



Turn every field activity into *great job* with FieldPie

Content
Review



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WHAT IS FIELDPIE?

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FEATURES

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What is FieldPie?

What is FieldPie?



Back Office Web Portal
for Managers

FIELDPIE IS A SIMPLE TO USE AND INNOVATIVE SOLUTION DESIGNED TO MANAGE "FIELD ACTIVITIES", "SALES TASKS", AND "FIELD SERVICE TASKS" WHILE INCREASING FIELD FORCE PRODUCTIVITY AND CUSTOMER SATISFACTION.

IT IS A MOBILE CRM SUITE DESIGNED FOR THE SALES AND SERVICE TEAMS MANAGING CUSTOMER FACING PROCESSES IN THE FIELD.



Mobile Apps
For Field Reps

What is FieldPie?

Manage your plans and field activities easily, collect any mobile data anywhere, increase sales figures and service satisfaction with the Award Winning features of FieldPie.



PLAN

EXECUTE

MONITOR

REPORT



FieldPie is Perfect For

FieldPie is Perfect For



FIELDPIE FOR SALES & DISTRIBUTION



Visit Scheduling

Easily schedule appointments for sales teams from the web console, or let your team schedule their own appointments directly from the mobile app.



Order Management

They can record the desired amount of each product, apply discounts and add any additional notes, and collect the customer's signature.



Field Force Tracking

You can easily track your field force on the map and make sure each member of your sales team is on task



Opportunity Management

Drive your opportunity pipeline step by step, either to finalize sales easily or to stop wasting time with bad leads.



1

Start Client Visit and Purchase Order

Client FINISH

INFO NEW VISIT HISTORY

Date, Time & Location








Plan	Actual
 -	9/9/17
 -	4:31 PM -
	Parseller Mahallesi, Sinpaş Aqua City - 1 Evleri, 34773 Ümraniye...


Photo 


Client State Note 

Lead

Purchase Order 



Media 

Form 



2

Add Items


Purchase Order  

PO Info

Due Date:
9/15/17

Note
Touch to enter

Items

 Nokia Lumia 620	2 Unit	
Unit Price : TL499.00	Unit Tax : TL89.82	Overall Total:
Total Price : TL998.00	Total Tax : TL179.64	TL1,177.64

Discount


Amount (TL) _____

Deposit

Amount (TL) _____



Grand Total


Subtotal : TL998.00 Tax : TL179.64

Total : TL1,177.64 

3

Capture Customer Signature

Purchase Order  

 LG G2 D802 32GB	1 Unit	
Unit Price : TL99.00	Unit Tax : TL17.82	Overall Total:
Total Price : TL99.00	Total Tax : TL17.82	TL116.82

Discount

Amount (TL) _____

Deposit


Amount (TL) _____


Grand Total

Subtotal : TL1,097.00 Tax : TL197.46

Total : TL1,294.46

Signature





1

List Products

☰ Products / Services 🔍

- General Mobile Discovery 16 GB**
General Mobile
📷 Front Camera
💰 TL399.00
- LG G2 D802 32GB**
LG
📷 Front Camera
💰 TL99.00
- Nokia Lumia 620**
Nokia
📷 Expandable Memory
💰 TL499.00
- Nokia Lumia 820**
Nokia
📷 Expandable Memory
💰 TL299.00
- Pirelli** Docs
💰 TL40.00

2

Search Products

☰ Products / Services 🔍

Front Camera x

- General Mobile Discovery 16 GB**
General Mobile
📷 Front Camera
💰 TL399.00
- LG G2 D802 32GB**
LG
📷 Front Camera
💰 TL99.00

3

Manage Product Media Attachments

← Products

Pirelli Tax % 18
CODE:
💰 TL40.00

MEDIA

- 📺 pirelli-image.png
- 📺 Pirelli_Novateck.pdf
- 📺 <https://www.youtube.co...>

FieldPie For Sales & Distribution






FIELDPIE MOBILE CUSTOMER MANAGEMENT



1

Customer Listing


LIST MAP

	Ann Lawrence VIP Manchester, M	Qualified Opportunity: TL22,500.00	START VISIT
	Anthony Brewer VIP Gibson City, IL	Lead Opportunity: TL32,750.00	START VISIT
	Charles Kowal Edinburgh, EH	Lead Opportunity: TL12,500.00	START VISIT
	Diann Ferebee VIP Spring, TX	Interested Opportunity: TL25,000.00	START VISIT 

2

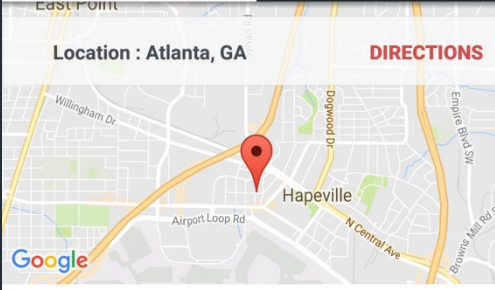
Check Customer Card

← Client ↗

 **Alicia Craig**
AliciaDCraig@einrot.com
Atlanta, GA

INFO HISTORY

Location : Atlanta, GA **DIRECTIONS**



Phone Number
706-443-9274

Code
55

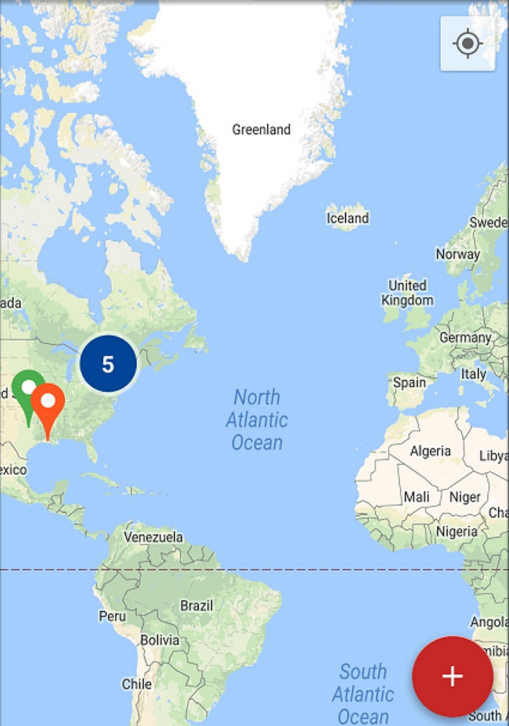
Address
650 Limer Street

3


Customer Locations

≡ Clients

LIST MAP



5



FieldPie For Sales & Distribution

- Can Also Create Purchase Order From Webportal
- Add Products to the Purchase Order

