

MOBILE COMMERCE FOR SAGE X3

A Solution Overview

Winning vs. the Competition

"When I think about where we were last year compared to where we are now, we're just leaps and bounds ahead. We've changed the way literally every job in our company is performed."

In our first year using xkzero Mobile Commerce we grew sales 16%, and we were able to hire 30 new driver / sales reps without having to add any new staff to help with administration or in the warehouse."

~ Fran Taglia, COO, Power Distributing, Inc.

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What Is Mobile Commerce?

Mobile Commerce is a whole new technology platform designed to handle the unique demands of wholesale distributors and manufacturers who deliver and sell their products using their own fleet of vehicles.

Mobile Commerce is designed to unify everyone in your company – from sales reps, delivery drivers, customer service, warehouse and logistics, to purchasing, production, IT and finance.

Mobile Commerce is an enterprise caliber technology platform leveraging and extending the full power of the ERP and CRM systems in all new ways to educate and inform your team, and to process your business transactions.

Business Processes Optimized

Mobile Commerce is essential technology for distributors who deliver their products directly to their own B2B customers. Mobile Commerce creates new growth and efficiency opportunities where ERP, CRM and accounting software systems alone simply cannot.

- Direct Store Delivery (DSD) – a standard for retail grocery products
- Delivery Automation
- Route Sales
- Route Planning
- Truck Loading
- Inventory and Payment Control
- Mobile Asset Management
- Mobile Intelligence
- Compliance and Safety



Value Proposition

Mobile Commerce educates, informs and unifies individuals and processes all throughout your company.

Many businesses are currently burdened by paper or spreadsheet-based solutions to manage these processes.

The consequence is poor visibility and lack of accountability around control of inventory, payments collected in the field, salesperson performance and customer sales.

The proper deployment of Mobile Commerce will result in a **healthy and speedy return on investment** for companies, helping you win against the competition. Clients routinely report measurable and significant improvements all across the business:

- Improved route efficiency allows for fuel and time savings, allowing driver reps to **visit more customers in less time and at a lower cost**.
- Greater knowledge of customer activity through fingertip access to sales patterns and pricing promotions results in **larger orders**.
- Optimized truck-loading means **drivers get in and out of the warehouse faster** so they can get on the street and do their jobs.
- Electronic signature capture and geo-coded photo proof-of-delivery results in **fewer disputes, reduction in returns** and allows customer service to **focus on new business** as opposed to chasing after mistakes and missed deliveries.
- **Gather customer and competitive intelligence**, effectively giving you eyes and ears on the street at all times using our flexible user definable survey application.
- **Improve your profit margins** and keep your **inventory under control** by utilizing dynamic Inventory check-in and check-out capabilities by warehouse and by truck
- Ensure **proper accounting** and **driver accountability** with full payment acceptance reconciliation by route and payment type.



Besides the direct bottom line improvements, Mobile Commerce can become the most important technology to drive and **reinforce cultural change** in your business.

Mobile Commerce can become the **education and communications hub** for your entire team, empowering, informing and raising the confidence level and performance of everyone who interacts with the system.

Ultimately, our goal is to help you **increase your brand loyalty** and shine a modern light on you and your team.

Introducing xkzero Mobile Commerce

xkzero released Mobile Commerce in the summer of 2014 to serve B2B distributors and manufacturers with their own fleet of vehicles used to automate deliveries, route sales or direct store delivery (DSD). We recognized that legacy DSD and delivery software was substandard in 1) technology and intelligence 2) functional capacity and 3) ERP integration.

Mobile Commerce is designed to be the best in the market in all three of those areas, placing all new intelligence and capability in the hands of the driver reps.

Target industries

Any B2B wholesaler with their own fleet of vehicles is a potential user of Mobile Commerce. xkzero has found particular success working with companies in these industries.

