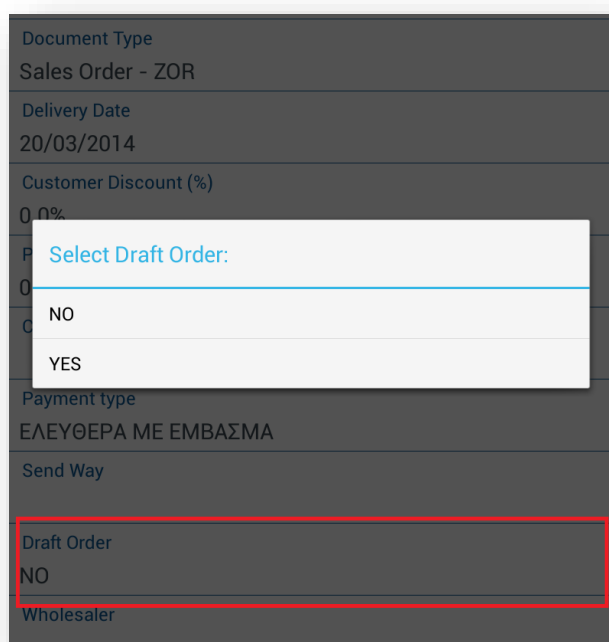
New Document

3.2.4 Draft Order

You are able to set an order as draft by the Header Tab. Touch on the Draft Order selection and an option menu will pop up.

If you wish to set the order as draft select 'Yes' else if you want to finalize the order select 'No'.

There is a third blank default option.



Document Type
Sales Order - ZOR

Delivery Date
20/03/2014

Customer Discount (%)
0.0%

Payment type
ΕΛΕΥΘΕΡΑ ΜΕ ΕΜΒΑΣΜΑ

Send Way

Draft Order
NO

Wholesaler

Select Draft Order:

NO

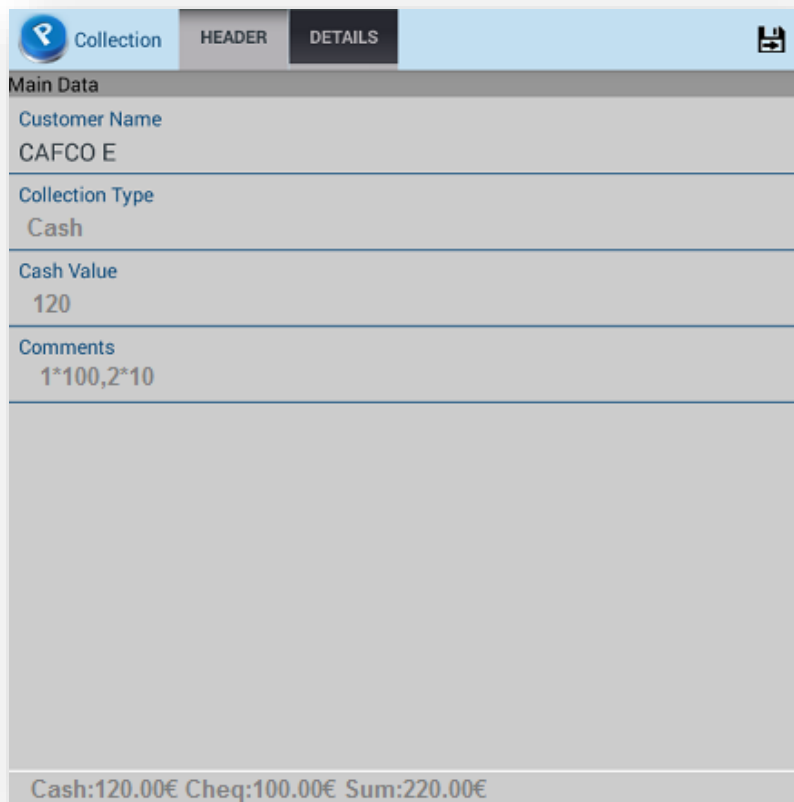
YES

3.3 Collection

To receive cash or a check from the customer, from the task list of the visit, choose the corresponding option «Collection».

In the screen that appears, there are two tabs of available collection options.

3.3.1 Cash



Collection	HEADER	DETAILS
Main Data		
Customer Name	CAFCO E	
Collection Type	Cash	
Cash Value	120	
Comments	1*100,2*10	
Cash:120.00€ Cheq:100.00€ Sum:220.00€		

In the «CASH» or «HEADER» tab, fill the «Cash» field with the amount of money you want to record, while in the «Comments» field optionally add a comment. Finally, it should be completed and the Receipt Number field if applicable.

3.3.2 Check

Under «CHEQUES» or «DETAIL», press the «+» button in the upper right corner to add a new check collection.

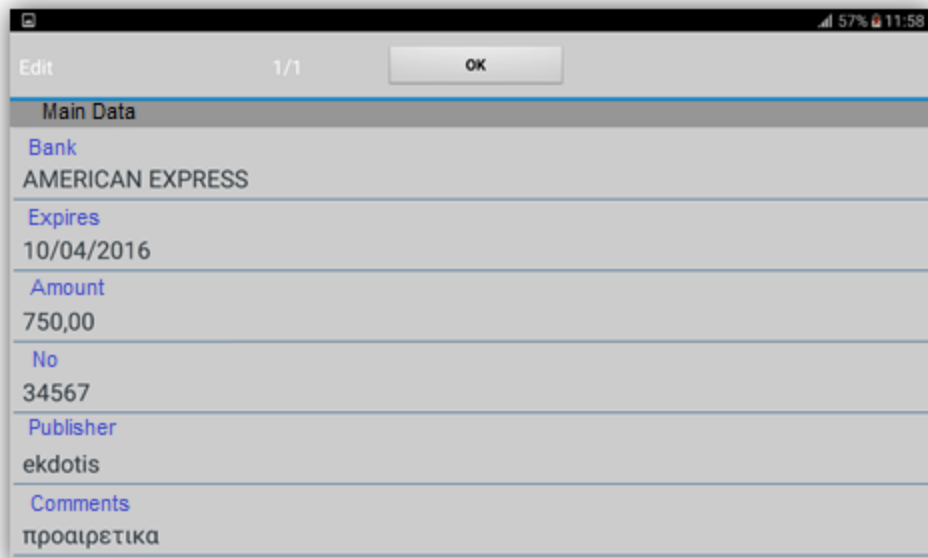
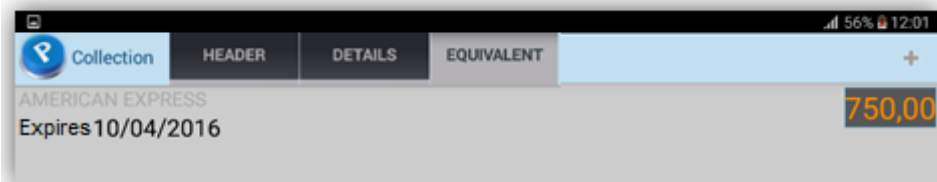


Collection	HEADER	DETAILS
+		

In the screen that appears, fill in the fields:

- BANK (from list)
- EXPIRATION DATE
- AMOUNT CHECK
- NUMBER CHECK
- PUBLISHER
- COMMENTS (Optional)

And press the «OK» button to move on to the application.

Selecting one of the checks that have already been recorded, we have the possibility to correct the data (pencil) or deleting (X).

At the bottom of the screen we can view the total of the values per collection type.

Cash:120.00€ Cheq:100.00€ Sum:220.00€

Then, to save them, we move on the «CASH» tab and press the button with the floppy diskette .

In case of the check must also complete the Receipt Number in the cash screen.

3.3.3 Collection mappings with pending documents (EQUIVALENT)

If the “document matches” is enabled, then a third Equivalent tab appears, which displays outstanding receivable documents and the user selects the document and the amount to be matched to the amount of the total collection.