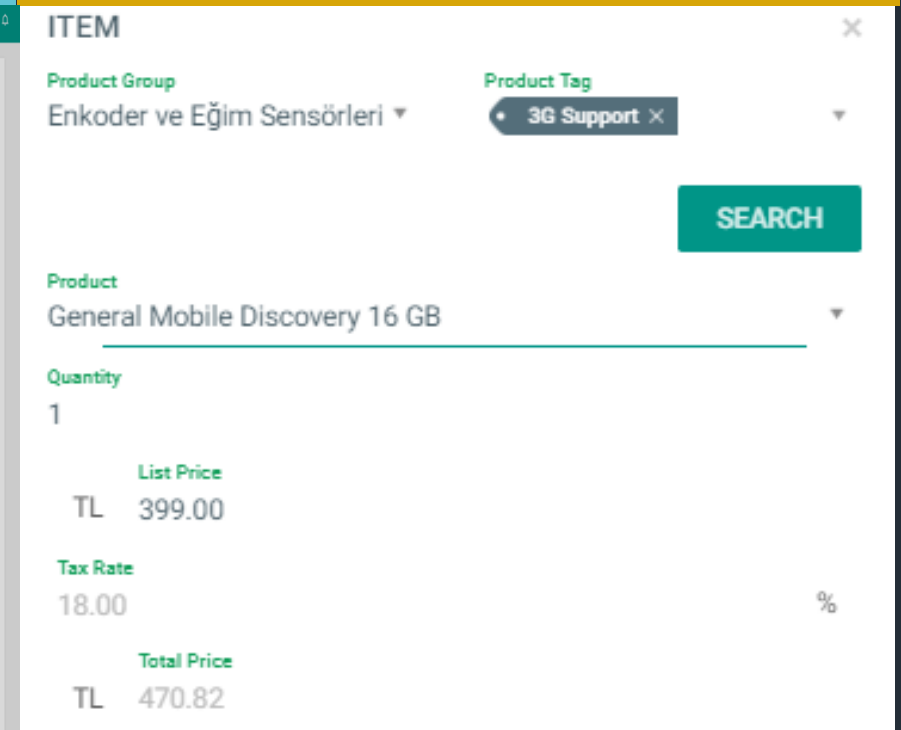
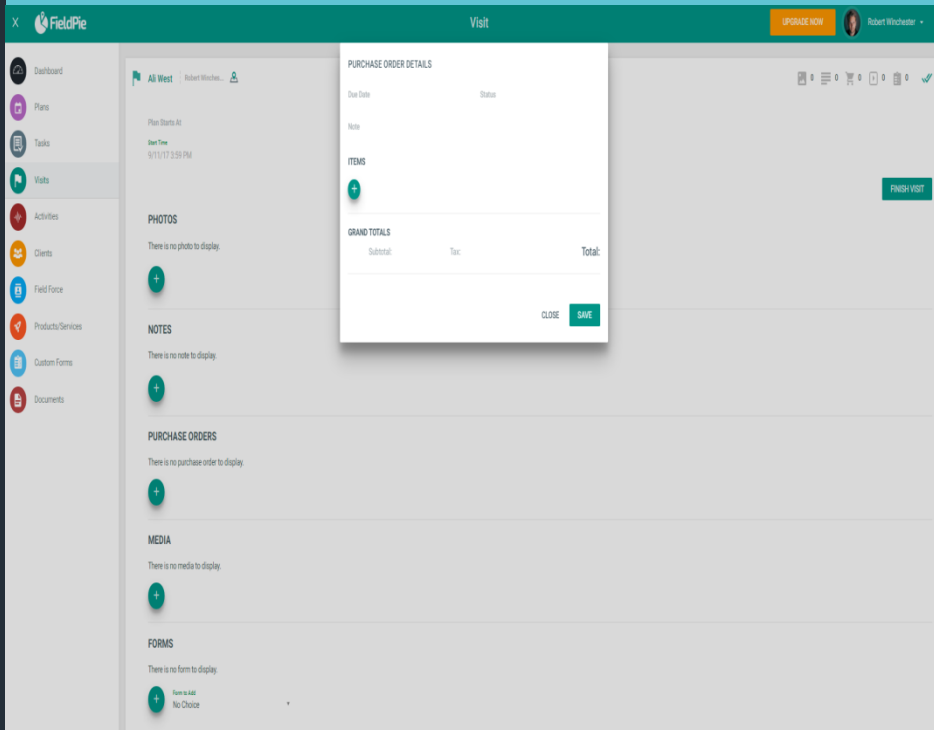


1

Create Purchase Order

2

Add Product Items to the Purchase Order



FieldPie For Sales & Distribution

Manage Customers and Products from Web Portal



1

Manage Customers

The screenshot shows the 'Field Force' page in FieldPie. It features a sidebar with navigation options like 'Dashboard', 'Plans', 'Tasks', 'Visits', 'Activities', 'Clients', 'Field Force', 'Products/Services', 'Custom Forms', and 'Documents'. The main content area displays a table of customer records with columns for profile photo, name, email, user code, blocked status, roles, and various filters.

