REGATE EFFECTIVE

ADMINISTRATION MANUAL

TABLE OF CONTENTS

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

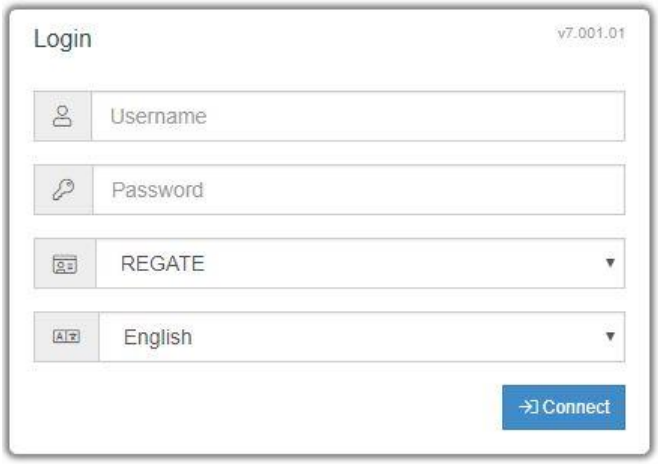
Access to Regate Effective can have all authorized users with direct connection to the server through the web interface of the application, including:

- 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:

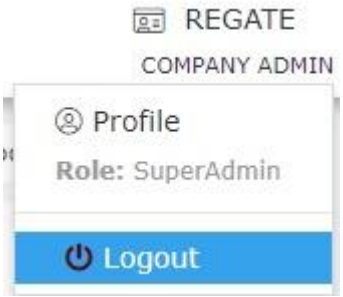


(HINT: every time you enter the Regate Effective, click F11. This will increase the working screen in full screen. By exiting the application, press F11 again to restore the correct size).

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: o View Customer Relationship

- 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

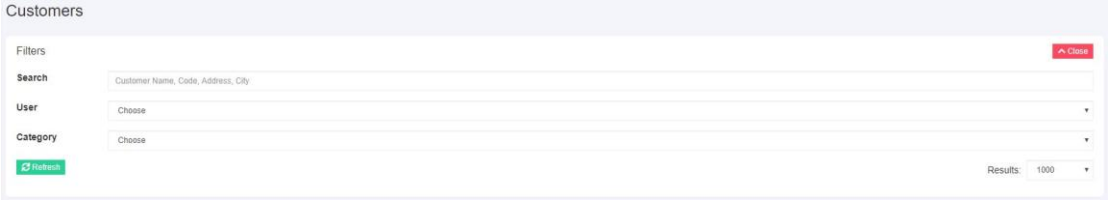
2.1. Display Customers

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.

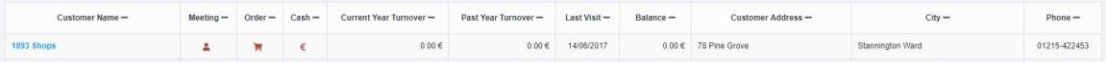
The search can be done using criteria such as:

- 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
1893 Shops			€	0.00 €	0.00 €	14/06/2017	0.00 €	78 Pine Grove	Stannington Ward	01215-422453

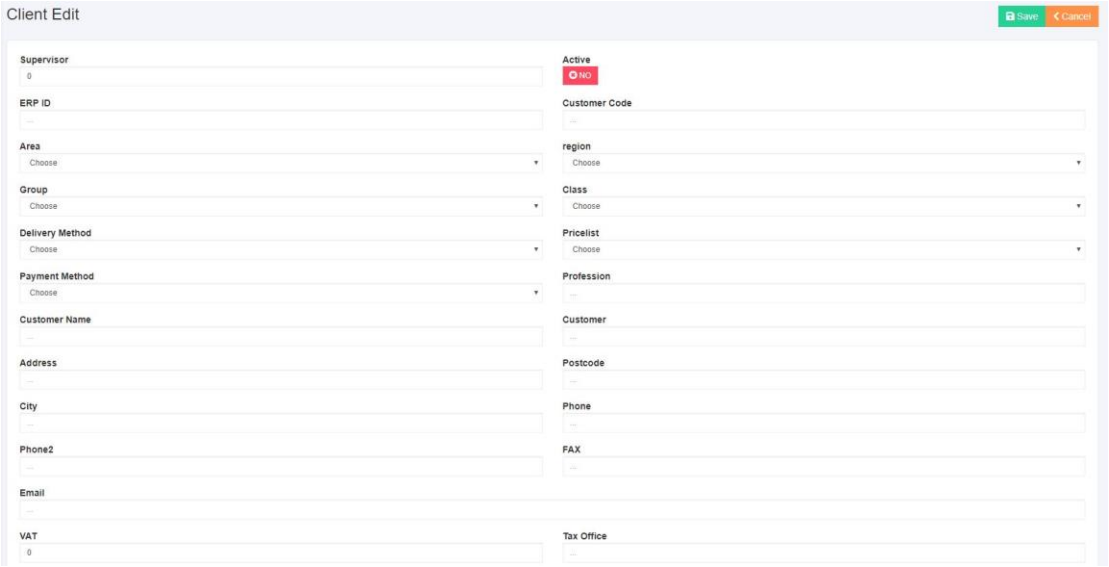
In the above screen, the user can click on the name of a customer and see the tab with basic details.

2.1.1. Insert New Temporary Customer

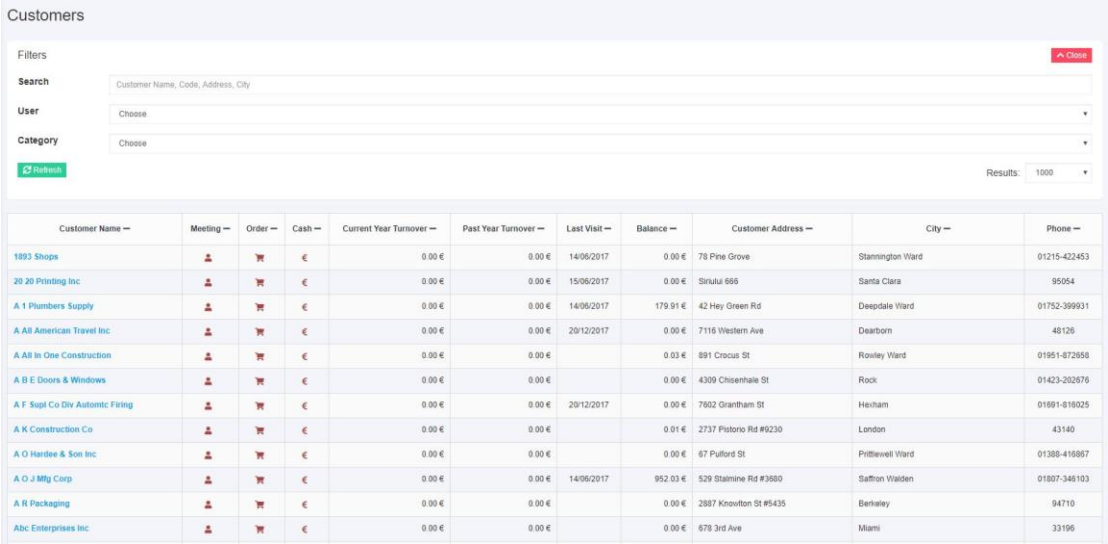
Each user has the ability to insert new customers in the system. During the day, the Sales Management Department collects all the data from the new customers that have been applied by the users, checks them and approves them. The steps that must be followed by the user to insert a new customer in the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

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

In this case, the screen bellow appears:



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:



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	Stannington Ward	01215-422453
20 20 Printing Inc			€	0.00 €	0.00 €	15/06/2017	0.00 €	Sirului 666	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	Rowley Ward	01951-872658
A B E Doors & Windows			€	0.00 €	0.00 €		0.00 €	4309 Chisenhale St	Rock	01423-202676
A F Supl Co Div Automtc Firing			€	0.00 €	0.00 €	20/12/2017	0.00 €	7602 Grantham St	Hexham	01691-818025
A K Construction Co			€	0.00 €	0.00 €		0.01 €	2737 Pistorio Rd #9230	London	43140
A O Hardee & Son Inc			€	0.00 €	0.00 €		0.00 €	67 Pulford St	Prittlewell Ward	01388-416867
A O J Mfg Corp			€	0.00 €	0.00 €	14/06/2017	952.03 €	529 Stalmine Rd #3680	Saffron Walden	01807-346103
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.

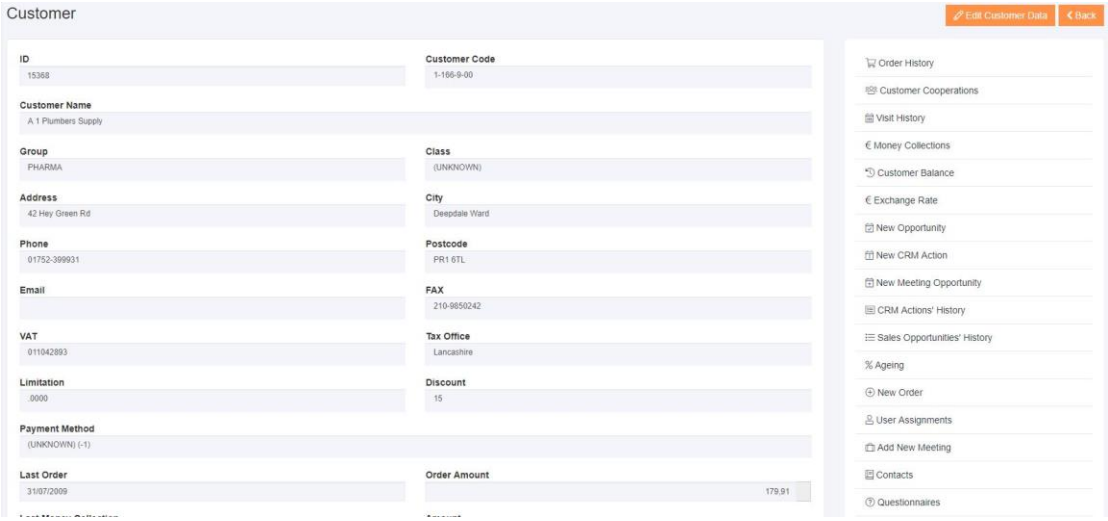
2.1.2. View Customer's Tab

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.

