sales App 4.0
Service Specification

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1 Introduction

This document contains a list of all services and its descriptions, which are included when the product is ordered.

In addition, the associated chapters document the requirements and obligations for the provision and operation of the individual services.

The sales App is a mobile application optimized for tablet computers, which in its final application is directed to the field staff of a manufacturer (hereinafter "client"). The sales App is a digital hand tool that provides the client's employees with mobile access to catalogue, customer and order data as well as current (marketing-) documents. The product data available in the sales App can be maintained and updated in the back office. An essential part of the functional scope is the provision of shopping baskets with transfer function for orders and quotations.

The sales App has different user groups and can be configured for different client systems (e.g. countries) individually and within the scope of nexmart's possible range of functions. The basic functionality of the sales App can be extended with various packages, so that, among other things, prices and availability of products can be queried in real time from a connected ERP system of the client. An overview of the available extension packages can be found in the section extension packages.

The sales App is available for iPad devices running iPadOS (iOS) and for Windows devices running Windows 10. Further details on device and operating system support are listed under client's obligations to cooperate. The availability of a specific functionality in the sales App for iOS or Windows is not a guarantee of the availability of the same functionality in the sales App for the other operating system. A list of functional differences between operating systems can be found at the end of this document.

2 Scope of Service („in scope")

In the following the scope of services of the product sales App 4.0 is described. Orders, quotations, and completed forms (excluding PDF forms) are generally grouped together as activities. Quotations require the additional assignment of the workflow package. Forms, on the other hand, require the additional order of the marketing package.

2.1 Setup of the sales App

In the standard version, the sales App is delivered in nexmart colours - specific shades of yellow and blue - and can be adapted to the client's corporate identity using the marketing package.

2.1.1 Languages

The user interface of the sales App is available in the following languages:

German, English, Spanish, Italian, French, Dutch, Portuguese, Polish, Czech, Russian, Danish, Norwegian, Slovak, Swedish, Hungarian, Slovenian, Ukrainian and Korean.

2.2 Basic functionalities

The sales App provides the following functionalities and views (hereinafter referred to as "tabs") to best support the sales or information process of a sales representative.

2.2.1 Login

On the login screen, the user can choose from various client systems defined by the client. The actual user ID consists of the user name and password of the user. Furthermore, there is the option to remain logged in until a logout occurs or the device is restarted.

2.2.2 Header bar

The functionality of the header bar always adapts to the active tab. For the tabs "Customers", "Catalog", "Shopping Cart" and "Archive" the globally selected customer is always visible in the right corner of the header bar. When a global customer is selected, an open shopping cart for an order or a quotation is created at the same time. The info button, which appears after selecting a customer, can be used to call up customer master data sheets, allowing customer-specific files such as conditions to be called up. Behind the icon of the document clip in the header bar, documents can be marked and sent collectively by e-mail to the customer. The e-mail address of the customer is used automatically, provided that it was entered via the customer data import and a global customer has already been selected. A further icon opens forms for customer-independent recording of information (e.g. for recording leads).

2.2.3 Customer

The tab Customers lists all previously imported customers of the client (see basic Setup) in a sortable way. The sales App can display the following contact data of the customer: Company name, identification or name of a branch, postal address and internal customer number of the customer. Optionally, any number of individual fields can be transported, which are then displayed in the customer details within the order header data.

With an existing Internet connection, the customer can be displayed on a map. In addition, the distance to the customer, starting from the current position, is calculated and displayed. To do this, the app must be allowed to access its own location via the operating system. In addition, the navigation route to the customer can be opened directly from the sales App using the map app standardized by the operating system. In addition, extended customer master data sheets can be displayed from here, similar to the functionality in the header bar.

2.2.4 Catalog

Products are presented in the electronic catalogue according to the level of information provided by the client (see basic Setup). Both the product categories and the comprehensive product catalogue are searchable. In addition, the individual history of the user's last search terms is stored and displayed to assist the user.

By selecting a product, the product detail view can be accessed. Here the available information about a product is displayed. This can be the master data of the product such as article number,

description, technical features, one or more pictures, videos, up to the linking of documents (e.g. safety instructions) as well as accessories and spare parts (see basic Setup). Furthermore, fixed prices and discounts can also be set here. The individual information blocks can be folded in and out in order to keep a clear overview.