PROFILE PHOTO	NAME	E-MAIL	USER CODE	BLOCKED	ROLES	MAIL OF ALL TEAMS	TEAMS	CATEGORY	CLIENT TAG	PRODUCT GROUP	PRODUCT TAG
	Robert Wrochester	robert.wrochester@fieldpie.com	10261	No	Admin	Yes		Guest	Multi-Resource Professional	General Mobile	No Support Add
	John McManis	john@fieldpie.com	102	No	Field Force	No		VIP	Professional Add	Nokia	No Support Assignable Resource
	Albert John	albert@fieldpie.com	100	No	Field Force	No		Silver	CE Add	Sony	Field Camera No Support
	Ashley Johnson	ashley@fieldpie.com	103	No	Field Force	No		Gold	Multi-Resource Professional	LG	CE No Support
	Jon Jervey	jon@fieldpie.com	101	No	Field Force	No		Standard	Professional Add	Apple	No Support No Support
	Jonathan Healy	jonathan.healy@fieldpie.com	104	No	Admin	Yes		Guest	Multi-Resource Professional	General Mobile	No Support Add Camera
	Sarah Smiley	sarah.smiley@fieldpie.com	105	No	Field Force	No		Standard	Professional Add	Apple	Assignable Resource Field Camera Add
	Jennifer Cooper	jennifer.cooper@fieldpie.com	106	No	Field Force	No		VIP	Multi-Resource Professional Add	Samsung	No Support Assignable Resource Add
	Paul Adams	paul.adams@fieldpie.com	106	No	Field Force	No		VIP	Professional Add	Apple	No Support Assignable Resource Add
	Alan Walker	alan.walker@fieldpie.com	107	No	Admin Field Force	Yes			CE Multi-Resource Professional		No Support Assignable Resource

2

Manage Products

The screenshot shows the 'Products/Services' page in FieldPie. It features a sidebar with navigation options like 'Dashboard', 'Plans', 'Tasks', 'Visits', 'Activities', 'Clients', 'Field Force', 'Products/Services', 'Custom Forms', and 'Documents'. The main content area displays a table of product records with columns for code, product name, list price, discount, actual price, tax rate, measurement unit, product group, product tag, related products, and menu.

CODE	PRODUCT NAME	LIST PRICE	DISCOUNT (%)	ACTUAL PRICE	TAX RATE	MEASUREMENT UNIT	PRODUCT GROUP	PRODUCT TAG	RELATED PRODUCTS	MENU
10214	Sony Xperia Z2	70,99.00	0	70,99.00	0	unit	Sony	CE		X
10215	Nokia Lumia 620	75,499.00	0	75,499.00	18	unit	Nokia	Assignable Resource		X
10216	Samsung Mobile Dictionary T9 5.8	70,299.00	0	70,299.00	18	unit	General Mobile	Field Camera		X
10217	Nokia Lumia 620	70,299.00	0	70,299.00	18	unit	Nokia	Assignable Resource		X
10219	LG CE 8802 2008	70,99.00	0	70,99.00	18	unit	LG	Field Camera		X
	Pixel	70,45.00	0	70,45.00	18					✓

FIELDPIE SALES OPERATION CYCLE



1. Create purchase order and add products from mobile devices
2. Check stock and create Purchase Orders if the items are available in the stock
3. Analyze Purchase Orders Realtime

Purchase Order

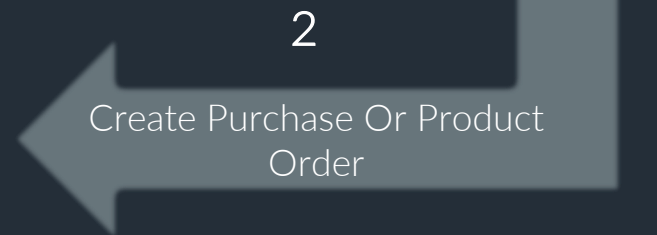
PO Info
Due Date: 9/15/17
Note: Touch to enter

Items
Nokia Lumia 620 2 Unit
Unit Price : TL499.00 Unit Tax : TL89.82 Overall Total:
Total Price : TL998.00 Total Tax : TL179.64 TL1,177.64

Discount
Amount (TL)

Deposit
Amount (TL)

Grand Total
Subtotal : TL998.00 Tax : TL179.64
Total : TL1,177.64



FieldPie Visit Details

Client: Ahmed Visit Date: 6/22/17 8:54

PURCHASE ORDER DETAILS

Items:
Nokia Lumia 620 5 Unit
Unit Price: TL499.00 Unit Tax: TL89.82 Overall Total:
Total Price: TL2,495.00 Total Tax: TL445.10 TL2,944.10

GRAND TOTALS
Subtotal: TL2,495.00 Tax: TL445.10 Total: TL2,944.10

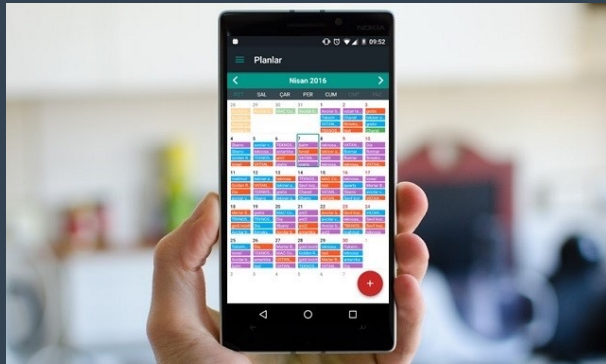
SIGNATURE
Show Signature

FieldPie For Field Service Management



Schedule and Dispatch for greater efficiency

Schedule and Dispatch your workers effectively, and avoid wasted trips and efforts in the field.



Add photos, inside your forms

Add images and sketches on top of them to provide visuals of site-related activities and better reporting of job site issues.



Work offline

Forms can be filled out with or without network connection, and are auto-sent once the network is restored.



Capture signatures

Collect authorization via signature capture right on the device using the touch screen.

FieldPie For Audit



Audits With Powerful Photo Functionality

Manage an unlimited number of images that are automatically tagged with time, location, customer and field force.



Up-to-Date Audit Scheduling

Let your field force manage their own calendars, or have back office personnel set appointments for them.