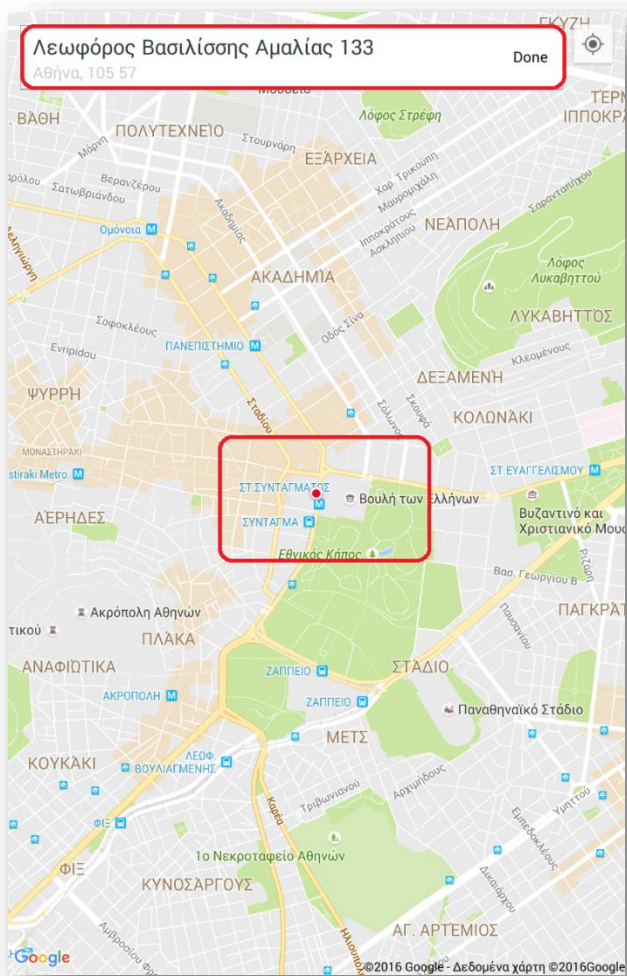
Collection	HEADER	DETAILS	EQUIVALENT	10.00	✓	✕
Παραγγελία (Δα-Τιμ.)				40.00	0.00	
Ημερομ.: 06/05/2016						

It can be done either directly by pressing  or clicking on a document amount.

Collection	HEADER	DETAILS	EQUIVALENT	10.00	✓	✕
Παραγγελία (Δα-Τιμ.)				40.00	0.00	
Ημερομ.: 06/05/2016						

Collection	HEADER	DETAILS	EQUIVALENT	0.00	✓	✕
Παραγγελία (Δα-Τιμ.)				30.00	10.00	
Ημερομ.: 06/05/2016						

3.4 Geocoding / Location search



With the Geocoding task and with the use of GPS and Google Maps we can register the geographical coordinates of the actual visit point.

The screen that appears, shows in a map the actual position we are at that moment.

The blue dot represents the stigma (our current position) that have retrieve the tablet via GPS, at the moment we took the action.

The red dot shows the end point that we record the data of latitude and longitude. For greater accuracy we can drag the map to the exact address, so that the red dot indicates the point that we want.

At the top of the screen, the white bar shows the address of the location of the red dot is pinned on the map.

Finally, after we have determined the preferable address (specified by the red dot), we press the «Done» button at the top of the screen in order to record the coordinates of the point.

3.5 Stigma capturing

With this action and by the use of GPS, the application simply captures the stigma of our actual point - position (geographical coordinates).

3.6 Target

In target, the comment you enter will appear in the "visitation data" of customer for our next visit.

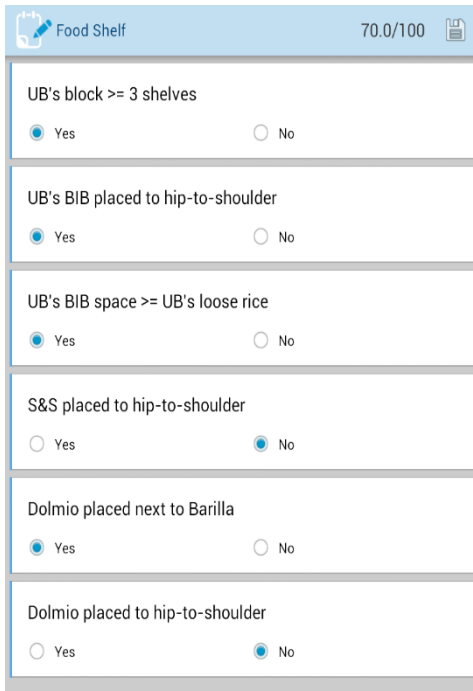
3.7 Surveys



The surveys enable users to respond to predefined questions to customers.

The surveys are designed to work in conjunction with Sales and Field Service. In Sales, used by salesmen besides ordering and gather qualitative data on their clients. In Field service, used by technicians and drivers for repair and receipt/delivery of assets.

The functionality of the surveys is available with either the default format in the Core app versions or in the Benchmark format in the versions of Surveys.



Food Shelf 70.0/100

UB's block >= 3 shelves
☒ Yes ☐ No

UB's BIB placed to hip-to-shoulder
☒ Yes ☐ No

UB's BIB space >= UB's loose rice
☒ Yes ☐ No

S&S placed to hip-to-shoulder
☐ Yes ☒ No

Dolmio placed next to Barilla
☒ Yes ☐ No

Dolmio placed to hip-to-shoulder
☐ Yes ☒ No

1. **Benchmarks:** It is the new interface of the surveys. Displays all questions on one page and given the possibility of scoring (each one of these questions has a different weight in the score).

A Benchmark type survey has the form of left screenshot and contains 6 questions with possible Yes/No answers. In the upper right corner shows the obtained score and the max score.

2. **Survey:** It is the old interface of the surveys. Each question is a different page and it is not possible score.

An example follows, where the user after having answer the questions, he should press over the tick (at the right top) to save.



Customer Satisfaction 70.0/100 ✓

1 Immediate delivery of products
☒ Yes ☐ No

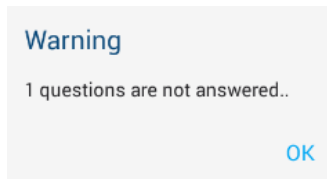
2 Prices of products are better than the competitors'
☒ Yes ☐ No

3 Products are accepted from consumers.
☐ Yes ☒ No

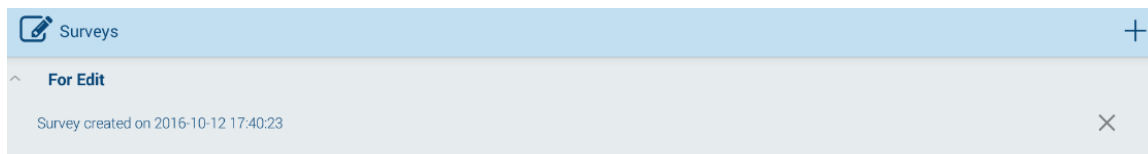
4 Offers are adequate.
☐ Yes ☒ No

5 Quality of products is the anticipated.
☒ Yes ☐ No

If not answer all mandatory questions comes a relevant warning message.



By saving, the survey grayed out in the action list. But we can choose it again and the following screen will appear:



Displays a record line with date and time. We can choose it and view or edit the answers.

We can also delete it by pressing the X at right. Caution, pressing the X shows no new warning message and delete it immediately.

There is also the possibility to record multiple surveys for the same visit if this makes sense, by pressing the + sign at the top right.

3.8 Merchandising scenarios

3.8.1 Price collection

With the «Categories» button we create specific category/sub-category filter (HPC chosen in the screenshot below).

The last price registration for the specific client is shown on the screen. And the columns that are filled is the Price, free goods etc. (depending on the configuration).

 Scenario: Pricing of Immediate Reaction

 All Companies	 HPC	 Save&Next	 Save&Exit	 Clear Rows	 Back
Product Descr	Price	Free	Coupon	Έκπτ(%)	Sticker
ARIEL ALPINE 2,88Lt	8.5				
SKIP LIQUID 3LT	8				
SKIP CONV 72M					
SKIP CONV ECO 12MEZ					
SKIP CONV ECO 27MEZ					
NEOMAT 70M					

Choosing a product/price cell in order to enter the value, after blush appears a window with the following functionality

	Price	Free	Coupon	Έκπτ(%)	Sticker
2,88Lt	8.5				
LT	8				
M					
O 12MEZ					
O 27MEZ					
ΡΟΠ. ΛΟΥΛ.					

ARIEL ALPINE 2,88Lt : Price

8.5









We type a numerical value in the field. The X cancels the import, and the tick confirms it. With the arrows we change the target cell backward, forward, right, left, without return to the previous screen grid, for more speed. The description of each cell is updated and displayed above.

With **Save&Next**, store the current scenario (price collection) and automatically opens the next

With **Save&Exit**, store the current scenario and the user returns to the main menu where he can choose himself the next action

With **Clear Rows**, we clean prices on selected lines. The selected rows are red colored. The rows can be selected/deselected if the user clicks their description (first left cell).

All Companies		HPC	Save&Next	
Product Descr	Price	Free	Co	
ARIEL ALPINE 2,88Lt	8.5			
SKIP LIQUID 3LT	8			
SKIP CONV 72M				
SKIP CONV ECO 12MEZ				
SKIP CONV ECO 27MEZ				

With **Back**, we return to the visit menu and if we haven't save our work yet a message of the following format

Are you sure you want to exit without saving?

Cancel
Exit

protect us or let us go without to save anything.

Also a button named «Add Product» added in order to add an item that doesn't exists in the list, by the salesman.

