BLUEMOBILE INTRODUCTION

CONTENTS

DICARLO BLUEMOBILE

INTRODUCTION

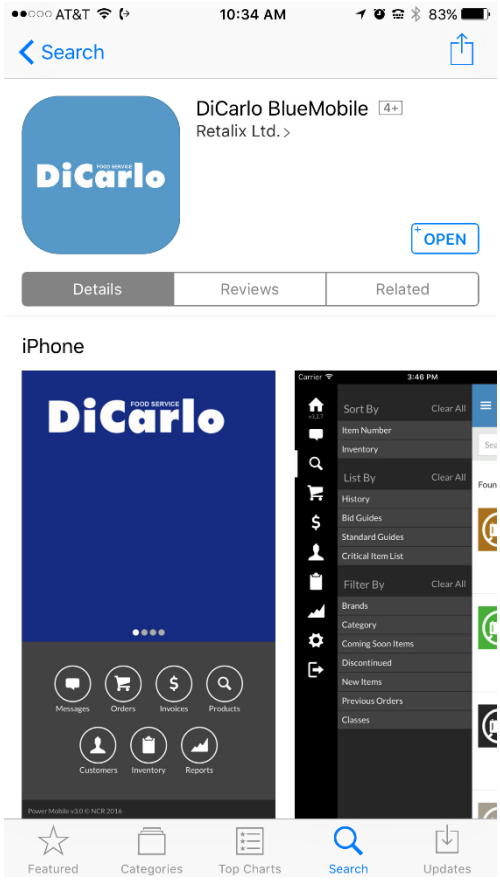
DiCarlo BlueMobile is a mobile application designed to provide order and information sharing opportunities for the Distribution Sales Representative (DSR) and for Customers (self-ordering options). BlueMobile delivers a superior customer experience through new mobile touch points. The solution leverages current mobile technology trends with traditional business processes mobilizing the DSR, driving sales, and fostering customer loyalty through improved visibility and support.

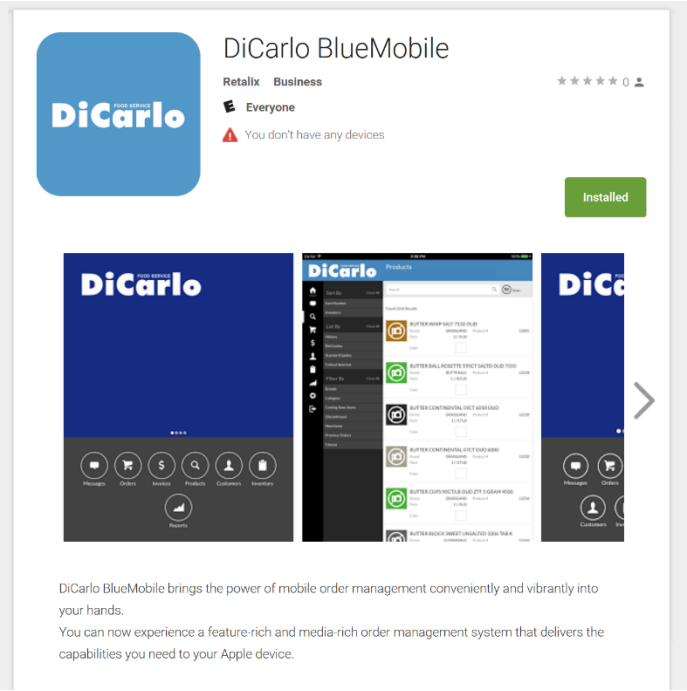
You may download the application onto iPhones, iPads, Android smartphones and tablets, and Windows 8 phones and tablets. A single application designed to recognize device type and modify the screen display to optimize user

The images in this document represent a DSR view of the application, with full access to all information, including access to multiple customers. The customer experience may be identical to that displayed in this document, but can be limited to a subset of functionality and a subset of data elements, based on role definition and configuration

LOGIN INTO DICARLO BLUEMOBILE

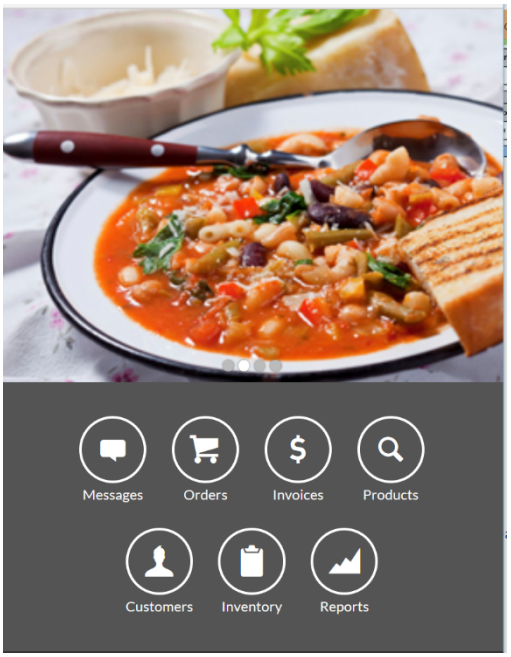
You can login to BlueMobile by either downloading the Application from the IOS Store or the Android Google Play store as shown below





Or you can access the Application via the web using the following link:
https://powermobile.dicarlofood.com/power-mobile-client/

When you login to the Application, you will see the Landing Page as shown in the image below (The image might be different since there are 4 rotating images within the landing page). Please be advised that these images can be changed at any point time and also can contain hyperlinks that can be pointing to Marketing Programs.



You can tap one of the blocks to begin using Power BlueMobile.

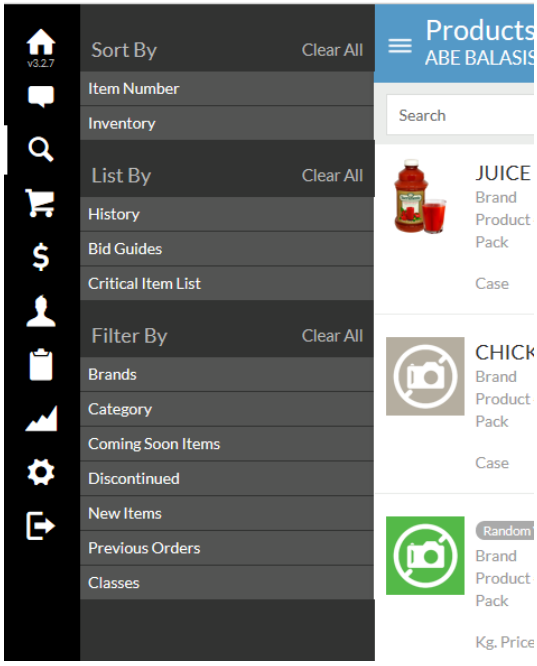
- Products – Puts media-rich product data and third-party product information at your fingertips in real-time. Add promotional material, photographs, and links to additional customer-specific content.
Also, utilize a mobile device's camera to support barcode scanning and product lookup.
- Customers – Easily search and find customer contact information. BlueMobile enables oneclick options to place a call or send an email to customers, simplifying and enhancing communications.
- Orders - Contains multiple ordering methods, including guides, lists, and previous orders.
- Invoices - Easily search and review, including drill-down capability to products; invoice payment status and associated alerts also display.
- Messages - Occurs when an unexpected event happens with an order.
- Inventory – Customer Inventory can be added using this function
- Reports – Easily produce Reports such as Invoice Header, Invoice Details, etc.

