Anveo Mobile App

for Microsoft Dynamics

Version 16 · November 2023

Discover

The Anveo Mobile App

Fully offline capable for your notebook, tablet, or smartphone
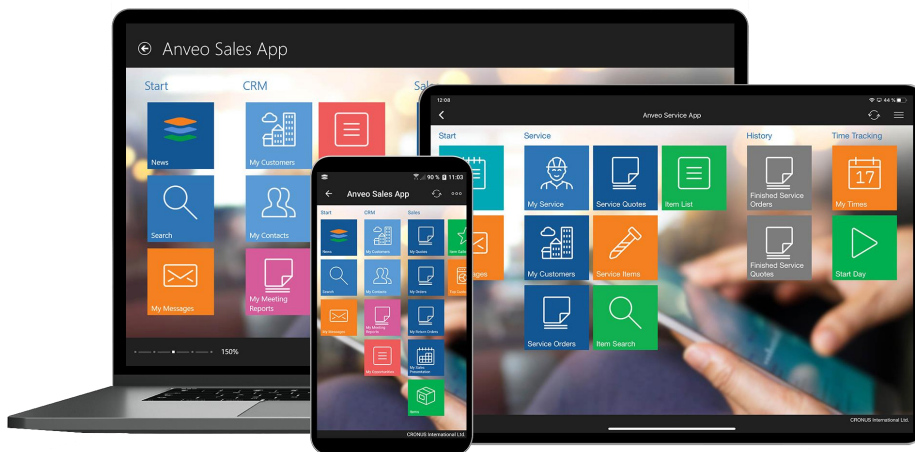
Available for Microsoft Dynamics 365 BC (Business Central) and Microsoft Dynamics NAV 2009 R2 - 2018 (from Navision 3.6)

One solution for all systems:

Get it from **Microsoft**

Download on the **App Store**

GET IT ON **Google Play**

Experience

Experience new mobile working environments with the Anveo Mobile App

Benefit from a new Microsoft Dynamics experience while on the go. With the Anveo Mobile App, Microsoft Dynamics becomes available on your laptop, tablet, and smartphone – offline capable, regardless of network coverage.

One Solution For All Industries

Experience with Anveo a flexible toolkit for creating your own app

SALES & CRM

Quotes, orders, contacts, prices and inventory levels

SERVICE

Get your to-do list, enter work times, travel expenses and required items.

CREATE YOUR INDIVIDUAL APP

With Anveo you are able to design your own app from scratch directly in Microsoft Dynamics.

DELIVERY

Assign delivery orders, document delivery, digital signature

ISV

App for your ISV solution

Anveo Mobile App For Sales Representatives

With the Anveo Mobile App, your mobile sales team can access customer data, quotes, orders, meeting reports, and more: **anytime and anywhere**

The app automatically synchronizes in the background. You will always have your data on hand.
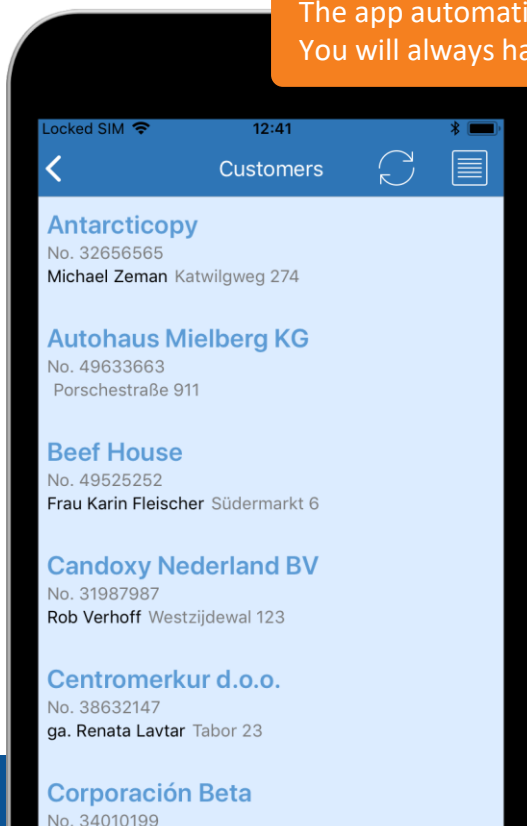
Increase Your Efficiency