Generally (depending on the configuration), in Merchandising the last registration data is displayed on the grid which we can change it. Each time all the grid is saved, even if only one column have value.

This is one of the standard merchandising scenarios. Next we will see some other samples with the same functionality.

3.8.2 Shelf Share measurements

Scenario: Shelf Share Μέτρα			
All Companies	Κατηγορίες	Save&Next	Save&Exit
Product	MDLZ	TOTAL	EYE
TABLETS	6.0	9.0	4.0
COUNTLINES	2.0	5.0	2.0
MERENDA	1.5	2.0	1.0
BISCUITS - IBI	3.0	12.0	2.0

3.8.3 Availability / promotions

Scenario: Out of stock OSA					
All Companies	OUT OF STOCK FOODS	Save&Next	Save&Exit	Clear Rows	Back
Product Descr	Faces	OOS	Warehou	Promo	
AMITA FROOTIES 250ML ΜΗΛΟ-ΔΥΛΛΑΙ	3	OOS	0	YES	
LIPTON KITPINO 60X10X1,5	4				
LIPTON KITPINO 30X20X1,5	1				
LIPTON TCHAE OPIENT					

3.8.4 Competition Points

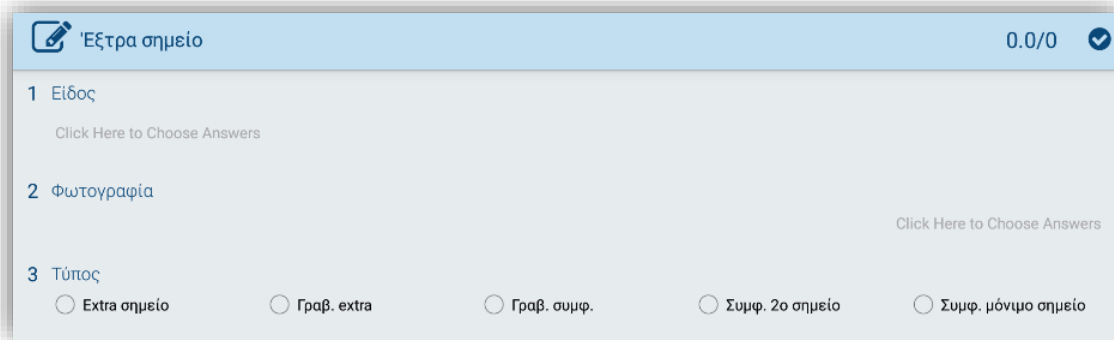
Scenario: Σημεία Ανταγωνισμού					
All Companies	Κατηγορίες	Add Product	Save&Next	Save&Exit	Clear Rows
Product	Ανταγωνιστής	Τύπος	Πολλ.		
TABLETS	FAGE	EXTRA ΣΗΜΕΙΟ		4	
TABLETS MULTIPACK	ION	EXTRA ΣΗΜΕΙΟ		2	
MINIS/PRALINES					
COUNTLINES					

There is no filter for items by category/subcategory. The screen first displays all the products were on the last register and the products can be added from a separate search screen (**Add product** button).

3.8.5 Distribution/OOS

Scenario: Διανομή/OOS			
All Companies	Κατηγορίες	Save&Next	Save&Exit
Product	DISTR	OOS	
ΔΕΝ ΥΠΑΡΧΕΙ OOS		X	
TRIDENT SLAB ΔΥΟΣΜΟΣ		X	
TRIDENT SLAB MENTA			
SENSES ΔΥΟΣΜΟΣ 1€ ΠΛ		X	

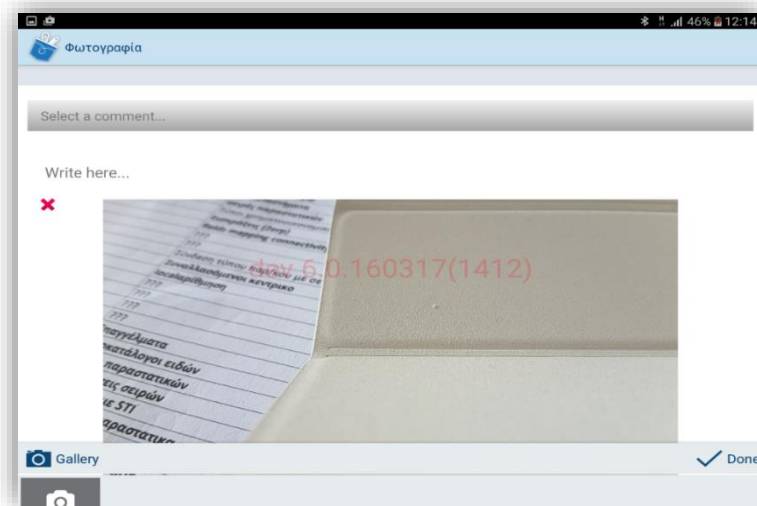
3.8.6 Extra point Photograph



In Merchandising photos except the item, the second column of the corresponding questionnaire always displayed too.

In other words, in the first and third question must be logged the item and the type of the first and second column of the corresponding merchandising scenario, so that answers can be matched to the record for which we want to take a photo.

For example, on the extra point we have the lacta item and tie extra as type, so in the extra point photo we must have the lacta item and the Extra point type.



The functionality of the Picture is the same in all the questionnaires with photographic variations on the menu options.

Just the user selects for each question one of the proposed answers - options or typing the relevant comment.

And after having taken a photo or video and put a description on the proper field, clicks

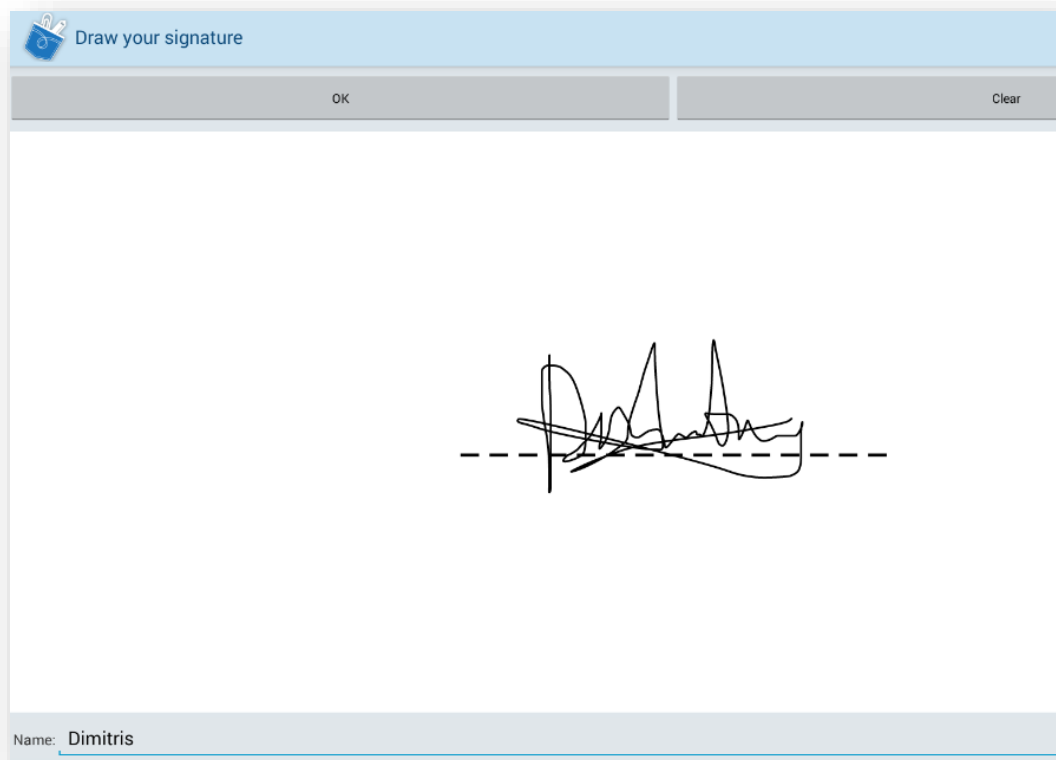


To display the OK button, make slide down (dragging down) the bar that says Camera.

There is also the possibility to add an existing photo from the Gallery.

3.9 Electronic Signature

With this action, we may request an electronic signature from the customer / partner for confirming the visit (for example).



Besides the signature drawn with the finger in the center of the screen, it must be entered in the relevant field and the name of the signatory.

By pressing OK button, store the signature and complete the signature taking task.

By pressing Clear button, clean the screen and redesigned the signature from the beginning

3.10 End Visit

To complete the visit to the customer, leaving the store we have to "close" our visit.