ADDING PRODUCTS TO YOUR ORDER

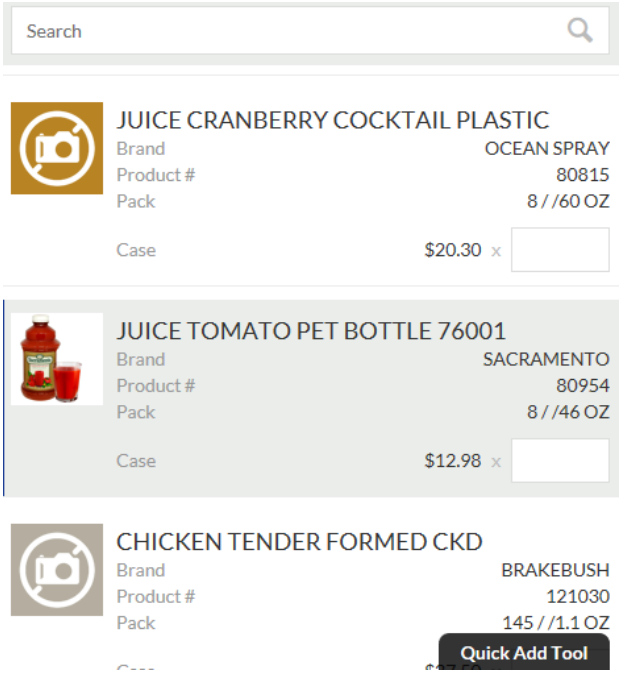
PRODUCT SCREEN

Use the Products screen to search and view products and product groups. Search through product groupings as part of the ordering process, and navigate to other screens, such as product Details. The Products screen allows you to easily navigate through products associated with a customer (end-user) using order guides, custom lists, and other filters like product classification. You can also search for products using multiple search criteria, including barcodes.

This screen also contains a Quick Add tool for faster product and quantity data entry, which allows you to efficiently navigate in list view to generate the order. Each Power Mobile screen typically includes a sidebar panel containing Sort, List, and Filter options. Menu navigation icons exist on the tablet view in the far left menu bar section. On a smartphone, to make better use of limited screen size, we hid this portion of the screen to allow for easier viewing.



1. Tap Products on the Main Menu sidebar. The Products screen opens with a list of products.

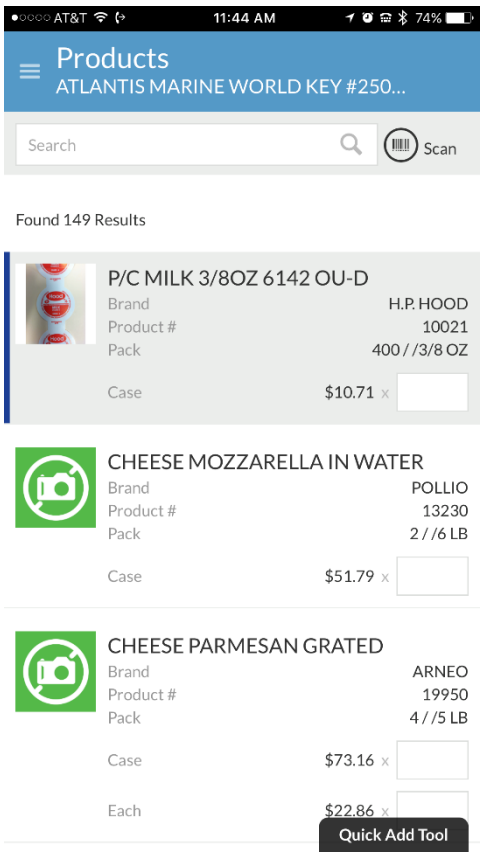


2. Sort products by the following categories depending on the customers for which you have access:
    a. Item Number
    b. Item Description
    c. Price
    d. Last Updated
    e. Inventory
    f. Cost (DSR only)
3. List products by the following categories depending on the customers for which you have access:
    a. Standard Guides
    b. Custom Guides
    c. History
    d. Category
    e. Critical Items Lists
    f. New Items
    g. Best of the Best
    h. Discontinued
    i. Reserved
    j. Recommended
4. Filter products by the following categories depending on the customers for which you have access:

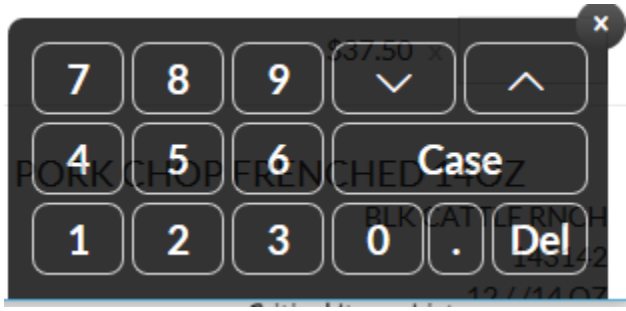
a. Brands
b. Classes
c. On Sale
d. Previous Orders
e. Price Book Families
f. Price Book Headings
g. PAR list

5. Select a product
   a. Using the Search functionality. You can search by Product #, product Name, UPC code, description, or Brand.
      i. Enter part or all of the product number, name, UPC code, description, or Brand.
      ii. You may also scan product barcodes to search for items by leveraging your device's camera or link your device with a Bluetooth scanner.

Click the Barcode Scanner button to activate your device's camera:



6. Tap the Quick Add Tool in the lower right-hand corner to begin entering items and quantities for rapid order creation. This allows you to by-pass the order Details screen.
   a. Tap the Cases button to switch back and forth between the Eaches and Cases fields.
   b. Tap the Down button to move downward in the list to the next product on the screen.
   c. Tap the Up button to move upward in the list to the previous product on the screen.
   d. Enter the amount of product you wish to order. You cannot enter a quantity higher than the ordered quantity.
   e. Press the Del key to delete a quantity.

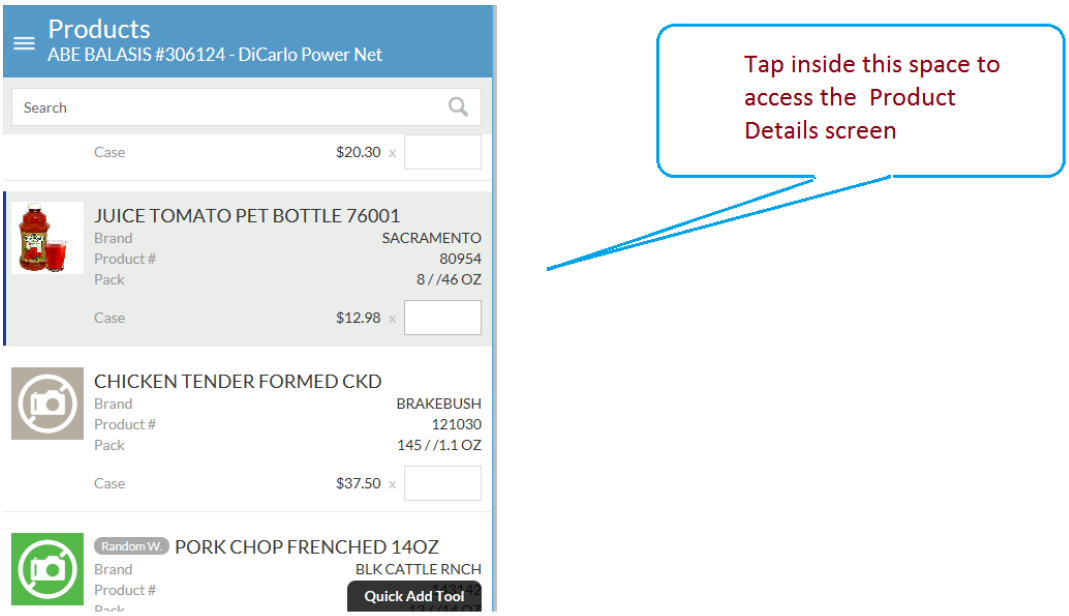


PRODUCT SCREEN FIELDS

Products display in tile view. The following fields display for each product:

- Thumbnail product image based on the default image loaded in Power Admin.
  - Unique display for weighted and out-of-stock items, and items you place in your cart.