✓ **Faster response times**: Once the order has been created, the warehouse is able to ship on the same day to the customer

✓ **Always up to date:** With access to live stock levels, you can reserve scarce items

✓ **Save time:** Enter important information such as meeting reports

"We wanted a fairly basic system […] for our Account Managers. […] Usability was therefore at the focus of decision-making."
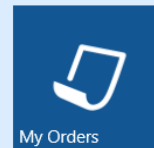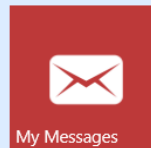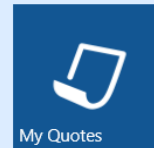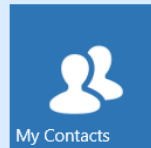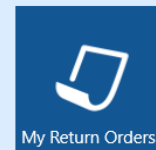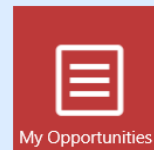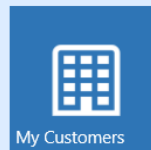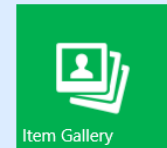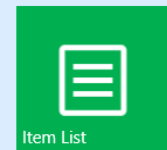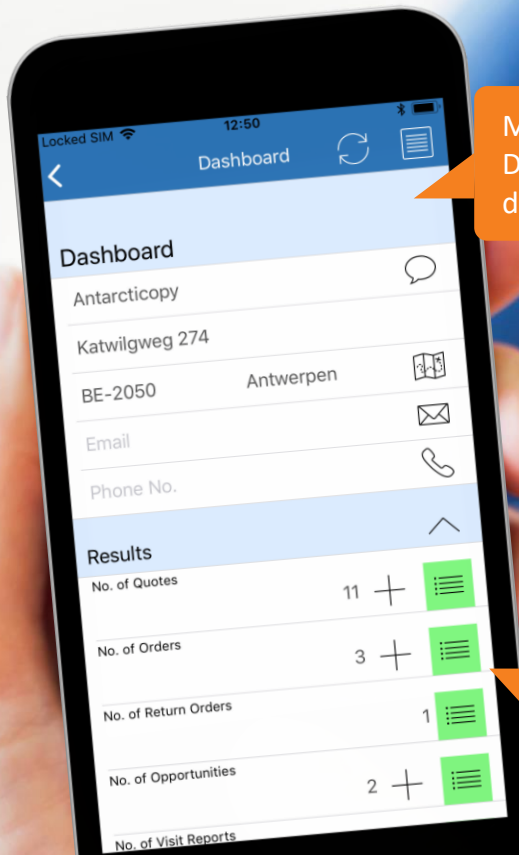
Maintain an overview with the Dashboard, even on smaller devices.

Identify important information and navigate easily

"We recommended Anveo [...] because we found the Anveo Mobile App to be the best on the market to meet the customer needs for offline capabilities, easy customization and fast synchronization."

Kim Hvilsted, NAV-Vision

Quick Start Made Easy

Benefit from the extensive preconfigured functions of the Anveo Sales App.

QUOTES & ORDERS

- ✓ Display & create
- ✓ Price calculation
- ✓ Digital signature
- ✓ Item information
- ✓ Live-item stock
- ✓ Invoice & credit note
- ✓ History, e.g. customer item

SALES PRESENTATION

- ✓ Items with pictures
- ✓ PDFs and other details always at hand
- ✓ History of presentations
- ✓ Automated creation of quotes & orders
- ✓ Automatic saving of viewed items

MEETING REPORT

- ✓ Digital notes
- ✓ Evaluation of meetings
- ✓ Connection with CRM sales opportunities
- ✓ All contact details
- ✓ Attach photos
- ✓ Print reports
- ✓ Meeting history

SIMPLE HANDLING

- ✓ Clear dashboards
- ✓ Central, structured search
- ✓ Active notifications from Microsoft Dynamics

„Finally I have all the necessary operating information always and everywhere at hand and after visiting the farmer I can enter all the information into the program so that my colleagues know what's going on! "

Martin Gerdes, Topigs Norsvin

Anveo Mobile App For Service Technicians

With the Anveo Service App, your service technicians always have all important information on hand, and can use their working time more efficiently.