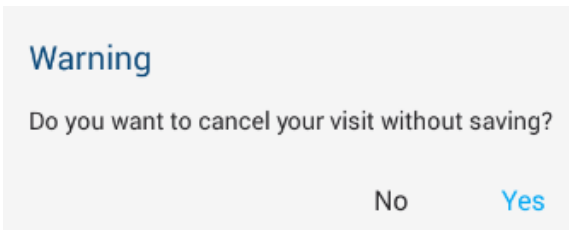


To close the visit, from the main Pocketbiz menu, choose the option "End visit". This action also updates the end time of the visit.

If «End Visit» not pressed, no action recorded in the system (order, sampling, etc.) of those who have made and thus and the order can be lost.

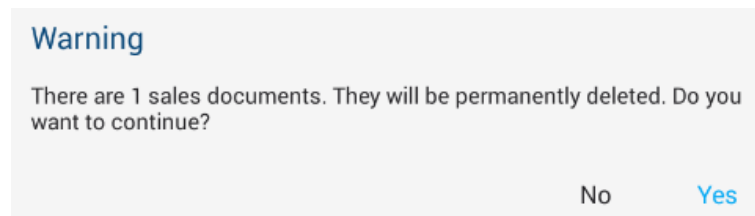
To be able also to close the visit, we should have completed all mandatory actions about the customer (depending on the configuration of the installation).

If you try to leave the visit menu without pressing the button «End Visit», the following message will appears



Answering «No», we return to the visit menu.

By «Yes», and if we have already entered required order details, the following message will appear,



Answering «Yes», the order will be permanently deleted and will return to the customer list. If we select again the customer who we were before, will display the message that we have already visited him, but with the difference that would seem to be optional task.

3.11 Simple Visit

 Start Visit

Depending on the configuration, be apart from option «Start Visit» and the option «Simple Visit».

 Simple Visit

With this option, the salesman may declare that he made a simple visit to the customer (perhaps except his route or telesales) and simply recorded the reason for the visit, as below:

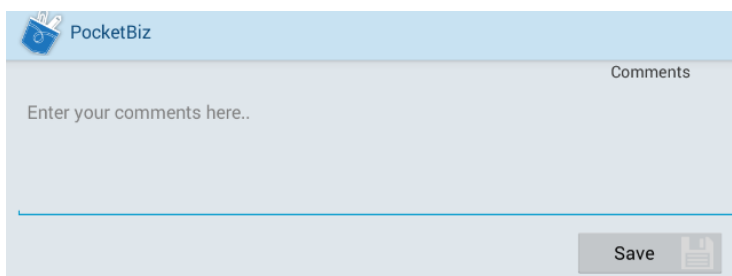


For example, he made the visit and the shop was closed. If we open a normal visit might have to take mandatory action so you could not close the visit later.



Comments

In the option Comments , may be submitted comments on this specific visit to the client.




4 Reports

There are the following types of reports:

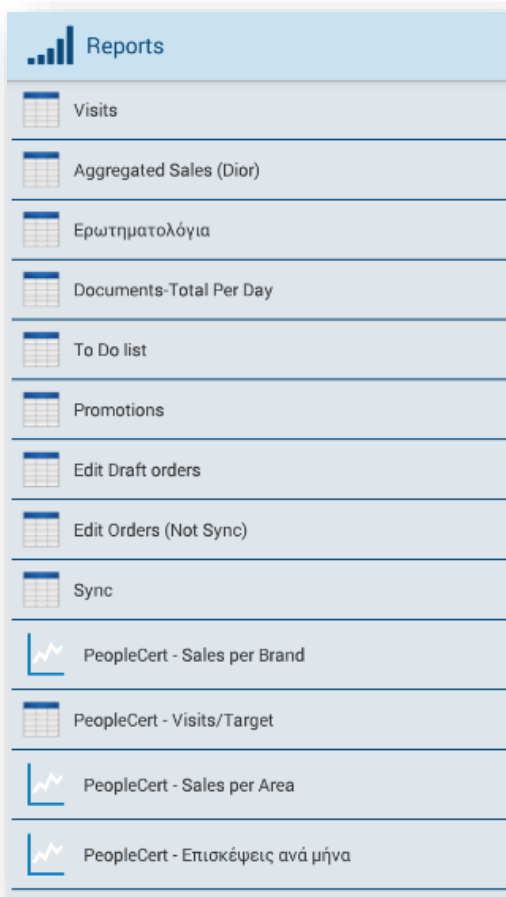
- General reports
- Customer reports

In general reports, we can view aggregated data for the current period we are going through such as invoices, money collections etc.

On customer reports, we can view data for each customer, such as his financials, his orders etc.

4.1 General Reports

By pressing the Reports button  from the main menu of Pocketbiz, we can view all the available general reports depending on the configuration.



For example:

4.1.1 Sales orders history

In this report sample we can view a list of orders taken in the past.

Firstly, we have to set the period date (from date - to date) we want to display.

PocketBiz
☰

Από: 28/08/2014 

Εως: 28/08/2014 

Then, by dragging the screen (the white arrow's area) from left to right we view the results like the screenshot below. We can view all orders taken in that period (one row per day by date, quantity, discount, value etc.) and their total values.

PocketBiz
☰

Παραγγελίες - Ιστορικό παραγγελιών 60 μέρες

Ημ/νία	Συν. Παραγ.	Ποσ. Τεμάχια	Ποσ. Κιβώτια	Αξία Προ Εκπτώσης	Εκπτώση	Καθαρή Αξία	ΦΠΑ	Συν. Αξία
Total	3	652.4	14.69	698.16	12.15	686.01	77.03	775.19
01-08-2014	3	652.4	14.69	698.16	12.15	686.01	77.03	775.19

Pressing on a row (order) we can view the next screenshot that shows in detail the sales orders of the specific date.

PocketBiz
☰

Παραγγελίες Ημέρας - Αναλυτικά

Αριθμός	Ωρα	Πελάτης	Κωδ. Πελάτη	Τεμάχια	Κιβώτια	Αξία Προ Εκπτώσης	Εκπτώση	Καθαρή Αξία	ΦΠΑ	Συν. Αξία
37	18:56	BAZAAR AE	0000204299	362.0	3.01	87.52	8.64	78.88	10.26	89.14
37	18:55	ΓΕΓΟΣ SUPER MARKET AE.	0000102833	162.4	2.45	129.22	3.51	125.71	16.34	142.05
37	17:52	ΓΕΓΟΣ SUPER MARKET AE.	0000102833	128.0	9.23	481.42	0.0	481.42	62.58	544.0

Next, by pressing on a row (order) we can view the next screenshot having the details of the order document (rows of items).

PocketBiz
☰

Παραγγελίες Ημέρας

Είδος	Κωδ. Είδους	Τεμάχια	Κιβώτια	Stock	Αξία Προ Εκπτ.	Εκπτώση	Καθαρή Αξία	ΦΠΑ
FERRERO KIND.BUENO WH. T30X8 STAND(39ΓΡ)	1418124	2.0	0.25	2.0	39.6	0	39.6	
TANDO TRIMMA ΤΕΤΗΓΜΕΝΟ ΤΥΡΙ 10Χ1ΚΙΑ	1021101	2.0	0.2	0.0	20.76	0	20.76	
TANDO TRIMMA ΤΕΤΗΓΜΕΝΟ ΤΥΡΙ 16Χ250ΓΡ	1021110	2.0	0.13	0.0	6.22	0	6.22	
TANDO TRIMMA ΤΕΤΗΓΜΕΝΟ ΤΥΡΙ 20Χ500ΓΡ	1021105	2.0	0.1	0.0	11.94	0	11.94	
VIOLIFE CREAMY ORIGINAL 13Χ200ΓΡ	1021501	2.0	0.15	0.0	4.7	0	4.7	
VIOLIFE CREAMY ΜΥΡΩΔΙΚΑ 13Χ200ΓΡ	1021504	2.0	0.15	0.0	5.1	0	5.1	
VIOLIFE ΦΕΤΑΚΙΑ ΓΕΥΣΗ CHEDDAR 12Χ180ΓΡ	1021506	2.0	0.17	0.0	5.04	0	5.04	

4.2 Customer Reports

By pressing the Reports button  from the Customer's tabs, we can view all the available customer reports.