    - You can display On-sale items with a red price amount and an On-sale banner.
- Description
- Product No
- Brand
- Pack
    - Displays multiple item packages from which you may order
- Price
    - Regular price
    - Display Promotional Points program (per Items\Package)
        - Display points value per product and total order, including customer's current balance.
        - Based upon points defined in the host system (not managed in BlueMobile).
    - Overrides (only DSR)
        - Governed by user-role setting.
        - Allows DSR to override selling price within established limits (based upon deviation from selected cost).
        - Allows Administrator to define price override rules in Power Admin.
        - Item price edits during ordering applies as temporary price change for that order only.
- Cases
- Eaches



DETAILS SCREEN

Use the product Details screen to view additional information about a product available. The information displayed is based on the Product No. It also allows you to update order quantities using different methods, depending on the device you're using. You may select a product by searching or scanning for the product on the Products screen. Use the Details screen to research product information before you order. The screen presents far more data than is presented in other screens. It is designed to encourage you to browse associated products displaying on the bottom portion of the screen.

The Details screen includes the following attributes (specific attributes defined using configurations based on available data and preferences):

JUICE TOMATO PET BOTTLE 76001

- Customer Name
- Customer No
- Order No
- Product Name and Images
- Product Qty - Case Price - Case Cost (DSR Only) - Eaches Price - Inventory Quantity Available (DSR only) - Product Cost (DSR only) - Orders - Product Detail - Product No - On Hand Inventory - Pack – Size - Weight - Cube – Brand
- Links: Contains Spec Sheets on the product
- Order History

Update Order

Case $12.98 ×

Product Details

Product #	80954	Onhand Inventory	122
Pack	8	Weight	28.00 Lb
Cube	0.880509 Cu.Ft	Brand	SACRAMENTO
Size	/46 OZ	Class	GROCERY CANNED
PB Header	JUICE DRINKS	Vendor Item	SACVA4PC08
Critical	No		

Order History

Links

Substitute Items

RED GOLD

Sacramento 8/46oz. Tomato Juice PET

Tomato Juice PET

Product Last Saved Date:21 October 2016

Nutrition Facts

Serving Size: 240 ML

Number of Servings per 6

Product Specifications:

Man Prod Code	Dist Prod Code	GTIN	Pack	Pack Description
SACVA4PCDC08	80954	20072940760010	8 X 46 OZA	

Order History

Sales

Substitute Items

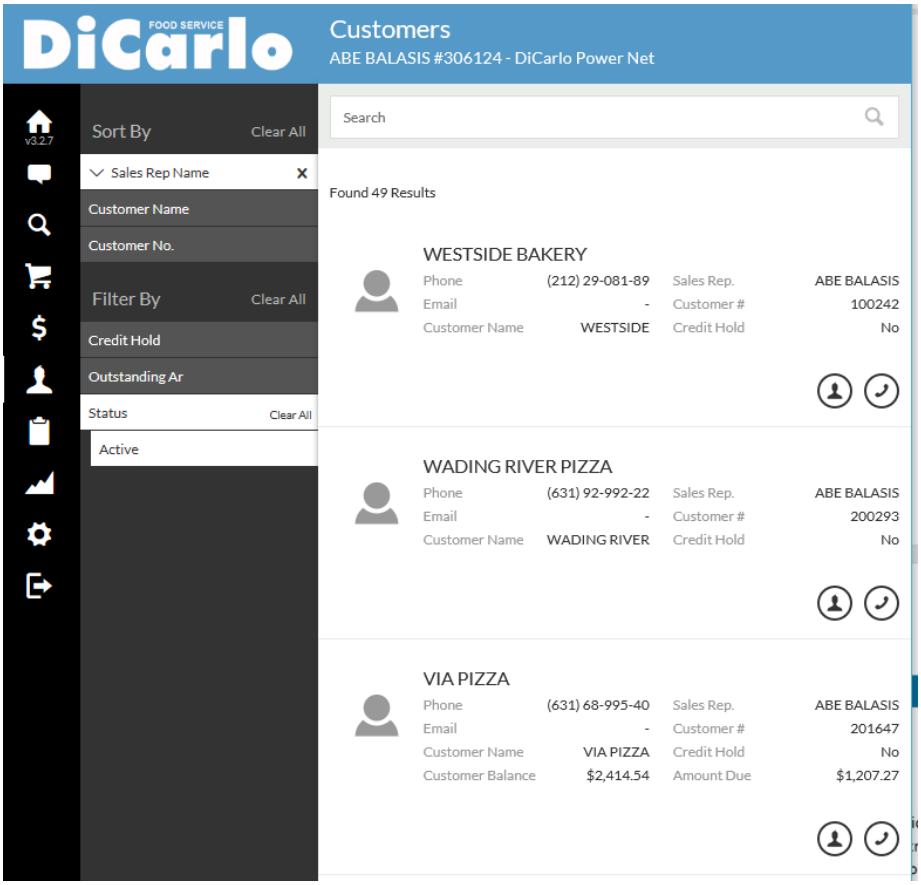
JUICE TOMATO CANS 76002 OU

Product #	80950	Onhand	196
Pack	12 / /46 OZ	Weight	41.30 Lb
Cube	0.897599 Cu.Ft	Brand	SACRAMENTO
Class	GROCERY	PB Header	JUICE DRINKS