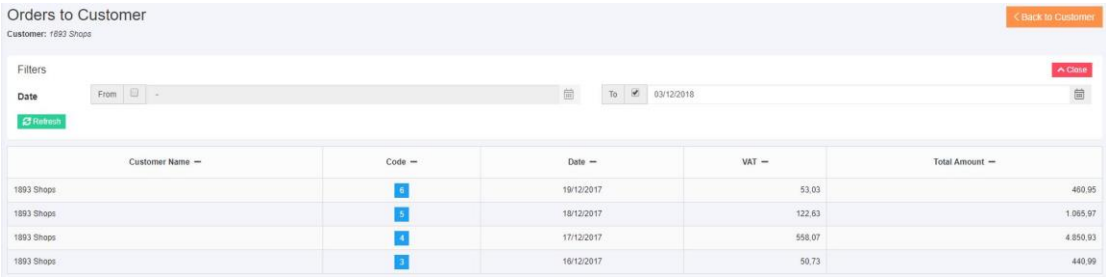


2.1.3. Search Customer's Order

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

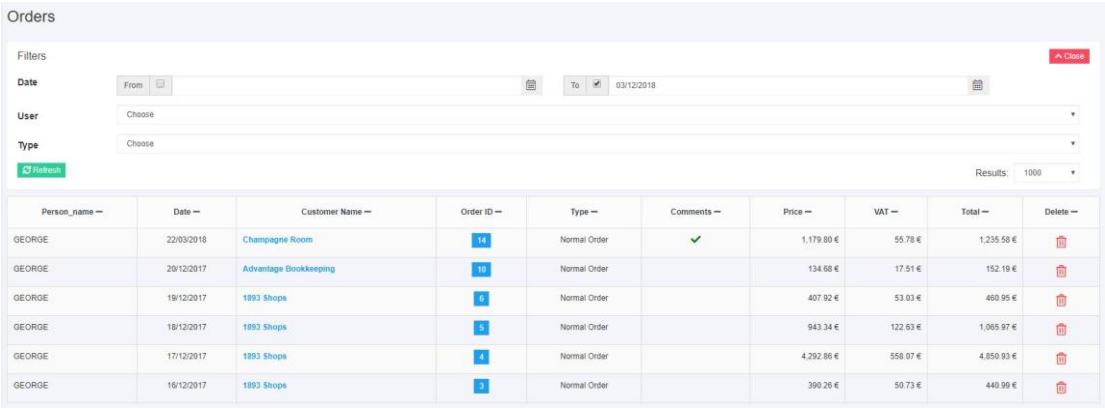
By following the above operation, a list with all the orders collected on behalf of the specific customer. First appears the latest order. In that list, the user can view many information such as current order status etc.



Alternatively, the user can follow the steps below:

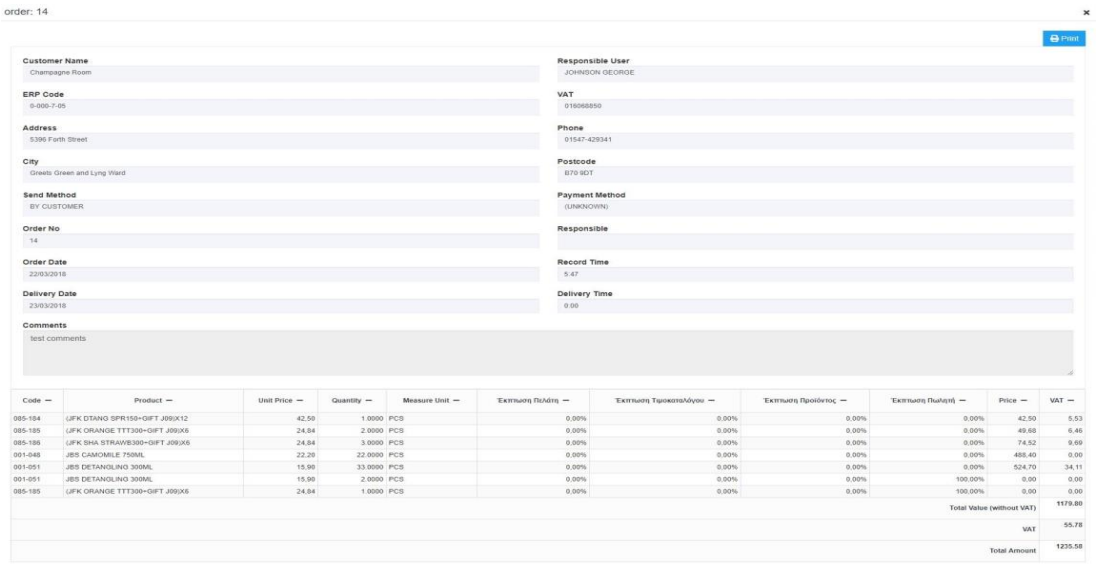
- Initiate Regate Effective
- User Authentication
- Click on Orders Tab
- Complete the search criteria
- Click on Refresh button

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.



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		407.92 €	53.03 €	460.95 €	
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		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 o pop-up appears displaying in detail the information of the order like below:



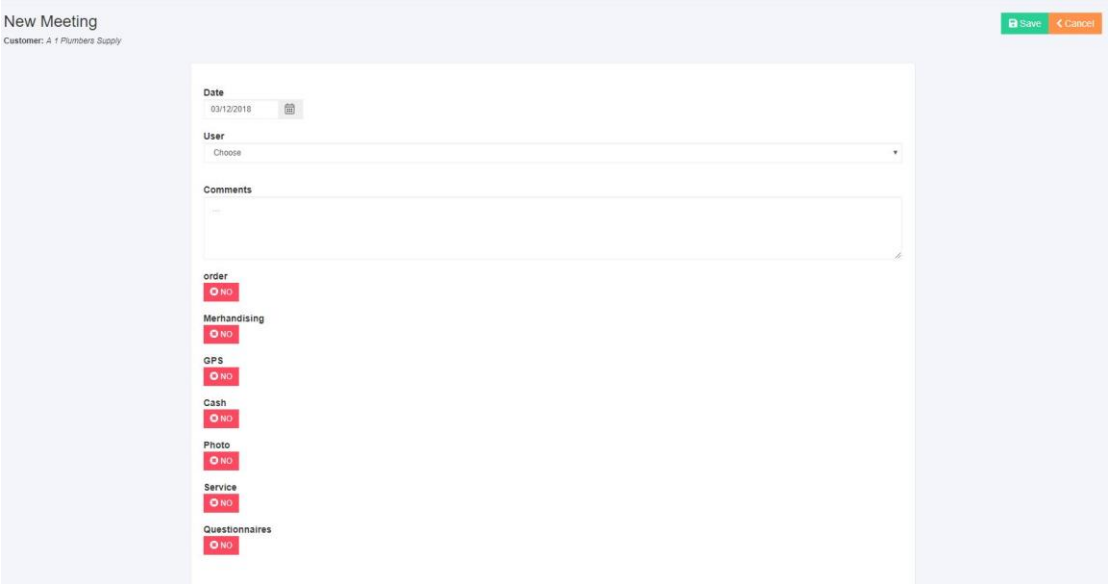
Code	Product	Unit Price	Quantity	Measure Unit	Έκπτωση Πελάτη	Έκπτωση Τιμοκαταλόγου	Έκπτωση Προϊόντος	Έκπτωση Πωλητή	Price	VAT
085-184	(JFK DTANG SPR150~GIFT J09)X12	42,50	1.0000	PCS	0,00%	0,00%	0,00%	0,00%	42,50	5,53
085-185	(JFK ORANGE TTT300~GIFT J09)X6	24,84	2.0000	PCS	0,00%	0,00%	0,00%	0,00%	49,68	6,46
085-186	(JFK SHA STRAWB300~GIFT J09)X6	24,84	3.0000	PCS	0,00%	0,00%	0,00%	0,00%	74,52	9,69
001-048	JBS CAMOMILE 750ML	22,20	22.0000	PCS	0,00%	0,00%	0,00%	0,00%	488,40	0,00
001-051	JBS DETANGLING 300ML	15,90	33.0000	PCS	0,00%	0,00%	0,00%	0,00%	524,70	34,11
001-051	JBS DETANGLING 300ML	15,90	2.0000	PCS	0,00%	0,00%	0,00%	100,00%	0,00	0,00
085-185	(JFK ORANGE TTT300~GIFT J09)X6	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:

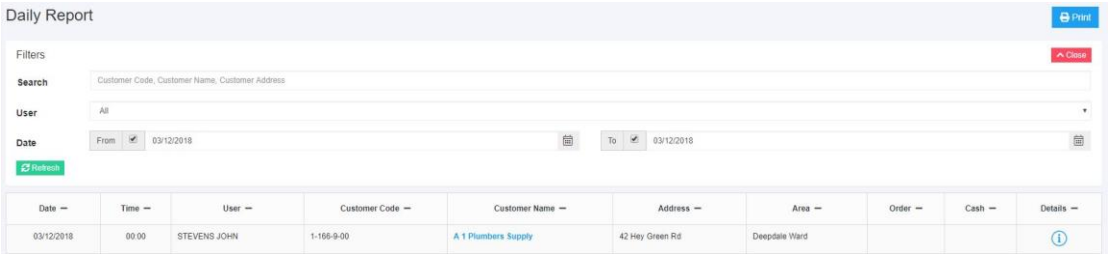
- View Customer's Tab
- Click on Add New Meeting

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

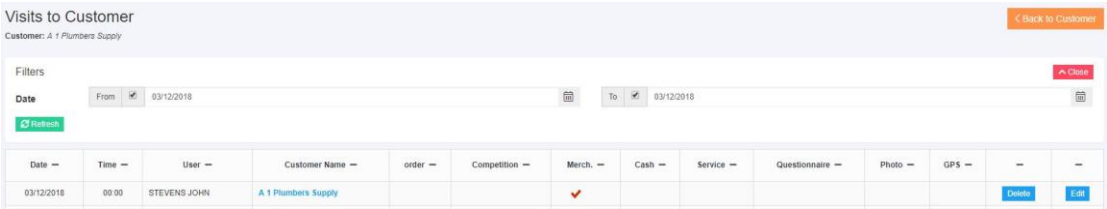


In all cases, after inserting the new meeting info (date, time, comments), the user has these opportunities:

- 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:



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



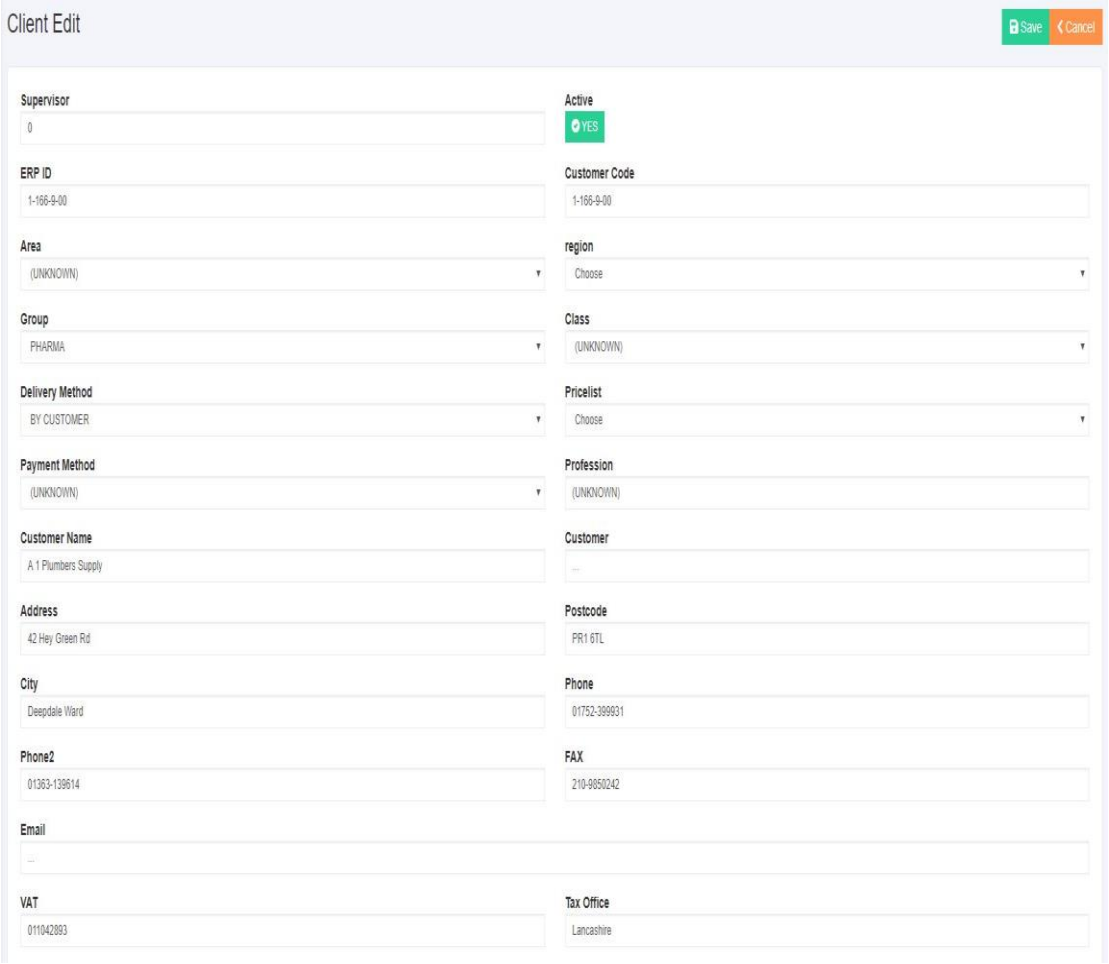
Also, in the screen, appear all the different meetings for the specific date. The visits that are scheduled and not yet fulfilled, give the user, the choice to edit or delete. In our example, we have only one customer.

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:



- 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 been followed to achieve that are:

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

Customer Balance

Customer: *A 1 Plumbers Supply*

< Back to Customer | < Back

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.

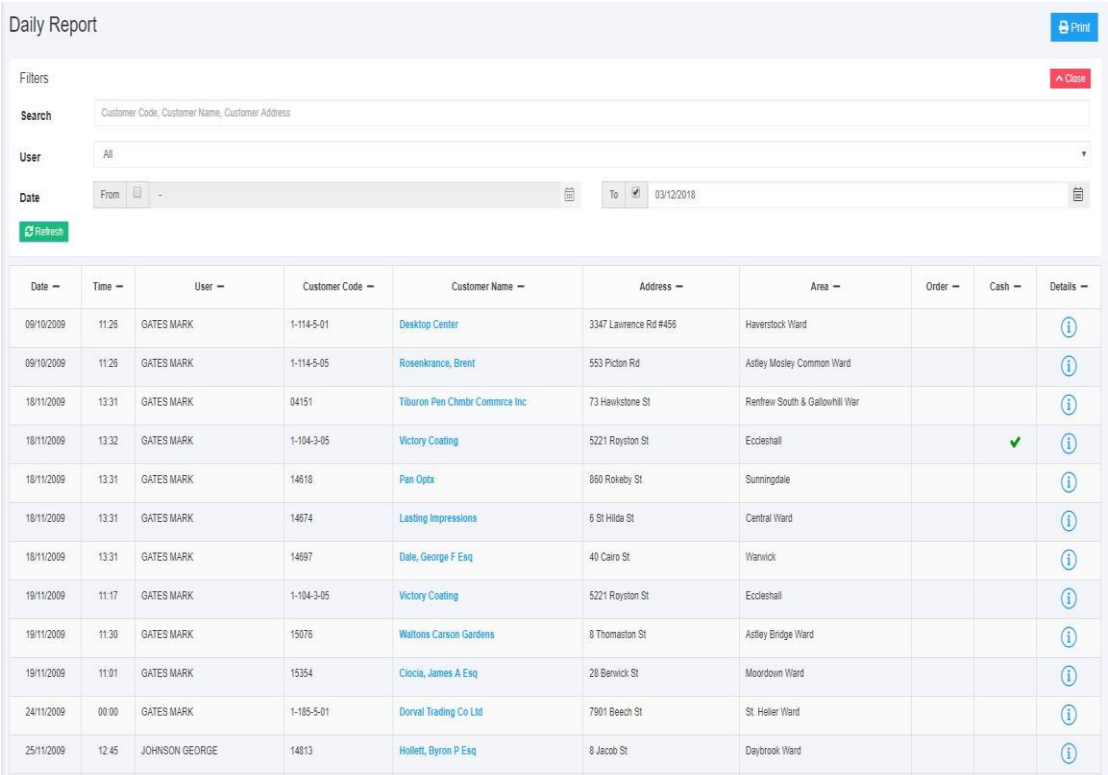
3. Daily Report

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 ore will do. The steps that must be followed are:

- Click on the Daily Report Tab

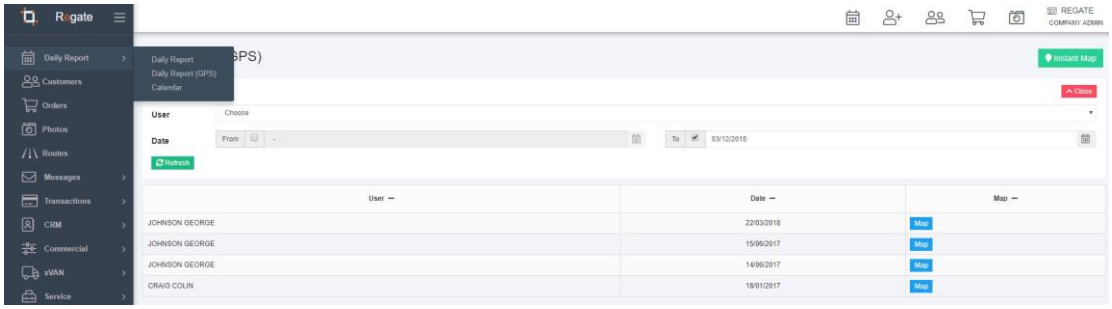
By applying the criteria about the period of time, the person, or the customer, a list appears with the visits and orders that the user collected on behalf of the customer as seen below.



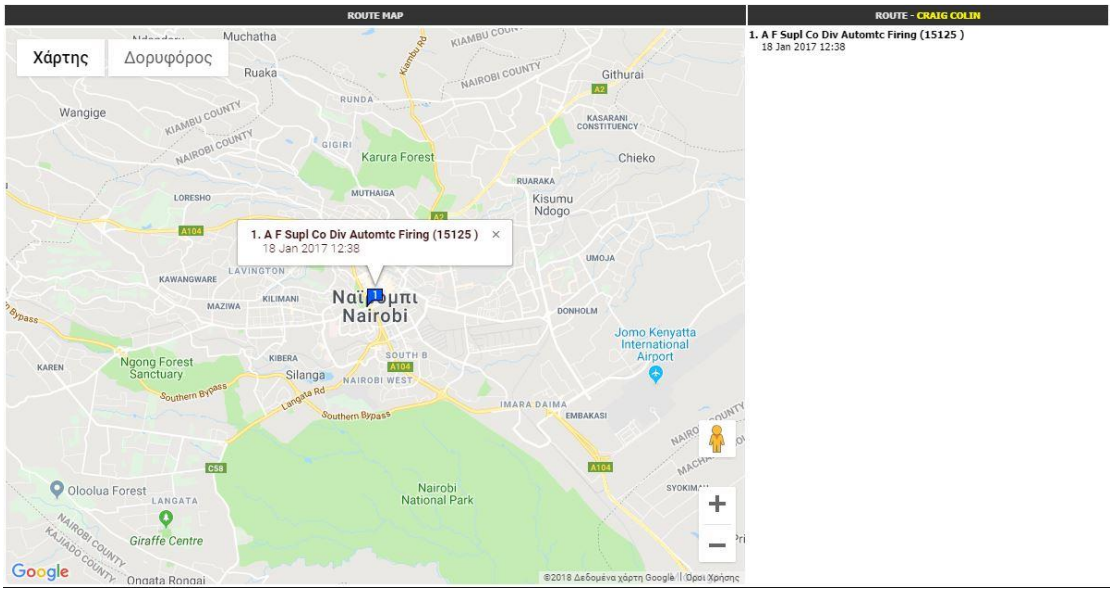
Date	Time	User	Customer Code	Customer Name	Address	Area	Order	Cash	Details
09/10/2009	11:26	GATES MARK	1-114-5-01	Desktop Center	3347 Lawrence Rd #456	Haverstock Ward			
09/10/2009	11:26	GATES MARK	1-114-5-05	Rosenkrance, Brent	553 Picton Rd	Astley Mosley Common Ward			
18/11/2009	13:31	GATES MARK	04151	Tiburon Pen Chmbr Commrce Inc	73 Hawkstone St	Renfrew 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 Optx	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	Waltons Carson Gardens	8 Thomaston St	Astley Bridge Ward			
19/11/2009	11:01	GATES MARK	15354	Ciocia, James A Esq	28 Berwick St	Moordown Ward			
24/11/2009	00:00	GATES MARK	1-185-5-01	Dorval Trading Co Ltd	7901 Beech St	St. Helier 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		407.92 €	53.03 €	460.95 €	
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		390.26 €	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