Reports

Visits-30 days

Sales per Category (Dior)

Orders-30 days

Visits-30 days

Date	Cus. Code	Start time	End time	Duration
21-11-2016	0010103458	17:33	17:33	0
02-11-2016	0010103458	14:15	14:15	0
02-11-2016	0010103458	14:12	14:13	1

Orders-30 days

Date	Document	Tot. Doc.	Tot. GSV	Tot. Qty\CS	Tot. Qty\PC
<u>21-11-2016</u>	ORDER	1	0	0.0	0.0
<u>05-11-2016</u>	ORDER	1	786.8	1.0	10.0

Notice the drill down functionality (click on underline cell)

Day orders

Number	Time	Cus. Code	Value	Qty\CS	Qty\PC
<u>881011</u>	17:33	0010103458	0	0.0	0.0

Document Detail

Material	Mat. Code	Value	Qty\CS	Qty\PC	Weight
P DUOFOLD LE'12 MANDARIN YELLOW FPen	1102.0001.	786.8	1.0	10.0	0.5

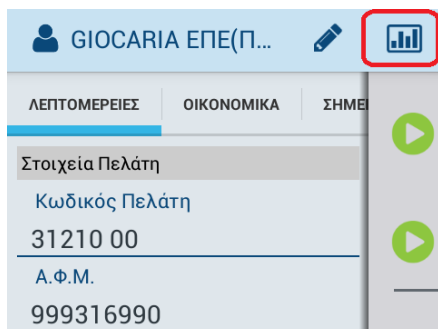
4.3 Report types

There are also the following types of reports as to their form layouts.

4.3.1 Grid Reports

The Grid Reports show the information we want in a list format and the user has the ability to move serial in the list, moving upwards or downwards. Also, it is possible by pressing on a line to be moved to another report, taking dynamically the information desired at the line level (drill down). The line that is selected to move to another report, will act as a criterion for the next

PocketBiz								
Daily Document Info								
Number	Time	Customer	Cus. Code	Status	GSV	Qty\CS	Qty\PC	Salesrep
294006	18:23	TASTY FOODS	0010330619	Approved	555	5	50	ΔΗΜΗΤΡΟΠΟΥΛΟΥ ΝΤΟΡΑ
294001	11:39	ΚΑΜΠΑΝΗ Χ ΑΦΟΙ ΟΕ	0010258425	Pending	313.2	4	44	ΔΗΜΗΤΡΟΠΟΥΛΟΥ ΝΤΟΡΑ



The Grid type reports can be viewed:

- In the reporting menu of the main screen
- In the reporting menu in the customer tab
- In the header of the order

4.3.2 Drill down reports

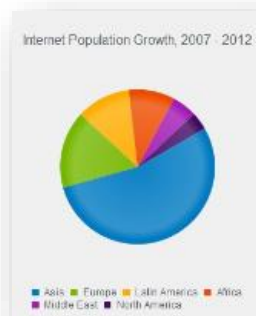
Having displayed the desired information in the report, we have the ability by pressing on a record line to be transferred into another report. In this way we can analyze the original information on what levels we want.

4.3.3 Multiselect Drill down Reports

We have a master and a detail report. In the master report we can choose one or more lines and pressing the action bar button, the detail report opens, with contents that are filtered according to the selected master records. To select a line in the master report, we click on it and colored in blue. If we click it again the record will be deselected.

4.3.4 Bar & Pie Charts

We can also embed graphics for impressive results.



5 Messages

With this option, the salesman can see the messages that send him from the back-office of the company.

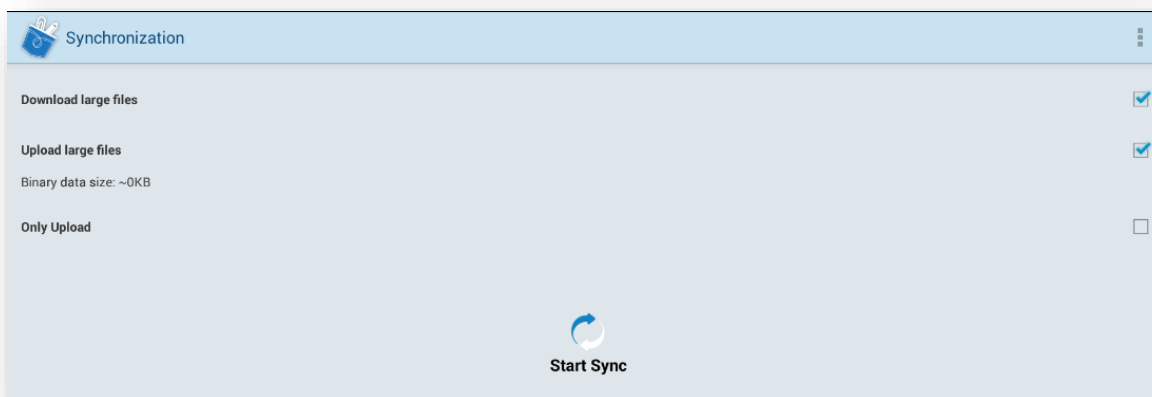
6 Synchronization

Synchronization is a very important action and should be done both at the beginning and the end of our working day, but also several times during the day. With the process of synchronizing, the data already stored on the tablet sent (upload) to the company's server too. At the same time related data generated by the company and concerns customer information, schedules, statistics etc. will be downloaded in our tablet.

For making the synchronization, we select the icon  from the main Pocketbiz menu.

If we have to take large multimedia files (pdf, video, etc.) «Download large files» option must be checked. Caution: there may be data charges, prefer to do this using Wifi.

If we have to send photos the «Upload Large Files» option must be checked.



In case that we don't have to send photos or receive large files, the above options does not affect us in the operation of the synchronization.

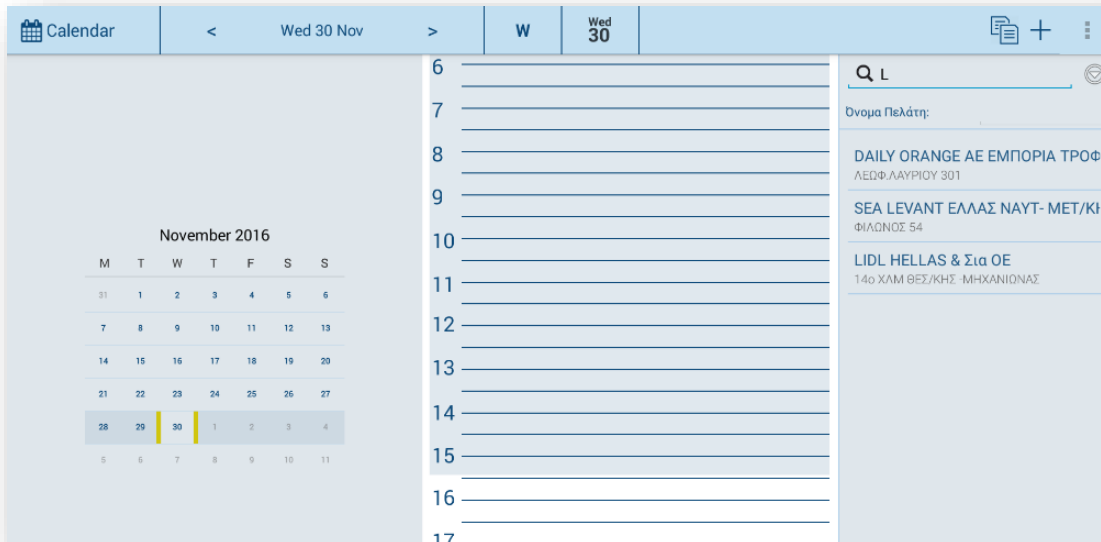
If we only want to send data and not receive updates, we check the «Upload Only» checkbox.

Then we press the «Start Sync» button to start the synchronization process.

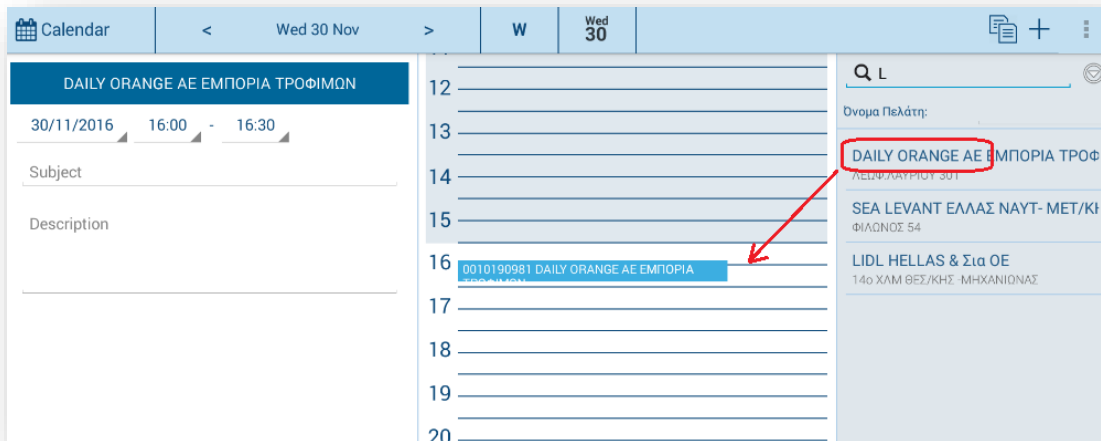
Note that for the synchronization, we need to have connected to a wireless network using the WiFi or even 3G coverage.