CUSTOMER INFORMATION

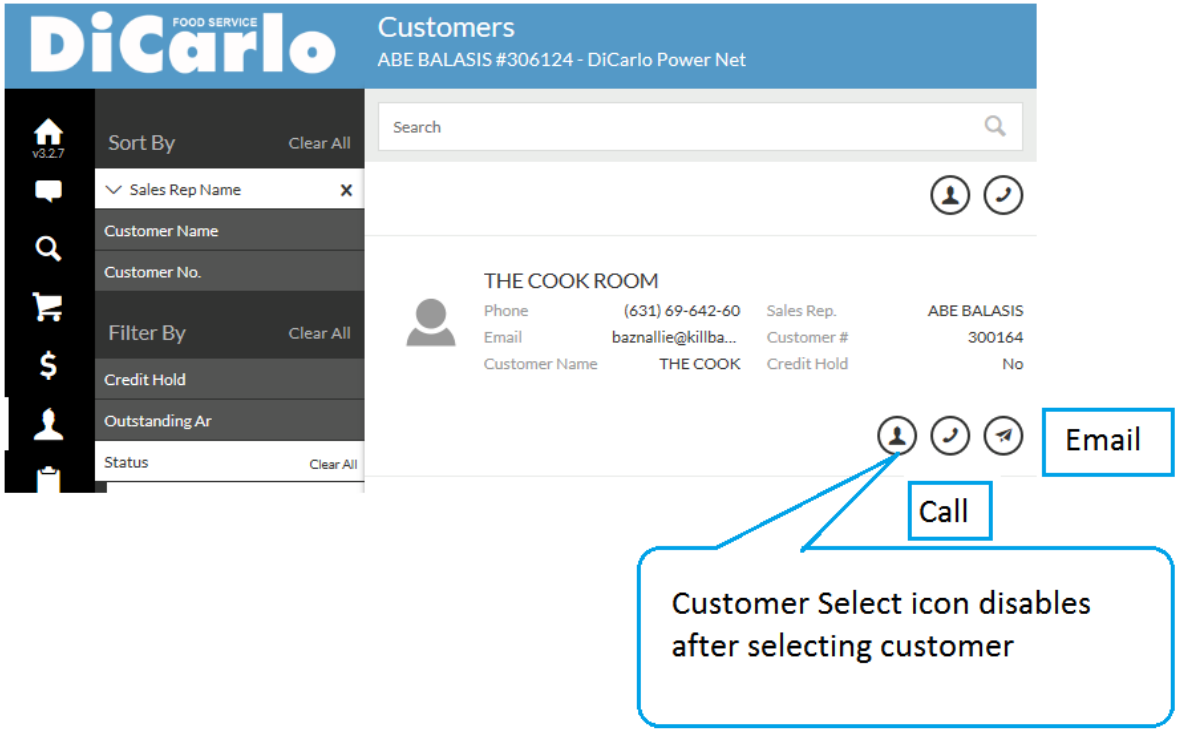
CUSTOMERS SCREEN

Use the Customers screen to view the customer list for which you have access. You may have the ability to view multiple customers (multi-customer access) and scroll through a customer list to select an individual customer. If you are authorized for a single customer, that customer populates in the header and in the main portion of the screen (you have multi-customer access when you have a single customer with multiple locations; your customer populates in the header and in the main portion of the screen).



1. Tap Customers on the Main Menu sidebar. The Customers screen opens with a list of customers. A multi-customer user defaults to the customer based on the user profile when you first access the application. If the application is cached on your device and you close the application, the last customer accessed is the customer loaded when you open the application next; otherwise, the application defaults to the customer based on the user profile. This means you do not have to choose a customer to begin selecting products and placing orders using BlueMobile

   a. Select a different customer by searching on customer name or number (full or partial). Selecting a customer fills the customer bar at the top of the screen. The customer carries throughout the application until you change customers again.
2. Sort customers by
   a. Customer Name (multi-customer access only)
   b. Customer No. (multi-customer access only)
   c. Sales Rep Name
3. Filter customers by
   a. Credit Hold
   b. Daily Visits
   c. New Customers (multi-customer access only)
   d. Outstanding AR
      i. Filter by Status: Enabled - Suspended - Deleted



4. Use the Call button to place a phone call to the customer, if necessary. This only works on devices supporting the functionality (e.g. a tablet does not support phone calls and phones may not support calls if you do not enable functionality or other software).

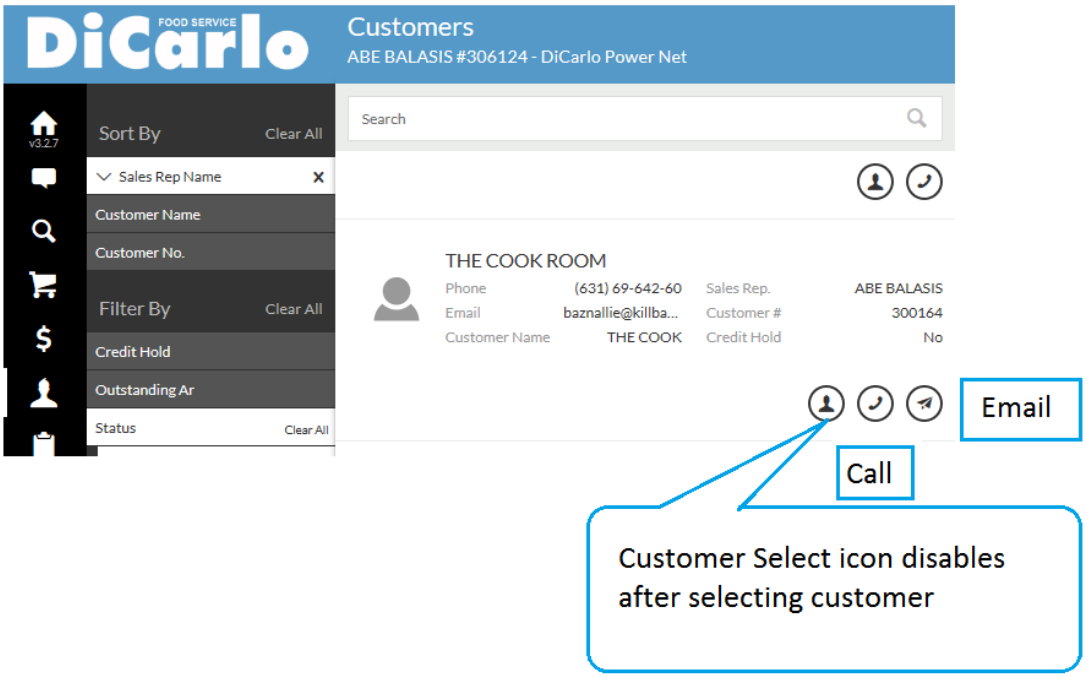
5. Use the Email button to send electronic mail to the customer, if necessary. This only works on devices supporting the functionality (i.e. your device may not support email if you do not enable functionality or other software).

6. Tap anywhere inside the customer area to pull up the Details screen.

CUSTOMER SCREEN FIELDS

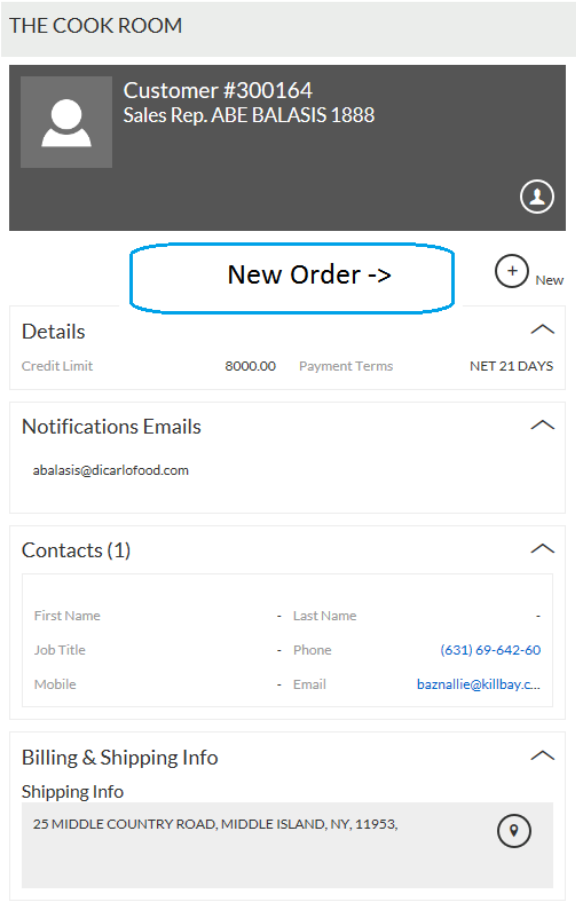
The following fields display for each customer:

- Customer Name
- Customer No
- Phone, if provided
- Sales Rep
- Email, if provided
- Credit Hold, if applicable



DETAILS SCREEN

The customer Details screen allows end-users to view additional customer information. You may have the ability to edit some data fields depending on your access. You can select a customer on the Customers screen and then navigate to this screen unless you are only authorized for a single customer, in which case the Customers screen only defaults to your customer.