Print

Customer Name: Champagne Room
Responsible User: JOHNSON GEORGE
ERP Code: 0-000-7-05
VAT: 016068850
Address: 5396 Forth Street
Phone: 01547-429341
City: Greets Green and Lyng Ward
Postcode: B70 9DT
Send Method: BY CUSTOMER
Payment Method: (UNKNOWN)
Order No: 14
Responsible:
Order Date: 22/03/2018
Record Time: 5:47
Delivery Date: 23/03/2018
Delivery Time: 0:00
Comments: test comments

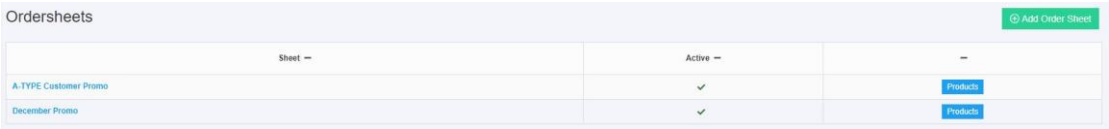
Code	Product	Unit Price	Quantity	Measure Unit	Έκπτωση Πελάτη	Έκπτωση Τιμοκαταλόγου	Έκπτωση Προϊόντος	Έκπτωση Πωλητή	Price	VAT
085-184	(JFK DTANG SPR150+GIFT J09)X12	42,50	1.0000	PCS	0,00%	0,00%	0,00%	0,00%	42,50	5,53
085-185	(JFK ORANGE TTT300+GIFT J09)X6	24,84	2.0000	PCS	0,00%	0,00%	0,00%	0,00%	49,68	6,46
085-186	(JFK SHA STRAWB300+GIFT J09)X6	24,84	3.0000	PCS	0,00%	0,00%	0,00%	0,00%	74,52	9,69
001-048	JBS CAMOMILE 750ML	22,20	22.0000	PCS	0,00%	0,00%	0,00%	0,00%	488,40	0,00
001-051	JBS DETANGLING 300ML	15,90	33.0000	PCS	0,00%	0,00%	0,00%	0,00%	524,70	34,11
001-051	JBS DETANGLING 300ML	15,90	2.0000	PCS	0,00%	0,00%	0,00%	100,00%	0,00	0,00
085-185	(JFK ORANGE TTT300+GIFT J09)X6	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

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



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

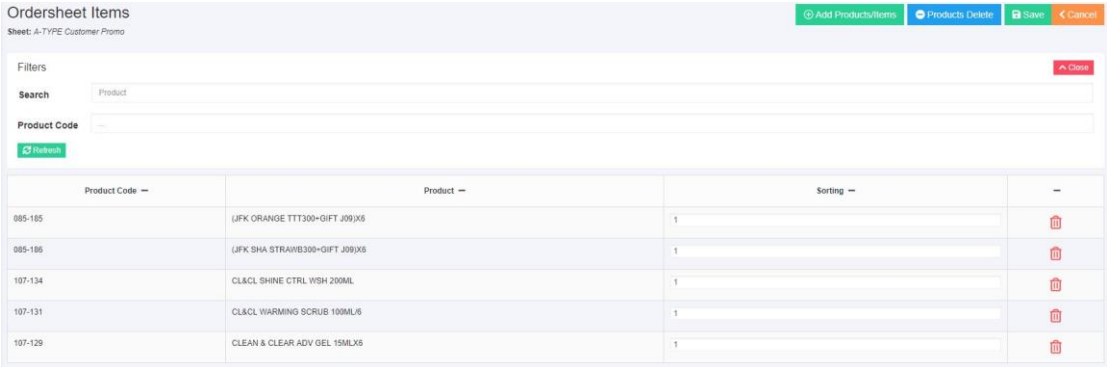
Here the user can delete an order sheet by clicking the button “Delete” at the blue button, change its name by typing the new one and by clicking on “Save” button or change it to active/ inactive by checking/ unchecking the button at the “Active” line and by clicking the “Save” button.

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

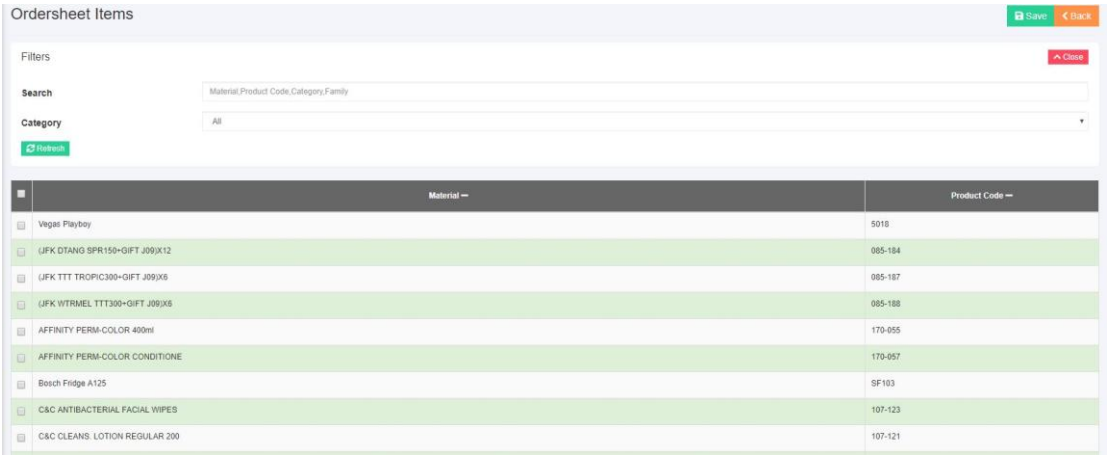
A list with the products corresponding to the current order sheet will appear.



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 choses the products that wants to add in the order sheet and clicks on the “Save” button.



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”

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

5.3. Merchandising Management

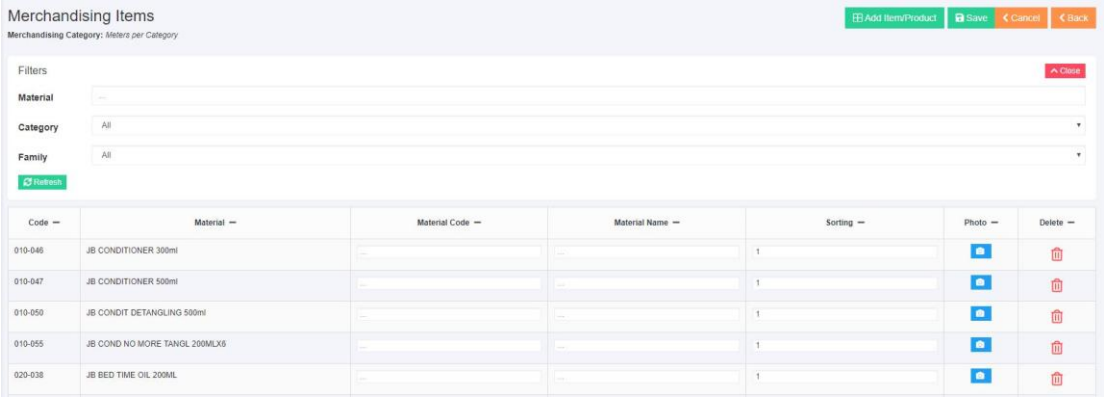
The user can access the merchandising scenarios by following the procedure below:

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

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

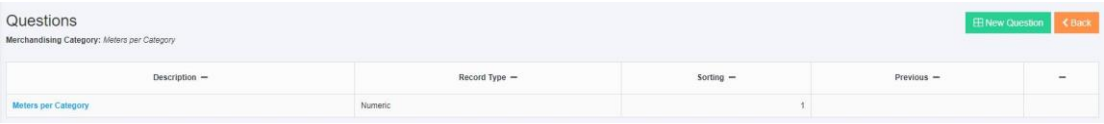
In the screen that shows up, the user can view the products already existing in the list.

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



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.



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.

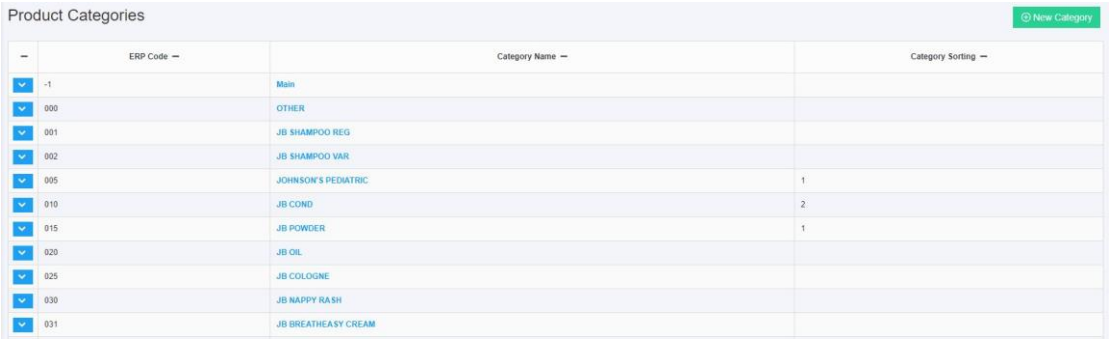
In the screen that shows up, the user gets the opportunity to change the type of the question, the sorting and the title. Also he’s given the ability to delete by clicking the blue button on the top right corner where the choice “Delete” appears.