7 Calendar – Agenda

With Calendar option, the salesman can schedule visits (route)

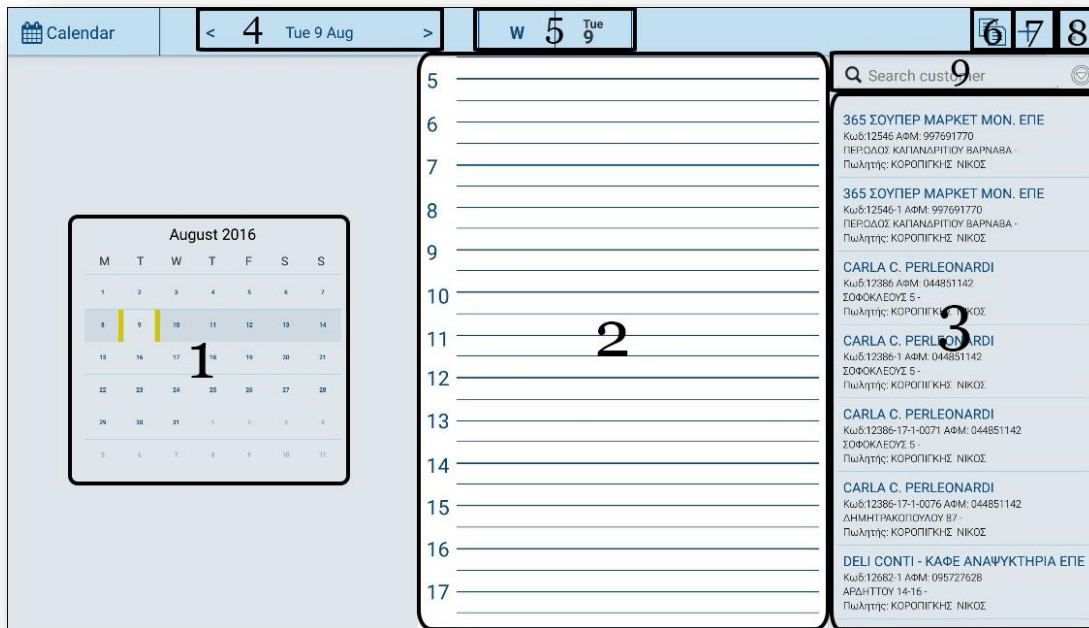


On the right of the screen there is the client list. We can filter the results by typing next the magnifier symbol (in the above screenshot we type the letter L to display only the customers having this letter included in their description). After we select the day of the visit we want (from the left calendar or using the top arrows), with a long tap on the customer, we drag it through the calendar at the desired visit time of the selected day.



There is also the possibility of the salesman to register a personal appointment. Pressing the + right at the top of the screen, we can fill the appointment details.

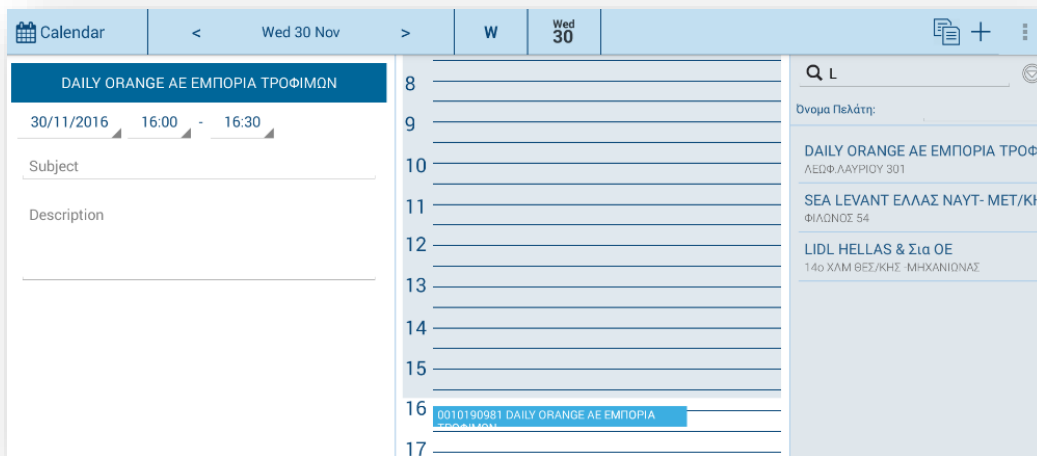
Specifically, in the image below, we have the following options:



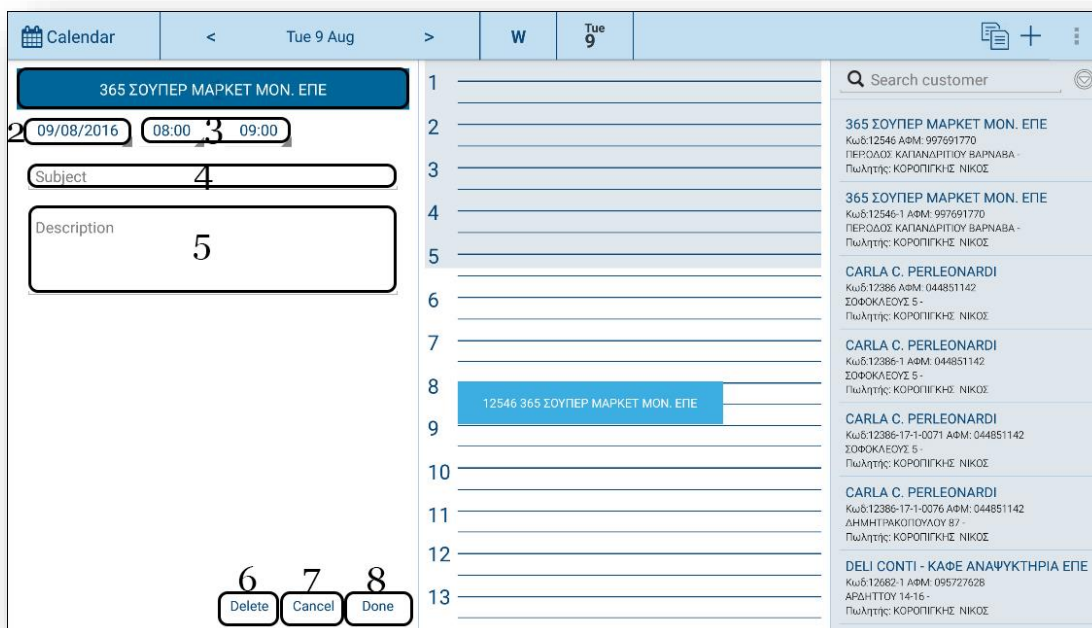
1. Monthly calendar
2. Agenda by calendar day, divided into hours
3. Customer List for appointment
4. The selected day
5. The way in which we view the agenda. (Weekly or Monthly view)
6. Copy an appointment at another date
7. Add appointment
8. Button to delete all appointments of a day, from that day onwards
9. Customer Search for adding appointments

7.1 Appointment (Monthly view)

Clicking on a date, our screen is modified in the following form:



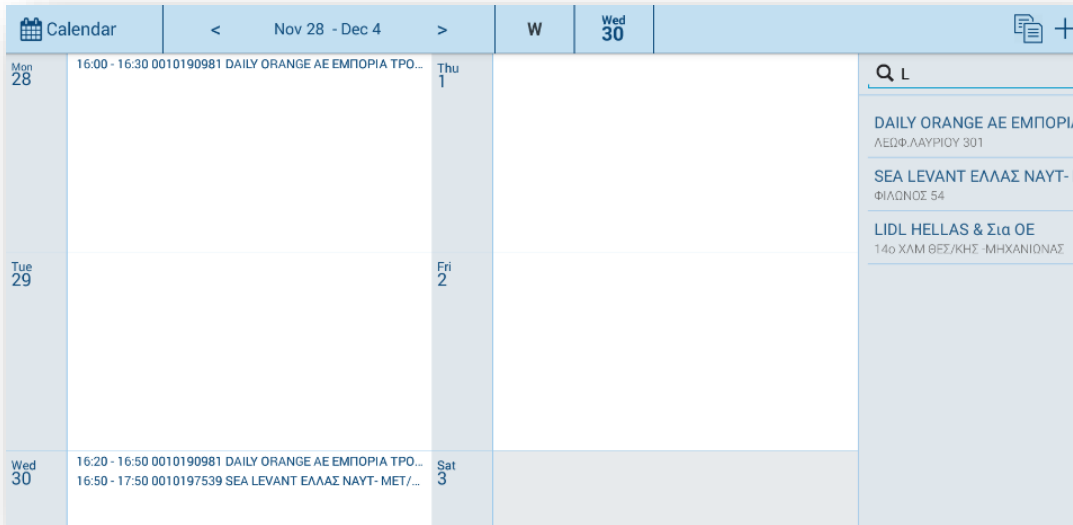
We observe that the left column where the calendar was before, now carrying the appointment information. So now we have the following new options:



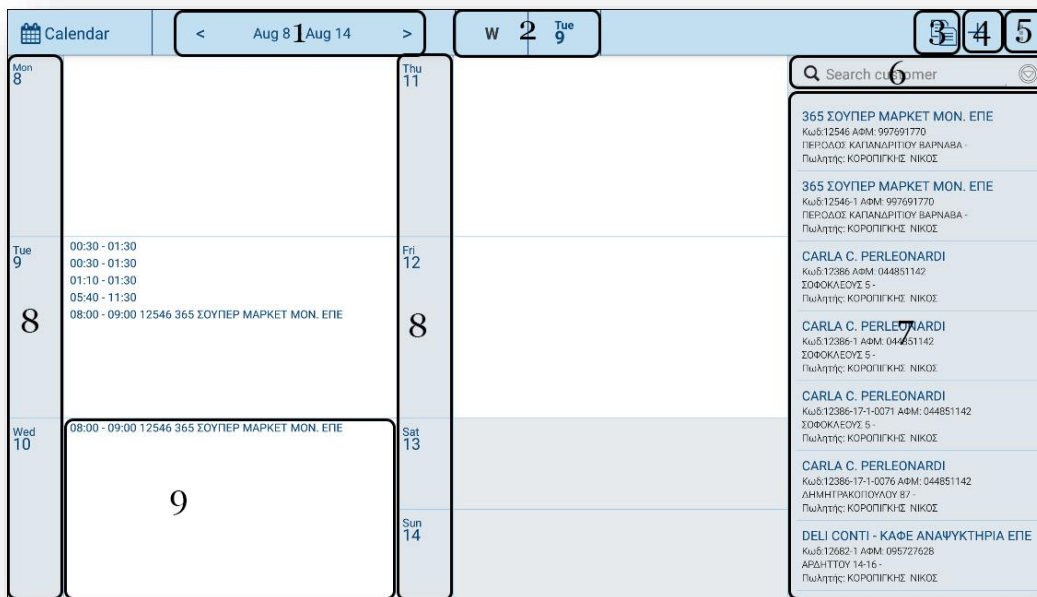
1. Customer Name
2. Date of appointment
3. The start and the end time of appointment
4. Subject of the appointment
5. Comments / description
6. Delete specific appointment
7. Cancel and return to the previous screen
8. Commit Changes

7.2 Appointment (Weekly view)

The home screen for the agenda on a weekly view, has the following format:



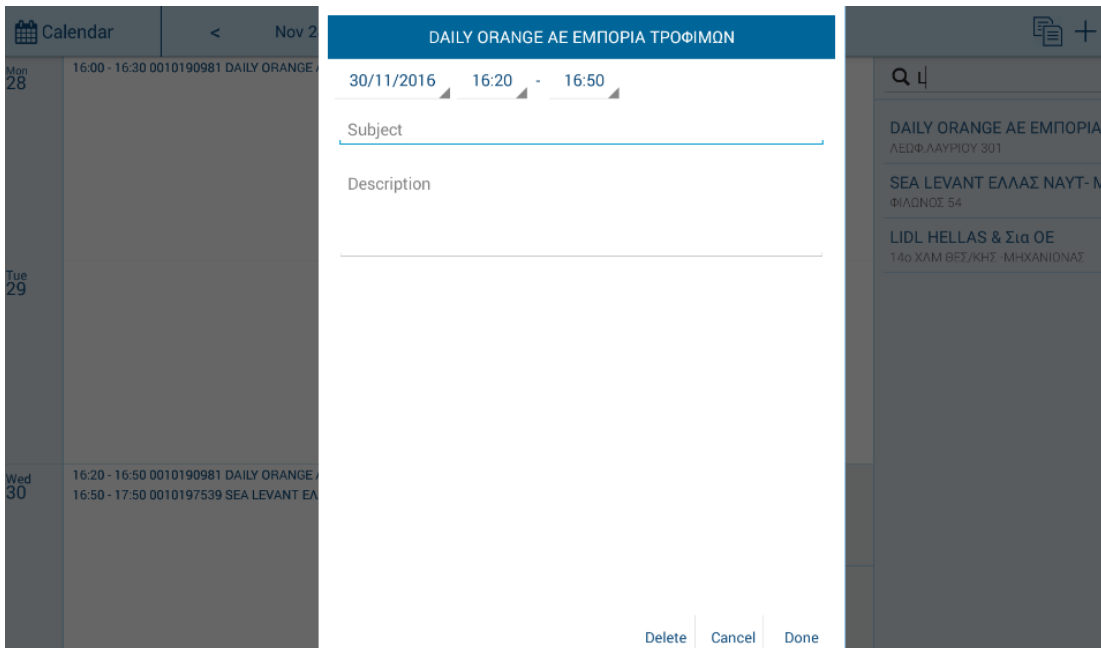
In the screenshot below, we have the following options:



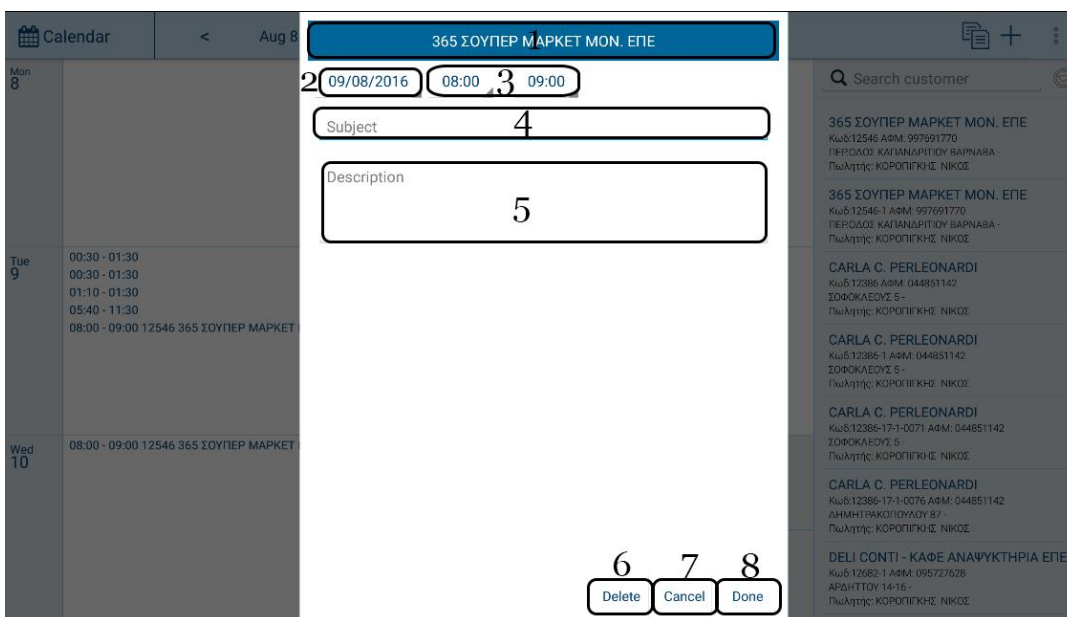
1. Range of days
2. The way in which we view the agenda. (weekly selected)
3. Copy an appointment
4. Add appointment
5. Button to delete all appointments of a day, from that day onwards
6. Search customer for adding appointments
7. Customer List
8. Days of that week
9. The appointments for the specific day of the week

7.3 Appointment details (weekly view)

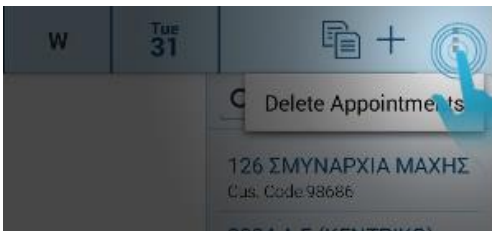
Clicking on a date, our screen is modified in the following form:



Notice that now the screen is displayed with the information of this appointment. So now we have the following new options:



1. Customer Name
2. Date of appointment
3. The start and end time appointment
4. Subject of the appointment
5. Comments / description
6. Delete specific appointment
7. Tab Cancel and return to the previous screen
8. Commit Changes



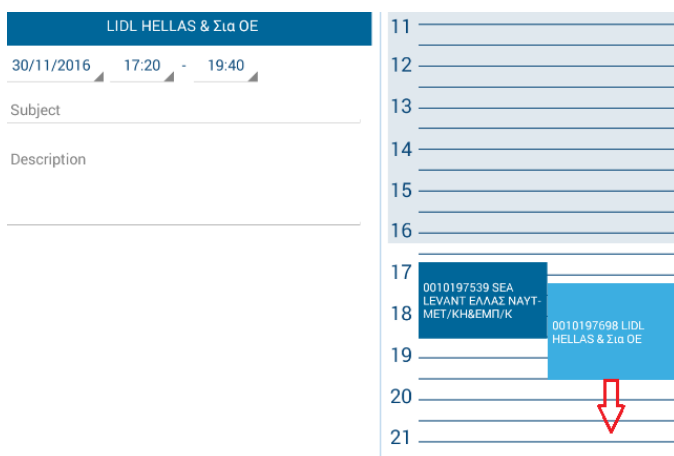
The delete button also is not readily apparent, but there is inside the 3-dots menu of action bar, as shown left.

