



REGATE EFFECTIVE ADMINISTRATION MANUAL

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1. General Information

1.1. Introduction

This document refers to the instruction manual of the Regate Effective Sales Force automation and Field Service system installed and adapted to the specific requirements of your company. Regate Effective is developed to meet the functional and informational needs of the following core user groups:

- Department of Customers
- Inspectors Salesmen
- Director of Sales
- System Administrator

In Chapter 2 (Application Usage) the functionality of the application for each of the aforementioned user groups is described in detail.

1.2. Application Usage

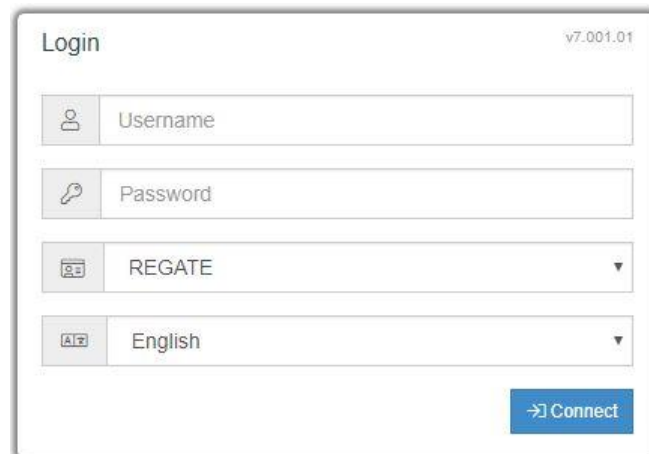
Access to Regate Effective can have all authorized users with direct connection to the server through the web interface of the application, including:

- Utilizing the central connection of an Internet company through the company's network from any computer company that has access to a Web Browser, such as Chrome.
- Turning on a dial-up connection, from anywhere (eg home, hotel, etc.), from any device (mobile or not) who have access to a Web Browser (e.g. Chrome).
- Activating the GPRS or 3G, from anywhere (e.g. home, hotel, etc.), from any mobile device that supports the technology GPRS / 3G and has access to a Web Browser (e.g. Chrome).
- Utilizing wireless hotspots networks (eg. at airports, hotels, tourist centers, etc.), from any mobile device that supports wi-fi technology and has access to a Web Browser (e.g. Chrome).

1.3. Application Start - Stop

1.3.1. User Authentication

With your connection to the server application displays the following user identification window, where you are asked to enter your personal code to use the application Regate Effective:



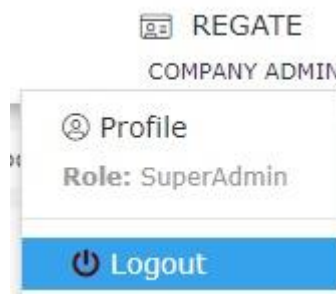
The login window is titled "Login" in the top left and "v7.001.01" in the top right. It contains four input fields: "Username" with a person icon, "Password" with a key icon, "REGATE" with a calendar icon, and "English" with a language icon. A blue "Connect" button with a right arrow icon is located at the bottom right.

(HINT: every time you enter the Regate Effective, click F11. This will increase the working screen in full screen. By exiting the application, press F11 again to restore the correct size).

After you enter these codes in the aforementioned Identification Window, the user "clicks" on Connect or presses ENTER on the keyboard to start using the application. In this case, it displays the home screen of the application, according to the personal code you just entered.

1.3.2. Logout

In the upper-right corner of the home screen of the application Regate Effective appears the icon below:



By clicking on this icon automatically crashes the application and displays the user identification window. When disconnecting, all information has been entered by the user, until that time, stored in the local application and sent to the central system in the process of synchronization.



1.4. Regate Effective Application Usage

Each user of the system, depending on the group rights, can manage the implementation and capabilities such as:

- Customer View
- Customer Search
- Order Search
- Modify Data
- View Credit-Debit Tab
- Merchandising Management
- Program Management Visits / Sales
- Trade Policy – Variables Management
- Warehouse Monitoring
- Expense Management
- Fund Management - Receipts
- GPS Data Management – GPS Routes
- Routes Management
- Visits Agenda Management
- Application Statistics
- User Management
- Customer Management
- Application Synchronisation

Any change of information as the Administrator may result improper operation of Regate Effective, so the system may not work as expected and it is necessary to be repaired by specialized technician.

2. Customers


2.1. Display Customers

The user can easily see the clientele, using the following procedure:

Launch Regate Effective

User Identification

Tab Customers



In this case, displays a search screen for the client or clients that we want to look or can do to temporarily introduce a new client as described below.

The search can be done using criteria such as:

- Part or all of the name of
- Part or all of the VAT
- Region
- Category Business (Marketing, Doctor etc.)

Complementing these elements press the button "Update".

In this case, a screen appears with the basics of the clientele of this user. Specifically, for each customer the following items appear:

- Name
- Visit
- Order
- Receipts
- Turnover This year
- Turnover last year
- Replacement
- Last Visit
- Balance
- Address
- Region
- Phone

Customer Name —	Meeting —	Order —	Cash —	Current Year Turnover —	Past Year Turnover —	Last Visit —	Balance —	Customer Address —	City —	Phone —
1892 Shops			€	0.00 €	0.00 €	14/06/2017	0.00 €	78 Pine Grove	Stamington Ward	01215-422453

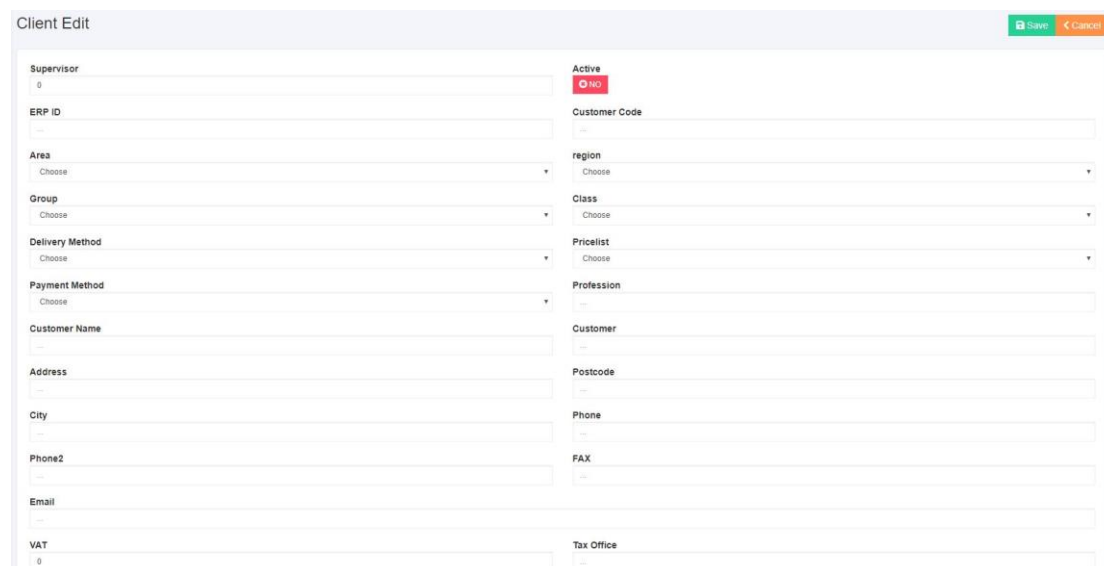
In the above screen, the user can click on the name of a customer and see the tab with basic details.

2.1.1. Insert New Temporary Customer

Each user has the ability to insert new customers in the system. During the day, the Sales Management Department collects all the data from the new customers that have been applied by the users, checks them and approves them. The steps that must be followed by the user to insert a new customer in the system are:

- Initiate Regate Effective
- User Authentication
- Click on Customers Tab
- Click on New Customer button

In this case, the screen bellow appears:



The 'Client Edit' form is a two-column layout. The left column contains fields for Supervisor (0), ERP ID, Area (Choose), Group (Choose), Delivery Method (Choose), Payment Method (Choose), Customer Name, Address, City, Phone2, Email, and VAT (0). The right column contains an 'Active' toggle (ON), Customer Code, region (Choose), Class (Choose), Pricelist (Choose), Profession, Customer, Postcode, Phone, FAX, and Tax Office. A 'Save' button and a 'Cancel' button are located in the top right corner.

User must complete all the fields in this screen. After that, by clicking the save button in upper right position – and having completed all the fields, correctly – the customers list appears having the new customer's info added:

Customers

Filters

Search:

User:

Category:

52 Records

Results: 1000

Customer Name	Meeting	Order	Cash	Current Year Turnover	Past Year Turnover	Last Visit	Balance	Customer Address	City	Phone
1893 Shops			€	0.00 €	0.00 €	14/06/2017	0.00 €	78 Pine Grove	Stamington Ward	01215-422453
20 20 Printing Inc			€	0.00 €	0.00 €	15/06/2017	0.00 €	Sirukul 696	Santa Clara	95054
A 1 Plumbers Supply			€	0.00 €	0.00 €	14/06/2017	179.91 €	42 Hey Green Rd	Deepdale Ward	01752-399931
A All American Travel Inc			€	0.00 €	0.00 €	20/12/2017	0.00 €	7116 Western Ave	Dearborn	48126
A All in One Construction			€	0.00 €	0.00 €		0.03 €	891 Crocus St	Rouley Ward	01951-872958
A B E Doors & Windows			€	0.00 €	0.00 €		0.00 €	4309 Chisenthale St	Rock	01423-202676
A F Supl Co Div Automatic Firing			€	0.00 €	0.00 €	20/12/2017	0.00 €	7602 Grantham St	Heigham	01691-816025
A K Construction Co			€	0.00 €	0.00 €		0.01 €	2737 Platoro Rd #9230	London	43140
A O Hardee & Son Inc			€	0.00 €	0.00 €		0.00 €	67 Pultord St	Pittsfield Ward	01388-416867
A O J Mfg Corp			€	0.00 €	0.00 €	14/06/2017	952.03 €	529 Staimine Rd #3680	Saltham Walden	01807-348193
A R Packaging			€	0.00 €	0.00 €		0.00 €	2887 Knowlton St #5435	Berkeley	94710
Abc Enterprises Inc			€	0.00 €	0.00 €		0.00 €	678 3rd Ave	Miami	33196

Now, the user can click on new customer's Name so that his info Tab appears , giving the user the opportunity to operate, having all the jobs being executed automatically.

In case that not all the fields are completed as needed, the system warns with the appropriate message.