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.

5.4. Product Categories Management

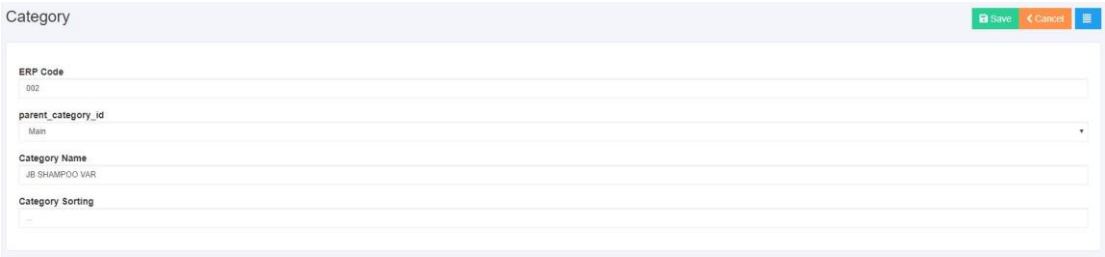
The user can manage the categories of the products by following the procedure below:

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



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:



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.

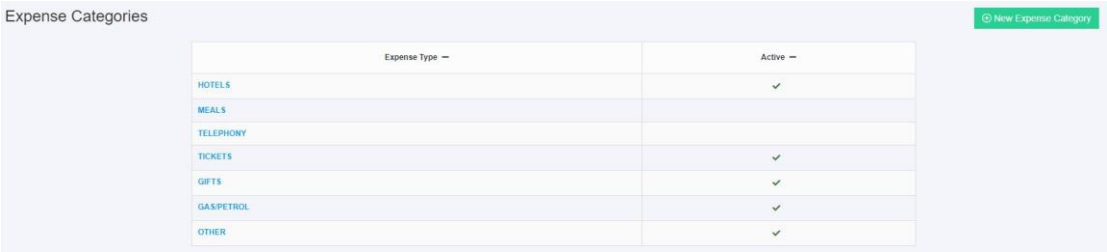
The Sub-Category management follows the same steps as the Category Management.

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”.



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:

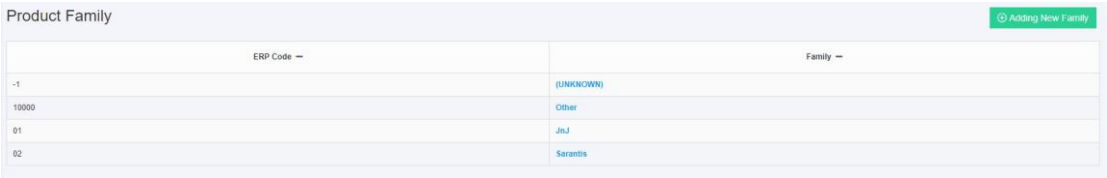
In that screen the user can insert a name for the category, at the field “Expense Type” and select if the category is active or not.

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

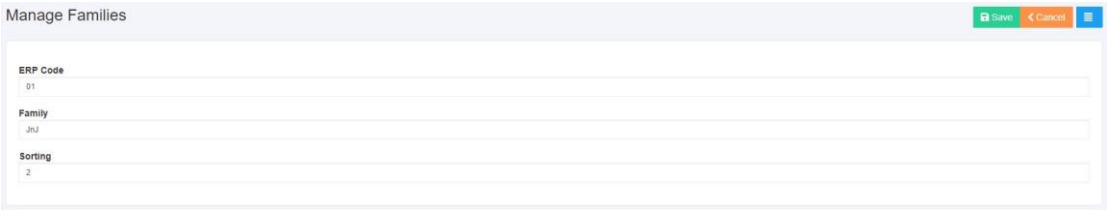
5.6. Product Families Management

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

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



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.



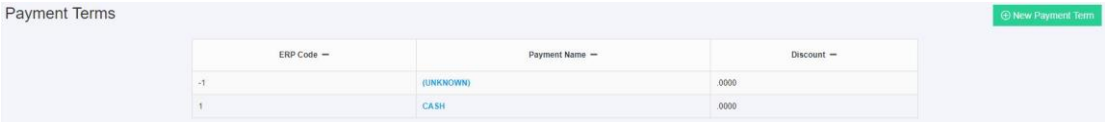
On the Insert – Edit screen of the Product Families, the user can add a name for the Family, ERP Code and the sorting of his will and click on “Save” to save the changes. Also, the user can delete a Family, by clicking on the “Delete” option under the blue button on the top right corner.

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.



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.

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.

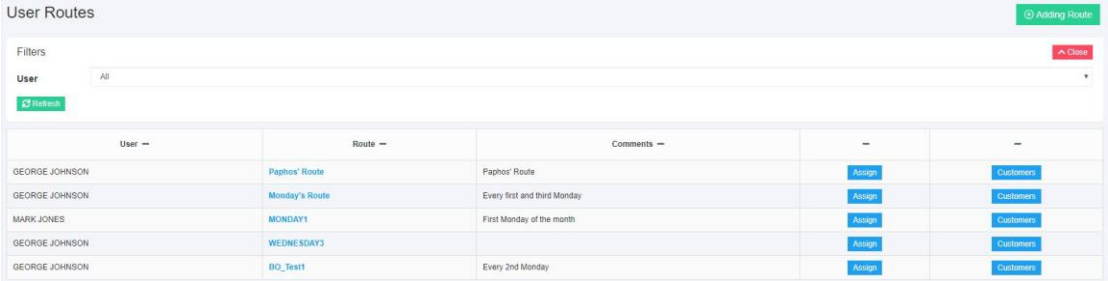
Here the user can add a new delivery method by clicking the “New Delivery Method” button or edit an existing one by clicking on its name.

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

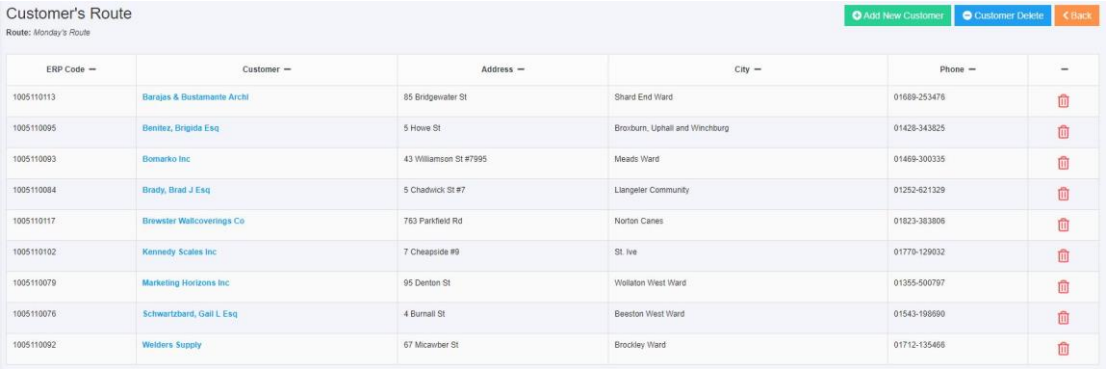


Here the user can add a new route by clicking on “Add Route”.

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.

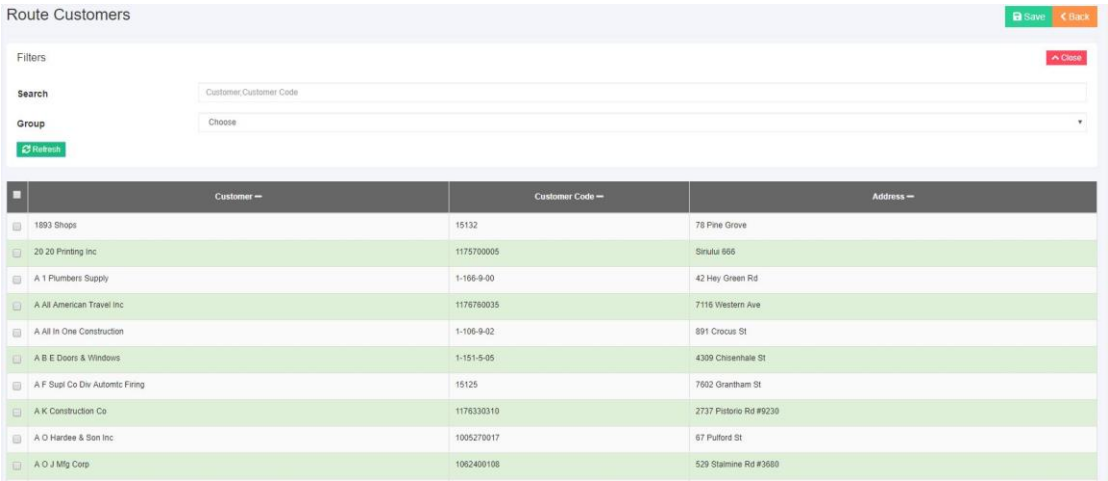
To manage the customers of a route, the user should click on the button “Customers”.



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”.



