

DefactoGo! – Mobile Systems for Sage ERP 1000



Version 1.0 - Concept Document

DefactoGo! is the new mobile solution from Defacto for delivery, collection and task management on the move. The system comprises modules covering Field Service, Delivery and Collection, Delivery and Installation, Van Inventory, Van Sales, Asset Tracking and Measurement Capture. Any combination can be installed. Further modules will be available shortly.

DefactoGo! Mobile Gateway and Base System

The DefactoGo! system is based on portable Windows mobile computers with communications options for 3G cellular network and 802.11 wireless and provides integrated communication with your Sage 1000 ERP solution to manage customers, products and orders and deliveries and services.

Customers

DefactoGo! holds customer database information relevant to the tasks and route of the operator holding the device. The data is loaded from the Sage ERP system and can be updated on-line or back at base. From this data customer information can be displayed and address and contact information updated if required.

DefactoGo! can operate without being connected to the Sage database and stored information on the mobile device. When a WiFi or cellular data network is available, the device can connect via the Internet to the Mobile Gateway and synchronize data with Sage when needed. In some situations on-line access to Sage ERP 1000 may be required and DefactoGo! allows the configuration of which queries can be executed via 3G wireless.

[Futures: creation of new customers, amendment of customer data, contacts, sales history, prices/discounts, credit limits and credit status and payment methods including parameterization and authorization of information available for each operator.]

Products

DefactoGo! holds product database information relevant to the tasks and route of the operator holding the device. The data is loaded from the Sage ERP system and can be updated on-line or back at base. From this data descriptions, prices, units, and stock levels in the van, available to promise and at base can be displayed.

To simplify operations and minimize order processing errors, DefactoGo! supports bar code scanning of common formats including GS 128 and EAN13 and bar code to Sage code mapping built in.

[Futures: Links to Sage Contract Billing to record units, weight, area, volume, metering (running water, gas) Standard Sage batches, lot, expiry dates and serial number tracking will be supported.]

Pricing/Discount

[Futures: Optional data about customer pricing and discounting to mirror the Sage calculations can be downloaded to DefactoGo! for on the spot quoting and selling.]

DefactoGo! Load Planning

Taking planned sales despatches and deliveries directly from the Sage ERP system, DefactoGo! Load Planning offers a console to organize the deliveries by van or driver and automatically produce a picking list for each vehicle. Route planning can be via sales order header coding, customer codes or manually override on the console.

DefactoGo! Vehicle Check System

At the start of each round, the system can be configured to ask the driver to make a check on the vehicle including lights, wipers, tyres and other safety features and to record the vehicle mileage. The driver is asked for a signature capture to confirm the check has been performed. This information is transferred back to the ERP system in and can be produced as custom Vehicle management enquires or reports.

DefactoGo! Delivery System

DefactoGo! Delivery takes information about the product load of the vehicle. This information can be downloaded directly from the Sage ERP system or via the Lorry Load Plan module of DefCapture and DefWarehouse. Stock loaded onto the Van can be checked against the pick note and confirmed as loaded or can be individually scanned onto the Van.

Route planning can be uploaded as part of the import. DefactoGo! then guides the operator along the route to make deliveries.

When goods are delivered, proof of delivery can be captured at the drop point.



Items which are not accepted or cannot be delivered can be captured and recorded with a reason code.

DefactoGo! Collection System

DefactoGo! Collection takes information from the Defacto Customer Returns module for Sage 1000.

DefactoGo! then guides the operator along the route to make the collections.

When goods are collected, the date and time and state of the item is recorded.

Items which cannot be collected can be captured and recorded with a reason code.

DefactoGo! Printing

DefactoGo! Can support printing to wireless or connected printers allowing the production of documents at the point of activity.

[Futures: Wireless and Bluetooth printing support for specified hardware, the creation of PDF files and auto-emailing]



DefactoGo! Instant Sales System

[Future: This module allows the sales of items directly from the vehicle stock and generates the sales order and invoice entries and paperwork through the Print function. Payment options will also be supported.]

DefactoGo! Delivery Service System

At the start of each delivery when custom installation or onsite service is required, the system can be configured to ask the service officer to make a check on the safety of the environment where the work is to be performed. The service officer is asked for a signature capture to confirm the check has been performed. This information is transferred back to the ERP system in and can be produced as an audit.

Job start and stop times including breaks can be recorded as the work progresses.

When goods are delivered and the installation is completed, proof of delivery can be captured at the drop point and return to the Sage ERP system to trigger the billing.



[Futures: Tool Management, Expenses Tracking]

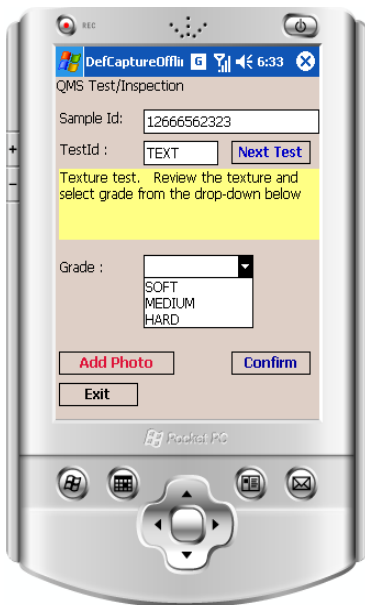
DefactoGo! Field Service System

The DefactoGo! Service System is based on the development of custom DefCapture Offline solutions developed for initial customers and brings a generic solution which integrates into Sage 1000 and the Defacto modules. The first version module is due for release Q3 2011.



