

MOBILE COMMERCE FOR ACUMATICA

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.



Table of Contents

- Winning vs. the Competition..... 1
- What Is xkzero Mobile Commerce?..... 3
- Business Processes Optimized 3
- XMC Opens Doors and Informs Your Team..... 4
- Target industries 5
- Organizational Impact by Role..... 6
- Mobile App – At The Customer Site 7
- Back Office Processes 8
 - Truck Loading 8
 - Inventory Check-Out / Check-In 8
 - Route Management and Planning 8
- Intelligence, Reporting and Analytics..... 9
- Technology 10
- xkzero at a Glance 11
- Contact Info..... 11



What is xkzero Mobile Commerce?

xkzero Mobile Commerce (XMC) for Acumatica provides companies with a whole new competitive edge with business technology. XMC, built natively in Acumatica The Cloud ERP, is designed to handle the unique demands of wholesale distributors and manufacturers who deliver and sell their products using their own fleet of vehicles. These business processes are commonly referred to as Direct Store Delivery (DSD).

XMC unifies everyone in your company – from sales reps, delivery drivers, customer service, warehouse and logistics, to purchasing, production, IT and finance.

Unlike traditional DSD systems, with XMC for Acumatica you only need to invest in one system to leverage and extend the full power of ERP and CRM systems – all from one single database and one single management interface.

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



XMC Opens Doors and Informs Your Team

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.

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

Mobile Commerce provides the opportunity to reduce or eliminate inefficient procedural workarounds and manual activities. These job functions are vital to revenue growth, customer relations and supply chain efficiency for wholesalers.

- 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

Back Office Processes

XMC powered by Acumatica allows you to define and streamline your DSD processes seamlessly with your ERP and CRM functions.

Documents can be attached to customers, chains, vehicles, items and users. XMC Surveys are built and defined directly in Acumatica. So are Routes and route schedules. Advanced pricing and promotional rules are defined in Acumatica and extend to the mobile app. Maintenance of data such as container deposits, task assignments, asset transaction types are also performed directly in Acumatica.

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.

Calendar views are available 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

Technology

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



It's all here

The two key technology elements of xkzero Mobile Commerce for Acumatica

- Front end: *Native iOS Mobile app* (Apple iPhone, iPad, iPod Touch)
 - Offline processing—you don't need to be continuously connected
 - Fast, reliable synchronizations
 - Wide ranging sales and delivery functionality
 - Pre-sales
 - Route Sales
 - Delivery orders
 - Electronic proof of delivery
 - Take payments (including credit card, C.O.D., checks)
 - Handle returns and credits
 - Gather intelligence
- Back end: *Native integration into Acumatica Cloud ERP*
 - The single place to manage your ERP data
 - Inventory, customers, and pricing
 - Promotions, important processes, and more
 - Manage routes and dispatch drivers
 - Create tasks, set schedules
 - Customize reports, intelligence & design surveys



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've now brought our solutions and experience to the world of Acumatica.

We are:

- ERP certified developers and consultants for Acumatica, Sage X3 & Sage 100
- 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.

Contact Info

- Sales and marketing opportunities info@xkzero.com
- Technical support support@xkzero.com
- Telephone inquiries 847-416-2009
- Web www.xkzero.com
- Twitter [@erp_apps](https://twitter.com/erp_apps)
- Facebook www.facebook.com/xkzeroapps/