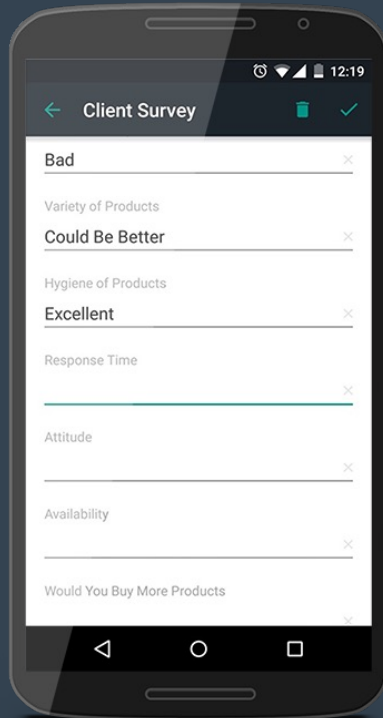
Custom Mobile Forms & Checklists

Design "mobile forms" easily without coding, and make them instantly available to your team for powerful auditing.



Export and Share Audit Data

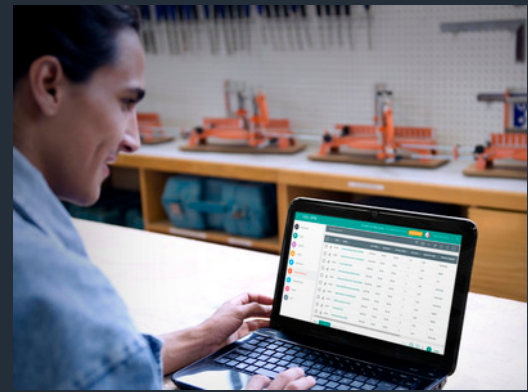
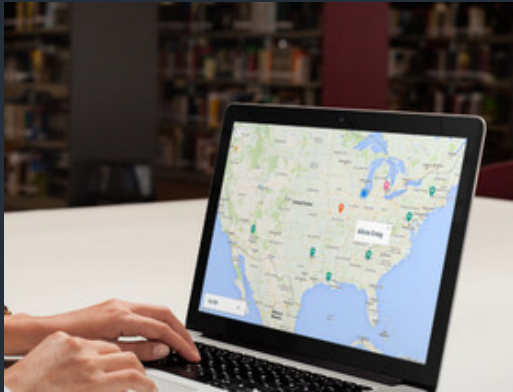
FieldPie allows you to convert your data into the selected documentation form and provide your clients, business partners or other departments within your organizations with access to the audit activities.





Features

Features For MANAGERS



1

Manage Field Force With
Real Time Visibility

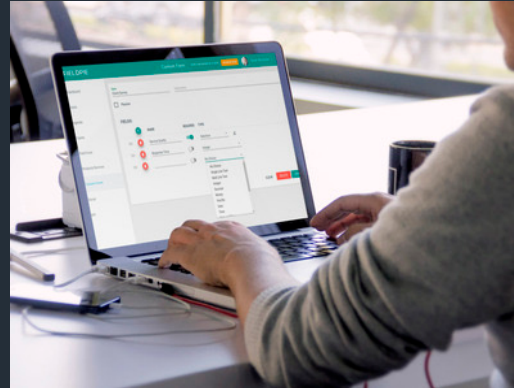
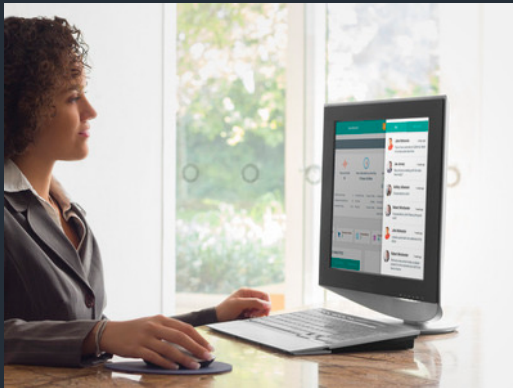
2