The following information is included on the customer Details screen:

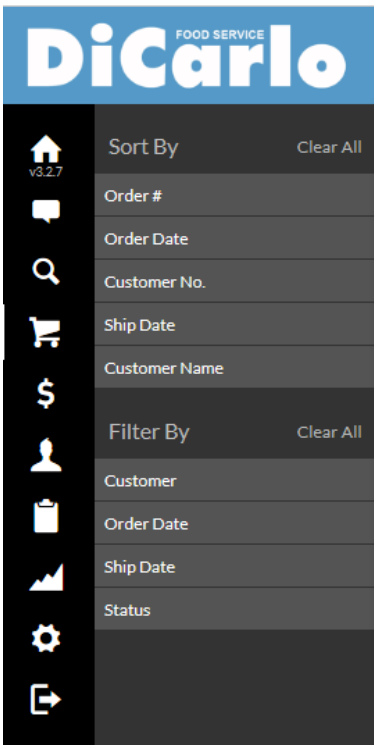
- Customer Name
- Customer Logo
- Customer No
- Orders, invoices, and messages.
- Sales Rep
- Sales Rep Number
- Details-screen defaults with this section expanded.
- Customer No
- Credit Limit
- Payment Terms
- AR status, including Past Due and Credit Hold indicators.
- Contact Information - Associate photo, if available.
- Notes
- Billing & Shipping Info
- Images

1. Tap the New Order button to begin a new order. The Products screen opens.
2. View the customer Details section, which defaults when the screen opens.

ORDERS

ORDERS SCREEN

The Orders screen allows you to search, view, sort, and filter orders, and allows a DSR and end-user with multi-customer access to view orders for multiple customers. You can access additional information, navigate through the list, or filter the list by various criteria. Use the Orders screen to determine order status. Orders may sometimes have fulfillment problems (e.g. the warehouse shorts an order or substitutes a product) or product problems (e.g. recall or other alerts) that may be important to you. You may easily identify these problems by the red font and warning icon so you can update your order and continue to process

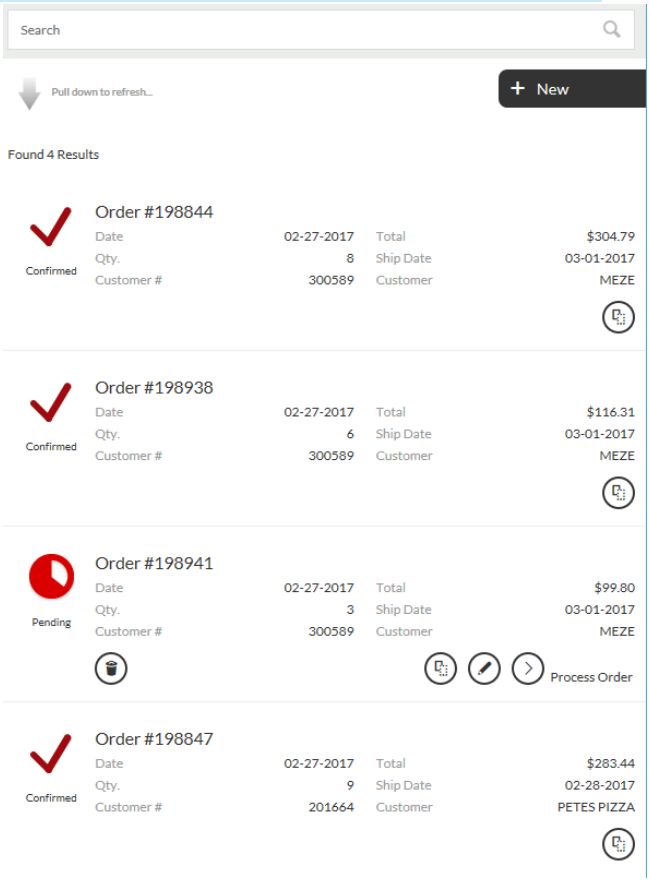


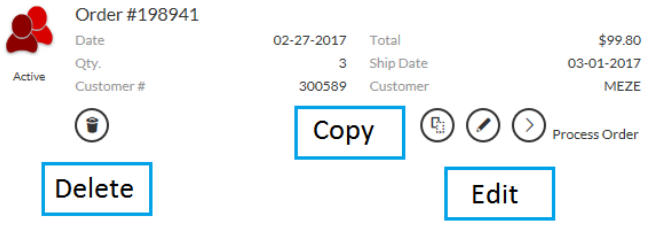
1. Tap Orders on the Main Menu sidebar. The Orders screen opens with a list of orders.
2. Sort orders by
    a. Order Date (default-most recent date at the top)
    b. Ship Date
    c. Order Number
    d. Customer No. (multi-customer access only)
    e. Customer Name (multi-customer access only)
3. Filter orders by
    a. Alert Type
    b. Customer (multi-customer access only)
    c. Order Date (default-most recent date at the top)
    d. Ship Date
    e. Status
    f. Type

ORDER SCREEN FIELDS

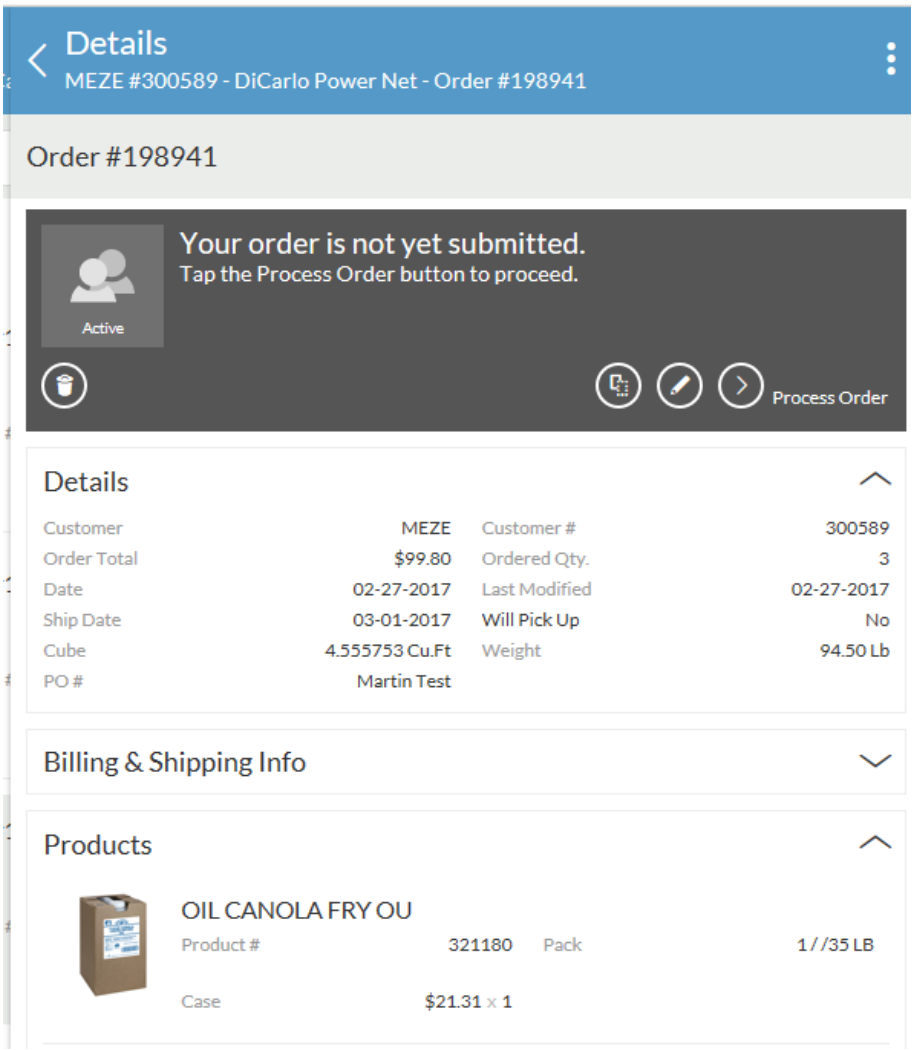
The following fields display on each order