Information on a product can be sent directly to the customer as a PDF file via e-mail from the product detail view. In addition, a product can be added directly to the shopping cart and optionally provided with a customer note.

2.2.5   Shopping cart

When a shopping basket is created, a distinction is made between the activity types Quotation (see workflow package) and Purchase Order. In principle, articles from the product catalog can be compiled here and provided with an order quantity. If the tablet computer has a camera, barcodes can be scanned and associated products added to the shopping basket (currently only available under iOS). The default delivery address is always that of the globally selected customer. You can choose between the standard delivery address or a different, custom delivery address. If stored in the customer master data, a branch linked to the customer can also be set as the consignee. In the header data, the following parameters can be shown/hidden and partially configured for quotations and purchase orders:

Parameters (orders and quotations)	Configuration (besides on/off)
Deviating delivery address	Permitted and deviating delivery countries.
Contact person (field service)	-
Contact person (back office)	-
Contact person (customer)	-
Remark	Length can be limited individually.
Order number (customer)	Length can be limited individually.
Incoterms	Incoterms named by the ordering process.
Internal remark	-
Complete delivery	-
Head discount	A limit and fixed values can be defined for an ERP code.
Item number	-
Positions free of charge	-

Position remark	Length can be limited individually.
Position conditions	Allow free position, fixed price and position discounts with ERP codes.
Submission number	Allow any submission number (if deactivated a date is expected; length can be limited individually.
Value date	-
Sales promotion	Allow any sales promotion; length can be limited individually.
Shipping method	Choose between normal shipping, scheduled shipping, express shipping and pick-up.
Consignee	Force consignee, transfer address.

Specific parameters (orders)	Configuration (next to on/off)
Order type	Can be set individually by ERP code.
Order number	Can be generated automatically. Length can be limited individually.

Specific parameters (offers)	Configuration (next to on/off)
Type of quotation	Can be set individually by ERP code.
Offer validity	Validity of offers can be set in weeks. Grace period for preventing orders after expiration of the offer can be set in weeks.

ERP stop flag

In order to check orders or quotations manually before further processing in the ERP system, it is possible to send stop flags with specific actions in the sales App.

Discounts

It is possible to grant and define both header discounts and item discounts independently of each other. Individual ERP codes can be created as discounts and provided with identifiers in different languages. These are then displayed accordingly in the sales App and allow a percentage discount to be specified. The discount values available in the UI and a general limit can be defined. A stop flag can also be set.

Contact selection

In the detailed view of the header data of a purchase order or quotation, contact persons can be recorded using the following methods. A contact can be selected from the local and standard address book of the mobile device. If the tablet computer has a camera and the use of the camera

is approved by the system, barcodes with a stored vCard can also be recorded (currently only available under iOS). Contact persons can also be entered manually using the input fields for name and e-mail address.

2.2.6 Archive

The archive serves a sorted list of all activity records. In the context of the sales App, orders, quotations and forms currently exist as possible activity types. It offers search and filter functions that make it easier to find data records. Specifically, the following attributes can be filtered: customer, activity type, source and date range. In addition, there is a text search function that can be used to search for an order number.

Incomplete activities are also stored here and can be accessed for further processing. Completed activities can be used as the basis for a new data record. For example, a purchase order can be generated from a quotation. Furthermore, both quotations and purchase orders can be copied. For each stored activity, you can switch to a detailed view that provides comprehensive information about the data record.

The archive and its contents are available offline, with regular data reconciliation taking place if an Internet connection is available. Data records from other nexmart systems can also be included (e.g. orders from Online Market). Optionally, the customer's ERP can be used as a further source for data records, for which the nexmart product *ERP Connect* must also be ordered. It should be noted that order-related data is sometimes located in the local memory of the end device and in the cache of the nexmart server.

2.2.7 Documents

In the Document Center, the client can search and display documents provided. The client can categorize and store them in individual folder structures. A distinction is made between general and user-defined documents, whereby the standard version is obtained from an FTP file server. WebDAV, OneDrive and Sharepoint are optionally available as data sources (see document package PRO). These data sources cannot be used at the same time, so the files for both general and user-defined documents must come from one of these sources. The OneDrive and Sharepoint services are authenticated with Microsoft as soon as the app is started. The connection to FTP is set up in advance.