Manage Customers,
Products and Services

3

Analyze Field Data
With Powerful
Analytics Tools

Features For MANAGERS



4

Utilize powerful
Collaboration Between
Field Reps and Office
Managers

5

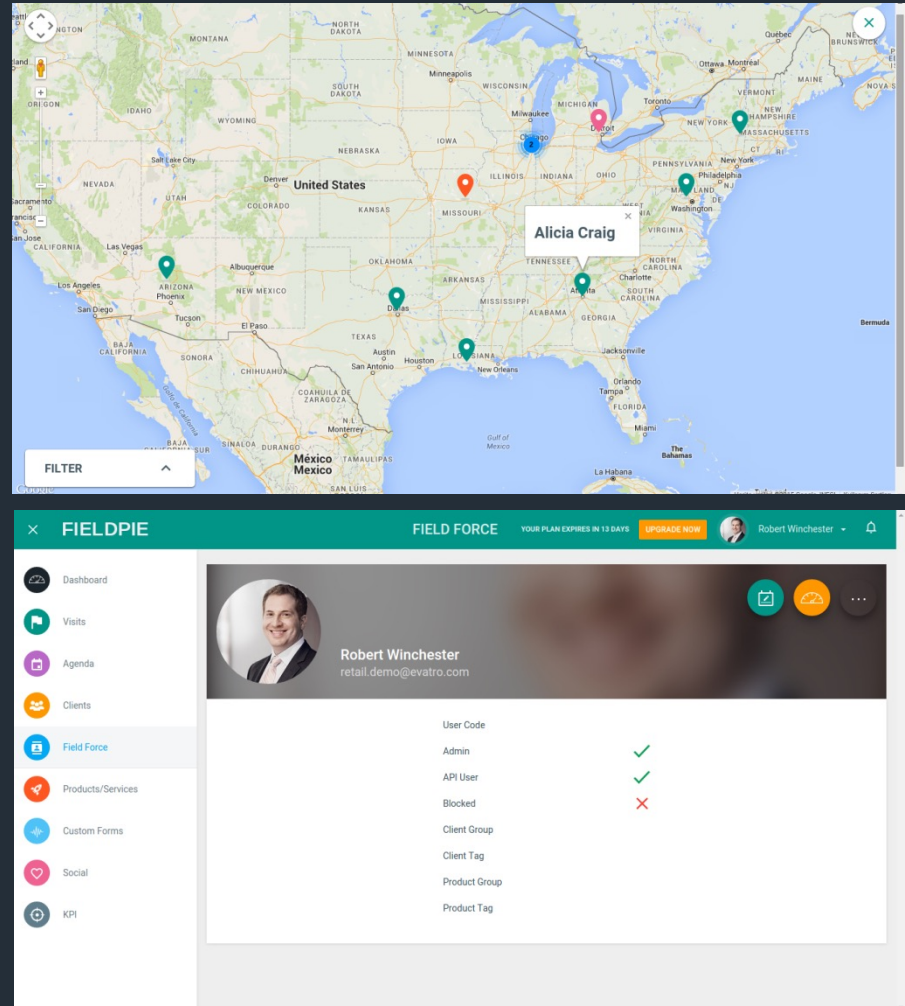
Create Mobile Forms
Without Coding

6

Integrate With Your Existing
Systems Seamlessly

1 Manage FieldForce With Real Time Visibility

- Visually track your team members on the map as they perform tasks in the field or view detailed data as a list.
- Stay in touch with other team members in real time

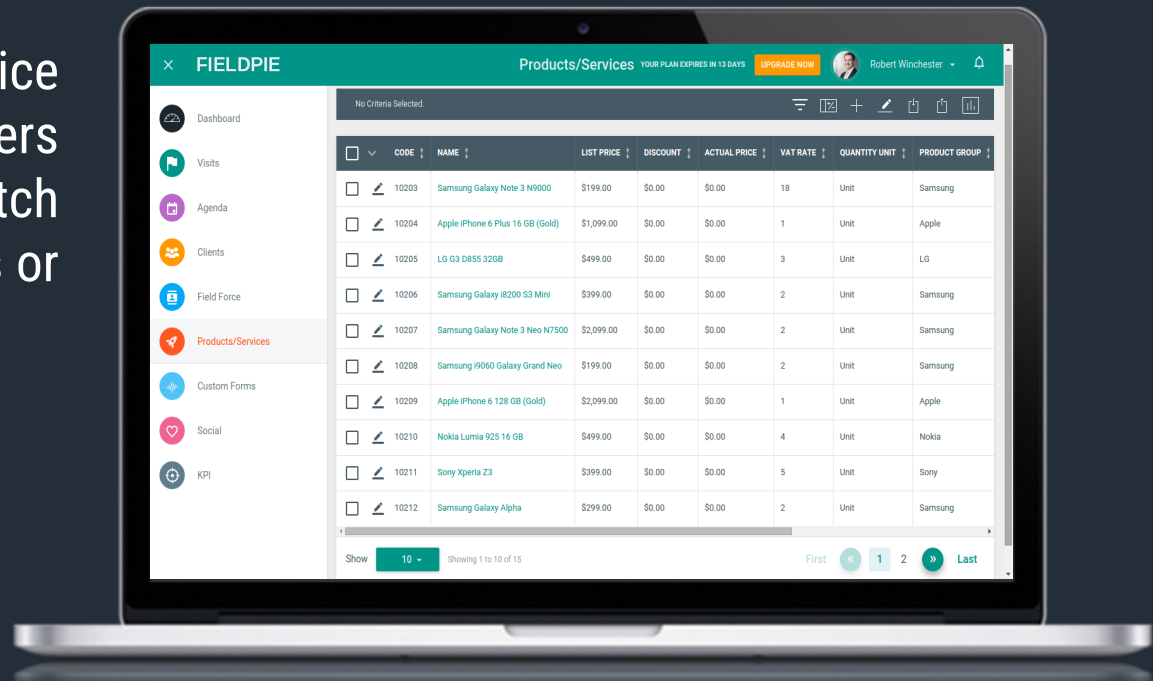


The screenshot displays the FieldPie Field Force interface. The top section features a map of the United States and Mexico with several location pins. A pop-up window for 'Alicia Craig' is visible over the Chicago area. Below the map is a sidebar menu with icons for Dashboard, Visits, Agenda, Clients, Field Force (selected), Products/Services, Custom Forms, Social, and KPI. The main content area shows the user profile for Robert Winchester (retail.demo@evatro.com) and a list of permissions:

User Code	Status
Admin	✓
API User	✓
Blocked	✗
Client Group	
Client Tag	
Product Group	
Product Tag	

2 Manage Customers, Products and Services

Manage every product and service you provide to your customers easily from one source and watch your field team execute the sales or service strategy for you.



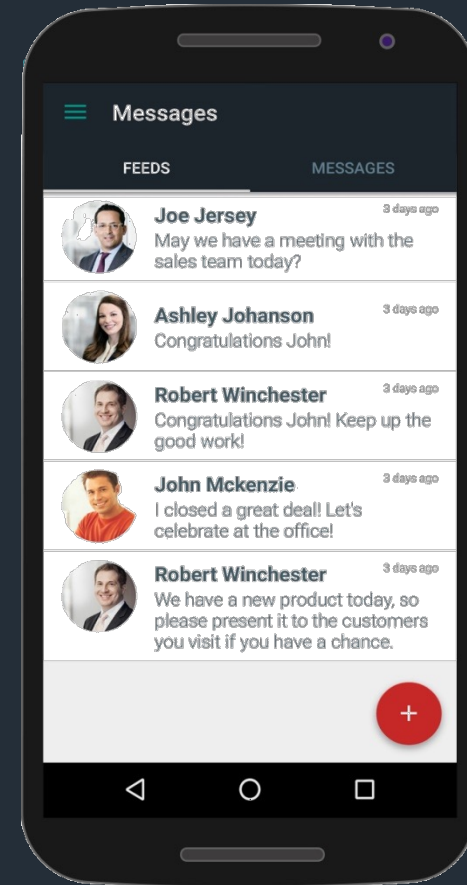
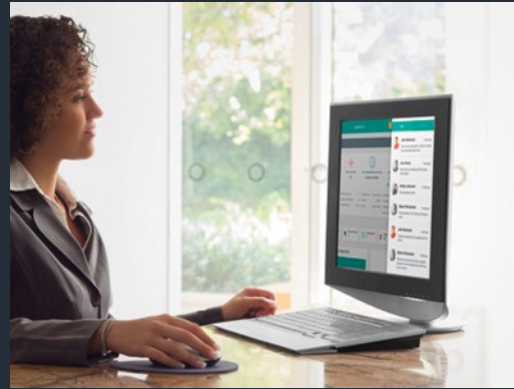
3 Analyze All Field Data with Powerful Analytics Tools

