



Outsourcing - Sistemi Informativi

Detailed data sheet: Agent/client portal

This portal allows the exchange of documents between the company and its agents, or, more directly, between the company and the clients or even the public administration.

It offers the management of incoming and outgoing documents in a single space, providing information on the status of transmission/reception (through EDI channel or certified email).

The system is multichannel and it manages the transmission of EDI, FTP, SFTP, http, regular or certified email.

Clients can upload in a controlled, simple and safe way their orders and respond with status updates, send notices and invoices.

This contributes to the dematerialisation of documents in a variety of business relations, such as company-agents, company-clients, company-suppliers (see also Supplier portal data sheet), and eventually lead to a reduction of operative internal costs. Consider the following benefits.

- Reduction of interface activity costs, due to increase of productivity and decrease of consumable materials;
- Increase of quality and accuracy of processes thanks to the removal of manual activity;
- Reduction of archival space and decrease of documents' research cost.

The feature of the interactive input by the client is especially designed for small businesses, since bigger ones usually operate EDI data or send customised files through providers or FTP.

Our product is aimed at optimising the collection of orders, thus providing a single interface for the company's informative system.

The solution we offer allows a **neat management of agents' and clients' orders**, simply asking the informative system to import/export the data in a single track, valid for all clients.

The solution is based on **WOW-Trade Link**, which allows the following:

- **Subscription of agent or client.** The agent relates to all his clients, while the client only interacts with the company. During the subscription phase, the client defines the preferred transmission channel;
- **Management of sales lists.** This data has to pass through the informative system. The list has a validity span and can be sorted out by client, product, or just by product. It can include discounts, which can be managed by agents;
- **Input, management and transmission of orders.** A client's orders can be input by an agent, directly by the client, or sent by the client via EDI, email, FTP or SFTP. Agent and client can check and create a new order starting from a previous one.



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There is an option for a simple, interactive input of the orders, which starts from a list of products bought by the client during a certain period: based on this list you can simply add the quantity and the system will determine the price according to the current sales list. The order can be modified or cancelled as long as it has not been transmitted to the company;

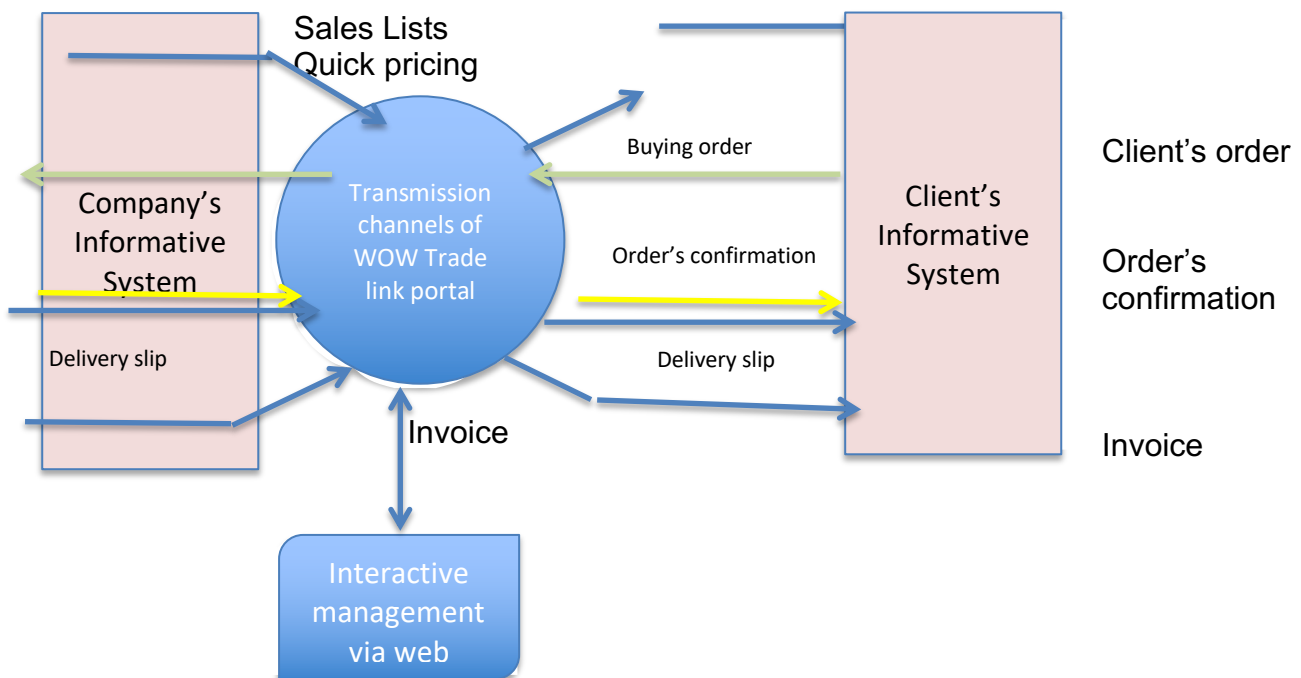
- **Sending orders.** The agent or the client selects the order he wants to send, presses enter and the company receives the order in the format chosen: EDI (Euritmo, 90.1, 96A...) CSV, CML, IDoc or customised. The submission of the order takes place through the channel selected by the client;
- **Confirmation of buying order to the client.** This step represents the confirmation of the order's reception by the company. The company can confirm directly on the portal, or it can change the delivery date, quantity or cancel parts of the order. The system detects all the changes and memorises them. The confirmation can also be generated by the company's informative system and be passed to the portal through a pre-determined track (CSV, TXT, XML, IDoc). The issue of a confirmation document is not mandatory. If you choose to issue one, the client will receive it via email and will be able to print it directly from the portal, or he will receive it via EDI, FPT, SFTP, or email, according to the channel chosen;
- **Delivery slip.** It is issued by the informative system and can be transmitted to the portal, both simply as PDF or as CSV, TXT, XML, IDoc, or customised file. In case you use the PDF, you will also need to attach an interchange file, specifying the order to which the delivery slip refers to. The portal can send the slip via email to the client, or send it via EDI, mail, FTP, SFTP; or when accessing the order, the client can view the delivery slip and print it. In case the CSV file of the slip has been passed through the portal, the client can simply download it;
- **Confirmation of arrival.** The client can submit the confirmation of arrival of the goods, or report otherwise. Confirmation or any differences can be passed through the company's informative system via CSV, TXT, XML or IDoc files;
- **Invoice.** The company issues the invoice through its informative system and then pass it to the portal both as PDF or via CSV, TXT, XML or IDoc. If the company uses the PDF format, a file with delivery slip or order reference number will have to be attached. The portal sends the invoice to the client via email, or via EDI, FTP, SFTP, or the client can access the portal directly and print it. If the company uses the CSV format, the client can access the portal and download it;
- **Request of a credit note.** The client can submit the request of a credit note, which will be passed on to the company's informative system. As soon as the note is issued, the portal will receive it, exactly like it does with invoices;
- **Stats of orders by product, client and month.** Usually accessible only to agents, the stats include quantity and net worth. These too can be accessed directly through the portal.