- Status: Pending - Active - Confirmed
- Order No
- Customer
- Customer No
- Date
- Total
- Ship Date
- Qty

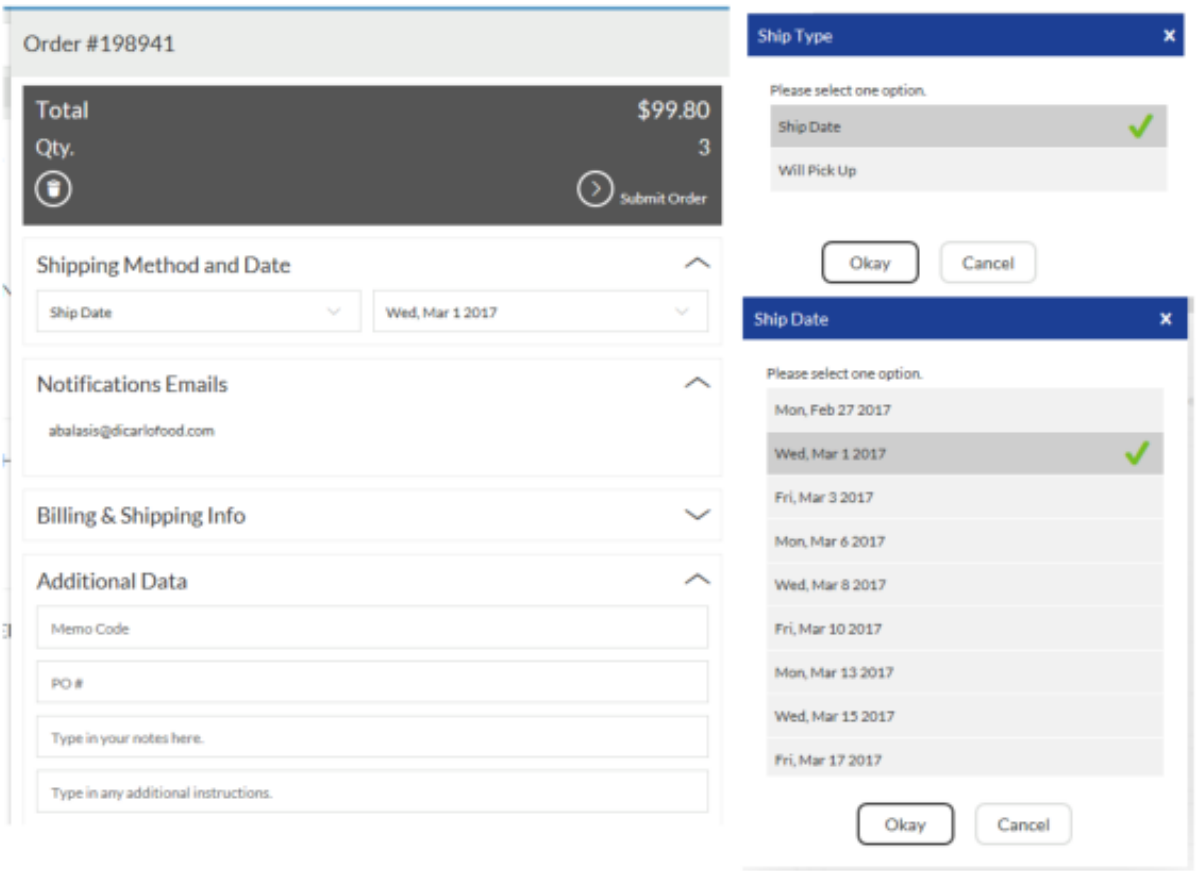




1. Review the order details in the Details section, which defaults when the screen opens.
2. Tap the Billing & Shipping Info arrow.
3. Tap the icon to locate the billing or shipping address on a map.
4. Swipe the address from right to left to select billing and shipping address, if more than one address exists (based on defined list of options in your ERP, or any back-end host system(s)). The green dot changes positions.
5. Tap the Product Details arrow to view the following details:
    a. Product No
    b. Brand
    c. Pack
    d. Cases
6. Follow the procedures in the product Details screen section to continue reviewing and adding items to your order.



SUBMIT AN ORDER



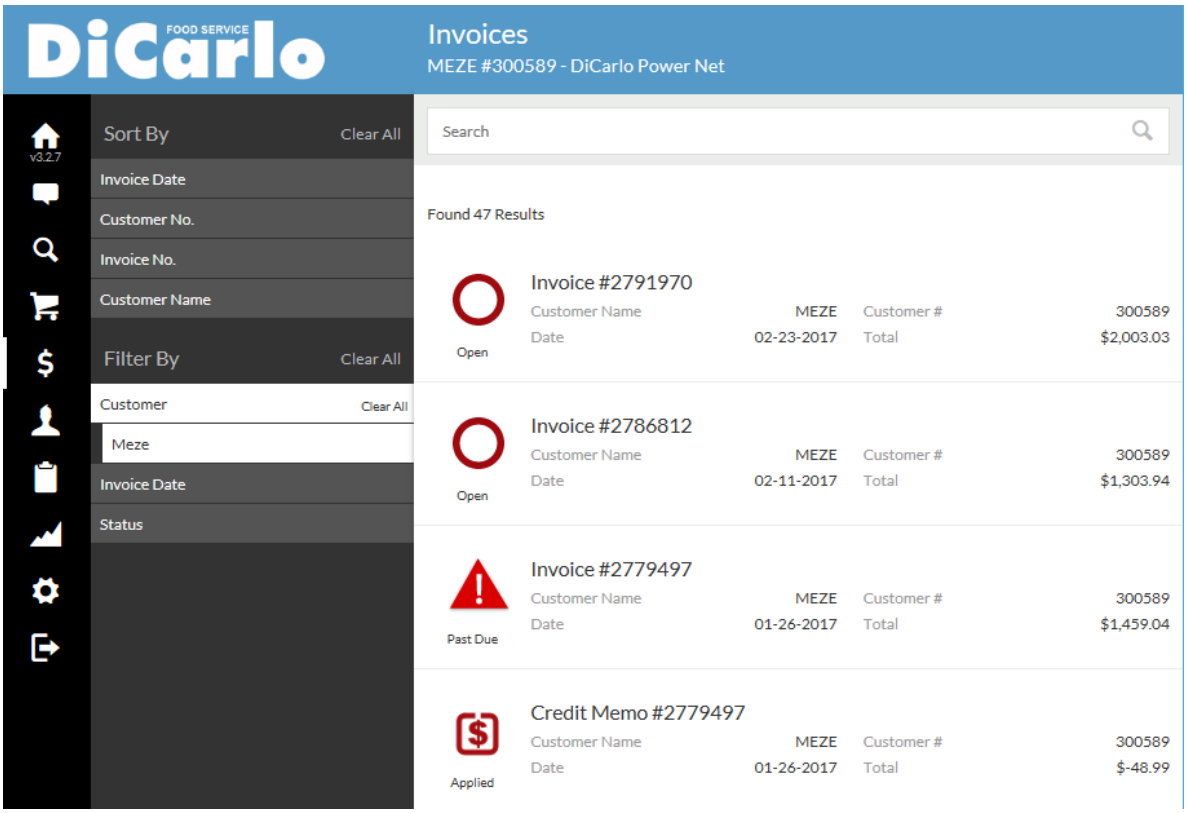
1. Make adjustments to the order as necessary. For more information, see the order Details screen.
2. Update the Ship Type, if necessary.
3. Update the Ship Date, if necessary.
4. Tap the Billing & Shipping Info arrow.
5. Tap the icon to locate the billing or shipping address on a map.