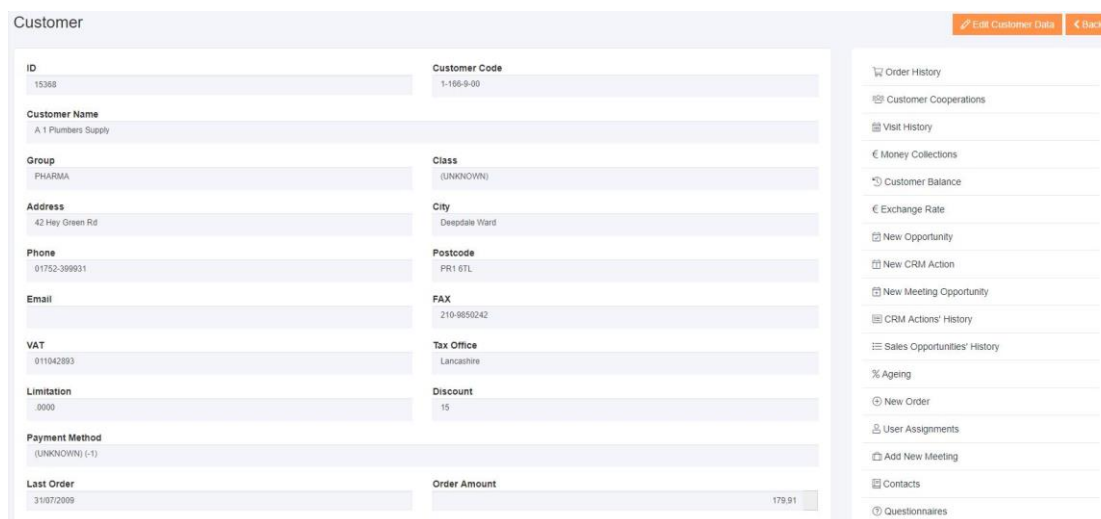
2.1.2.View Customer's Tab

The first activity that a user must do to be able to support efficiently the customer, is opening the customer's information tab. Through this tab, the user gains access in all available information according this specific customer, as well as the ability to execute fully automatically basic operations, such as Ordering, Money Collections etc.

The steps that the user must follow to view Customer's Tab in backoffice are:

- Initiate Regate Effective
- User Authentication
- Click on Customers Tab
- Complete Search criteria
- Click on REFRESH button

Based on the criteria applied by the user, a list with one or more customers appears. By Clicking on a Customer's Name, navigates to its Tab, like shown in picture below.

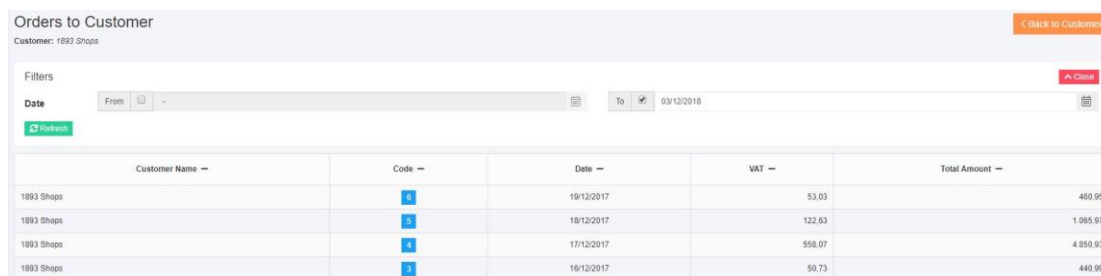


2.1.3. Search Customer's Order

A user can search for an order of a customer, with purpose to control its current status or other information regarding the order. The steps that must be followed to search for a customer's order are:

- View Customer's Tab
- Click on 'Order History' item

By following the above operation, a list with all the orders collected on behalf of the specific customer. First appears the latest order. In that list, the user can view many information such as current order status etc.



Customer Name	Code	Date	VAT	Total Amount
1893 Shops	5	19/12/2017	53.03	480.95
1893 Shops	5	18/12/2017	122.63	1,065.97
1893 Shops	4	17/12/2017	558.07	4,850.93
1893 Shops	3	16/12/2017	50.73	440.99

Alternatively, the user can follow the steps below:

- Initiate Regate Effective
- User Authentication
- Click on Orders Tab
- Complete the search criteria
- Click on Refresh button

Depending on the search criteria, applied by the user, a list of one or more orders of one or more customers appear. First appears the latest order. In that list, the user, can again view information such as the current status of the order etc.

Orders									
<div> <div>Filters</div> <div> <div>Date</div> <div> <div>From</div> <div>To</div> </div> <div>03/12/2018</div> </div> <div> <div>User</div> <div>Choose</div> </div> <div> <div>Type</div> <div>Choose</div> </div> <div>Refresh</div> <div>Results: 1000</div> </div>									
Person_name	Date	Customer Name	Order ID	Type	Comments	Price	VAT	Total	Delete
GEORGE	22/03/2018	Champagne Room	14	Normal Order	✓	1,179.80 €	55.78 €	1,235.58 €	
GEORGE	20/12/2017	Advantage Bookkeeping	10	Normal Order		134.68 €	17.51 €	152.19 €	
GEORGE	19/12/2017	1893 Shope	6	Normal Order		407.92 €	53.03 €	460.95 €	
GEORGE	18/12/2017	1893 Shope	5	Normal Order		943.34 €	122.63 €	1,065.97 €	
GEORGE	17/12/2017	1893 Shope	4	Normal Order		4,292.86 €	558.07 €	4,850.93 €	
GEORGE	16/12/2017	1893 Shope	3	Normal Order		390.26 €	50.73 €	440.99 €	

In case the user needs more information regarding a specific order, should click on the blue colored number that corresponds to the order. Then a pop-up appears displaying in detail the information of the order like below:

order: 14

Customer Name

Champagne Room

ERP Code

0-000-7-05

Address

5385 Firth Street

City

Greets Green and Lung Ward

Send Method

BY CUSTOMER

Order No

14

Order Date

22/03/2018

Delivery Date

23/03/2018

Comments

test comments

Responsible User

JOHNSON GEORGE

VAT

016058850

Phone

01547-429341

Postcode

B79 9DT

Payment Method

(UNKNOWN)

Responsible

Record Time

9:47

Delivery Time

9:59

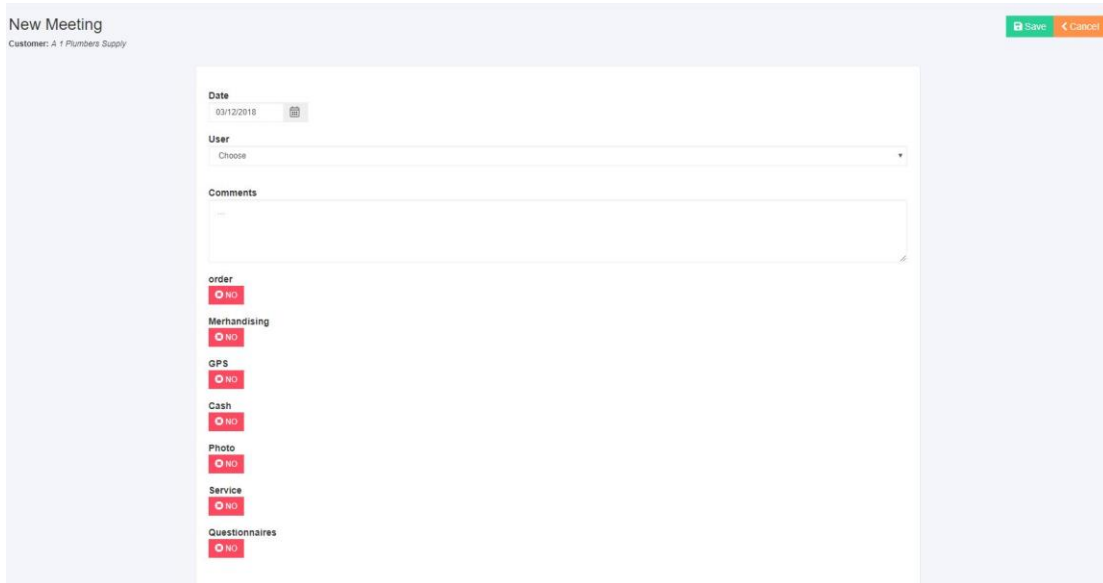
Code	Product	Unit Price	Quantity	Measure Unit	Extrusion Rdmdn	Extrusion Taperosolymos	Extrusion Rpoilntoc	Extrusion Duayth	Price	VAT
985-154	LFK DRANK SPR150-GIFT J99X12	42.59	1.0000	PCS	0.00%	0.00%	0.00%	0.00%	42.59	5.53
985-185	LFK ORANGE TTT300-GIFT J99X6	24.84	2.0000	PCS	0.00%	0.00%	0.00%	0.00%	49.68	6.45
985-186	LFK SHA STRAWB300-GIFT J99X6	24.84	3.0000	PCS	0.00%	0.00%	0.00%	0.00%	74.52	9.69
991-248	JBS CAMOMILE 750ML	22.28	22.0000	PCS	0.00%	0.00%	0.00%	0.00%	488.40	0.00
991-251	JBS DETANGLING 300ML	15.98	33.0000	PCS	0.00%	0.00%	0.00%	0.00%	524.70	34.11
991-251	JBS DETANGLING 300ML	15.98	2.0000	PCS	0.00%	0.00%	0.00%	100.00%	0.00	0.00
985-185	LFK ORANGE TTT300-GIFT J99X6	24.84	1.0000	PCS	0.00%	0.00%	0.00%	100.00%	0.00	0.00
Total Value (without VAT)									1179.80	
VAT									55.78	
Total Amount									1235.58	

2.1.4. Insert new Meeting to the Customer

The steps that the user must follow to insert a new meeting to the customer are:

- View Customer's Tab
- Click on Add New Meeting

By following the above operation, the below entry screen appears:



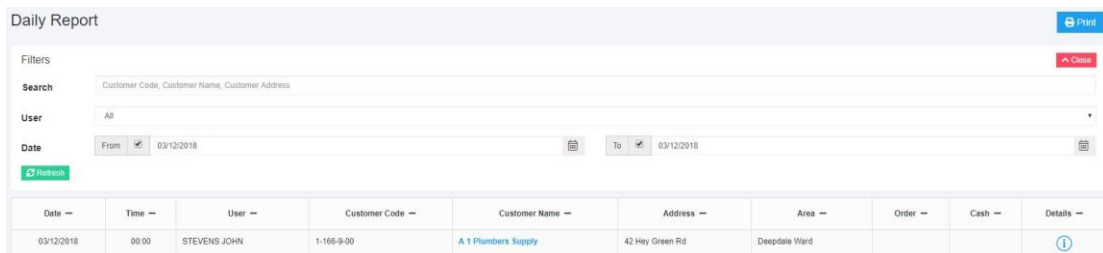
The 'New Meeting' screen for customer 'A 1 Plumbers Supply' includes the following fields and options:

- Date:** 03/12/2018
- User:** Choose
- Comments:** Text area
- Order:** NO
- Merchandising:** NO
- GPS:** NO
- Cash:** NO
- Photo:** NO
- Service:** NO
- Questionnaires:** NO

Buttons: Save, Cancel

In all cases, after inserting the new meeting info (date, time, comments), the user has these opportunities:

- To go back to the customer's tab, by clicking the back button. In this case the information applied are not being saved.
- To save the new entry, by clicking the save button. After that, the daily report screen appears, where the new meeting that has been applied, is displayed:



The 'Daily Report' screen displays a table of meeting entries. The filters section includes a search bar, user selection, and date range.