This Service System is aimed at Installation or Maintenance, Monitoring or Service calls.

Technicians will be able to receive by 3G messages, service calls which have been booked for each of the working days. Details about client, promised visit time and date, contact name, details of problem and action required will be downloaded to the device.



Records of work completed on the visit and also details of the equipment found and status and readings can be captured against QMS Test Plans and Equipment events with in the Sage 1000 hosted Defacto modules.

Details about charging and how the client will pay are also provided.

DefactoGo! will also be able to capture details about the task and activities performed, start and end of the task, materials used, time spent and add notes about the progress of the call.

The module will also be able to capture 1d and 2d bar codes and even images of equipment and findings subject to device capabilities.

When the work is completed the module will be able to produce a visit report and or an invoice and record data ready for feeding back into the Sage ERP system as Sales Invoice, Defacto Customer Returns/Repairs Project or Works Orders.

DefactoGo! will also be able to record usage figures from plant and equipment and feedback and there are plans to provide integration in to the Sage Contract Billing system.]



DefactoGo! Operator Time-Track System

The Operator module of DefactoGo! handles information about the operator and his activities. The initial system provides an Activity Log into which the operator can make entries such as start of day, arrival at site, messages to base, time booked to job, materials requests and queries.

The personal expenses of each of your operators (meals, transportation, accommodation) can be collected and synchronized with your management system using the ExClaim! interface.

Suitable Hardware Devices

Budget lowest to highest..

Motorola MC65

<http://www.motorola.com/web/Business/microsites/US-EN/MC65/index.html>



Give your mobile workers the tools they need to get the job done right—right now with the MC65. They will redefine productivity with the MC65 in hand—one of the toughest and most flexible EDAs on the market. Desktop-like application performance and our most robust scanning, camera and GPS technologies plus a customizable user interface make data capture and information access easier than ever.

And with the ability to connect to virtually any carrier anywhere in the world, the MC65 rugged mobile computer can better serve your business.

Intermec CN50 Mobile Computer

<http://www.intermec.co.uk/products/cmptrcn50/index.aspx>



The industry's most advanced rugged mobile computer

High performance communication and computing in a small and lightweight ruggedized design that is optimized for highly mobile field workers

Choice of WAN radio - 3.75G wireless WAN technology supports both voice and high-speed uplink and downlink data exchange to help improve worker productivity, 2.5G GPRS/EDGE ideal for regions where network providers do not support 3G data rates Enhanced Mobile Document Imaging (eMDI) option enables users to capture high quality document images while on their route to help streamline back office operations and improve cash flow

Integrated digital compass and GPS radio provides instantaneous and real-time directional information to improve navigation for both pedestrian and vehicle-based applications

Built-in accelerometer senses position of the device to trigger display rotation

Standard features include both a high performance 3 MP color camera and an area imager for responsive 1D and 2D barcode reading

Choice of area imagers – EA11 optimized for scan intensive applications, EA21 optimized for document imaging with the capability to scan 1D/2D barcodes

Bluetooth® v2.1 EDR radio provides secure wireless connectivity to headsets, mobile printers and other Bluetooth compatible devices for simple and convenient connectivity

Wi-Fi certified 802.11 radio enables fast and secure voice communications or end-of-day synchronization with your enterprise network

Integrated cell phone provides high quality voice communications eliminating the need to carry a separate device

Windows Mobile 6.1 operating system promotes ease of integration and intuitive

use by developers and users
Available with up to 256MB RAM and 512MB
Flash Memory allows you to run multiple
simultaneous applications – fast
Available in QWERTY or numeric keyboards

Motorola MC75

<http://www.motorola.com/Business/XU-EN/Business+Product+and+Services/Mobile+Computers/Handheld+Computers/MC75Loc%253AXU-EN%252CXC-EN%252CXM-EN%252CXE-EN%252CXN-EN%252CPK-EN%252CXF-EN>



No matter what your workers need to get the job done, Motorola's MC75 Worldwide Enterprise Digital Assistant delivers by combining an unparalleled number of business capabilities into an easy-to-carry rugged device. 3.5G GSM HSDPA and 3G CDMA-EVDO Rev A support provides high performance voice and data services around the globe.

Your workers will enjoy having all the features they need right at their fingertips in one device designed to endure all day everyday use outside the enterprise -- including push-to-talk, integrated GPS with superior sensitivity and tracking capabilities, 1D and 2D bar code scanning, a high resolution 2 megapixel autofocus digital color camera, 802.11a/b/g wireless LAN (WLAN), Bluetooth and IrDA connectivity.

Intermec 70 Series Mobile Computers

<http://www.intermec.com/site/70series/index.aspx>



Tgenew ultra-rugged CN70 is engineered to be at home in demanding environments, where its industry-leading performance, incredible durability and low power consumption can actually reduce overhead.

Its superior scanning performance and improved ergonomics lead to increased efficiency, while its extensive communication ability meets the needs of in-field workers. In fact, when you make the CN70 your mobile device, achieving your goals becomes a whole lot easier—and far more profitable.

CN70 Key Features.

- Power-packed mobile computing in terms of size, weight and ruggedness
- Indestructible Numeric and QWERTY keypad options
- Exceptional battery life for long device runtime without extra size and weight
- Advanced barcode imaging technology with motion tolerance for fast scanning and white illumination with laser aiming for high read rates
- Brilliant display with extended life touch panel
- On-board diagnostics provides device health visibility and reduces downtime
- Full compatibility with printers, application software, communications, and a complete set of peripherals and accessories enabling a comprehensive enterprise business solution