Digital recording of work steps

Documentation of **performed work** with photo and drawings
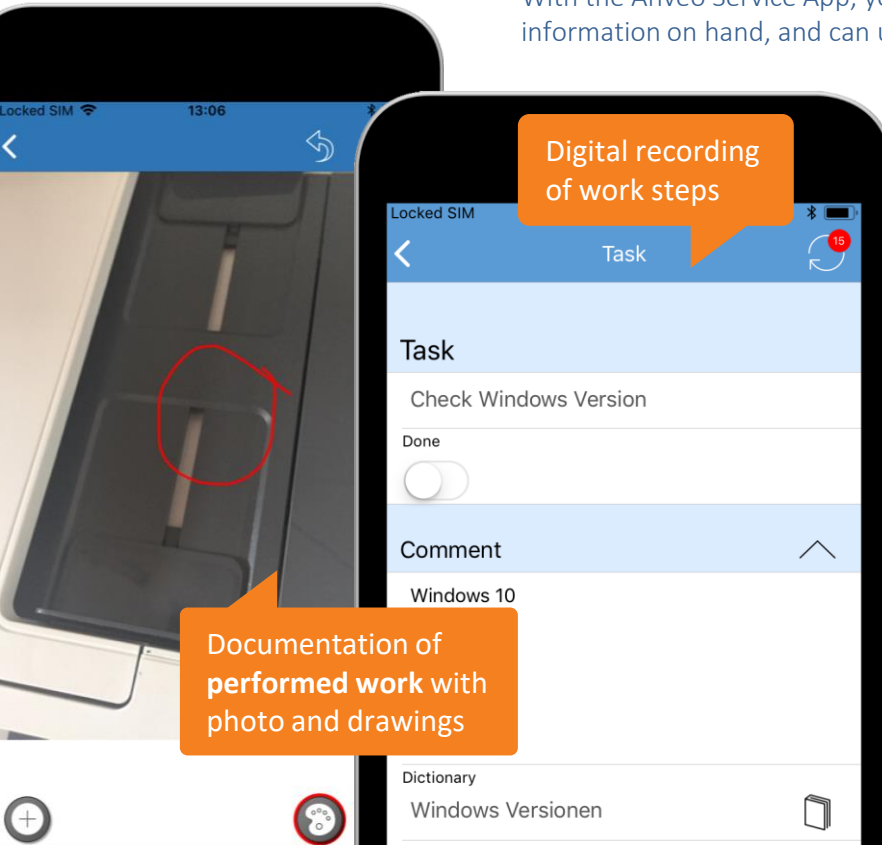
Optimize your work

✓ **Always up-to-date:** New service orders are immediately and actively sent to the service technician with a push notification

✓ **Documentation:** The work performed is supplemented by photos, drawings or handwritten remarks

✓ Significant **increase of efficiency:** Complete processing of the service order during on-site work

"Our facility managers are very pleased with the new, mobile processes. The use of the Anveo Mobile App greatly reduces their workload."