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

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

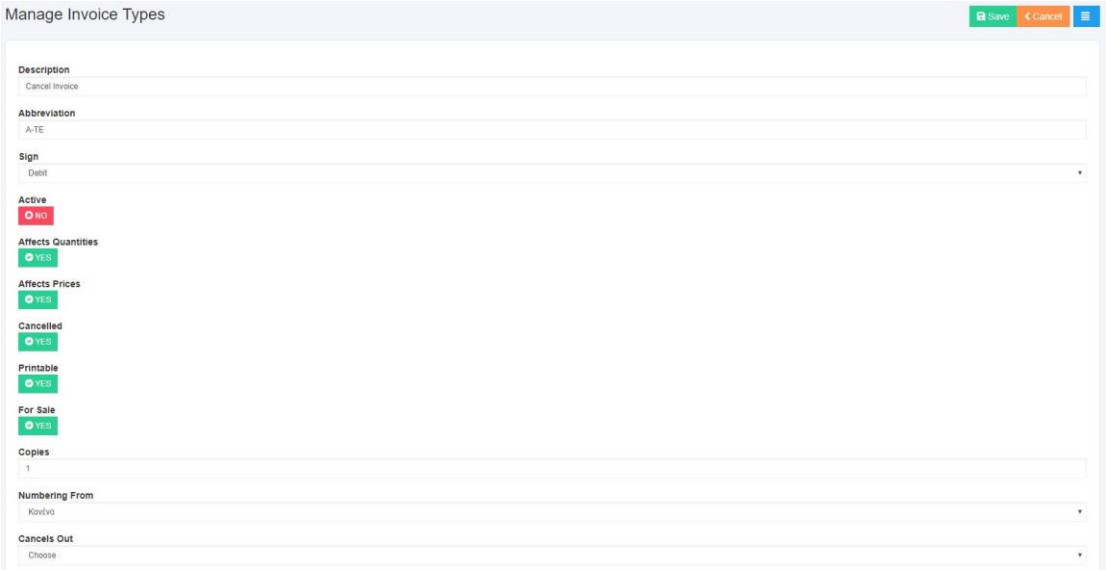
In this case, a screen appears with the basic invoice information for the corresponding user. Specifically, for each customer appear the details below:

- 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

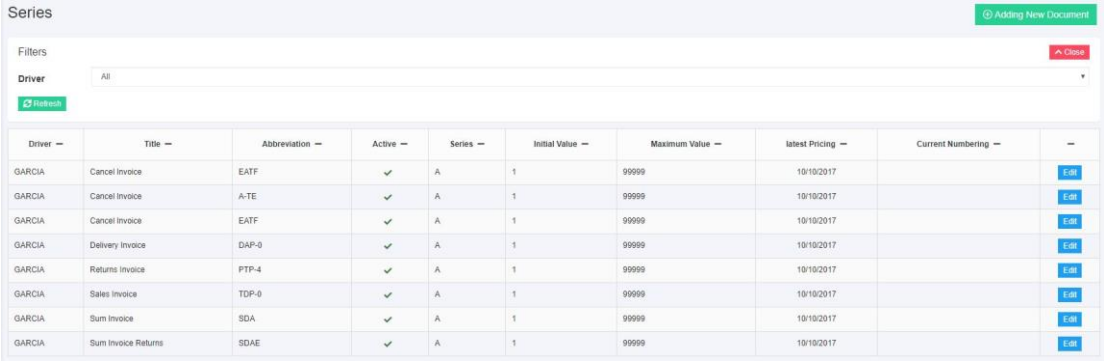
To insert an invoice the user should click on the corresponding button, on the invoice management screen. The user must necessarily complete all the fields on the screen. After that, by clicking on “Save” option – given that all the fields are correctly completed – the invoices screen appears completed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



7.3. Series Management

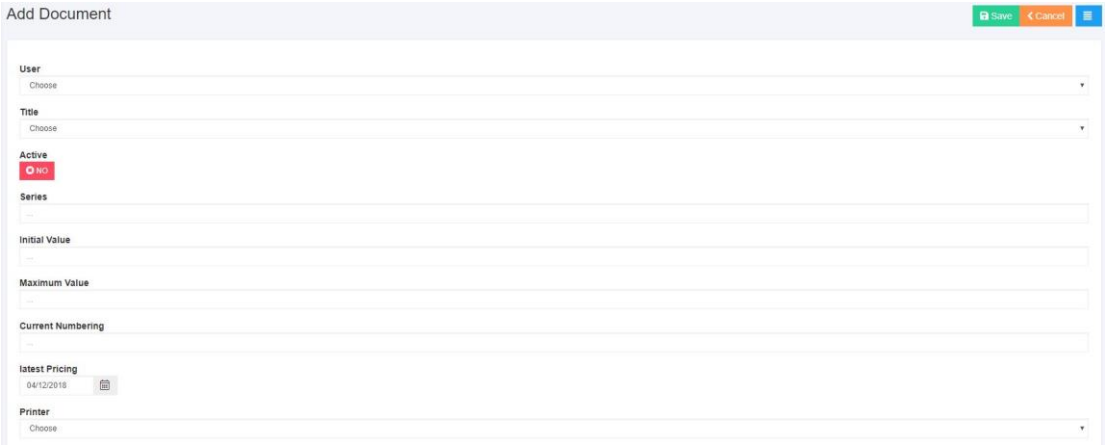
The user can manage the series and numbering of the invoices by accessing the proper screen through the procedure below:

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



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.



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

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.

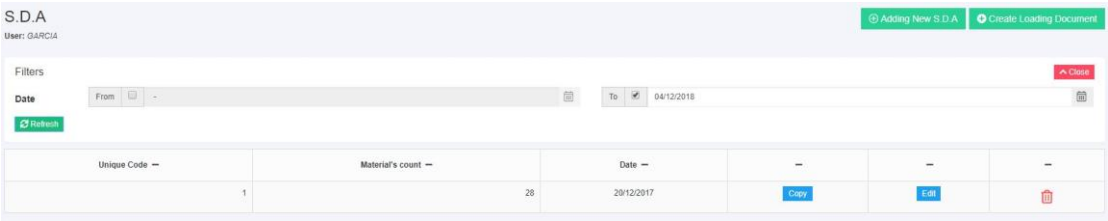
7.4.3. View Shipping List

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

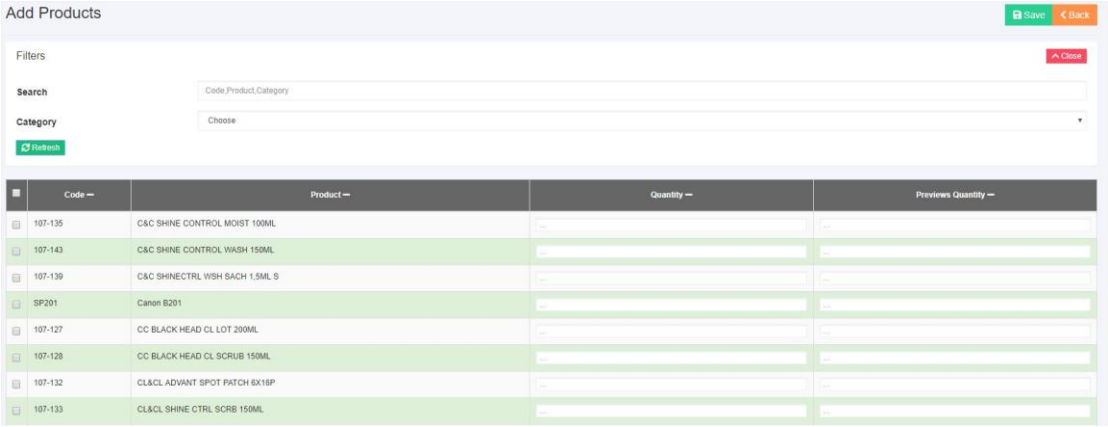
Also, the ability for the user to edit or delete a Shipping List is available.



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.

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



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:

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.

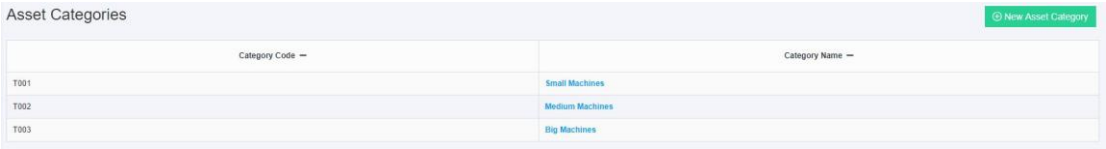
Select "Save" to finalize the changes.

8. Field Service

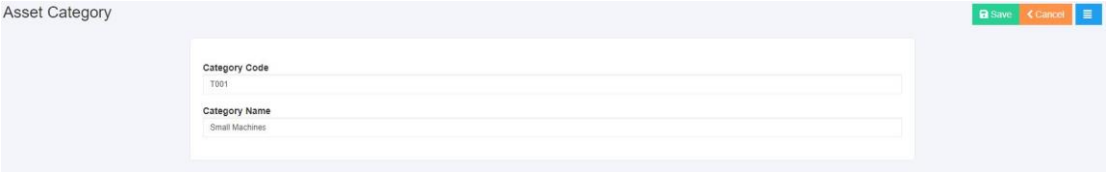
The user can through the back-office, control the technicians that are out on the field, to follow their jobs, the Assets they manage and their action.