6. Swipe the address from right to left to select billing and shipping address, if more than one address exists (based on defined list of options in your ERP, or any back-end host system(s)). The green dot changes positions.
7. Tap the Additional Data arrow, if available.
8. Review, add, or edit memo code, PO#, additional comments, or special instructions.
9. 9. Submit the order.
10. Delete the order using the Trash Can

INVOICES

The Invoices screen allows you to search, view, sort, and filter customer invoices created in PE, including the payment status. From this screen, you can scroll through multiple invoices and easily navigate additional information about an invoice by selecting an individual invoice and navigating to the invoice Details screen

INVOICES SCREEN

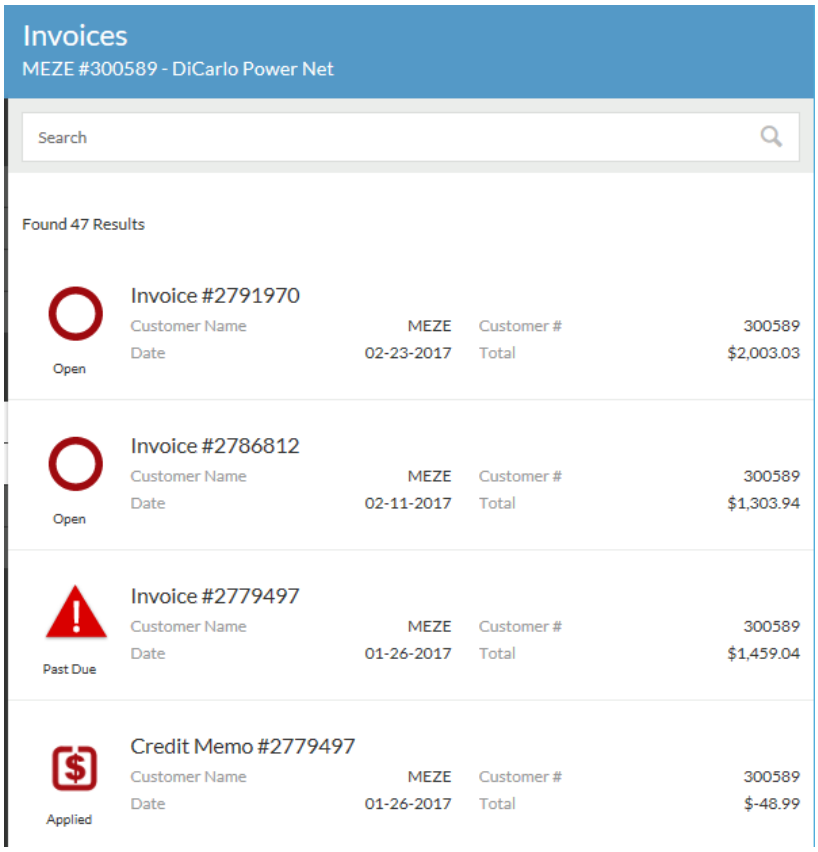


1. Tap Invoices on the Main Menu sidebar. The Invoices screen opens with a list of invoices.
2. Select an invoice by searching on invoice number (full or partial).
3. Sort invoices by

a. Invoices Date
b. Invoice No.
c. Customer No. (multi-customer access only)
d. Customer Name (multi-customer access only)

4. Filter orders by
   a. Customer (multi-customer access only)
   b. Invoice Date
   c. Status

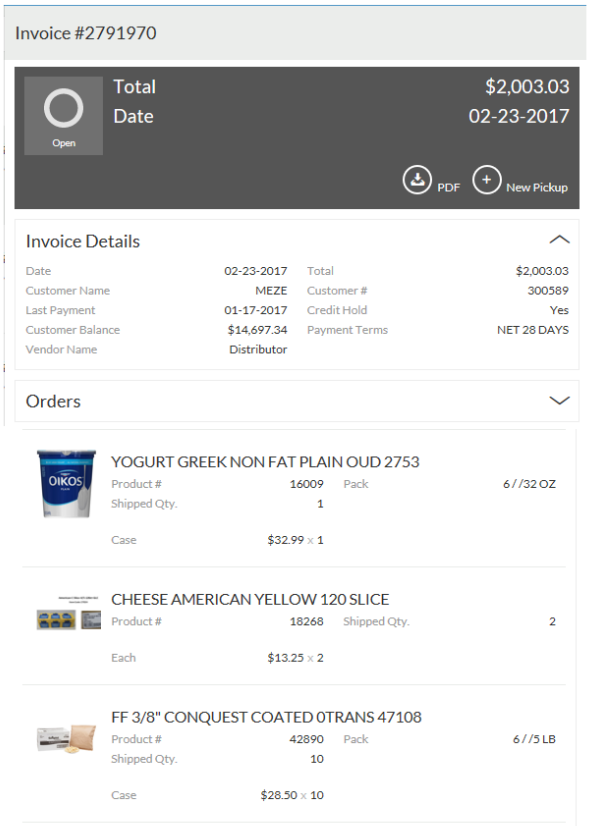
INVOICE SCREEN FIELDS



The following fields display on each invoice:

- Invoice Status
- Paid
- Balance Due
- Open
- Invoice No
- Customer Name
- Customer No
- Date
- Total

Tap anywhere inside the invoice area to pull up the Details screen.