Astrid Grottke, Sahle Wohnen

Discover

Experience

Customize

License

Act

Automatic timekeeping

Capture the complete workflow, including service orders and service items as well as serial numbers, directly on site, independent of network coverage.
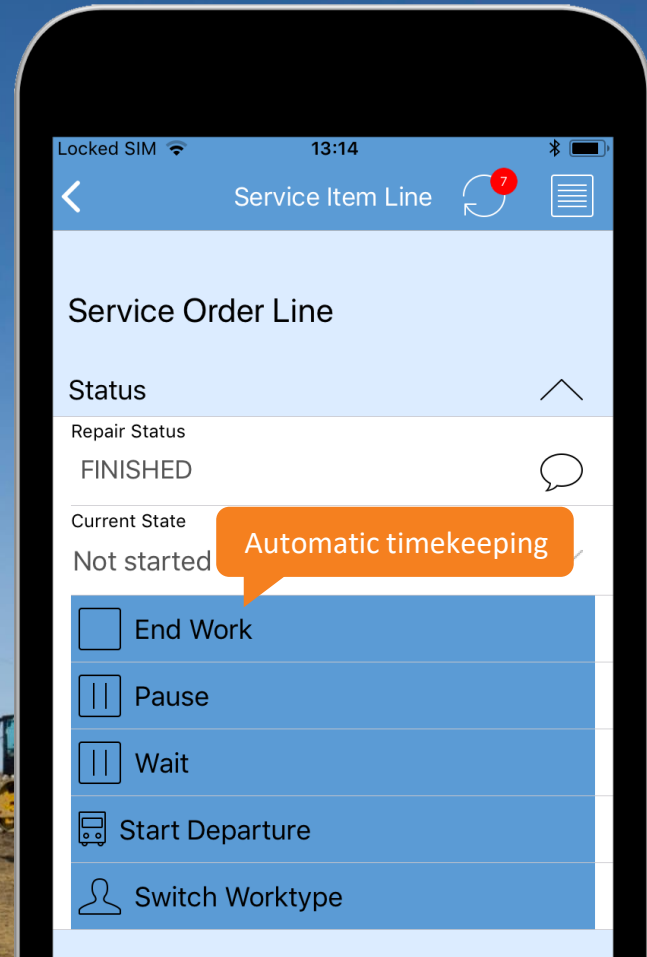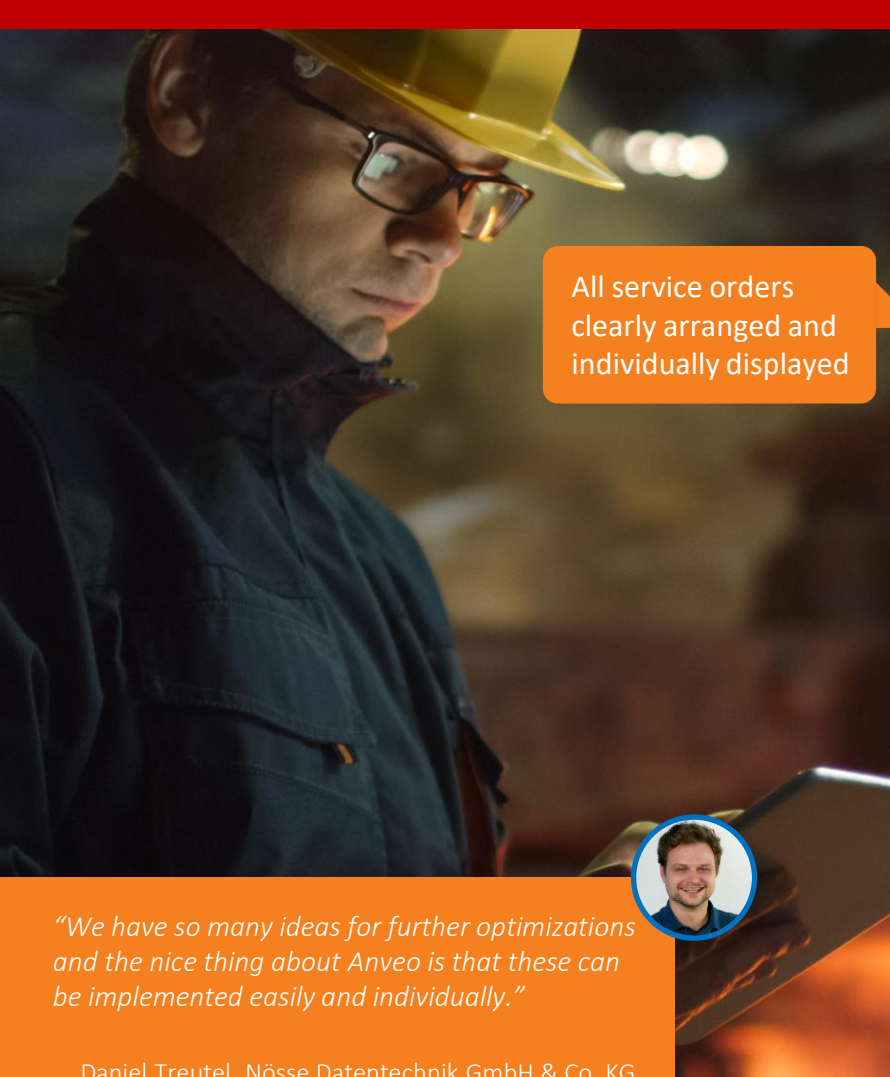
All service orders clearly arranged and individually displayed

