

integraSoft *Mobile*



*Salesforce Automation Solution
from*

Tech Systems, Inc.



www.integrasoft.net
888-717-5030



The Opportunity

- Salesreps need access to inventory, pricing, and customer account information to do their business.**
- Salesreps need a simple way to submit orders from the field to the office for processing and fulfillment.**
- Salesreps need profit generating tools to make the best use of the limited time they have to spend with their customers/prospects.**
- Salesreps need to spend their time “selling” rather than writing up orders and finding answers to simple questions.**
- Conclusion: Salesforce Automation is needed.**



Goals of Salesforce Automation

- Provide salesreps with the information they need at the point of customer contact to succeed in their job.**
- Reduce lag time receiving orders from the field through the use of wireless update technology.**
- Reduce routine calls placed by salesreps to customer service for pricing, AR account information, order history and inventory availability. It is estimated that up to 30% of your time in customer service is spent supporting salesreps!**
- Increase productive selling time with the customer by using wireless handheld technology to facilitate the ordering process.**
- Create a positive image of your company and salesreps through the smart implementation of technology in the field.**



Issues and Concerns: Salesforce Automation

- Solutions have been very expensive.
- Implementation of laptop based systems has met with “mixed success” due to cumbersome nature of the technology.
 - Laptops take too long to boot up.
 - Laptops are “portable” devices, not necessarily “mobile.”
 - Laptops are ineffective at the point of customer contact since it is unlikely to find a place to “sit down” and do data entry.
- Inability to obtain current information throughout the day leads to deviation from goals.
- Productive time is spent hand writing orders at customer site, then communicating orders to the office via cell phone, phone booth or fax machine.
- Salesforce automation is only viable when it is completely integrated to the main system.



Our Solution: IntegraSoft Mobile

- Wireless Handheld Device for Salesrep Order Entry.**
- Compaq iPAQ hardware.**
- Complete integration to IntegraSoft System at your office via secure, hosted Internet Site.**
- Feature Rich application provides:**
 - Order Entry via customer specific “Order Guide.”**
 - Order Entry via bar code scanner and inventory “par” for each product at a given customer site. Par is the amount of inventory desired, “a full shelf or bin”. The salesrep simply counts the inventory using the bar code scanner and IntegraSoft Mobile determines the order quantity.**
 - AR account information.**
 - Complete inventory catalog containing all products and quantities available.**
 - Multiple update options via wireless Internet Connection.**

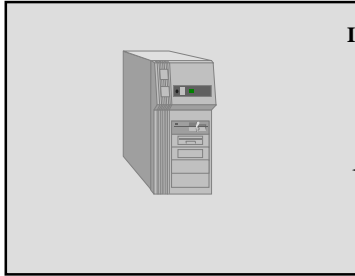


Overview of the Technology

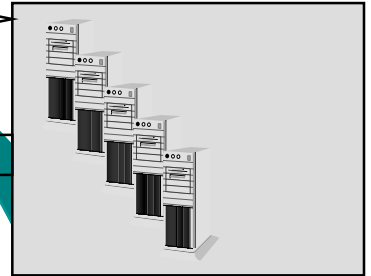
- Wireless Internet is ready for business. Virtually anywhere your salesreps can get a digital cell phone signal, the network is ready for IntegraSoft Mobile.**
- Orders are entered at the point of contact, then submitted via wireless Internet connection to the hosted site.**
- Host Site collects orders from all salesreps and submits them directly to IntegraSoft at your office every few minutes.**
- IntegraSoft is populated with complete orders from the field minutes after the point of customer contact. Pick tickets can be printed at this point and the order can be ready to ship the same business day.**
- Each day salesreps download a complete update of Inventory and AR information to use throughout the day. (Salesreps can request this information at any time during the day as well.)**