- Information captured in the field is automatically recorded in the system.
- FieldPie provides detailed analytics tools
- All data is synced in real time.
- Mobile app works on line or off line.



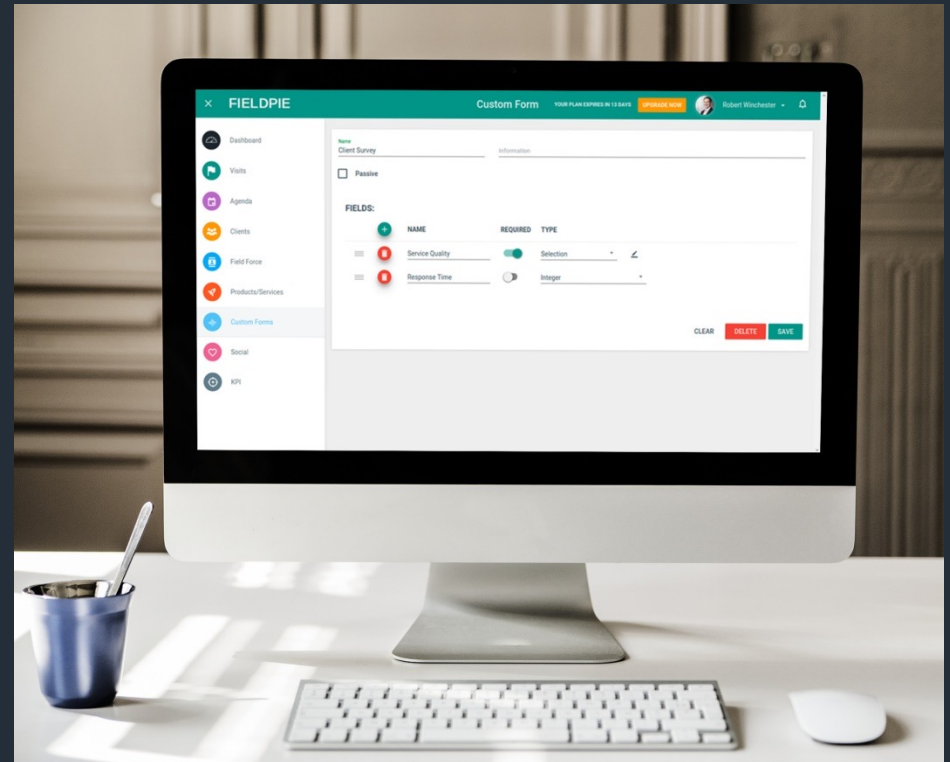
4 Collaborate with Team Members Through Messaging and File Sharing

• Stay in touch with everyone in the field, as well as your back-office managers by using powerful messaging and collaboration system.



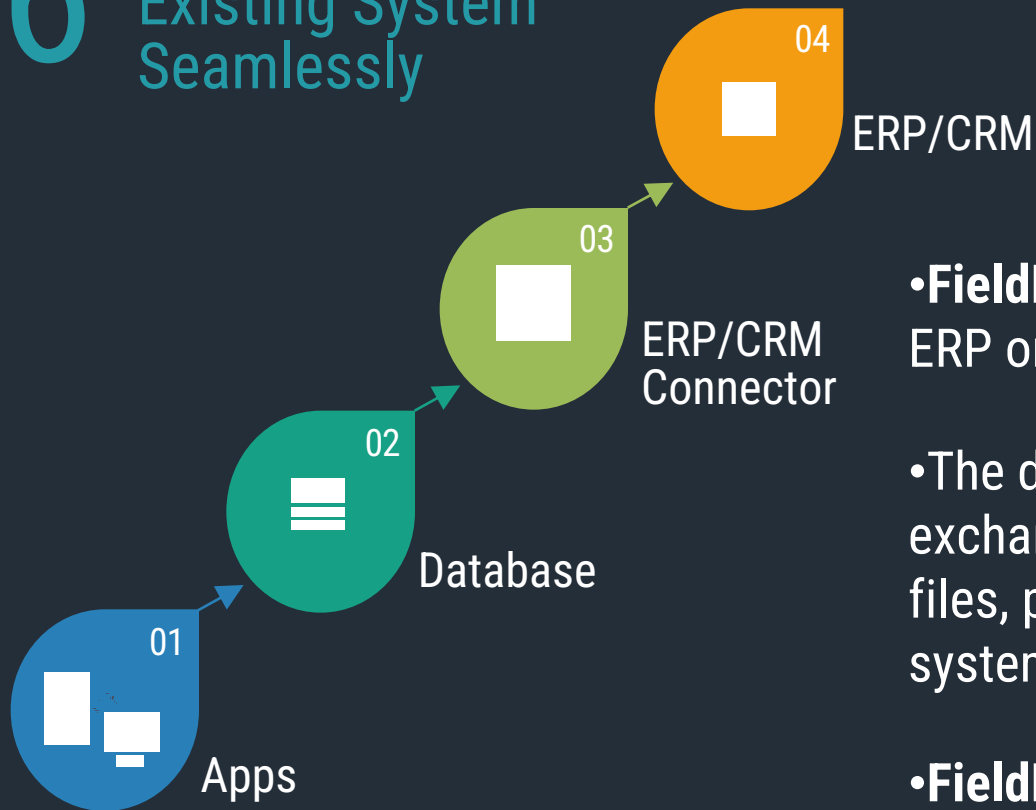
5 Create Mobile Forms Without Coding

•Thanks to the powerful technology platform of **FieldPie**, you can create mobile screens without coding and publish them easily to your field team's mobile devices.



