Dynamics Mobile
Van Sales Scope

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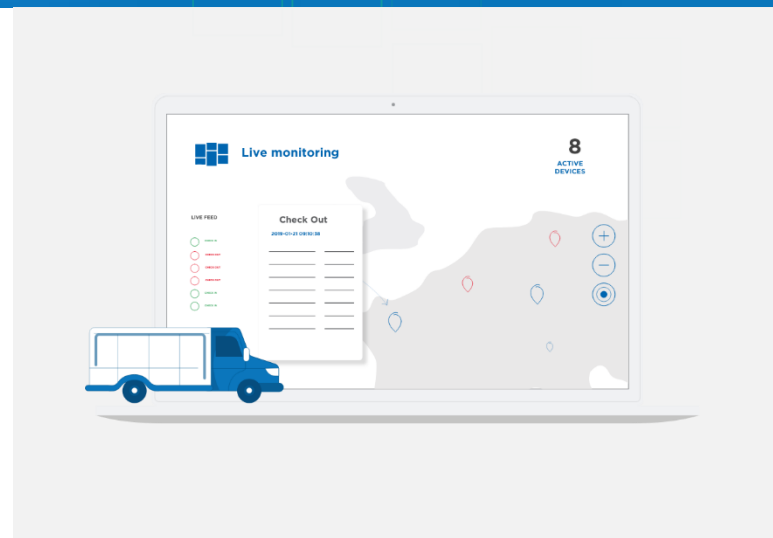
Functionalities for:

Supervisors

Mobile agents

Supervisor functionality

Accessible via web browser

Supervisors are users, who access the functionality for administration and reports of the system through a web browser with Internet connectivity. They plan routes for Mobile agents, define types of visits, questionnaires, sites and visualize reports.

1. Sites/Customers/Outlets

- Create, modify, delete sites/outlets/customers with details
- Import sites/outlets/customers from a CSV file
- Export sites/outlets/customers to a CSV file

2. Products

- Create, modify, delete products with details
- Import sites/outlets/customers from a CSV file
- Export sites/outlets/customers to a CSV file

3. Route management

- Create, modify, delete routes (one per vehicle/agent)
- Plan route for each date (today or in the future)
- Automatic route optimization over world map for fastest completion
- ETA (estimate-time-of-arrival) for each visit based on travel and service durations
- Estimated distance in kilometers
- Estimated time of route completion for each date
- Visual representation and management of the route over the world map
- Analyze the route completeness for each date for one agent, selected agents, or all agents

4. Management of periodic visits (weekly, monthly)

- Create, modify, delete periodic visits
- Assign visits to routes
- Assignment of visit type – e.g. what to do during the visit
- Automatic generation of route schedule and optimization for each date based on the periodic and one-time visits

5. Management of one-time visits

- Create, modify, delete one-time visits
- Assign visits to routes
- Assignment of visit type – e.g. what to do during the visit
- Automatic generation of route schedule and optimization for each date based on the periodic and one-time visits

6. Visit types

- Create, modify, delete visit types (e.g. what needs to be done during the visit)
- Definition of tasks to be performed during every visit type (E.g. planned tasks)
- Support for the following types of tasks: Sales Order, Sale, Delivery of a previous order Return of goods, Collection of payment, Questionnaire, Photo, Signature, Activity, Comparison of items (Prices, Quantities, Capacities and many more)
- Assignment of visit types to one-time and periodic visits

7. Campaigns

- Create, modify, delete campaigns with period and targeted customers and products
- Define detailed description and instructions
- Define tasks for each campaign (e.g. what to do during the visit to implement the campaign)
- Support for the following types of tasks: Sales Order, Sale, Delivery of a previous order Return of goods, Collection of payment, Questionnaire, Photo, Signature, Activity, Comparison of items (Prices, Quantities, Capacities and many more)
- Analyze the progress for the campaign implementation (implemented vs non-implemented, pending, etc.)

8. Territorial management

- Creating, modifying, deleting territories - geographical areas defined on a map and given coordinates based on (Headquarter)
- "Attachment" of routes by territories for improved optimization of the route according to Headquarter location
- Defining Geofencing alarms in case of deviation of a mobile device outside the predefined territory

## 9. Management of questionnaires (surveys)

- Creating, modifying, deleting questionnaires
- Defining a period of activity (date from, date to) for each questionnaire
- Defining a group / site classification for each questionnaire for automatic filtering / displaying questionnaires when visiting a site
- Support for the following types of questions: Integer, Fractional, Date, Time, Single   selection, Multiple selection, Text
- Support for product related questions (select one product, select multiple products, select one or more products and provide one number (price, quantity) two numbers, or select item (reason, classification), etc.)
- Extended description for each question (instructions)
- Attach explanatory photos (e.g. planograms) to each question
- Configure rules for attaching photos and captions to the questionnaire

10. Reports (Support for predefined reports)

- Real-time activity monitor
- End of the day analysis by user and date
- Tracking / Re-playing of a route for specific date and agent over the world map
- Heatmaps on a map for analysis of the most "active" areas
- Route compliance - analysis of route execution for a date for all or a group of Mobile agents
- Timesheet
- Analysis of questionnaires
- Implemented vs Pending Campaigns
- Planned tasks versus Completed tasks
- Predefined Business Intelligence Dashboards and analytics
- Self-created Business Intelligence Dashboards and analytics (Route Compliance, Route Progress, Visits