The following file types are supported:

- RTF Documents
- Microsoft Office documents from Office 97 upwards (PowerPoint, Word, Excel)
    - from Excel tables only the first 4096 rows can be displayed
- PDF and PDF forms
- Graphics in the formats JPEG, PNG, GIF, BMP, TIFF
- Videos are supported in the file formats and codecs that are supported by the operating system for the respective device
- MP3 Sounds

- HTML Documents

The file names can be searched across all folders. A full-text search, which also considers the content of the documents, is not possible. In addition, the usual possibilities for export/sharing of documents are available for the respective operating system. Furthermore, both user-defined favorites and user-defined categories can be defined and compiled in virtual folders.

Advanced functions are available for PDF documents. This makes it possible to search PDF documents for full text (the PDF document must support full text search for this to work). In addition, a quick navigation can be displayed at the bottom of the screen to jump to previous or subsequent pages.

Under iOS, the individual PDF pages within a document can be displayed in a gallery view and bookmarked.

Under Windows, PDF documents can also be opened outside of the app and with the program defined as the default under Windows.

In order to guarantee a smooth synchronization of documents, we recommend to limit the path length from the respective root directory to the file name including the extension (e.g. *.docx) to 130 characters. This is limited by the Windows operating system, which we can only influence to a limited extent at present. This limitation applies to all data sources, regardless of whether FTP, WebDAV, Sharepoint, OneDrive or other.

2.2.8   Options

Under Options, data from sources supported by nexmart can be stored in the sales App and thus on the local memory of the end device used. Once the data has been initially collected, only changed data - those that have been added or removed - is synchronised thanks to change detection. This includes the product catalog, catalog media, customer data, customer master sheets and documents.

Furthermore, in consultation with nexmart, the configuration can be updated here and a log file can be sent to nexmart. The currently active version of the sales app and the user logged in with the active system are displayed and the user can log out.

2.3   Referenced documents

The documents listed below are made available to the client together with the service description.

The current version of the documents can be accessed online. The access data will be made available to the client separately.

2.3.1   Service specification basic Setup

This document describes which services are part of setting up an interface to nexmart. It is only possible to use nexmart products once the basic setup has been set up.

2.3.2   Service specification EDI Connect

This document describes which services are part of the setup of an EDI Connect interface. EDI Connect enables the further processing and transmission of orders generated by the sales App to the customer.

2.3.3   Service specification ERP Connect

This document describes the services that are part of setting up an ERP Connect interface. ERP Connect enables synchronous checking against and posting to the customer's ERP system.

2.3.4   sales App Integration Guide for clients

This describes how the sales app can be supplied with documents and how files should be structured. It also explains how to import customer data and consignees into the sales app.

3 Add on packages

The product can be expanded with the following optional packages.

3.1 **Marketing package**

The color scheme of the sales App can be individualized and adapted to the corporate identity of the client by means of a primary and secondary color and the use of the logo. The app's control elements are immersed in these two colours. The colours for the upper and lower menu bar can be determined separately. The login screen can also be designed using a graphic, whereby the specified login functionality must be available. In addition, a start page is installed, on which a tile matrix is displayed, which shows the available tabs. Depending on the configuration, the matrix consists of between 1 and 12 tiles. This fills approx. 40% of the lower viewing area. The upper viewing area is equipped with a banner slider and can be filled with individual graphics and links. The sales App icon, which can be seen on the home screen of the device, can be custom designed. Any adjustments are defined before the sales App is set up and implemented by nexmart. In addition, a tab can be defined as a dynamic content area that can be filled with HTML content or, if an Internet connection is available, also displays web pages.

Part of the package is also the activity type Form, provided that standard forms are involved. The three standard forms Lead Entry, Visit Report and Warranty Registration are included. The forms can be filled out within the app and can be stored and retrieved in the archive (similar to orders). The form responses are made available at a specific interval on the FTP as a CSV file. All individual forms can be set up and imported via the Knowledge package.

3.2 **Workflow package**

The package enables the integration of external barcode scanners to quickly and easily add items to the shopping cart. The scanner device must have a Wedge/HID mode and send a return at the end of each scan. With the Quotation Workflow Light, quotations can be stored and retrieved as a

separate activity in the archive in the same way as purchase orders. Before sending an order/quotation, an ERP obligation check can be activated to query prices and availability. In addition, an order stop for the ERP system can be added with a note and including individual stop conditions. In the order/quotation itself, "free positions" can be entered to record products without product numbers. In addition, orders/quotations can be provided with the digital signature of the customer, which is removed as soon as the activity is changed again. A shopping cart can also be created as an quotation in the form of a PDF and sent by e-mail. A product photo can also be included as a thumbnail in the PDF. The nexmart product *ERP Connect* is required for parts of the package.