Notice that you can change the date of an appointment to a previous date from today. But you cannot change the date of an appointment having already an older date.



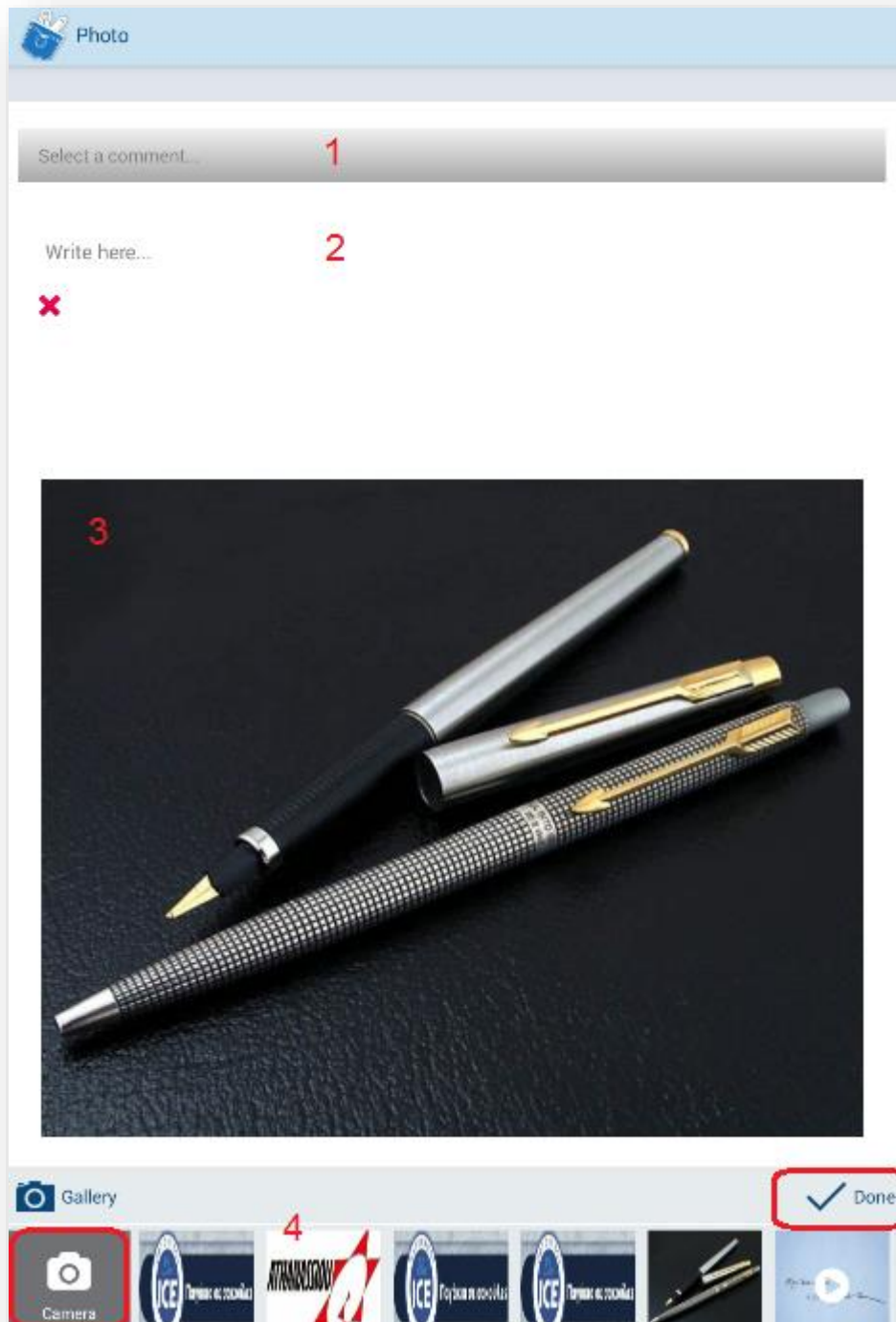
As shown above you can set appointments with overlapping start/end time.

Instead of changing the start/end time from the left corresponding fields, we could change them graphically by dragging and changing the size to the related colored box pointing to the desired hour.



8 Photo task

To take a photo when visiting a client, we select from the menu the photo task and then the following screen opens:



After we choose the «Camera» button (down left corner), a pop up window with two choices (take photo, take video) appears. We choose «take photo» and the device's camera will turn on. After taking the photo, we can view it inside the frame (3).

Then we have to press the «Done» button (down right corner) for acceptance or click on  to cancel and remove it. Alternatively, we can choose an existing photo from our gallery (4).

- (1) to put some predefined keywords (such as stand, shelf etc. - depending on the configuration), press «Select a comment» and select a keyword from the list.
- (2) to enter our own comments, we have to press on the «write here» message.

CAUTION: The application checks for the photo size and does not allow to store large photos.

The size of an image depends on the resolution of the camera of the device and the quality of the photo. These settings are set to the device's camera. (Not in pocketbiz!).



Therefore, if you do not allow to store photograph due to size, we need to reduce the resolution of the camera and / or the quality of the photo.

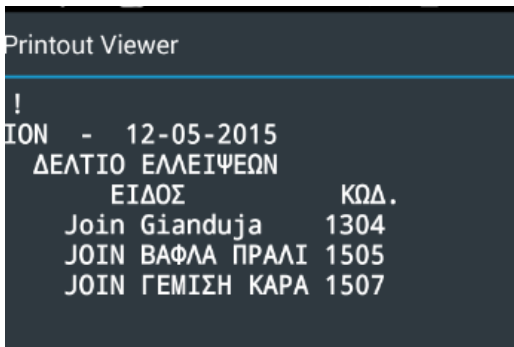
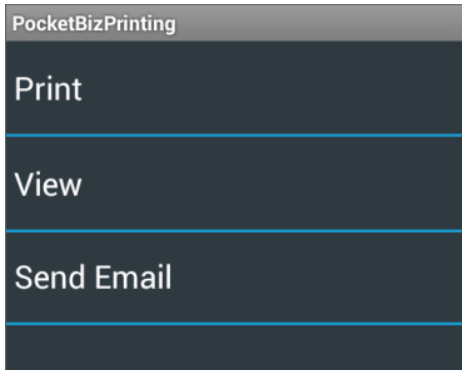
Note: To change the picture resolution must get out Pocketbiz to go in camera app to select settings. In Settings choose a lower resolution.

To avoid delays and malfunction in the camera and the device is recommended to delete the images from the device after a week.

9 Printing

If the task has printing option, a question like «Do you want to print ?» will appear.

Choosing «OK», the following screen will also appear:



Select «View», to preview the printing data.



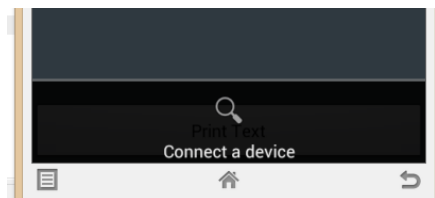
Select «Print», to proceed with printing.

And after select the «Print Text» button, starts printing.

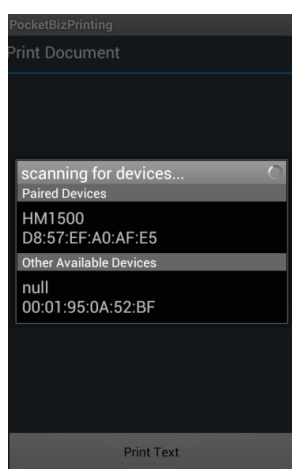
Connecting to Printer

If the printer is offline do the following steps:

1. Select the menu button of the device
2. Select «Connect a device»



3. Select «Scan for devices» (bluetooth must be on)
4. Select “myPrinter” device and made the connection.



5. Select «Print text».