integraSoft Mobile

IntegraSoft System At Your Office



IntegraSoft Mobile Host Site



Inventory Levels, New Products, New Customers, Misc. Changes

Orders

Wireless Internet

Orders

Rep Specific AR & IC Information

SalesReps





Benefits

- Wireless Handheld Device is much more likely to be used at point of customer contact.
 - Wireless Handheld Devices do not require “boot up” process. They are ready when “powered on.”
 - Wireless Handheld Devices are a truly “mobile” tool keeping pace with the schedule of a salesrep in the field.
 - Ease of use and bar code technology make hand writing the order at point of customer contact a thing of the past.
- IntegraSoft Mobile investment is considerably less than comparable laptop systems.
 - Compaq iPAQ with bar code scanner is 1/3 to 1/2 the cost of a new laptop.
 - IntegraSoft Mobile is completely integrated with IntegraSoft business software as a standard feature. No additional “custom” fees to make the system work with the back office.
- Productive selling time is found by reducing or eliminating phone calls to the office.
- Ability to refresh data as needed gives a new flexibility only viable in a wireless environment.
- Lag time retrieving orders from the field is reduced by a full day in many cases.



Account List: Longhorn St 9:33a

Sun	Mon	Tue	Wed	Thu	Fri	Sat	All
Name							Acct No
Legion Home Of Marietta							23548
Longhorn *****...							10477
Longhorn Steak House*****...							24167
Longhorn Steaks 2xcopies*****							24118
Longhorn Steaks Of Canton							24611
Longhorn Steaks Of Cobb*****...							24120
Main Street Cafe							43150
Marietta Country Club							26840
Marietta Pizza Co							26889
Mellow Mushroom							28485
Mellow Mushroom Pizza Cafe							27460
Michael's Sports Grille							36580
Montecalvos							28013
Mount Fuji							28264

Details Order Guide History

Jump To Help

Choosing The Account

- **Keyword search capability to help find the account record.**
- **Accounts can be assigned to a particular day allowing the salesrep to use scheduling features of their iPAQ and IntegraSoft Mobile.**



Account Details: Longhorn 9:31a

Address LONGHORN 1375 CANTON, GA	Contacts RARE HOSPITALITY INT. (770) 345-4564
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Route Number: Rte:499 Stp:11 Inv:100425

Order Guide Order History Edit Account

Add Note

Date	Note
12/6/01	Remember Gallo Promotion

Jump To Help

Account Details

- **Choosing Account Details** presents the salesrep with address, contact and phone information.
- **User defined note fields** provide account reminders for salesreps.



OG:Longhorn Steaks Of Ca 9:36a

(99037) S/A Octfest
4/6 Pk 12 Z (24/cse)

Case: 0 24.36
Single: 0 1.01

Find Add

Description	Deal	Disc
S/A Octfest 4/6 Pk 12 Z		0.00
00 Copperidge Chardonnay		0.00
Courvoisier Vs 80 LIT		0.00
Courvoisier Vsop 80 LIT		0.00
Desert Isl L/I Tea LIT	902	0.00
Dewars 12 Yr Old 6pk LIT		0.00
Dewars White Label LIT		0.00
Drambuie 80 LIT		0.00

Jump To Help

Inventory Catalog Provides:

- Access to all inventory items.
- Access to real time product information including expanded product description, notes and pricing.
- Information on stock status, available inventory and allocation levels.
- A 13 month SKU order history by product for individual accounts.
- Catalog Search by product category, “key word” or advance search.
- Real time promotions and new item listings.

integraSoft Mobile



Order Guide:1848 House (2:41p

Description (66275) HEDGES CAB/MERLOT THREE VINEYARDS 98 750M Case 0 Single 0 285.00 24.15 Find Add

Description	Deal	
HEDGES CAB/MERLOT THREE	0	
ANAPAMU P NOIR	910	2
BEEFEATER BAR PK (6)	903	0
BEEFEATER BAR PK (6)		0
BEEFEATER BAR PK (6)		0
BEEFEATER BAR PK (6)		0
BURGESS CAB SAUV VINTAGE	910	0
CAMPARI	903	0

Dup Done Jump To Help

Order Guide:Costco / t 11:21

(1045855A) 98 Patrick Brunet Fleurie 750ml Case 14 (12/cse)