3.3 Promotion package

The package contains a status display of definable promotional products in the product overview. Promotional products can also be displayed in categories. Specific promotion texts, promotion prices and their validity can be called up at product level. This information is imported via the product catalog.

3.4 Produkt package PRO

The package includes a status display to highlight new products. Furthermore, accessories and spare parts can be linked to the main product.

3.5 Realtime package

The prerequisite for this is the order of the realtime Connect package of the nexmart product *ERP Connect.* The package enables the prices and availability of items from the sales App to be checked against the client's ERP, provided an Internet connection is available. Notes from the ERP can be displayed at header or item level. Furthermore, orders can be posted synchronously into the ERP.

3.6 Documents package PRO

The package allows to send single pages of a PDF. It is also possible to combine more than one PDF page into a new PDF document and send it by e-mail. This cannot be saved. In addition, a user has the possibility to create own and individual categories for documents and to mark favorites. The features mentioned in this paragraph are supported on both iOS and Windows.

Furthermore, the package can also be used to display protected documents with a send lock. By marking product numbers or descriptions in PDFs, this product can be displayed directly in the catalog or added to the shopping cart. PDFs created as forms can be filled out and sent by e-mail. The functions mentioned in this paragraph are only supported under iOS.

3.7 Hybrid package

The package allows parallel operation of iOS and Windows. The apps for both operating systems access the same backend, so that a user can access his data independent of the device.

3.8 **Quotation Workflow package**

The package enables the direct transfer of activities of the "quotation" type to the connected ERP system. Together with orders, these can be viewed in the sales App archive together with the rest of the ERP history and are available offline. Quotations can be configured separately from orders as described in the shopping cart section. Furthermore, quotations can be converted into new orders in the archive. A prerequisite for this is the order of the Realtime package.

4 Exclusions („Out of Scope")

The product does not cover the following services.

- No product or customer data can be maintained in the sales App.

- Data is only consumed and not exchanged bidirectionally.

- Furthermore, the sales App does not have its own mailing service, so a client must be set up on the tablet.

- Only products with prices in a monetary currency can be processed within an order/quotation.

- A connection to the ERP system is optional and not included in the basic functionality.

5 Assumptions on the provision of services

The assumptions regarding the performance of services described in the following must be ensured on the client's side in order to ensure a smooth deployment of sales App 4.0.

- The nexmart Basic Setup for setting up an interface for article master data has been successfully completed.

- The regular and correct provision of article master data by the customer as part of the Basic Setup is guaranteed.

- The nexmart Basic Setup for setting up an interface for customer master data has been successfully completed.

- The regular and correct provision of customer master data by the customer as part of the Basic Setup is guaranteed.

- The nexmart Basic Setup for setting up an interface for catalogue data has been successfully completed.

- The regular and correct provision of the catalogue data by the customer as part of the Basic Setup is guaranteed.

- To be able to send e-mails from the sales App, an e-mail account must be set up in the operating system of the device and defined as the primary mailbox. The sales App uses this as a e-mail client and does not offer any mail functionality itself.

- The following assumptions regarding service provision are only applicable when using the real-time package:

    o The implementation of the *ERP Connect* product to create an interface for prices and availability was successfully completed.

    o The regular and correct provision of prices and availabilities by the customer within the scope of the *ERP Connect* product is guaranteed.

    o The customer is responsible for the subsequent implementation of stop flags in ERP.

6 Client's obligations to cooperate

The duties of cooperation described in the following are to be ensured on the client's side in order to guarantee a smooth use of the sales App.

- As part of the onboarding project, the desired adjustments in terms of configuration and design are agreed and defined with nexmart.

- Product data is provided in a format supported by nexmart. This point is omitted if this data is already available and can be processed for another nexmart solution.

- Customer data as well as consignees and documents are prepared in accordance with the Integration Guide.

- Updates to the sales App must be installed accordingly in order to maintain smooth operation.

- Procurement and provision of suitable technical devices to field staff.

- Organization and support of its employees in terms of first-level support.

- Ensuring the timely and orderly rollout to the employee devices.