The system keeps track of all the documents in the exchange process with the client, so whenever you access to view an order, you will be able to see from which previous order has been generated, the delivery slips received and the corresponding invoices.

The same steps can be covered starting from the delivery slip. In this case too, all documents associated to the slip can be viewed (offers queries, orders, invoices, notes).

How the system works

The system is web based and accessible only to authorised users (the access can be integrated with the company's portals), no need for additional software installation for users. Each of them is identified by a role and the portal will display the information and documents specific for that role. Since there are different type of clients (bigger ones, equipped with informative systems, or smaller ones, less equipped), the portal offers them a variety of actions: for the equipped clients an automatic download will be available, the file containing slips and invoices will be passed on directly to the informative system, as represented in this chart:



Essentially, the portal allows the download and the upload of the exchanged documents according to a plan, that can either be standard or customised meeting the parties' needs of transmission channel. It also allows the manual management of the documents by the client.

The exchange track between the company's informative system and with the portal's manager is always just one, since the portal works as a translator of the different formats (EDI or non-EDI).



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Additional notes on the use

The app installed on the server is developed in Java. The app can be used in two different ways: in house at the client's location, or in cloud, in case the database and the app are being used on different machines. Thanks to this, functionality can be guaranteed 24/7 with a 99,9% uptime.

If the company installs in cloud, the client can interact with the cloud through SFTP, FTP or a client communication software provided by us on your local server.

The app is **multi-database**. It is crucial that the database you use supports the views (or logical views) and allows Joins among different archives.

If the company does not express a preference on the type of database, the system is installed with MySQL. This is a **multichannel** app, capable of managing different transmission channels, such as EDI (with the use of VANs), FTP, SFTP, FTPS, SMTP (mail), certified email, http.

The app is also **multi-platform**. If installed in house, thanks to the Java development, it can be executed on Windows, Linux, or any other OS supporting Java Virtual Machine (JVM).

You just need a http server and an app server, such as Tomcat, WebSphere or Web Logic for advanced environments.

The whole app has been developed based on the concepts of **multicompany** and **multilanguage**, where the language can be selected by the user, new languages can be added just by providing the translation of messages and descriptions to the system, without any further programming.