Details Screen

The invoice Details screen provides customers a way to easily see invoice information, like orders and products

that make up the invoice. When the screen opens, the Details section defaults to view the Invoice Details section, which contains the following items:

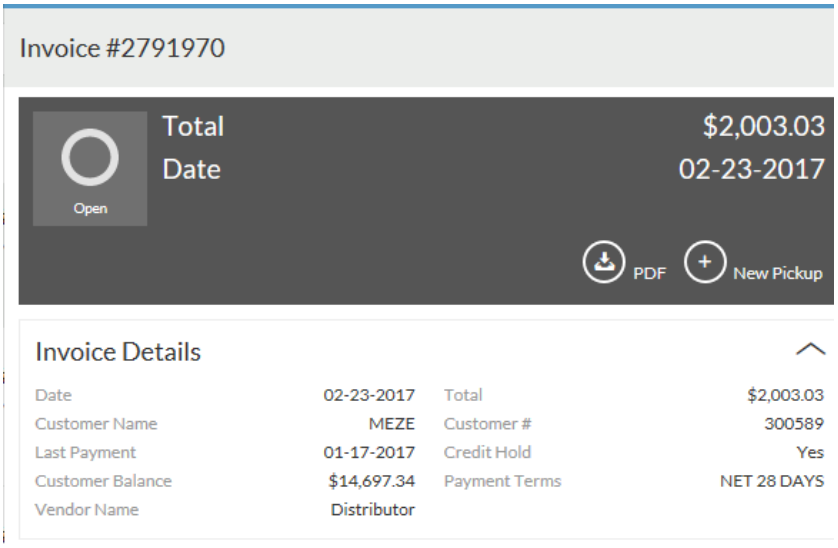
- Customer Name
- Customer No
- Total
- Amount Due
- Date
- Credit Hold
- Last Payment
- Payment Terms
- Credit Limit

1. View order details in the Orders area. For more information on order details, see the order Details Screen.

CREATE PICKUP REQUEST

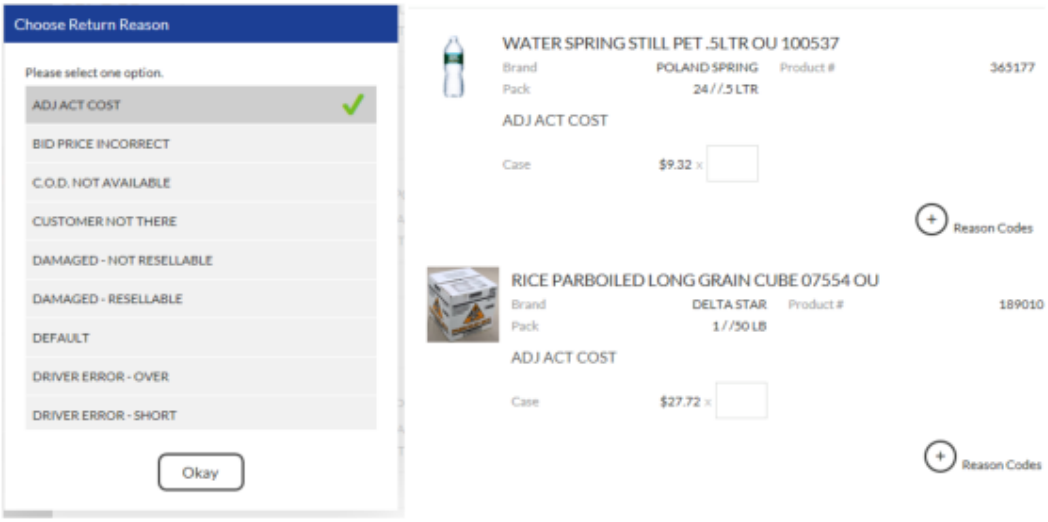
There are two ways to create a Pickup Request (aka a Return).

Option 1- Create a Pickup Request from an Existing Invoice



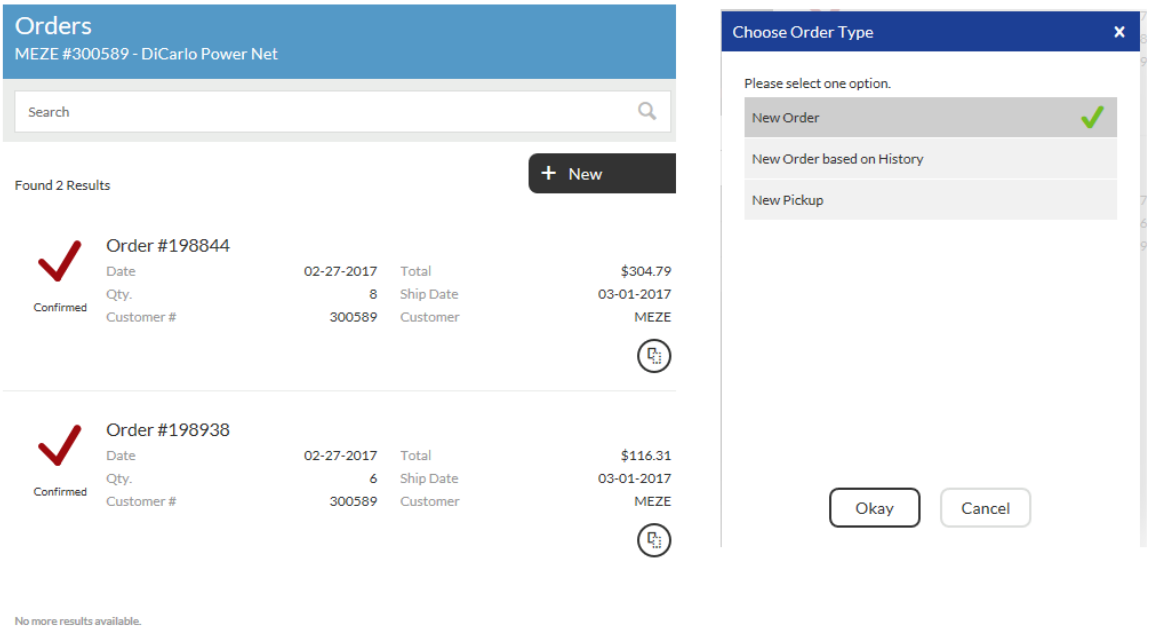
1. Create a Pickup request by clicking the New Pickup button from the Invoices detail screen. The Choose Return Reason window opens.
2. Select a reason to return the product. The Products screen opens.
3. Select items and quantities for pickup from the invoice.

a. If you begin the Pickup Request from the invoice Details screen (i.e. specific invoice), the pickup request is limited to the products and quantities on the original invoice.



4. Click the Preview button to see a summary of the items selected for pickup. The Pickup Details screen opens with your new Pickup request.
5. Click the Submit Pickup button. The pickup request processes and you return to the Orders screen. A credit memo creates corresponding to the relevant invoice(s) once the pickup request gets approved.

Option 2 – Create a Pickup Request Unrelated to an Invoice

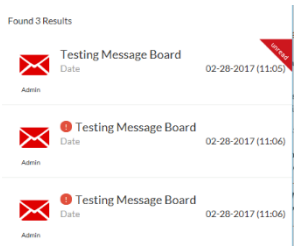


1. Create a Pickup request by clicking the New button from the Orders screen.
2. Select New Pickup. The Choose Return Reason window opens.

3. Select a reason to return the product(s). The Products screen opens.
4. Select items and quantities for pickup from the product database. Since you began the Pickup Request from the Orders screen (i.e. not a specific invoice), the return is not limited to a product(s) or quantity(s) on a particular invoice (i.e. pickup request is valid for any invoice).
5. Click the Preview button to see a summary of the items selected for pickup. The Pickup Details screen opens with your new Pickup request.
6. Click the Submit Pickup button. The pickup request processes and you return to the Orders screen. A credit memo creates corresponding to the relevant invoice(s) once the pickup request gets approved.

MESSAGES

There are occasions when the distribution center (DC) must notify Power Mobile users about an order or product, like product recalls, shipping shortages, or substitutions (based on information stored in PE). The Messages screen allows you to search, view, sort, and filter notifications, with a simple way to navigate to unread messages, or scroll through all your messages so you can see your important information at once.



These messages can be sent by the Power Net administrator to different audiences and the messages can contain hyperlinks, so it could be used to target customers, chains, SRs, etc.