Date	Time	User	Customer Code	Customer Name	Address	Area	Order	Cash	Details
03/12/2018	00:00	STEVENS JOHN	1-166-9-00	A 1 Plumbers Supply	42 Hey Green Rd	Deeptdale Ward			



Also, by clicking “Visit History” appear aggregated scheduled meetings for each day as shown in the following screen.

Visits to Customer
Customer: A 1 Plumbers Supply

Filters

Date From 03/12/2018 To 03/12/2018

Refresh

Date	Time	User	Customer Name	order	Competition	Merch.	Cash	Service	Questionnaire	Photo	GPS		
03/12/2018	00:00	STEVENS JOHN	A 1 Plumbers Supply			✓							

Details Edit

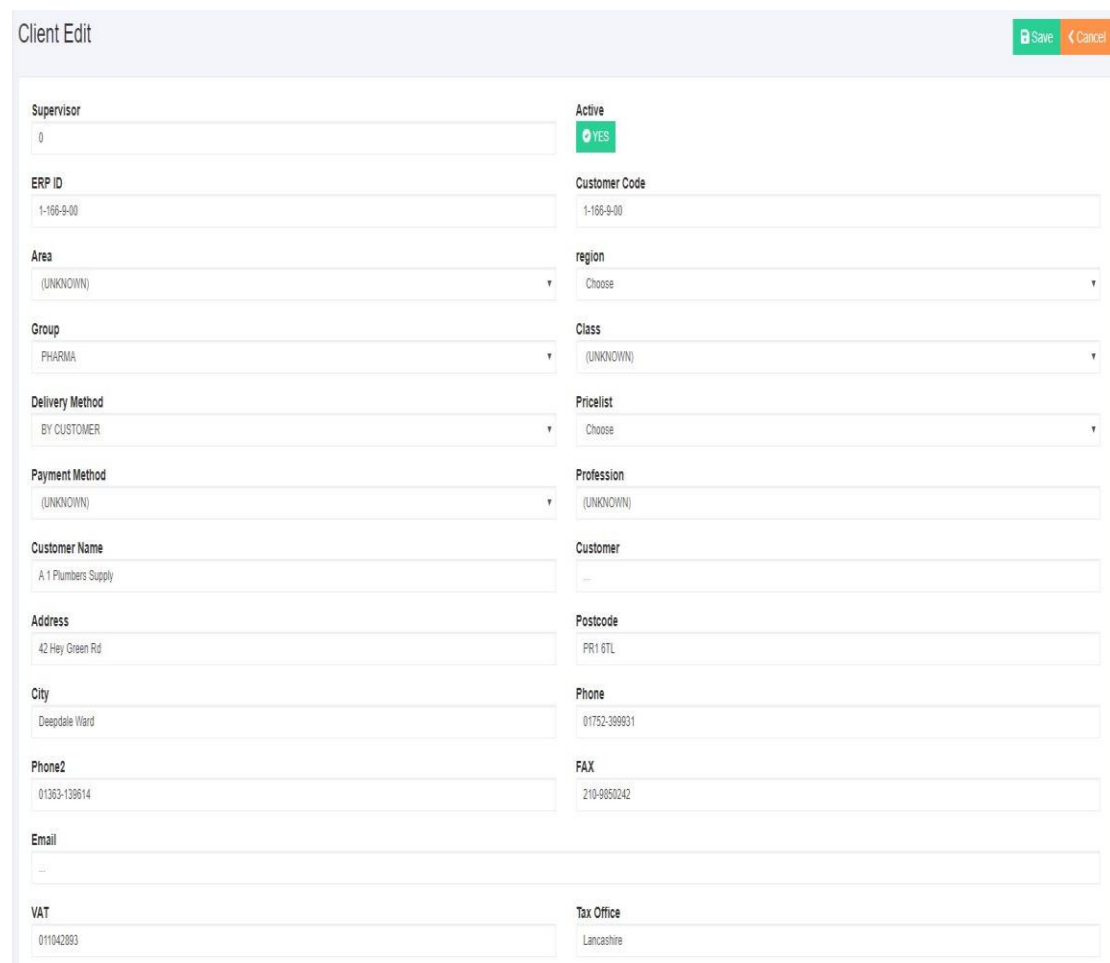
Also, in the screen, appear all the different meetings for the specific date. The visits that are scheduled and not yet fulfilled, give the user, the choice to edit or delete. In our example, we have only one customer.

2.1.5.Edit Customer Information

The steps that a user must follow to edit customer's information are:

- View customer's Tab
- Click on Edit Customer Data

In this case, a data edit screen appears that gives the following opportunities to the user:



Client Edit	
Supervisor 0	Active <input checked="" type="checkbox"/> YES
ERP ID 1-166-9-00	Customer Code 1-166-9-00
Area (UNKNOWN)	region Choose
Group PHARMA	Class (UNKNOWN)
Delivery Method BY CUSTOMER	Pricelist Choose
Payment Method (UNKNOWN)	Profession (UNKNOWN)
Customer Name A 1 Plumbers Supply	Customer ---
Address 42 Hay Green Rd	Postcode PR1 6TL
City Deepdale Ward	Phone 01752-389931
Phone2 01363-138614	FAX 210-9850242
Email ---	
VAT 011042893	Tax Office Lancashire

- **Cancel:** The system cancels every change in customer data that the user may have made until that moment, and returns to customer's tab.
- **Save:** The system saves the changes to the customer data, made by the user until that moment and returns to customer's tab.

2.1.6.View Customer Balance Tab

Every user can view a consolidated report on the total outstanding balance of the customer, and the analysis of debts and payments. The steps that must be followed to achieve that are:

- View Customer's Tab
- Click on "Customer Balance" entry

Customer Balance							← Back to Customer ← Back
Customer: A 1 Plumbers Supply							
Date	Document Type	Code	Description	Billing Value	Credit Value	Balance	
01/07/2009	Invoice	10-954	Debit	199.91		199.91	
22/07/2009	Payment	10-955	Credit		199.91		
31/07/2009	Invoice	10-956	Debit	179.91		179.91	

In that screen the following information appear:

- Date of the document (date of the invoice or payment)
- Type of the Document (π.χ. Invoice -Receipt, Check etc.)
- Document code
- Type of Invoice (Credit or Debit)
- Credit amount
- Debit amount
- Balance

Noted that the Credit Documents (e.g. credit notes, payments, etc.) appear with red letters. Relatively, the current balance of the customer is appears with red letters in case it is a debit and sows that payments are fewer than debits.

On the other hand, the debits (Cash, Checks etc.) appear with red letter. Relatively, the current balance of the customer appears with blue letters in case that it's debit and shows that the payments are more than the debits.

To go back to customer's tab, the user has to simply click on the back button.

3. Daily Report

3.1. Basic Report

A Sales Manager can view the activity of the day or a period for all the sales persons, according to the visits that each one did or will do. The steps that must be followed are:

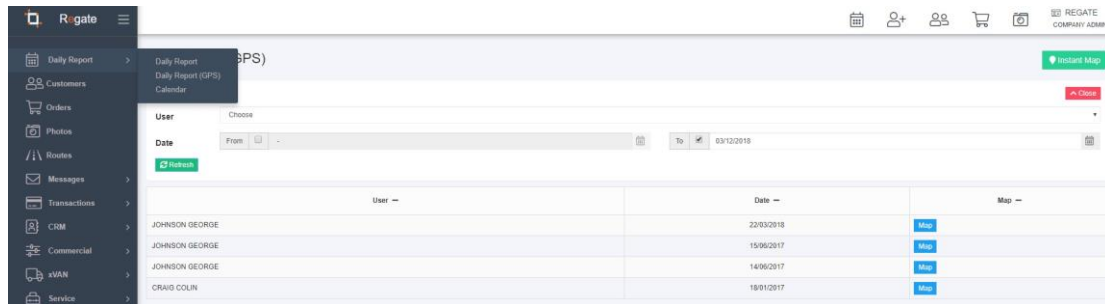
- Click on the Daily Report Tab

By applying the criteria about the period of time, the person, or the customer, a list appears with the visits and orders that the user collected on behalf of the customer as seen below.