- 1) Food Distribution
 - a. Bakery Products
 - b. Ice Cream
 - c. Frozen Products
 - d. Grocery Wholesalers
 - e. Salty Snacks
 - f. Ethnic Foods
- 2) Beverage Distribution

- a. Coffee and Water
 - b. Energy Drinks
 - c. Wine & Spirits
 - d. Craft Beer
 - e. Milk & Dairy
 - f. Red Bull Distributors
- 3) Other Wholesalers
- a. Oil & Gas (Petroleum) Products
 - b. Tobacco / Vape Products
 - c. Medical Devices and Pharmaceutical
 - d. Chemical / Industrial Supply
 - e. Automotive Parts and Fluids Supply
 - f. Electrical Supply
 - g. Building Materials and Contractor Supply
 - h. BG Products Distributors
- 4) Hard Goods such as Furniture Delivery

Organizational Impact by Role

These job functions are vital to revenue growth, customer relations and supply chain efficiency for wholesalers, but they're not fully served by ERP and CRM systems. Mobile Commerce provides the opportunity to reduce or eliminate inefficient procedural workarounds and manual activities.

- Outside sales reps / pre-sale reps
- Route sale drivers
- Delivery drivers
- Warehouse personnel
- Route planners and dispatchers
- Inventory and production
- Truck loaders
- Maintenance personnel
- Accounting
- Human resources
- Safety and compliance



xkzero Mobile Commerce solves this problem by providing an efficient, integrated system focused on these roles. Immediate benefits include:

- Eliminating redundant and non-value-added labor in customer service, warehouse, accounting and human resources.
- Improving control of inventory, sales, returns, payments, missed deliveries and compliance.
- Reducing unnecessary strain on IT, sales management, and the executive team.

[[ASK US FOR OUR MOBILE COMMERCE ROI CALCULATOR](#)]

Mobile App – At The Customer Site

Mobile Commerce provides a broad range of activities that can be performed at the customer location.

- Daily Planning
- Transaction Processing
 - Pre-Sales (order taking)
 - Route sales (sell “off the truck”)
 - Delivery orders (pre-existing in the ERP)
 - Return orders / credits
 - Product exchanges
 - Truck transfers
 - Payment acceptance
- Automated invoicing
- Electronic signature proof of delivery
- Apply Promotional Pricing
- Share performance metrics with customers
- Create next day load requests
- Merchandising / stock rotation
- Lot expiration management
- Plan-o-gram compliance
- PAR level orders
- Track who is running your promotions
- Customer surveys

- Customer reporting
- Competitive intelligence gathering
- Task management and completion
- Asset maintenance (drop off, pick up, otherwise service company-owned assets such as display cases, coolers, coffee makers)
- End of day processing and reconciliations
- Next day planning

Management Console – Back Office

The Management Console is a web-based tool that provides an important role for xkzero Mobile Commerce as an Education and Communication Hub, for Data and System Setup and for controlling inventory and transactions.

Using the Management Console, documents can be attached to customers, chains, vehicles, items and users. Surveys are built and defined in the Management Console too. Routes and route schedules are defined and maintained. Advanced pricing and promotional rules can be built in the Management Console too, along with maintenance of data such as container deposits, task assignments, asset transaction types and so on.

Important inventory management activities are managed here as well, such as:

Truck Loading

Mobile Commerce offers numerous methods to organize and manage truck loading. The ability to visually monitor the picking and truck loading status by warehouse with a graphical interface that refreshes in real time as items are picked and orders loaded is included.

It also offers calendar views to help organize and optimize traffic at the warehouse dock.

Some of the ways trucks can be loaded include:

- By pre-determined product mix (for route sellers)
- By order (for delivery orders)

- Hybrid (for those who may deliver pre-existing orders, but need additional inventory on the truck for point of delivery sales)

Inventory Check-Out / Check-In

- Multi-company / multi-site
- Reconcile and control inventory by truck
- Optionally map trucks/routes to warehouse codes in the ERP

Route Management and Planning

- Dynamic assignment to pre-determined routes
- Create customer specific schedules including route order
- Daily delivery route mapping and planning
- Integrate with dynamic routing services such as Roadnet

Intelligence, Reporting and Analytics

Reporting and analytics requirements vary by industry and user preference. Mobile Commerce provides the benefit of powerful, pre-built ERP reporting combined with all of the transactional, intelligence and compliance information gathered in the field.