8.1. Asset Categories

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



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



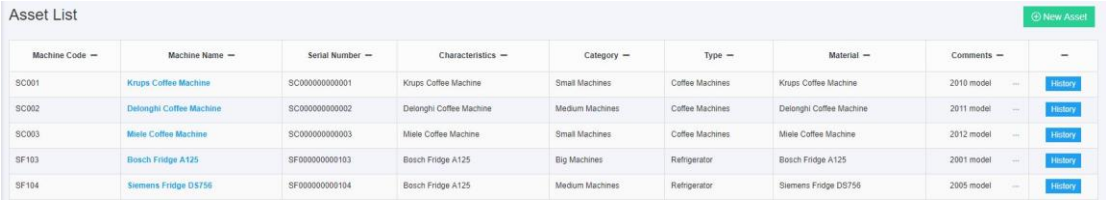
8.2. Asset Types

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

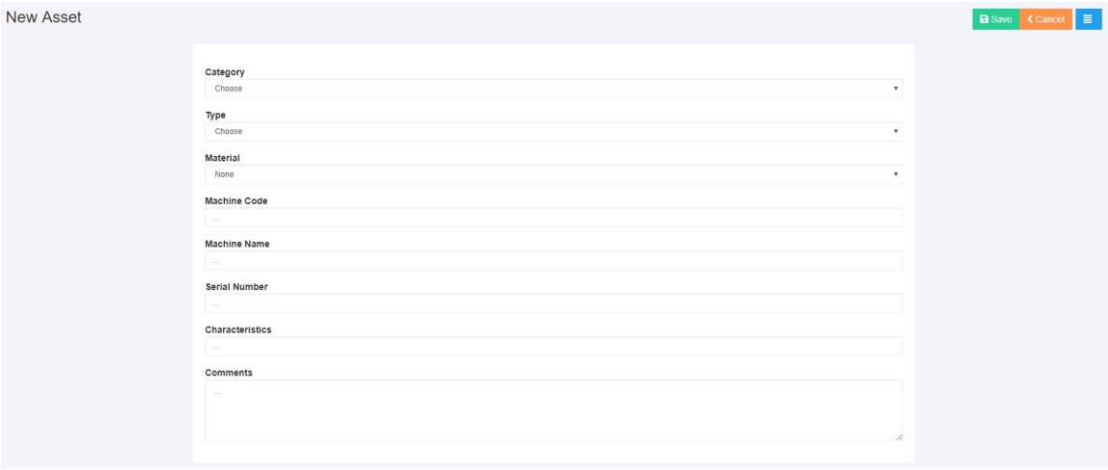
The user must click on “Add Asset Type”, complete the fields that appear on the form and click “Save” to complete the Submission.

8.3. Asset List

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



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.

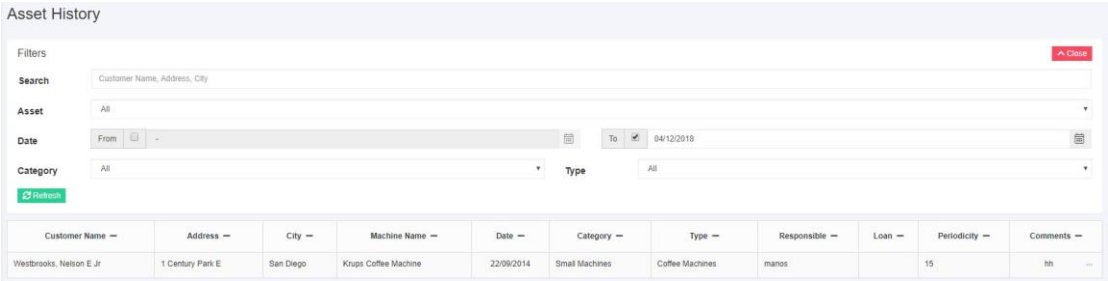


After the asset is added or it's info are changed, the user must click on "Save" button to save his changes.

8.4. Asset History

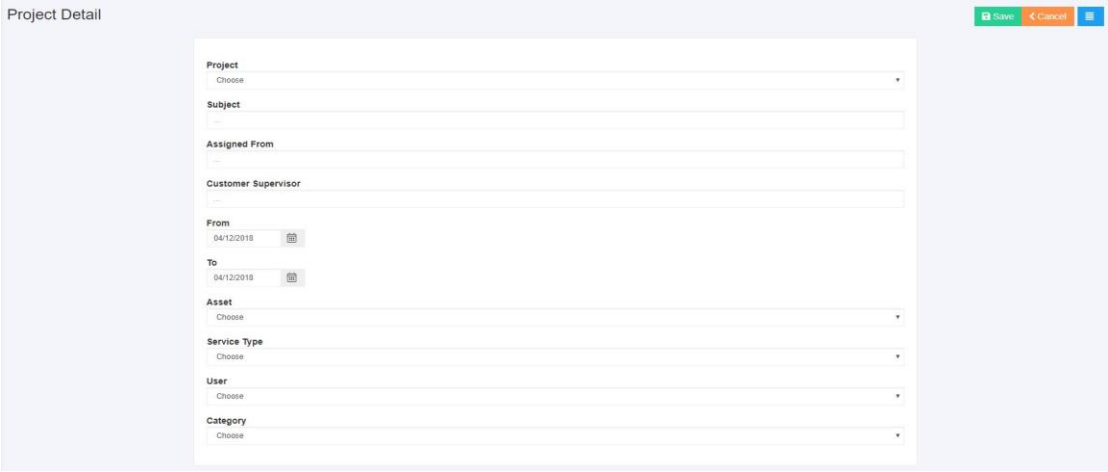
On this screen, the user can search the history of an asset based on the customer, the asset, the dates from and to, and the category and type of asset.

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



8.5. New Service

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

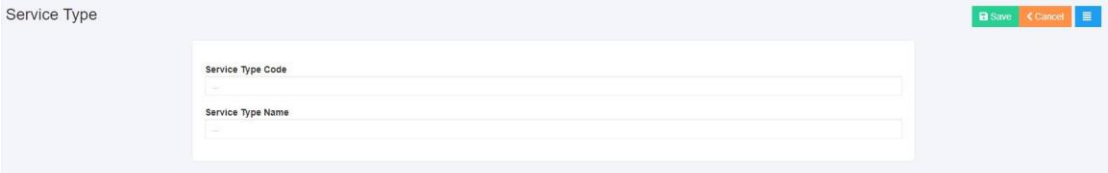


After completing the necessary fields, the user should save the changes by clicking on the “Save” button.

8.6. Service Types

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

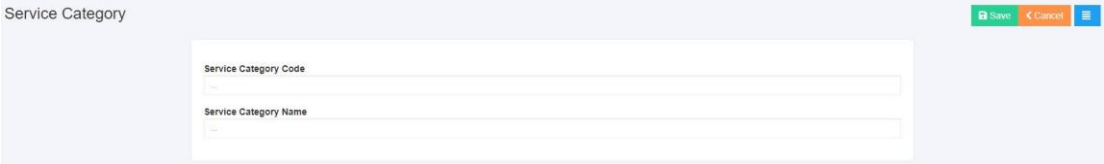
The user should click on “New Service Type”, complete the necessary fields and click “Save”.



8.7. Service Categories

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

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

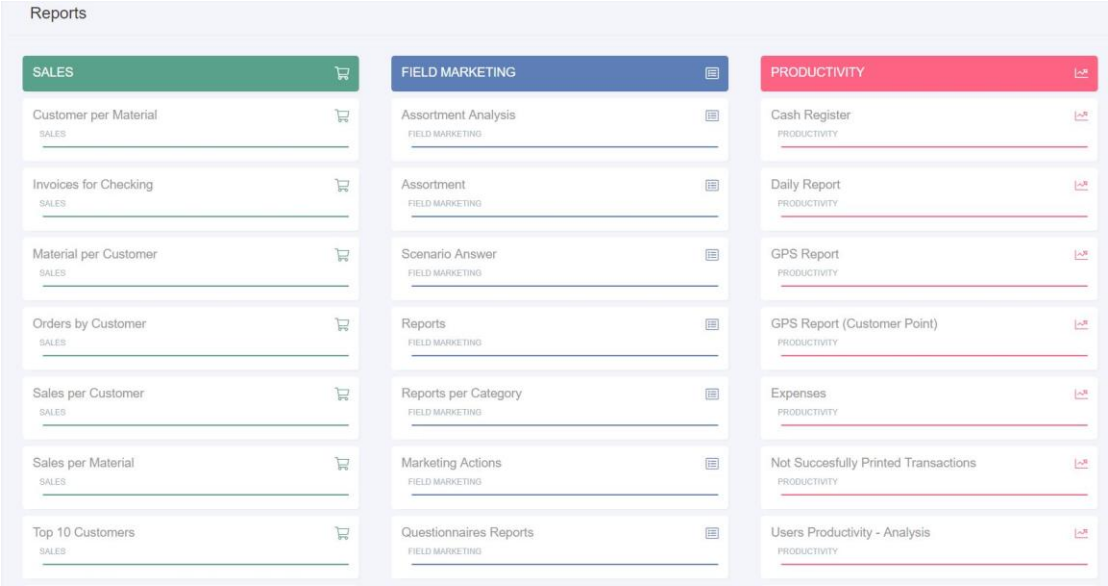


9. Reports

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]



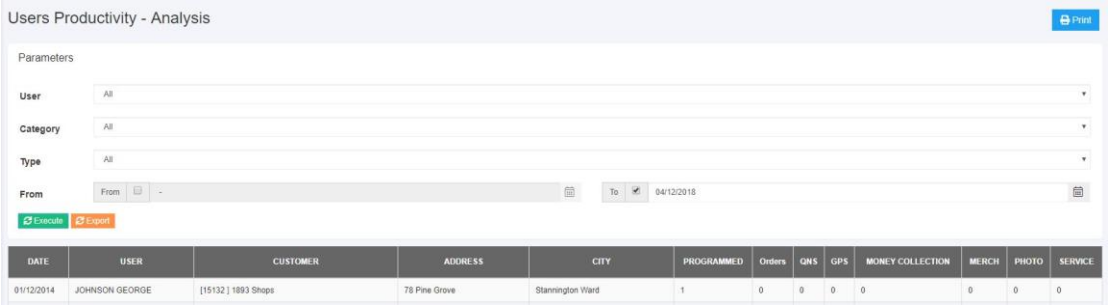
Here the user selects the report that he needs and on the screen that shows up, completes the report criteria and clicks on “refresh” button.