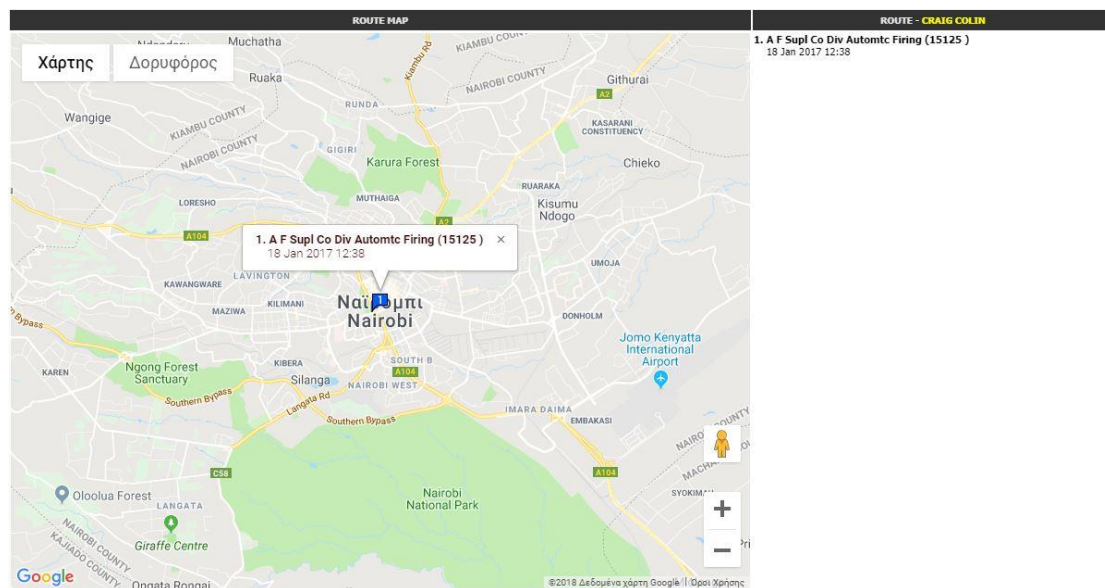
Daily Report										Print
Filters										Close
Search										
User										
Date										
Refresh										
Date	Time	User	Customer Code	Customer Name	Address	Area	Order	Cash	Details	
09/10/2009	11:26	GATES MARK	1-114-5-01	Desktop Center	3347 Lawrence Rd #456	Haverstock Ward				
09/10/2009	11:26	GATES MARK	1-114-5-05	Rosenkrance, Brent	553 Picton Rd	Astley Mosley Common Ward				
18/11/2009	13:31	GATES MARK	04151	Tiburon Pen Chmbr Commerce Inc	73 Hawkstone St	Rentfrew South & Gallowhill War				
18/11/2009	13:32	GATES MARK	1-104-3-05	Victory Coating	5221 Royston St	Eccleshall				
18/11/2009	13:31	GATES MARK	14618	Pan Optix	860 Rokeby St	Sunningdale				
18/11/2009	13:31	GATES MARK	14674	Lasting Impressions	6 St Hilda St	Central Ward				
18/11/2009	13:31	GATES MARK	14697	Dale, George F Esq	40 Cairo St	Warwick				
19/11/2009	11:17	GATES MARK	1-104-3-05	Victory Coating	5221 Royston St	Eccleshall				
19/11/2009	11:30	GATES MARK	15076	Watsons Carson Gardens	8 Thomaston St	Astley Bridge Ward				
19/11/2009	11:01	GATES MARK	15354	Ciocia, James A Esq	28 Serwick St	Moordown Ward				
24/11/2009	00:00	GATES MARK	1-185-5-01	Dorval Trading Co Ltd	7901 Beech St	St. Heller Ward				
25/11/2009	12:45	JOHNSON GEORGE	14813	Hollett, Byron P Esq	8 Jacob St	Daybrook Ward				

3.2. Daily Report with GPS

By clicking Daily Report and afterwards on the button that says “Daily Report (GPS)” appears the screen below.



In this screen by clicking the orange button that says “GPS Chart”, appears, in new window, for the specific user and date, the route on Google Maps.



4. Customer Orders

A user can search a group of orders for a specific time period, with purpose to control the current status, or other information according these orders. The steps that must be followed to search orders this way are:

- Click on Orders Tab
- Complete the search criteria
- Click on Refresh button

Depending on the search criteria, that the user completed, a list appears including one or more orders of one or more customers. First appears the last order. In this list, the user can view information such as comments, total price etc.

Person_name —	Date —	Customer Name —	Order ID —	Type —	Comments —	Price —	VAT —	Total —	Delete —
GEORGE	22/03/2018	Champagne Room	14	Normal Order	✓	1,179.80 €	55.78 €	1,235.58 €	
GEORGE	20/12/2017	Advantage Bookkeeping	10	Normal Order		134.68 €	17.51 €	152.19 €	
GEORGE	19/12/2017	1893 Shops	6	Normal Order		407.82 €	53.03 €	460.85 €	
GEORGE	18/12/2017	1893 Shops	5	Normal Order		943.34 €	122.63 €	1,065.97 €	
GEORGE	17/12/2017	1893 Shops	4	Normal Order		4,292.86 €	558.07 €	4,850.93 €	
GEORGE	16/12/2017	1893 Shops	3	Normal Order		389.26 €	50.73 €	440.99 €	

In case the user needs more information about a specific order, should click on the number with the blue background that corresponds to the order code, so that a popup appears containing detailed information about the order, like below:

order: 14

Customer Name
Champagne Room

ERP Code
0-000-7-05

Address
5396 Furth Street

City
Greets Green and Lyng Ward

Send Method
BY CUSTOMER

Order No
14

Order Date
23/03/2018

Delivery Date
23/03/2018

Comments
test comments

Responsible User
JOHNSON GEORGE

VAT
01606850

Phone
01547-429341

Postcode
B70 9DT

Payment Method
(UNKNOWN)

Responsible

Record Time
5:47

Delivery Time
0:00

Code —	Product —	Unit Price —	Quantity —	Measure Unit —	Εκτίμηση Πι/Α/Δ/Η —	Εκτίμηση Τροποσ/Α/Δ/Η —	Εκτίμηση Προϊόντος —	Εκτίμηση Πωλητή —	Price —	VAT —
885-154	U/KI DIANO SPR150-GIFT J09/X12	42.50	1.0000	PCS	0.00%	0.00%	0.00%	0.00%	42.50	5.53
885-185	U/KI ORANGE TTT300-GIFT J09/X8	24.94	2.0000	PCS	0.00%	0.00%	0.00%	0.00%	49.88	6.48
885-186	U/KI SHA STRAWB300-GIFT J09/X8	24.94	3.0000	PCS	0.00%	0.00%	0.00%	0.00%	74.82	9.69
881-048	JBS CACOMILE 750ML	22.20	22.0000	PCS	0.00%	0.00%	0.00%	0.00%	488.40	0.00
881-051	JBS DETANGLING 300ML	15.90	33.0000	PCS	0.00%	0.00%	0.00%	0.00%	524.70	34.11
881-051	JBS DETANGLING 300ML	15.90	2.0000	PCS	0.00%	0.00%	0.00%	100.00%	0.00	0.00
885-185	U/KI ORANGE TTT300-GIFT J09/X8	24.94	1.0000	PCS	0.00%	0.00%	0.00%	100.00%	0.00	0.00
Total Value (without VAT)									1179.80	
VAT										55.78
Total Amount										1235.58

5. Commercial Tab (Sales)

5.1. Order Sheet Management

User can manage the order sheets through the screen accessed by following this procedure:

- Click on Commercial Tab
- Click on “Order-Sheet Management” menu

Ordersheets			Add Order Sheet
Sheet	Active		
A-TYPE Customer Promo	✓		Products
December Promo	✓		Products

Here, the user can add a new order sheet in the list by clicking the button named: «+ Add Order Sheet».

Add Order Sheet
[Save](#)
[Cancel](#)

Sheet

Category
Choose

Active
☒

Here the user can delete an order sheet by clicking the button “Delete” at the blue button, change its name by typing the new one and by clicking on “Save” button or change it to active/ inactive by checking/ unchecking the button at the “Active” line and by clicking the “Save” button.

Note that a deletion of an order sheet that contains data is not allowed.

To manage the products that are assigned in an order sheet, the users should follow the procedure as described:

- Open Order-sheet Management (as described above)
- Click on the button named “Products” in the line that corresponds to the order-sheet

A list with the products corresponding to the current order sheet will appear.

Ordersheet Items Add Products/Items Products Delete Save Cancel

Sheet: A-TYPE Customer Promo

Filters Close

Search

Product Code

Product Code	Product	Sorting	
085-185	JFK ORANGE TTT300+GIFT J09/X6	1	<input type="button" value="Delete"/>
085-186	JFK SHA STRAWB300+GIFT J09/X6	1	<input type="button" value="Delete"/>
107-134	CLACL SHINE CTRL WSH 200ML	1	<input type="button" value="Delete"/>
107-131	CLACL WARMING SCRUB 100ML/6	1	<input type="button" value="Delete"/>
107-129	CLEAN & CLEAR ADV GEL 150MLX6	1	<input type="button" value="Delete"/>

Here the user can delete a product from the order sheet by clicking the “Delete” button in the corresponding line or change the hierarchy by changing the numbers in the column “Sorting” for each product and by clicking “Save”.

Also the user can add products to the Order Sheet by following this procedure:

- Add Products
- Type the name or part of the name of the product in the “Search” field or the Code or part of the product code in the field named “Product Code” and click the button “Refresh”.
- A list with the products that fulfill the search criteria, appear.
- The user chooses the products that wants to add in the order sheet and clicks on the “Save” button.

Ordersheet Items Save Back

Filters Close

Search

Category

Material	Product Code
Vegas Playboy	5018
JFK DTANG SPR150+GIFT J09/X12	085-184
JFK TTT TROPIC300+GIFT J09/X6	085-187
JFK WTRMEL TTT300+GIFT J09/X6	085-188
AFFINITY PERM-COLOR 400ml	170-055
AFFINITY PERM-COLOR CONDITIONE	170-057
Bosch Fridge A125	SF103
C&C ANTIBACTERIAL FACIAL WIPES	107-123
C&C CLEANS LOTION REGULAR 200	107-121

5.2. ERP Pricelists Management

The user has the capability to browse at the main pricelist of the application, and view the final prices (regardless the client) and affect the discounts to control the products’ final prices. The modifications that are being made in this tab do not affect the Order Placement of the customers (there is no change in the price).



The steps that the user should follow to change the discounts given this way, are:

- Click on the Commercial tab
- Click on the item “Pricelist Navigation”

A screenshot of the 'Pricelist Navigation' interface. It features a search bar at the top with a dropdown arrow and a 'Category Name' label. Below the search bar is a list of categories, each with a blue dropdown arrow and a text label: 'Main', 'OTHER', 'JB SHAMPOO REG', 'JB SHAMPOO VAR', 'JOHNSON'S PEDIATRIC', 'JB COND', 'JB POWDER', and 'JB OIL'.

By clicking on the Warehouse under the chosen pricelist, the user can navigate through the products existing in it.

5.3. Merchandising Management

The user can access the merchandising scenarios by following the procedure below:

- Click on Commercial tab
- Click on item “Merchandising Scenarios” under the Header “Merchandising”.

Merchandising Scenarios					New Merchandising Category
Record Name	Description	Show on Menu	Questions	Products	
Meters per Category	Shelf share% in the category	✓	Questions	Products	
Pricing	Price audit of both owned products and preselected competitive ones including special promotions	✓	Questions	Products	

Here the user can chose the category of the products to view the products existing in it by clicking the button “Products”.

In the screen that shows up, the user can view the products already existing in the list.

To add or remove a product, the user must click on the “Add Product” button to navigate to the screen below:

Merchandising Items							Add Item/Product	Save	Cancel	Back
Merchandising Category: Meters per Category										
Filters										
Material										
Category										
Family										
Code										
Material										
Material Code										
Material Name										
Sorting										
Photo										
Delete										
010-046	JB CONDITIONER 300ml			1						
010-047	JB CONDITIONER 500ml			1						
010-050	JB CONDIT DETANGLING 500ml			1						
010-055	JB COND NO MORE TANGL 200MLX6			1						
020-038	JB BED TIME OIL 200ML			1						

Here the user can search by name or category to add or remove products by selecting or not the products in the list. Also, the user can give an alternative name or code to the products.