6

Integrate with Your Existing System Seamlessly

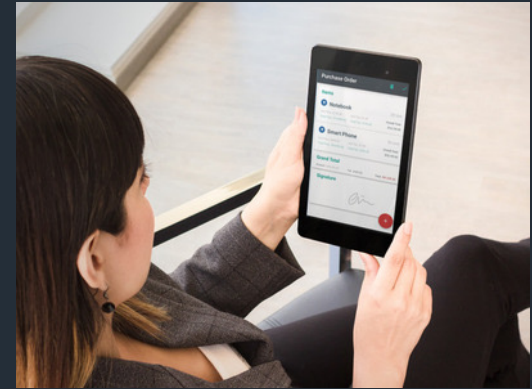
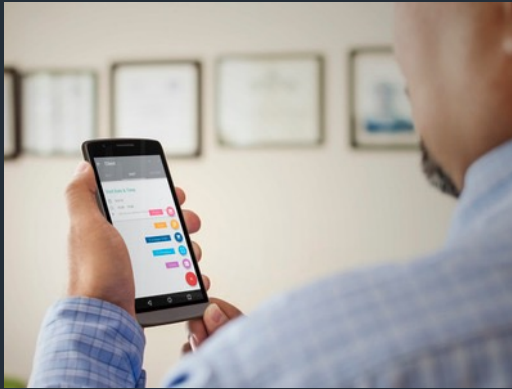


- **FieldPie** can easily be integrated with any ERP or CRM system.

- The data entry interface is based on an exchange of Excel (XSL) or plain text (CSV) files, periodically exported from the ERP/CRM system to a FTP server.

- **FieldPie** also features a web-service interface which allows for two-way integration, thus ensuring total synchronization of information with 3rd party systems.

Features For Field Teams



1

Capture Mobile Data In The
Field

2

Convert Leads Into Sales

3

Increase Customer Service
Satisfaction

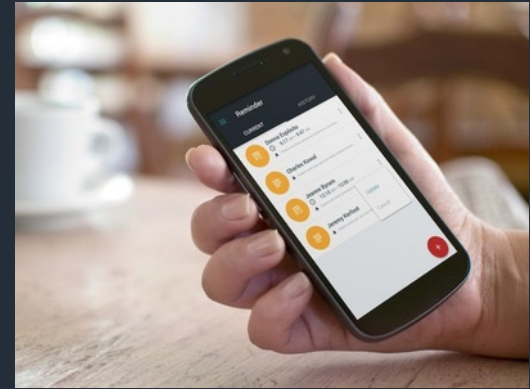
Features For Field Teams



4
Manage Your Visits



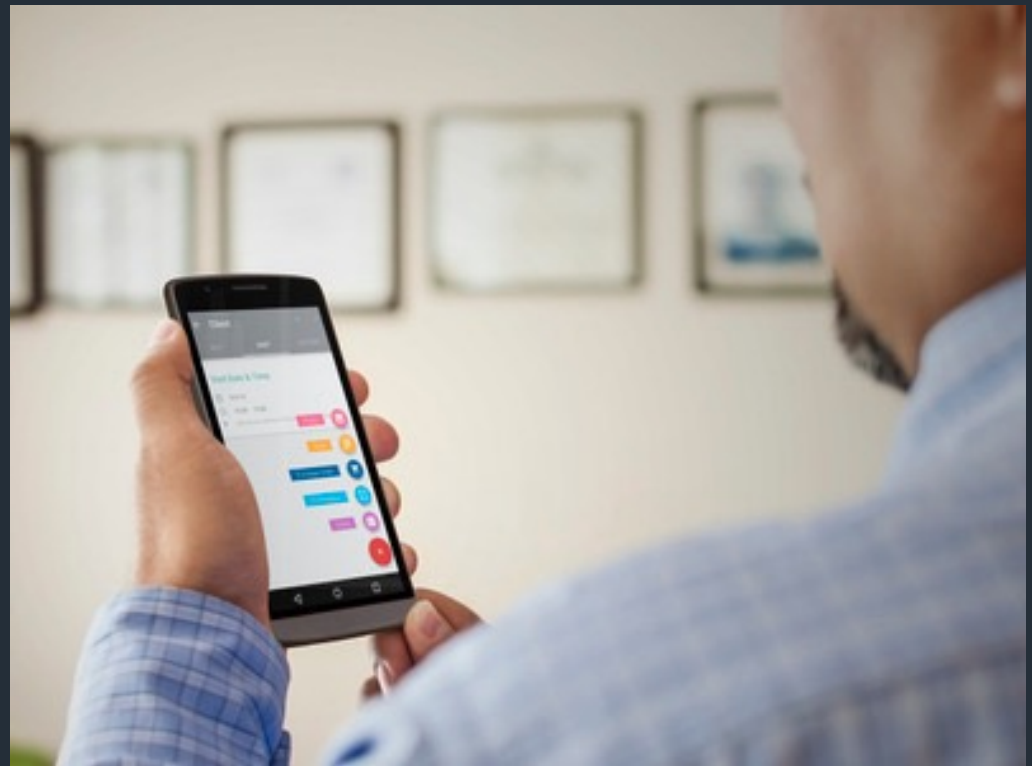
5
Track Your Performance



6
Do Not Miss a Single Task

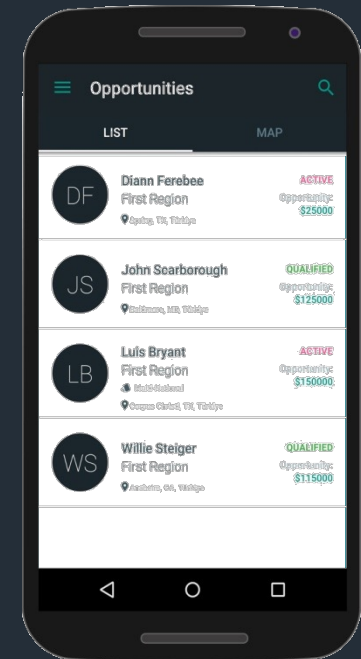
1 Capture Data In The Field

- Capture Photos, Notes, and any kind of customer data as you make your Visits or record new Opportunities as you move around.
- Sales teams dedicate all their time to selling, thus avoiding the onerous task of manually reporting sales visits and phone calls.