Intelligence tools and capabilities include:

- Pre-built dashboards
- Custom reports portal
- Publishing any document or report by driver, by customer, by chain, by item, by truck, by user
- Share spreadsheets, PDFs, reports, videos, images, audio, etc.
- Transaction memos – use them to create reminders or instructions to the sales or delivery rep at any step during the transaction process. Define by customer and transaction type.
- Survey application
 - Fully user definable
 - Gather valuable intelligence, such as:
 - Vehicle Inspections



- Accident Reports
 - Driver information gathering
 - Customer surveys
 - Competitive intelligence gathering
- Photo-enabled transactions and surveys
- Photo-tagging
- Geo-coded transactions and surveys
- Attributes management
 - Create user definable tables and fields
- Interactive customer memos
- Barcode scanning enabled
- Printing enabled

Sage X3 ERP Integration

Few solutions for the mid-market, if any, can match the level of ERP integration and flexibility that Mobile Commerce by xkzero offers. It's important to understand that no two businesses, even those in the same industry, work exactly alike. The customizability and configurability of Mobile Commerce is a very important differentiator that enables your business to succeed in any environment.

ERP / Mobile Commerce Integration

Many DSD and delivery automation systems say they'll work with any ERP. xkzero Mobile Commerce is unique – we are built for Sage X3 by Sage X3 experts, ensuring the most comprehensive and powerful integration with maximum flexibility to meet your individual requirements.

Sage X3 Managed Data

The masterfile data listed below is managed in Sage X3 by most companies. Mobile Commerce is flexible to optionally allow for primary data management to happen within Mobile Commerce.

- Customers
- Warehouses
- Items

- Pricing
- Inventory movements
- Product Lines
- Units of Measure
- Sales Tax
- Order processing
- Invoice processing
- Credit and return processing
- Payment processing

In addition, Mobile Commerce can pass back to Sage X3 information that makes life much easier for Customer Service and Accounting. This naturally creates a better experience for the final consumer too. All of this Mobile Commerce data and more can be accessed in Sage X3, including:

- Geo-coded transactions
- Electronic signature with time and date stamp as proof of delivery
- Photo-enabled transactions and surveys

Mobile Commerce Managed Data

Mobile Commerce relies heavily on the core ERP system, but some data is best maintained in Mobile Commerce itself.

- Trucks
- Assets
- Chains
- Tasks
- Surveys
- Container deposits
- Inventory loads for route selling
- Transaction memos
- Push notifications
- Customer PAR order levels
- Reorder items
- Restricted item sales by customer
- Mobile Commerce User and Role maintenance



Technology

Mobile Commerce is built using the most reliable, flexible and supportable technology tools available.

xkzero **Mobile Commerce**

Mobile App User Experience - Native iOS

Responsive Web Management Console

ERP Integration - xkzero Web Services

- Mobile app - Native iOS (Apple iPhone, iPad, iPod Touch)
- Management console
 - Microsoft SQL
 - Twitter Bootstrap, ASP.NET
 - Editable HTML homescreen
- ERP integration
 - RESTful Web API

Licensing and Pricing

xkzero Mobile Commerce licensing is on a subscription basis. Pricing is based on an upfront base system fee, followed by a monthly subscription fee based on the number of routes and users.

Projects are subject to a one-time initial system implementation fee. These are generally fixed-priced based on a pre-defined project scope. Service fees may apply to install version upgrades.

Contact xkzero for current pricing.



Opportunities for Sage X3 Partners

xkzero loves to work with partners and we're equipped to do so in a number of different ways. Some partners prefer to refer client and prospect opportunities directly to us and allow xkzero to do all the work. Other partners prefer to participate in co-marketing for new opportunities together, having xkzero perform the Mobile Commerce implementation and them taking care of the rest of the ERP.

Just let us know which way you prefer to engage. Referral commissions are available under both scenarios.

xkzero at a Glance

xkzero is a team of dedicated professionals helping manufacturers and distributors win versus the competition by making technology more meaningful and accessible for everyone in your organization.

The education and experience of our team is diversified to serve you. Our degrees and backgrounds are in Industrial Engineering, Information Technology, Computer Science, Manufacturing, Supply Chain, Natural Science, Marketing, Mathematics, private industry, and Public Accounting.

xkzero was founded in 2005 as a VAR (value added reseller) organization specializing in Sage ERP and accounting systems. We started with one main objective – the desire to create great technology for our clients - **technology to help catapult businesses like yours to new levels of success.**

When Apple hit the market with the iPhone and later the iPad, we saw our opportunity and seized it.

We are:

- ERP certified developers and consultants
 - Sage X3 / Sage 100 / Acumatica
- Mobile delivery and sales app leaders – B2B wholesale
- Publishers of xkzero web services



At xkzero, we take particular pride in being easy to do business and to work with. We hope to have the opportunity to work with you too.

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