- Ensuring the current and supported operating system:

    o The sales App supports at least the last two operating systems published by Apple for the Apple iPad. It should be noted that Apple will no longer support various iPads with new operating systems over the course of time and that an upgrade is therefore not possible. nexmart guarantees, with a certain delay, that the sales App will be fully functional under the latest version of Apple's operating system.

    o Similarly, the sales App runs smoothly on those versions of Microsoft Windows 10 that are officially supported by Microsoft. According to experience, the period of time is approx. 2 years and can be taken from the communication by Microsoft in individual cases. Windows 10 LTSB/C, S and ARM are excluded from this. For sending e-mails from the sales App, Outlook versions from Outlook 2010 and upwards (including Outlook 365) are supported.

- The following assumptions regarding the provision of services are only applicable when using the workflow package:

    o If an external barcode scanner is used, the compatibility of the scanner device with the iPad/Windows devices in use is ensured.

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nexmart reserves the right to change the range of services described in this document in future versions, which may also mean the elimination of existing services.

7 Functional differences between operating systems

All information is provided without guarantee of completeness.

Module	Feature	Description	iOS	Win
Catalog	Product search speed	Although, product search within the catalog is available for both systems, on Windows, it is way faster than on iOS.	-	Yes
	Relevance Rules	On iOS, search results can get ranked by various rules. Those are not yet supported on Windows.	Yes	No
	Product Highlights	Product highlights are not supported on Windows.	Yes	No
	Showing Net Retail Price (NRP) with ScopeOfSupply	In iOS it is not possible to use NRP-price together with ScopeOfSupply on products.	No	Yes
	Hide ScopeOfSupply on products	In Windows it is not possible to deactivate showing the ScopeOfSupply on products.	Yes	No
	Links in HTML	In Product details (e.g., Hotdeals Text) the link on phone numbers is not active in iOS, but in Windows.	No	Yes
Order	Discounts on fixed prices	In iOS, a discount on a fixed price is calculated. In Windows it is not calculated. On ERP check, prices are overwritten anyway.	Yes	No
	Country in Delivery Party	Changing the delivery country of a custom delivery address is not supported on Windows. Validation of given information (e.g., by length) is not supported as well.	Yes	No
	Barcode Scanner	The Windows app does not allow to scan barcodes using the integrated camera of the device.	Yes	No
	Create free positions inline as the last line of items	iOS features a configuration to set free positions to be the last line of item in cart. On Windows, free positions can be added to the cart only in general order.	Yes	No

	ERP remarks on line-items for free positions	ERP remarks coming through ERP-check are not shown for line-items that are free positions in Windows.	Yes	No
	PDF Generation	Fields in PDFs generated that are available in iOS, but not on Windows: • orderItem.dateAdded • orderItem.idOrderItem • oder.headerData.salesCampaign	Yes	No
Documents	PDF-2-Catalog	Due to a limitation of the PDF framework used to render PDFs on Windows, this functionality is not supported.	Yes	No
	PDF handling	iOS offers a variety of features related to PDF that are not covered by Windows (e.g. PDF Forms).	Yes	No
	Limited path length	The path length of a file stored by the Windows app may not exceed 130 characters. For additional information, see sales App - Integration Guide	Yes	No
	Open documents externally	The sales App for Windows supports opening documents externally. This offers option to open an MS Office Document in MS Office rather than in the sales App. However, editing or uploading modified files is not supported.	No	Yes
	Restricted Documents	Documents sharing cannot be restricted on Windows at the moment.	Yes	No
	Disabling share functionality	Currently, sharing functionality on Windows cannot be disabled.	Yes	No
	Bookmarks in PDF	Currently only available in iOS.	Yes	No
Options	Sync error handling	If the sales App iOS fails to synchronize documents, a popup will be shown listing the files which could not be synchronized.	Yes	No
	Change of System in App	Windows enables the user to change the system within the app. iOS does not offer this functionality today.	No	Yes
General	Mail Integration	The sales App for Windows allows to send mails either via the internal Mail app or Outlook. Sending mails using Outlook requires the Desktop Services to be installed. On iOS it is only possible to use Apple Mail as a client, but it is possible to use the iOS native share functionality to send single documents via Outlook (if installed).	No	Yes

	Currency Handling	As opposed to the sales App for iOS, Windows supports localized display of currency strings.	No	Yes
	Deployment	The sales App Windows may not be installed into a differing storage location.	-	No