Through the Logging List that mentioned above, the user has the ability to edit or add questions for Merchandising, by clicking the button Questions that exists in the column he needs to edit.

Questions				
Merchandising Category: Meters per Category				
Description --	Record Type --	Sorting --	Previous --	--
Meters per Category	Numeric	1		

In that screen by selecting “New Question”, the user can add a new question for the Merchandisers, and by selecting the underline title in column “Description” can edit the question corresponding to the specific line.

In the screen that shows up, the user gets the opportunity to change the type of the question, the sorting and the title. Also he’s given the ability to delete by clicking the blue button on the top right corner where the choice “Delete” appears.

Question
<div>Record Type</div> <div>Choose</div> <div>Sorting</div> <div>Question</div> <div>Previous</div> <div>NO</div>

Finally, in the Scenarios List Screen, by clicking the name of the scenario that the user needs to edit, can change the name of the scenario, and check if it will show up on menu or not and click “save”, or delete by clicking the blue button on the top right corner where the “Delete” option appears.

Merchandising Senario
<div>Record Name</div> <div>Expiry dates control</div> <div>Description</div> <div>Expiry dates control by following the min shelf life index per SKU</div> <div>Show on Menu</div> <div>YES</div> <div>Photo</div> <div>NO</div>

5.4. Product Categories Management

The user can manage the categories of the products by following the procedure below:

- Click on Commercial tab
- Click on item “Product Categories”.

ERP Code	Category Name	Category Sorting
-1	Main	
000	OTHER	
001	JB SHAMPOO REG	
002	JB SHAMPOO VAR	
005	JOHNSON'S PEDIATRIC	1
010	JB COND	2
015	JB POWDER	1
020	JB OIL	
025	JB COLOGNE	
030	JB NAPPY RASH	
031	JB BREATHEASY CREAM	

Here the user can edit a category by clicking on its name under the column “Category Name” in the corresponding line, to navigate in the sub-categories by clicking at the arrow at the left of the category of his choice or add a new category by clicking “New Category”.

During the edit or insert of a new category, the following screen appears:

Category	
ERP Code	002
parent_category_id	Main
Category Name	JB SHAMPOO VAR
Category Sorting	

In that screen the user can add the ERP code of this category, select if the category is a sub-category of another category and which and give a name and sorting number.

To save the changes, the user, must click on the “Save” button. The user can, also, delete a category by clicking the “Delete” under the blue menu button on the top right corner

Note that deletions of a category that has sub-categories assigned are not allowed.

The Sub-Category management follows the same steps as the Category Management.

Note that the deletion of a Category or Sub-Category that has products assigned, is not permitted.

5.5. Expense Categories Management

The user can manage the expense categories by following the procedure below:

- Click on Commercial tab
- Click on item “Expense Categories”.

Expense Categories + New Expense Category

Expense Type —	Active —
HOTELS	✓
MEALS	
TELEPHONY	
TICKETS	✓
GIFTS	✓
GAS/PETROL	✓
OTHER	✓

Here the user can edit a category by clicking on its name under the option “Type of Expense” on the line that corresponds to it or add a new category by clicking “+ New Expense Category”.

During the edit or insert of an expense category, the user navigates to the following screen:

Expense Category Save Cancel

Expense Type

Active

☒ YES

In that screen the user can insert a name for the category, at the field “Expense Type” and select if the category is active or not.

Also, the user can delete the category by clicking on “Delete” option under the blue button on the top left corner.

5.6. Product Families Management

The user can manage the list of product families by following the procedure below:

- Click on the Commercial tab
- Click on “Product Families” item.

Product Family		(+ Adding New Family)
ERP Code —	Family —	
-1	(UNKNOWN)	
10000	Other	
01	JnJ	
02	Sarantis	

Here the user can add a new family by clicking on “Adding New Family” or edit an existing one by clicking on the name of the family of his choice.

Manage Families		Save	Cancel	
ERP Code				
01				
Family				
JnJ				
Sorting				
2				

On the Insert – Edit screen of the Product Families, the user can add a name for the Family, ERP Code and the sorting of his will and click on “Save” to save the changes. Also, the user can delete a Family, by clicking on the “Delete” option under the blue button on the top right corner.

Note that deletion of a family that has products assigned is not permitted.

5.7. Payment Methods Management

The user can manage the list of payment methods by following the procedure below:

- Click on Commercial tab
- Click on “Payment Methods” option.

Payment Terms New Payment Term

ERP Code	Payment Name	Discount
-1	(UNKNOWN)	.0000
1	CASH	.0000

Here the user can add a new payment method by clicking on “New Payment Method” button or edit an existing one by clicking on the name of the payment method of his choice.

Payment Term Save < Cancel

ERP Code	1
Payment Name	CASH
Discount	.0000

In the Insert – Edit Payment Method screen, the user adds the name, the ERP Code, the discount if his choice and hits the “Save” button to save the changes. Also the user can delete a payment type by clicking the “Delete” option under the blue button on the top right corner.

5.8. Delivery Methods Management

The user can manage the list of delivery methods by following the procedure below:

- Click on Commercial tab
- Click on “Delivery Methods” item.

Shipment Terms New Shipping Term

ERP Code —	Delivery Name —	Delivery Cost —
-1	(UNKNOWN)	.0000
01	COMPANY VAN	.0000
02	COURIER	.0000
03	BY CUSTOMER	.0000
04	OTHER	.0000

Here the user can add a new delivery method by clicking the “New Delivery Method” button or edit an existing one by clicking on its name.

Shipping Term Save < Cancel

ERP Code	01
Delivery Name	COMPANY VAN
Delivery Cost	.0000

In the Insert – Edit Delivery Method screen the user adds the name, the ERP code and the delivery cost of his choice and clicks on “Save” to save the changes. Also the user can delete a delivery method by clicking on “Delete” under the blue button on the top right corner.

6. Routes

To manage the routes, the user must follow the procedure below:

- Click on Routes tab

User Routes + Adding Route

Filters + Close

User + Refresh

User	Route	Comments		
GEORGE JOHNSON	Paphos' Route	Paphos' Route	Assign	Customers
GEORGE JOHNSON	Monday's Route	Every first and third Monday	Assign	Customers
MARK JONES	MONDAY1	First Monday of the month	Assign	Customers
GEORGE JOHNSON	WEDNESDAY3		Assign	Customers
GEORGE JOHNSON	BO_Test1	Every 2nd Monday	Assign	Customers

Here the user can add a new route by clicking on “Add Route”.

Manage Routes + Save + Cancel + [Icon]

Route

User

Comments

The user can change the information of an already inserted route by clicking on the name of the route on the line that corresponds. In the form that shows up, the user can change the data and click on “Save” button.

The user can also delete a route by clicking on the blue button on the top right corner and then on the option “Delete”. Note that a route with assigned customers cannot be deleted.

To manage the customers of a route, the user should click on the button “Customers”.

Customer's Route + Add New Customer + Customer Delete + Back

Route: Monday's Route

ERP Code	Customer	Address	City	Phone	
1005110113	Barajas & Bustamante Archi	85 Bridgewater St	Shard End Ward	01689-253476	Delete
1005110095	Benitez, Brigida Esq	5 Howe St	Bronburn, Uphall and Winchburg	01426-343825	Delete
1005110093	Bomarko Inc	43 Williamson St #7995	Meads Ward	01469-300335	Delete
1005110084	Brady, Brad J Esq	5 Chadwick St #7	Liangeler Community	01252-621329	Delete
1005110117	Brewster Walkcoverings Co	763 Parkfield Rd	Norton Canes	01823-383806	Delete
1005110102	Kennedy Scales Inc	7 Cheapside #9	St. Ive	01776-126032	Delete
1005110079	Marketing Horizons Inc	95 Denton St	Violaton West Ward	01355-500797	Delete
1005110076	Schwarzband, Gail L Esq	4 Burnell St	Beeston West Ward	01543-198990	Delete
1005110092	Welders Supply	67 Micanber St	Brookley Ward	01712-135468	Delete

Here the user can remove a customer from the route by clicking “Delete” or remove all customers from the route by clicking “Customer Delete”, or add a customer to the route by clicking “Add Customer”.



By clicking “Add Customer” the user can add a customer to the route by following the procedure below:

- Type part of customer’s name in the “Search” field or selecting the Group of the customer.
- Click on “Refresh” button. The list of customers corresponding to the criteria appears.
- Select the customers to insert to route and click “Save”.

Route Customers

Save Back

Filters

Search

Group

Refresh

	Customer —	Customer Code —	Address —
<input type="checkbox"/>	1893 Shops	15132	78 Pine Grove
<input type="checkbox"/>	20 20 Printing Inc	1175700005	Siruku 666
<input type="checkbox"/>	A 1 Plumbers Supply	1-166-9-90	42 Hey Green Rd
<input type="checkbox"/>	A All American Travel Inc	1176760035	7116 Western Ave
<input type="checkbox"/>	A All In One Construction	1-106-9-02	891 Crocus St
<input type="checkbox"/>	A B E Doors & Windows	1-151-5-05	4309 Chosenhale St
<input type="checkbox"/>	A F Supl Co Div Automatic Firing	15125	7602 Grantham St
<input type="checkbox"/>	A K Construction Co	1176330310	2737 Pistorio Rd #9230
<input type="checkbox"/>	A O Hardee & Son Inc	1005279017	67 Pufford St
<input type="checkbox"/>	A O J Mfg Corp	1062400108	529 Staimine Rd #3680

The selected customer are added to the route.

7. Van Invoicing (DSD)

7.1. Invoice Management

The user can easily view the invoices, by following the procedure below:

- Initiate Regate Effective Application
- User Authentication
- Click on DSD Tab
- Manage Invoice Types

Invoice Types

Adding New Invoice Type

Title	Abbreviation	Sign	Active	Affects Quantities	Affects Prices	Cancelled	Printable	Copies	Numbering From	Cancels Out	Exception Number	Products Number
Cancel Invoice	EATF	Credit	✓	✓	✓	✓	✓	1	EATF	EATF	Exception	Products
Cancel Invoice	EATF	Credit	✓	✓		✓	✓	1	EATF	EATF	Exception	Products

In this case, a screen appears with the invoices and their details. The user can also add a new invoice type as explained below.