Previous orders ok

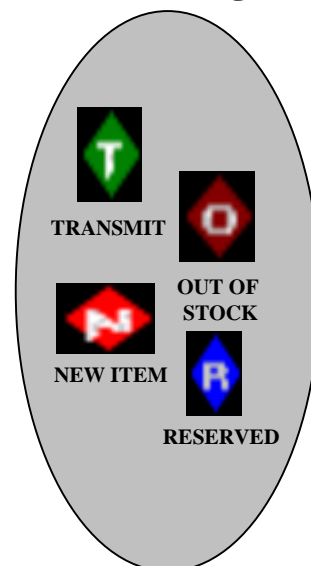
Date	Par	Inv	Ord	
11/06	35	30	5	
10/27	20	3	17	
98 10/21	30	6	24	4
99 10/13	30	4	26	
99 10/04	35	9	26	2
99 09/30	35	8	27	
99				
96 Diebolt-v...	0	13	0	
98 Ch.La Fl...	0	42	0	
98 Beckman	0	48	0	

Dup Done Jump To Help

Order Guide

- Unique “Order Guide” for each customer. Salesreps can plan for the likely items to be ordered based on sales history, promotions or their own insight.
- Application provides visual Flags to indicate product or order status.
- Optional pop-up window provides easy access to previous Par Inventory and Order History.
- Advanced search allows for price, division, and category parameters.

Visual Flags





Order Guide:Costco / I 11:18

(1045855A) 98 Patrick Brunet Fleurie 750ml (12/cse) Case 28 195.00

Description	Inven...	Par...	Defa...
98 Patrick B...	14	28	28
99 Testaros...	0	21	2
99 Mont St....	0	11	22
99 Marimar ...	0	14	0

Dup Done

Jump To Help

Order Guide:Costco / I 11:29

(1045855A) 98 Patrick Brunet Fleurie 750ml (12/cse) Case 14 195.00

Description	Inv...	Par...	Defa...
98 Patrick B...	14	28	14
99 Testaros...	0	21	2
99 Mont St....	0	11	22
99 Marimar ...	0	14	0
99 Beckmen...	0	35	0
96 Diebolt-v...	0	13	0
98 Ch.La Fl...	0	42	0
98 Beckman	0	48	0

Dup Done

Jump To Help

Building an order based on current Inventory

- “Build To” levels can be maintained for each customer file and adjusted by sales rep.
- Order quantities can be automatically generated by entering physical inventory into the Order Guide.



Order Guide:1848 House(3: 2:45p

Description (66275) HEDGES CAB/MERLOT THREE VINEYARDS 98 750M
 Case: 0 (285.00) Single: 0 (24.15)

Description	Deal	Q
HEDGES CAB/MERLOT THREE		0
ANAPAMU P NOIR	910	2
BEEFEATER BAR PK (6)	903	0

Accounts: K (6) 0
 Orders: K (6) 0
 Products: Browse 0
 Maintenance: Advanced Search 0
 Back: 903 0

Exit Dup Done

Jump To Help

Categories:1848 House(3: 2:50p

Add By Item: Add
 Search

- [-] Beer
- [-] Other
- [-] Spirits
- [-] Wine

Advanced Search Browse

Jump To Help

Product Catalog

- If an item does not exist within an account's Order Guide, it can be added from the product catalog.
- To Add from the Product Catalog, you locate the item by category, select it, and tap the "Add To Guide" button.

Products:1848 House(31: 2:49p

(62715) 00 OWENS CAB SAUV 750M (12/cse)
 Case: 0 (200.00) Single: 0 (17.07)

Description	CQty	SQty
99 HSH PITCHFORK PIN...	0	0
95 MERRILL CAB SAUV R...	0	0
00 OWENS CAB SAUV 7...	0	0
00 OWENS MERLOT 750...	0	0
98 OXFORD LANDING G...	0	0
98 YALUMBA SHIRAZ VI...	0	0

Go To Guide Add To Guide

Jump To Help