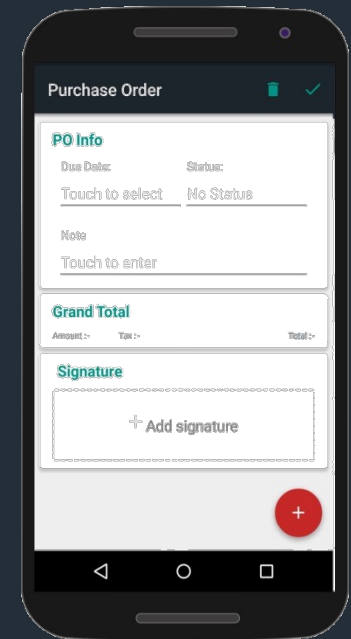
2 Convert Leads into Sales

- **FieldPie** recognizes each sales person's position and provides a **map with sales opportunities** in the local area.
- The map indicates the **optimal route** for getting to the next destination in the shortest time possible.
- **FieldPie** intuitively knows when the sales person is visiting a client and immediately provides information on that customer.



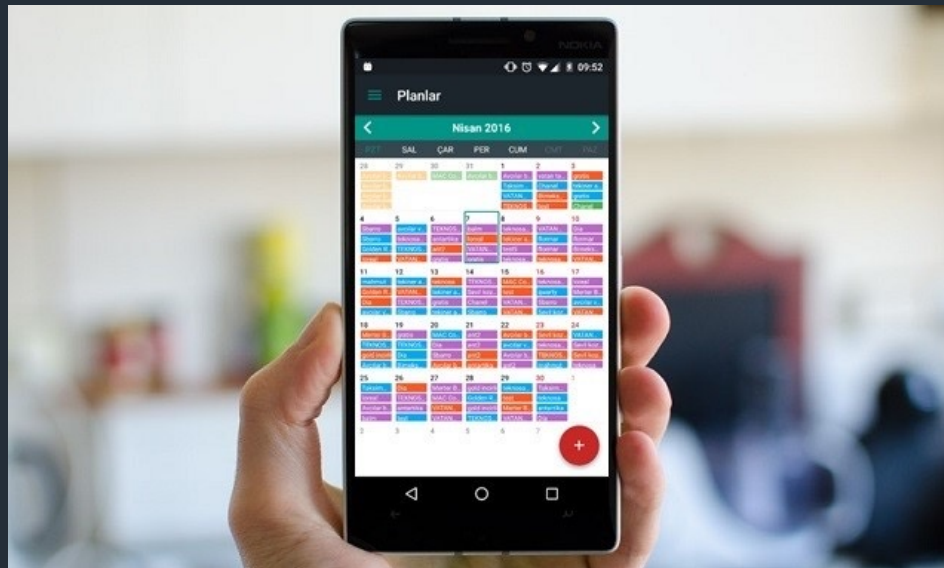
3 Manage Purchase Orders

- With **FieldPie** the sales person has the description, price and documentation on all products and services available to the prospective client.
- The sales person can provide quotes and place orders directly from the product catalogue in the mobile device, while still with the client
- The sales person can use **FieldPie's** integrated system of discount and promotions.



4 Manage Your Visits

- Appointment scheduling enables field force to manage their own calendars.
- View your calendar and add or edit visits to ensure that time is being used efficiently.



5 Track Your Performance



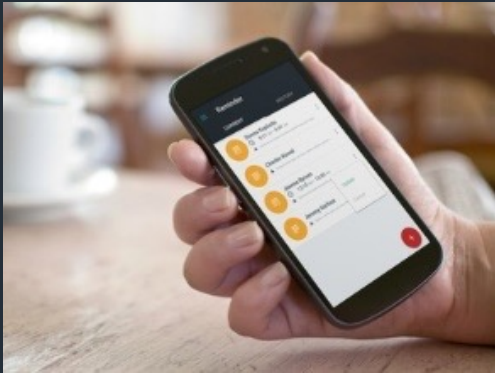
- Sales people can instantly monitor their performance about customer visits and field activities thru detailed dashboard.



- Sales people can also know the success of their sales activity in relation to other reps.

- Sales people also become aware of their field performance by means of reports designed to increase field sales.

6 Manage Tasks with Reminders



- **FieldPie** remembers every detail for you. Do not miss any details by using powerful reminder assistance.
- Your customers will be impressed by how much detail **you** detail you retain and your ability to act on them in a timely manner.



Why FieldPie?

Why FIELDPIE



IN A NUTSHELL:



User Friendly



Multi Language



No Hardware Costs



Real-time Analysis



Increase Sales



Boost Revenue



Improve Customer Service



Increase Productivity



Technology



FieldPie is based on cloud technology and supports high-availability, secure server, accessed from any device or location.

FieldPie is available as a web application for sales managers, and as a native application for mobile devices for field teams.

The mobile applications have a system of cache memory allowing sales and service people to work in areas of low or zero internet connection; that is it supports offline mode.



FieldPie

THANK YOU FOR YOUR TIME AND INTEREST

FieldPie Team

www.fieldpie.com

sales@fieldpie.com