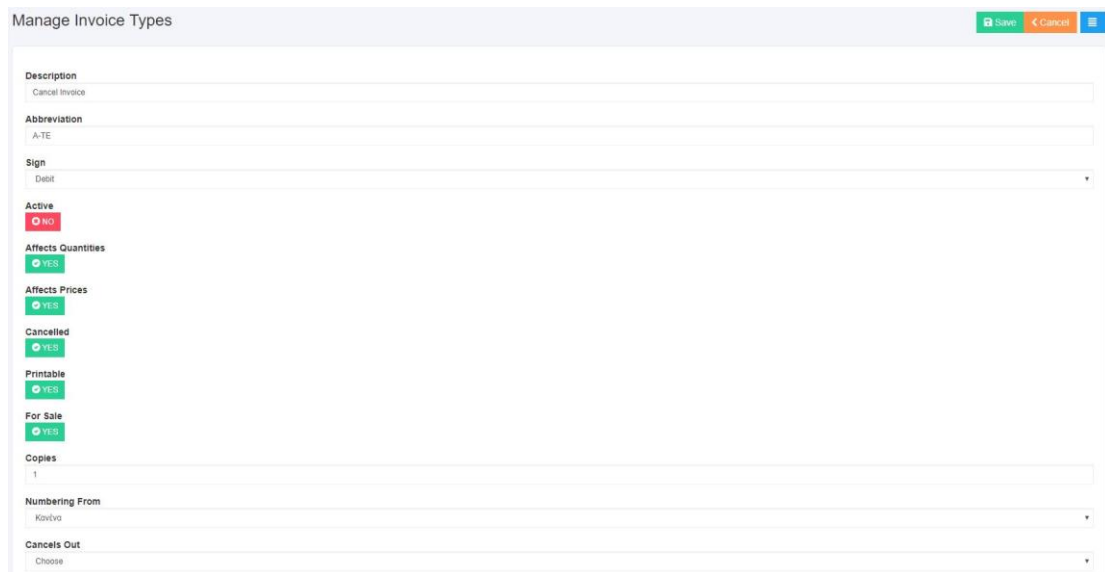
In this case, a screen appears with the basic invoice information for the corresponding user. Specifically, for each customer appear the details below:

- Title
- Abbreviation
- Sign
- If Affects Quantities
- If Affects Prices
- If it's Cancelled
- If there is use of Offers
- If it's Printable
- Numbering From
- Cancels From

By selecting the invoice name, the user can edit it's basic information.

7.2. Insert Invoice Type

To insert an invoice the user should click on the corresponding button, on the invoice management screen. The user must necessarily complete all the fields on the screen. After that, by clicking on “Save” option – given that all the fields are correctly completed – the invoices screen appears completed by the new one.



Manage Invoice Types

Save Cancel

Description
Cancel Invoice

Abbreviation
A-TE

Sign
Debit

Active
NO

Affects Quantities
YES

Affects Prices
YES

Cancelled
YES

Printable
YES

For Sale
YES

Copies
1

Numbering From
Koviva

Cancels Out
Choose

7.3. Series Management

The user can manage the series and numbering of the invoices by accessing the proper screen through the procedure below:

- Click on DSD tab
- Click on “Manage Series” option

Series + Adding New Document

Filters Close

Driver: All Refresh

Driver	Title	Abbreviation	Active	Series	Initial Value	Maximum Value	latest Pricing	Current Numbering	
GARCIA	Cancel Invoice	EATF	✓	A	1	99999	10/10/2017		Edit
GARCIA	Cancel Invoice	A-TE	✓	A	1	99999	10/10/2017		Edit
GARCIA	Cancel Invoice	EATF	✓	A	1	99999	10/10/2017		Edit
GARCIA	Delivery Invoice	DAP-0	✓	A	1	99999	10/10/2017		Edit
GARCIA	Returns Invoice	PTP-4	✓	A	1	99999	10/10/2017		Edit
GARCIA	Sales Invoice	TDP-0	✓	A	1	99999	10/10/2017		Edit
GARCIA	Sum Invoice	SDA	✓	A	1	99999	10/10/2017		Edit
GARCIA	Sum Invoice Returns	SDAE	✓	A	1	99999	10/10/2017		Edit

Here the user can search based on the sales person and edit the series and numbering of the invoices, as much as add a new type of invoice by selecting the proper button.

Add Document Save Cancel

User: Choose

Title: Choose

Active: ☒ Yes ☐ No

Series:

Initial Value:

Maximum Value:

Current Numbering:

latest Pricing: 04/12/2018

Printer: Choose

7.4. Vehicles Management

7.4.1. Basic Management

The user can easily view his vehicles, by following the procedure below:

- Initiate Regate Effective Application
- User Authentication
- DSD tab
- Vehicles Manager

Vehicles					
Driver --	Last Date SDA --	Last SDA --	Active --	--	--
GARCIA	29/12/2017		✓	Customers	S.D.A

On the screen the user can view and add customers per driver as much as administrate their Shipping List.

7.4.2. Insert Customers

The user by searching through the available filters and by selecting the customers of his choice can connect them to vehicle, so to the place that the vehicle supports.

Customers [GEORGE GARCIA]						
Add New Customer Delete Customers Delete Specified Customers Back						
	Customer Code --	Customer --	Address --	City --	Phone --	VAT --
<input type="checkbox"/>	15132	1893 Shops	78 Pine Grove	Stannington Ward	01215-422453	105942488
<input type="checkbox"/>	1175700005	20 20 Printing Inc	Sinutal 666	Santa Clara	95054	094505259
<input type="checkbox"/>	1-106-9-00	A 1 Plumbers Supply	42 Hay Green Rd	Deepdale Ward	01752-309931	011042993
<input type="checkbox"/>	1176760035	A All American Travel Inc	7116 Westem Ave	Dearborn	48126	999080978
<input type="checkbox"/>	1-106-9-02	A All in One Construction	891 Crocus St	Roxley Ward	01951-872658	094034181

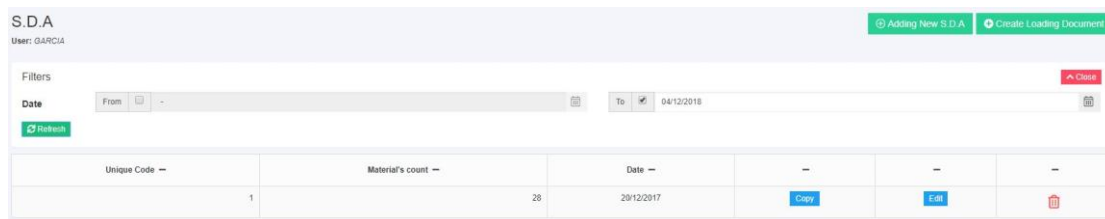
7.4.3.View Shipping List

In the screen that appears, by selecting Shipping List on the line of the vehicle, in Vehicles Section, the user can view the Shipping List for the specific vehicle.

These information are shown:

- Load Number
- Product Quantity
- Date

Also, the ability for the user to edit or delete a Shipping List is available.



The screenshot shows the S.D.A. (Sales Data Administration) interface. At the top, it displays 'S.D.A.' and 'User: GARCIA'. There are two buttons: 'Adding New S.D.A.' and 'Create Loading Document'. Below this is a 'Filters' section with a 'Date' filter. The 'Date' filter has a 'From' field and a 'To' field. The 'To' field is set to '04/12/2018'. There is a 'Refresh' button and a 'Close' button. Below the filters is a table with the following columns: 'Unique Code', 'Material's count', 'Date', and three action buttons: 'Copy', 'Edit', and 'Delete'.

Unique Code	Material's count	Date	Copy	Edit	Delete
1	28	29/12/2017			

7.4.4. Edit Shipping List

By clicking on the Shipping List a screen appears to the user, that displays the selected products for the specific Shipping List. The user can add or delete and change to the quantity as much as the previous quantity per product.

Edit S.D.A							Print S.D.A	Add Products	Save	Cancel
Code	Product	Quantity	Lot Count	Sum Lot Quantity	Lot					
5018	Vegas Playboy	100.0000	-	-	Lot					
885-184	(JFK DTANG SPR150+GIFT J09)X12	100.0000	-	-	Lot					
885-185	(JFK ORANGE TTT300+GIFT J09)X6	100.0000	-	-	Lot					
885-186	(JFK SHA STRAWB300+GIFT J09)X6	100.0000	-	-	Lot					
885-187	(JFK TTT TROPIC300+GIFT J09)X6	100.0000	-	-	Lot					
885-188	(JFK WTRMEL TTT300+GIFT J09)X6	100.0000	-	-	Lot					

Also the ability to print the selected S.D.A. is given by clicking on “Print” option.

Add Products					Save	Back
Filters						
Search						
Code Product Category						
Category						
Choose						
Refresh						
	Code	Product	Quantity	Previous Quantity		
<input type="checkbox"/>	107-135	C&C SHINE CONTROL MOIST 100ML				
<input type="checkbox"/>	107-143	C&C SHINE CONTROL WASH 150ML				
<input type="checkbox"/>	107-139	C&C SHINECTRL WSH SACH 1.5ML S				
<input type="checkbox"/>	SP201	Canon B201				
<input type="checkbox"/>	107-127	CC BLACK HEAD CL LOT 200ML				
<input type="checkbox"/>	107-128	CC BLACK HEAD CL SCRUB 150ML				
<input type="checkbox"/>	107-132	CL&CL ADVANT SPOT PATCH 6X18P				
<input type="checkbox"/>	107-133	CL&CL SHINE CTRL SCRUB 150ML				

7.4.5.Adding New Shipping List

To create a new Shipping List the user needs to click on the corresponding button and the following popup will show up:



The screenshot shows a web browser window with a popup titled "S.D.A." and "New S.D.A.". The form contains a "Date" field with the value "04/12/2018" and a "Loading Document" field with a "Choose" button. In the top right corner of the popup, there are two buttons: "Create" (green) and "Cancel" (orange).

Here the user should select the Date for the new S.D.A.

By clicking on “ Adding New S.D.A.” the edit screen that we came across before appears and the user can add products and edit the information as needed.

Select “Save” to finalize the changes.

8. Field Service

The user can through the back-office, control the technicians that are out on the field, to follow their jobs, the Assets they manage and their action.

8.1. Asset Categories

In the Service Menu, the user can add, edit and remove Asset Categories.

Asset Categories		New Asset Category
Category Code --	Category Name --	
T001	Small Machines	
T002	Medium Machines	
T003	Big Machines	

The user must select “Add Asset Category”, complete the fields that appear in the form and click on “Save” to complete the Submission.