The view of the reports below is available:

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

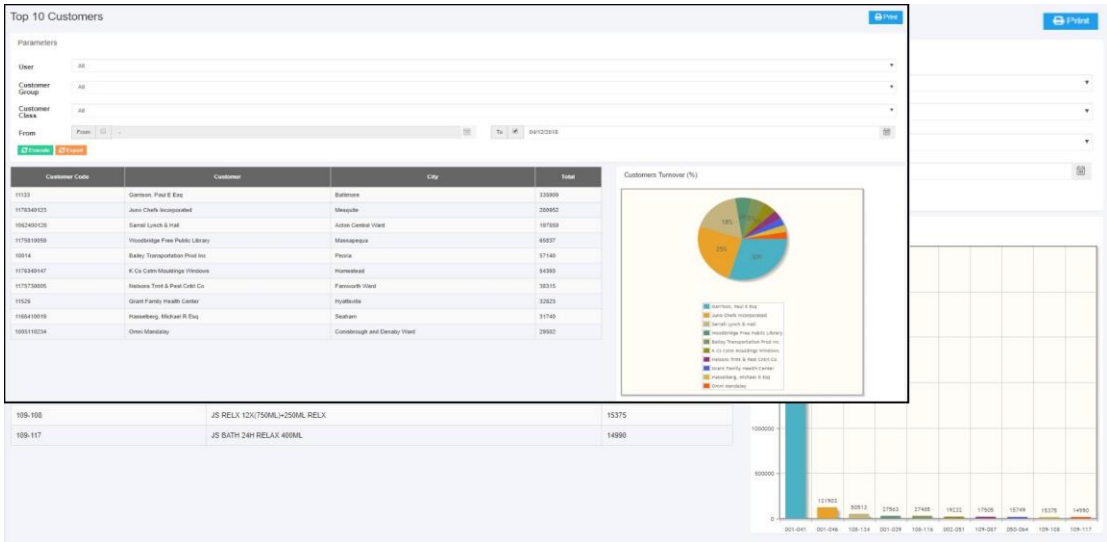
9.2. Filtering per Report Group

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



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.

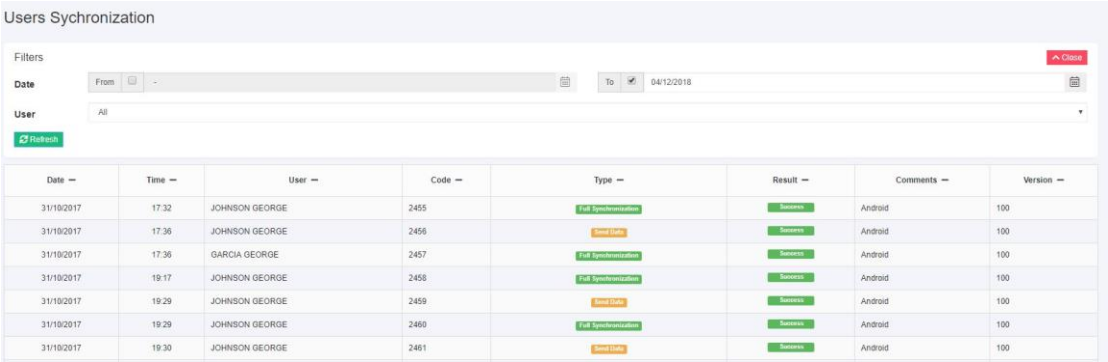
Please address to the company for more information on the matter.

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:

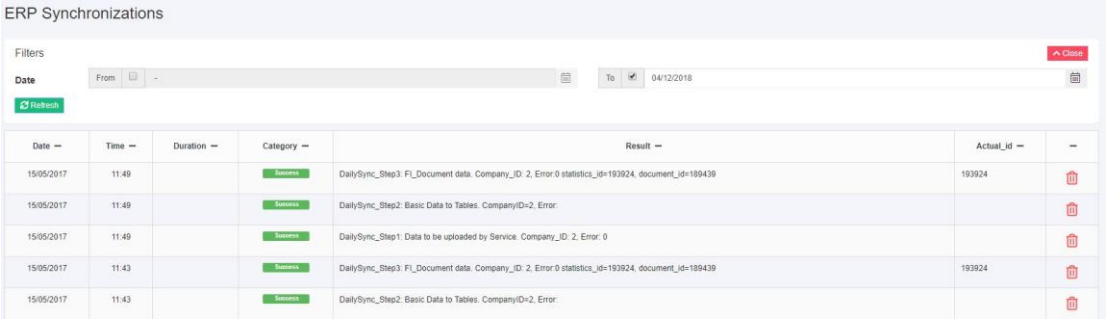
- Click on Reports tab
- Select type of statistic under "Statistics" Header

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



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	Send Data	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	Send Data	Success	Android	100
31/10/2017	19:29	JOHNSON GEORGE	2460	Full Synchronization	Success	Android	100
31/10/2017	19:30	JOHNSON GEORGE	2461	Send Data	Success	Android	100

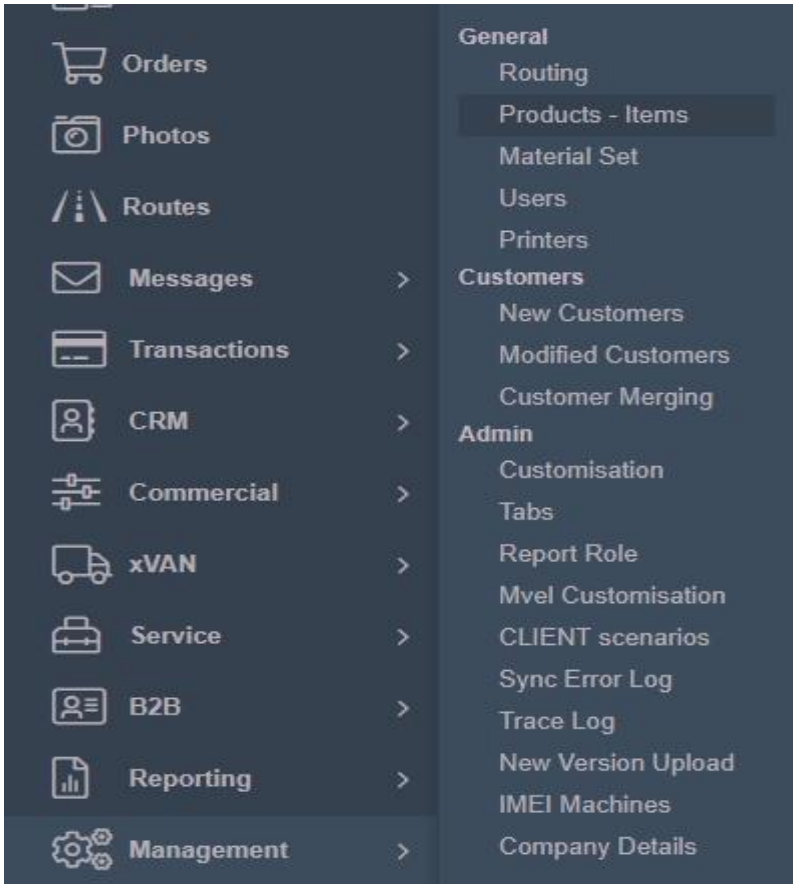
ERP Synchronizations: It is used mostly by the client to view the status of the daily synchronization with the ERP System. If the “Category” column shows “Success” and there are at least 3 lines per day, when the Actual_ID is rising (except the Weekend when the client might not issue invoices), then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



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

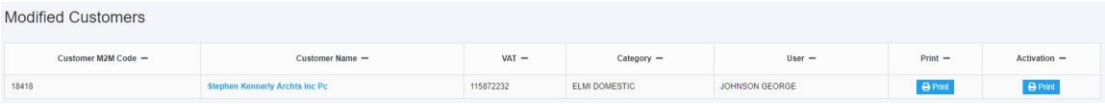
In this screen new customers show up. The user can accept the new entries by clicking "Save:, after optionally setting an ERP Code to each customer at the corresponding field.

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.

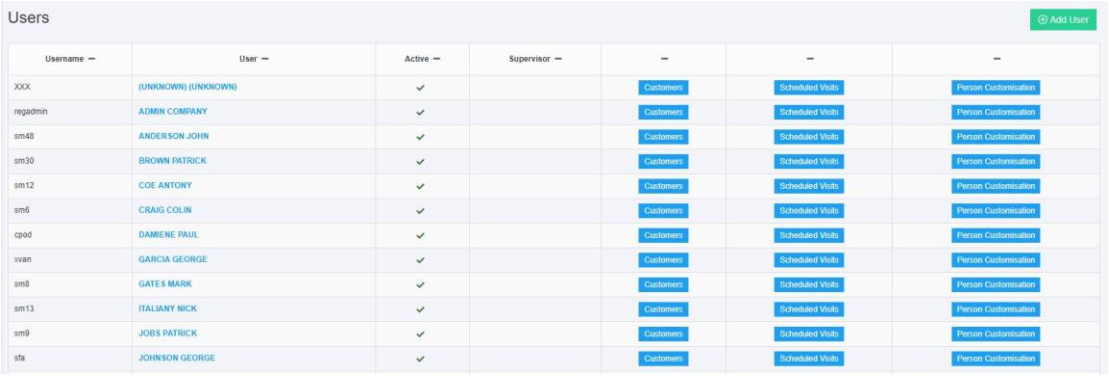
10.1.2. Modified Customers

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



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.



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:

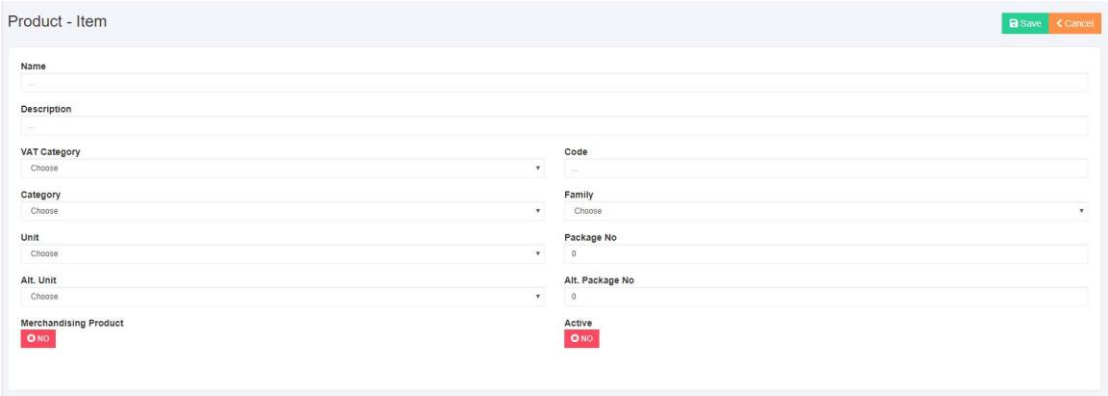
- Product Code
- Product Name
- Active

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.