11. User Administration

- Managing list of users - supervisors and Mobile agents
- Create, change delete users of any type
- Creating user roles by defining access to system functionalities and application settings
- Change passwords, remotely delete a device database when lost.
- Activation of a mobile user via e-mail or SMS
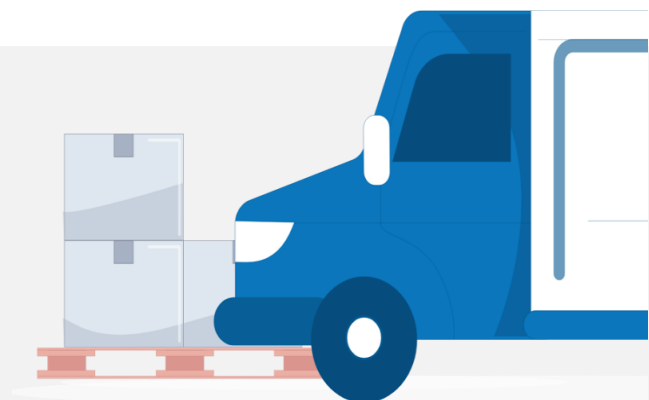
Mobile agent functionality
Van Sales/Presales/Delivery

Accessible via mobile device

Mobile agents are users who are using mobile application. The agents follow a pre-planned route and may have planned tasks for each visit. The application allows users to follow the predefined routes and tasks and to collect data about sites/customers/outlets and tasks automatically without the presence of the Internet (Offline capabilities).
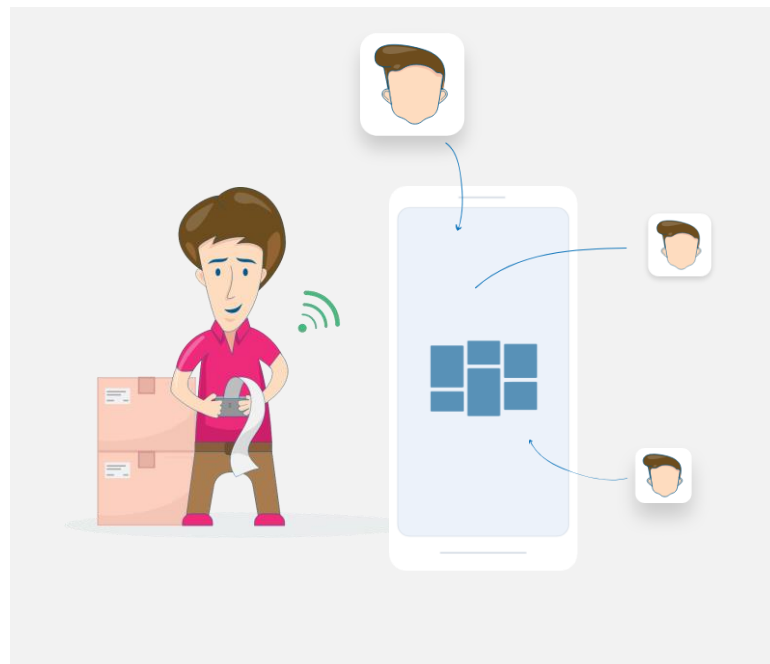
- Access through a mobile app for Android, iOS or Windows 10 devices
- Daily synchronization over the Internet to receive the latest data from Dynamics Mobile Portal
- Work without internet connection after the required daily synchronization

- Visualization of the planned visits for the day on the device screen as list sorted in specific order
- Visualization of the planned visits for the day on the device screen on the map with detailed navigation instructions (required customer GPS coordinates)
- Access to sites/customers/outlets outside the planned visits for the day
- Visualization of the daily progress (planned, visited, and skipped sites/outlets/customers)
- Visualize details for each visit (general info, financial info, addresses, coordinates, planned tasks, and others

- Start visit for specific site/customer/outlet
- Stop visit for specific site/customer/outlet
- Optional visit geo-fencing – e.g. do not allow to start the visit if the device is too far away from the planned address
- Automatic capturing of the GPS coordinates and duration of the visit (required enabled GPS function on mobile device)

- Visualization and execution of planned tasks during the visit: Order, Sale, Payment collection, Goods Return, filling in a Questionnaire, Activity, Comparing products (Prices, etc.)
- Image capturing and Signature capturing
- Execution of quick (unplanned) tasks: Order, Sales Goods Return, filling in a Questionnaire, Activity, Comparing items (Prices, etc.)
- Visualization of a route on a map with optimal time for visiting and distance (required customer GPS coordinates)

- Report for the end of the day - total amounts and numbers and details of sites, visits, documents, detailed information for all the operations performed on the mobile device during the day
- In-stock Item Report (Vehicle inventory level)
- Warehouse inventory levels Report
- Product catalog Report

- Automatic calculation of prices/discounts by items (customers, groups, etc.) based on a predefined trade policy (for orders) when creating Sales Order, Sale or Return order
- Loading of goods from the warehouse, initiated by the mobile user via Transfer Order
- Unloading of goods from the warehouse, initiated by the mobile user via Transfer Order
- Print of standard document (sales order, delivery, return, invoice, payment receipt)
- The standard printing feature applies for one printer model and for one printing template. If additional printers/templates are needed, further estimation needs to be added.

Dynamics Mobile

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