Asset Category

[Save](#)
[Cancel](#)

Category Code

T001

Category Name

Small Machines

8.2. Asset Types

Through the Service menu, the user can add, edit and remove Asset Types.

Asset Types		New Asset Type
Type Code --	Type --	
M001	Coffee Machines	
M002	Printers	
M003	Refrigerator	
fire ext	fire ext	

The user must click on “Add Asset Type”, complete the fields that appear on the form and click “Save” to complete the Submission.

Asset Category

[Save](#)
[Cancel](#)

Type Code

M002

Type

Printers

8.3. Asset List

By choosing “Asset List”, a list of the assets that exist in the program appears.

Asset List								New Asset
Machine Code --	Machine Name --	Serial Number --	Characteristics --	Category --	Type --	Material --	Comments --	
SC001	Krupps Coffee Machine	SC0000000000001	Krupps Coffee Machine	Small Machines	Coffee Machines	Krupps Coffee Machine	2010 model	History
SC002	Delonghi Coffee Machine	SC0000000000002	Delonghi Coffee Machine	Medium Machines	Coffee Machines	Delonghi Coffee Machine	2011 model	History
SC003	Miele Coffee Machine	SC0000000000003	Miele Coffee Machine	Small Machines	Coffee Machines	Miele Coffee Machine	2012 model	History
SF103	Bosch Fridge A125	SF000000000103	Bosch Fridge A125	Big Machines	Refrigerator	Bosch Fridge A125	2001 model	History
SF104	Siemens Fridge D5756	SF000000000104	Bosch Fridge A125	Medium Machines	Refrigerator	Siemens Fridge D5756	2005 model	History



The user can add a new asset by clicking on the button New Asset, as much as edit an existing one, by clicking on its name.

The screenshot shows the 'New Asset' form. It includes fields for Category, Type, Material, Machine Code, Machine Name, Serial Number, Characteristics, and Comments. At the top right, there are buttons for 'New', 'Cancel', and a list icon.

After the asset is added or it's info are changed, the user must click on "Save" button to save his changes.

8.4. Asset History

On this screen, the user can search the history of an asset based on the customer, the asset, the dates from and to, and the category and type of asset.

After that a list appears with results that are relevant to the previous search.

The screenshot shows the 'Asset History' form with filters and a table of results.

Filters:

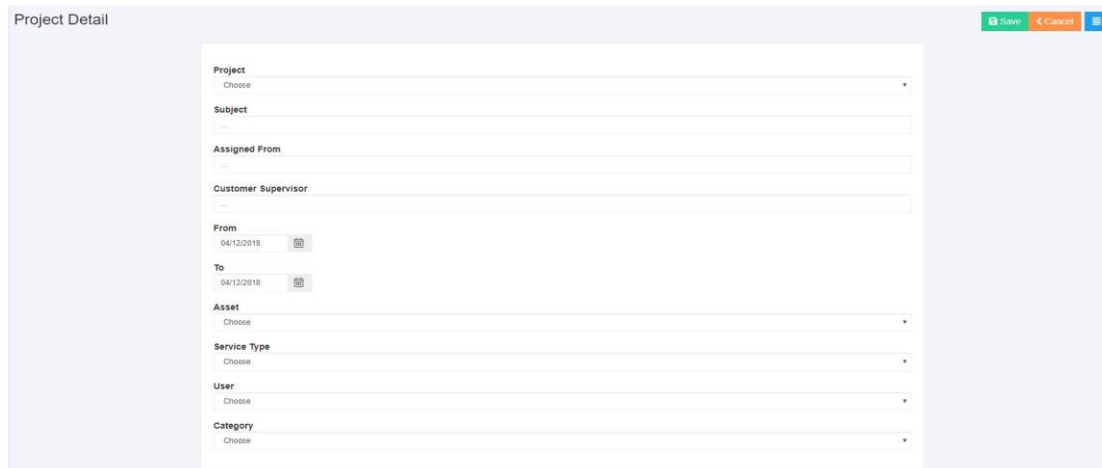
- Search:** Customer Name, Address, City
- Asset:** All
- Date:** From [] To [04/12/2018]
- Category:** All
- Type:** All

Table:

Customer Name	Address	City	Machine Name	Date	Category	Type	Responsible	Loan	Periodicity	Comments
Westbrooks, Nelson E Jr	1 Century Park E	San Diego	Krups Coffee Machine	22/09/2014	Small Machines	Coffee Machines	manos		15	th

8.5. New Service

The user is given the opportunity to add a new service by clicking on “New Service”.



The 'Project Detail' form includes the following fields:

- Project: Choose
- Subject: Choose
- Assigned From: Choose
- Customer Supervisor: Choose
- From: 04/12/2018
- To: 04/12/2018
- Asset: Choose
- Service Type: Choose
- User: Choose
- Category: Choose

Buttons: Save, Cancel, and a menu icon.

After completing the necessary fields, the user should save the changes by clicking on the “Save” button.

8.6. Service Types

Through the Service menu, the user can add, edit or delete a service type.



Service Type Code	Service Type Name
A001	Scheduled Service
A002	Scheduled Maintenance
A003	Unscheduled Repair

Buttons: New Service Type, Save, Cancel, and a menu icon.

The user should click on “New Service Type”, complete the necessary fields and click “Save”.



The 'Service Type' form includes the following fields:

- Service Type Code: Choose
- Service Type Name: Choose

Buttons: Save, Cancel, and a menu icon.

8.7. Service Categories

Through the service menu, the user can add, edit, and remove service categories.



Service Category Code	Service Category Name
S001	With Charge
S002	Without Charge

Buttons: New Service Category, Save, Cancel, and a menu icon.

The user should click on “New Service Category”, complete the necessary fields and click save to complete the submission.



The 'Service Category' form includes the following fields:

- Service Category Code: Choose
- Service Category Name: Choose

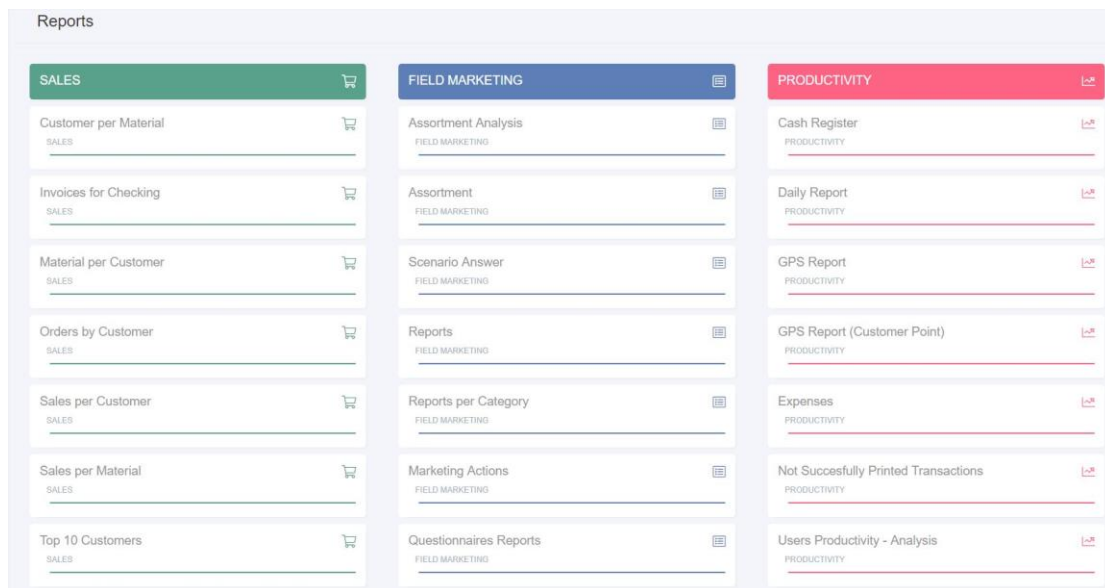
Buttons: Save, Cancel, and a menu icon.

9. Reports

9.1. Basic Information

To view the reports, the user must follow the procedure below:

- Initiate Regate Effective application
- User Authentication
- Click on Reports tab
- Click on the option that is needed [e.g. Reports]



Here the user selects the report that he needs and on the screen that shows up, completes the report criteria and clicks on “refresh” button.

The view of the reports below is available:

- Customer Sales
- Product Sales
- Customers per product
- Cash Register
- Orders
- Daily Report
- GPS Report

9.2. Filtering per Report Group

In reports screen, the user can chose between filters to adjust the results as needed at the time.

Users Productivity - Analysis Print

Parameters

User: All

Category: All

Type: All

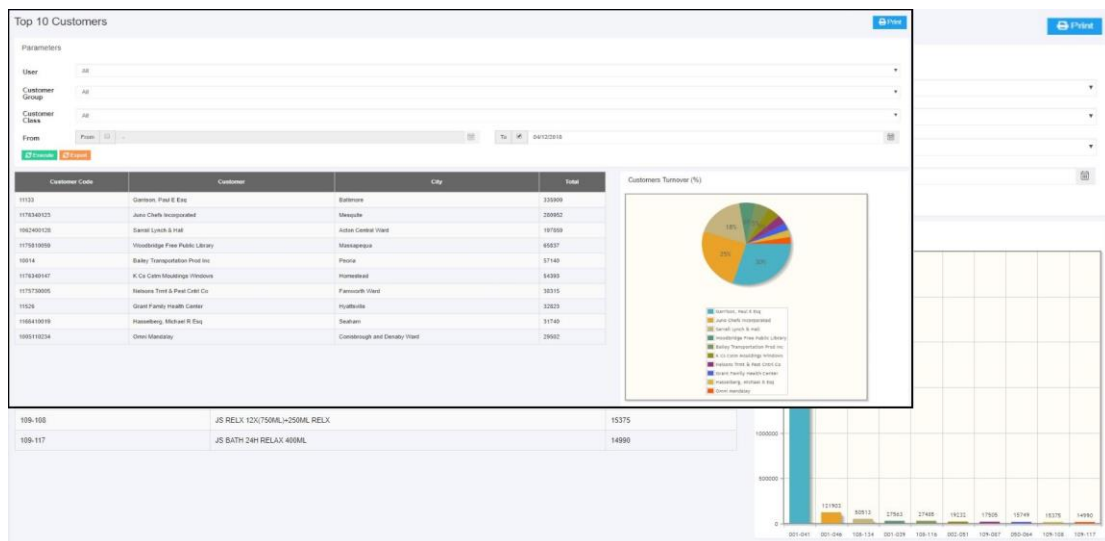
From: From To: 04/12/2018

[Execute](#) [Export](#)

DATE	USER	CUSTOMER	ADDRESS	CITY	PROGRAMMED	Orders	QMS	GPS	MONEY COLLECTION	MERCH	PHOTO	SERVICE
01/12/2014	JOHNSON GEORGE	[15132] 1893 Shops	78 Pine Grove	Stamington Ward	1	0	0	0	0	0	0	0

9.3. Reports With Graphs

In reports tab, the user can visually analyze his reports, by presenting the results into graphs.



9.4. Business Intelligence

These scenarios are available:

- Connecting Regate Effective with Business Intelligence Systems to create cubes, reports and exports to XLS
- Connecting with PowerQuery and PowerPivot to BI Analytics through Microsoft Excel.

Please address to the company for more information on the matter.

9.5. Application Statistics

A System Administrator can view statistic information regarding data synchronization between field persons' devices the central computer and ERP database. The required steps are:

- Click on Reports tab
- Select type of statistic under "Statistics" Header



Mobile User Synchronizations. In that specific list, show up the mobile users and their synchronizations , dates, times etc. As showed in the screen below:

Users Synchronization

Filters

Date: From [] To [04/12/2018]

User: All

Refresh

Date	Time	User	Code	Type	Result	Comments	Version
31/10/2017	17:32	JOHNSON GEORGE	2455	Full Synchronization	Success	Android	100
31/10/2017	17:36	JOHNSON GEORGE	2456	Incremental Sync	Success	Android	100
31/10/2017	17:36	GARCIA GEORGE	2457	Full Synchronization	Success	Android	100
31/10/2017	19:17	JOHNSON GEORGE	2458	Full Synchronization	Success	Android	100
31/10/2017	19:29	JOHNSON GEORGE	2459	Incremental Sync	Success	Android	100
31/10/2017	19:29	JOHNSON GEORGE	2460	Full Synchronization	Success	Android	100
31/10/2017	19:30	JOHNSON GEORGE	2461	Incremental Sync	Success	Android	100



ERP Synchronizations: It is used mostly by the client to view the status of the daily synchronization with the ERP System. If the “Category” column shows “Success” and there are at least 3 lines per day, when the Actual_ID is rising (except the Weekend when the client might not issue invoices), then the system works as it should.

ERP Synchronizations

Filters

Date

From

To

04/12/2018

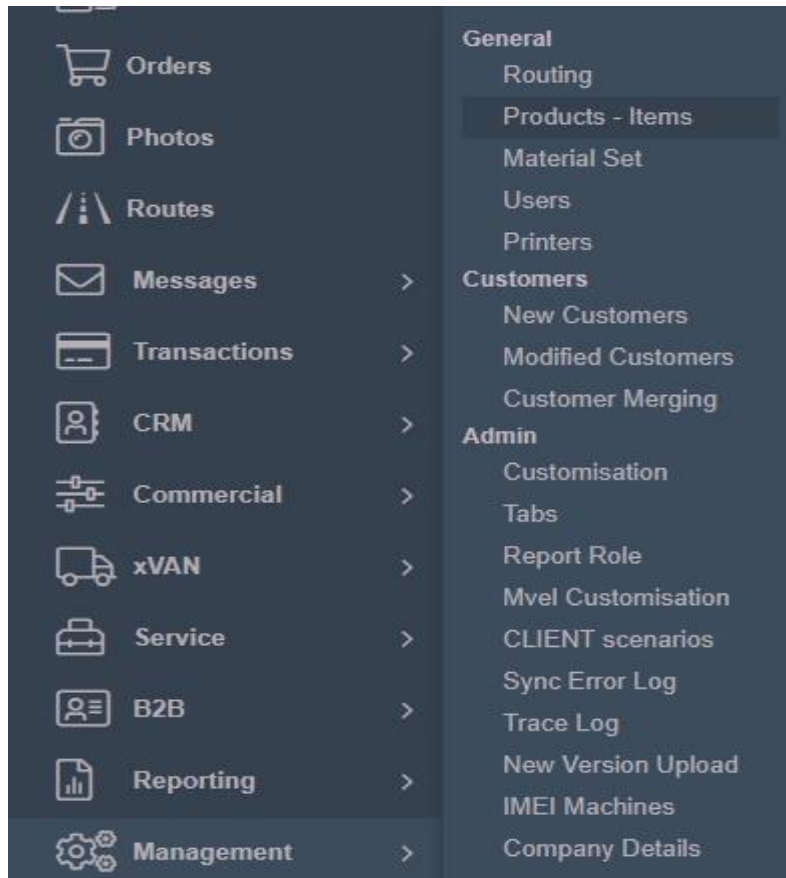
Refresh

Date	Time	Duration	Category	Result	Actual_id	
15/05/2017	11:49		Success	DailySync_Step3: FI_Document data. Company_ID: 2, Error: 0 statistics_id=193924, document_id=189439	193924	
15/05/2017	11:49		Success	DailySync_Step2: Basic Data to Tables. CompanyID=2, Error:		
15/05/2017	11:49		Success	DailySync_Step1: Data to be uploaded by Service. Company_ID: 2, Error: 0		
15/05/2017	11:43		Success	DailySync_Step3: FI_Document data. Company_ID: 2, Error: 0 statistics_id=193924, document_id=189439	193924	
15/05/2017	11:43		Success	DailySync_Step2: Basic Data to Tables. CompanyID=2, Error:		

10. Application Management

A System Administrator can manage Mobile Users' and Products' information, the Daily Synchronization, and manage remotely the server. The required steps are:

- Click on Management tab



10.1. Customers

10.1.1. New Customers

In this screen new customers show up. The user can accept the new entries by clicking "Save:", after optionally setting an ERP Code to each customer at the corresponding field.

New Customers Save Cancel

Customer M2M Code	ERP Code	Customer Name	VAT	Category	User	Print
13409		Arctic Star Distributing Inc	094063140	CORA	JOHNSON GEORGE	Print
19852		Proterra	000000000	CARREFOUR	JOHNSON GEORGE	Print

Also the user can print the new customer's information by clicking "print" at the line of each customer.

To cancel an entry the user can click on the button at "Delete" column.

10.1.2. Modified Customers

In this screen show up customers that their information have been changed.

Modified Customers						
Customer M2M Code --	Customer Name --	VAT --	Category --	User --	Print --	Activation --
18418	Stephen Kennedy Architects Inc Pz	115872232	ELMI DOMESTIC	JOHNSON GEORGE	Print	Print

10.2. View Users Management tab

In this screen the user is able to view all the customers for each person, to promote a person to supervisor, as well as change person's password in the system.

Users Add User						
Username --	User --	Active --	Supervisor --	--	--	--
root	(UNKNOWN) (UNKNOWN)	✓		Customers	Scheduled Visits	Person Customization
regadmin	ADMIN COMPANY	✓		Customers	Scheduled Visits	Person Customization
sm48	ANDERSON JOHN	✓		Customers	Scheduled Visits	Person Customization
sm30	BROWN PATRICK	✓		Customers	Scheduled Visits	Person Customization
sm12	COE ANTHONY	✓		Customers	Scheduled Visits	Person Customization
sm6	CRAIG COLIN	✓		Customers	Scheduled Visits	Person Customization
cpod	DAMENE PAUL	✓		Customers	Scheduled Visits	Person Customization
xvan	GARCIA GEORGE	✓		Customers	Scheduled Visits	Person Customization
sm8	GATE'S MARK	✓		Customers	Scheduled Visits	Person Customization
sm13	ITALIANY NICK	✓		Customers	Scheduled Visits	Person Customization
sm9	JOBS PATRICK	✓		Customers	Scheduled Visits	Person Customization
sta	JOHNSON GEORGE	✓		Customers	Scheduled Visits	Person Customization

10.3. Products Management tab

In that screen the user is able to view a list of the inserted products, as well as insert a new one or change a products information.

To view the list the administrator should click on "Search" button after optionally completing some of the existing filters, such as, Name, Code etc.

In the list that displays there are information for each product such as:

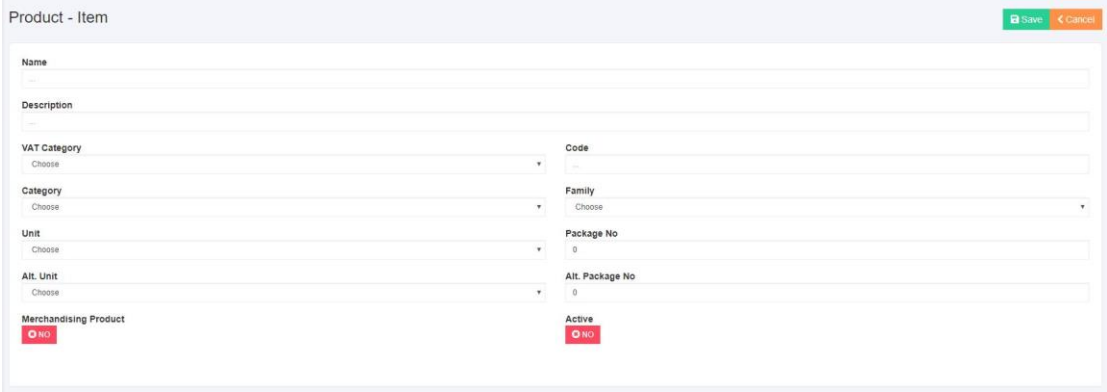
- Product Code
- Product Name
- Active

The administrator can change the information of a product by clicking on its name at the corresponding row or add a new one by clicking "New Product" at the top right corner.

10.4. Insert New Product

In this screen the user can insert information such as:

- Product Code
- Product Name
- Unit
- Family
- Category
- Description
- Size / Pieces
- Active / Inactive
- Is Merchandising Product or Not



The new product is inserted after clicking on “Save” button.

10.5. Product Edit

The administrator can change some of the information of a product, such as:

- Product Code
- Product Name
- Product Photo
- Unit
- Family

- Category
- Description
- Size / Pieces
- Active / Inactive
- Is Merchandising Product or Not

The changes are inserted after clicking on “Save” button. This way the user can add a photo file for each product to the system.

Product - Item Product Photos Save Cancel

Name
JBS REGULAR 500ml

Description
JBS REGULAR 500ml

VAT Category
23

Code
001-040

Category
Main >> JB SHAMPOO REG

Family
JnJ

Unit
PCS

Package No
0

Alt. Unit
PCS

Alt. Package No
0

Merchandising Product
☒ NO

Active
☒ YES

Product Photos [Product:JBS REGULAR 500ml CODE:001-040] Delete Back


Choice	Icon	File Name
<input type="checkbox"/>		5.jpg

Photo File Select File

Upload

Accepted types of file: jpg, png
The file must contain latin characters only
Special characters will be deleted