"We have so many ideas for further optimizations and the nice thing about Anveo is that these can be implemented easily and individually."

Daniel Treutel, Nösse Datentechnik GmbH & Co. KG

Locked SIM 13:17

My Services

The Cannon Group PLC
6/26/2018 12:00 PM to 1:00 PM
Mr. Andy Teal
192 Market Square Birmingham

The Cannon Group PLC
1/7/2019 8:00 AM to 10:00 AM
Mr. Andy Teal
192 Market Square Birmingham
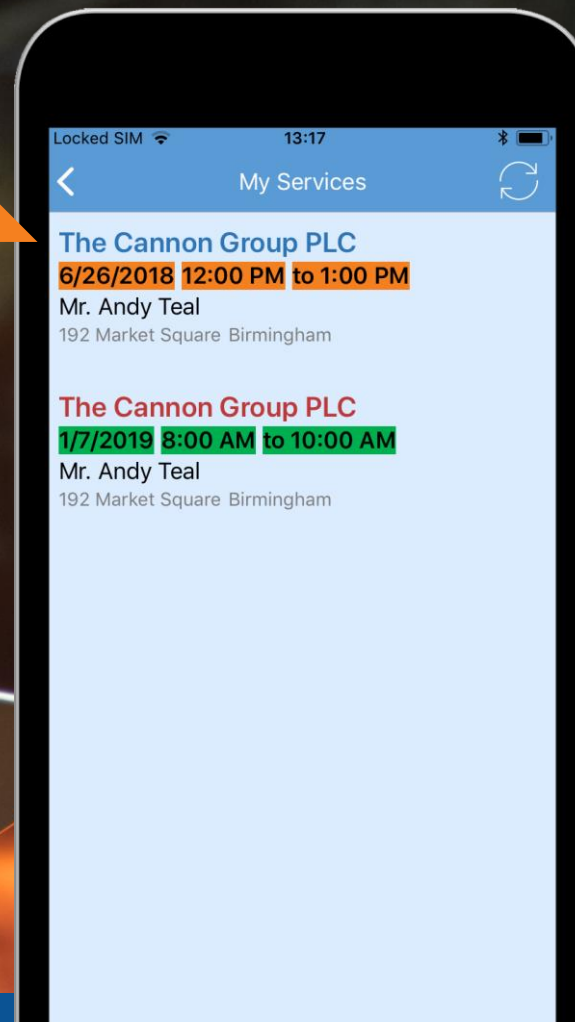
Discover

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License

Act

Quick And Easy Start

Use the preconfigured functions of the Anveo Service App for a quick deployment.

SERVICE ORDERS

- ✓ Display & edit
- ✓ Automatic timekeeping
- ✓ Service item information
- ✓ Task list
- ✓ Digital signature
- ✓ Capture and edit photos
- ✓ Save and recall GPS positions
- ✓ Start navigation

SERVICE ITEMS

- ✓ Item data with pictures and serial numbers
- ✓ Product PDFs always on hand
- ✓ List of components
- ✓ Item history
- ✓ Contract data as PDF
- ✓ Stock levels of replacement items in the vehicle or warehouse

SIMPLE HANDLING

- ✓ Active notifications from Microsoft Dynamics
- ✓ Central, structured item search
- ✓ Historical data

"Anveo has convinced us with its flexible customizing possibilities. If the time is available, you can set up everything yourself. The add-on is easy to understand and simple to use, directly out of Microsoft Dynamics."

Alexander Bruckert, ulrich medical®
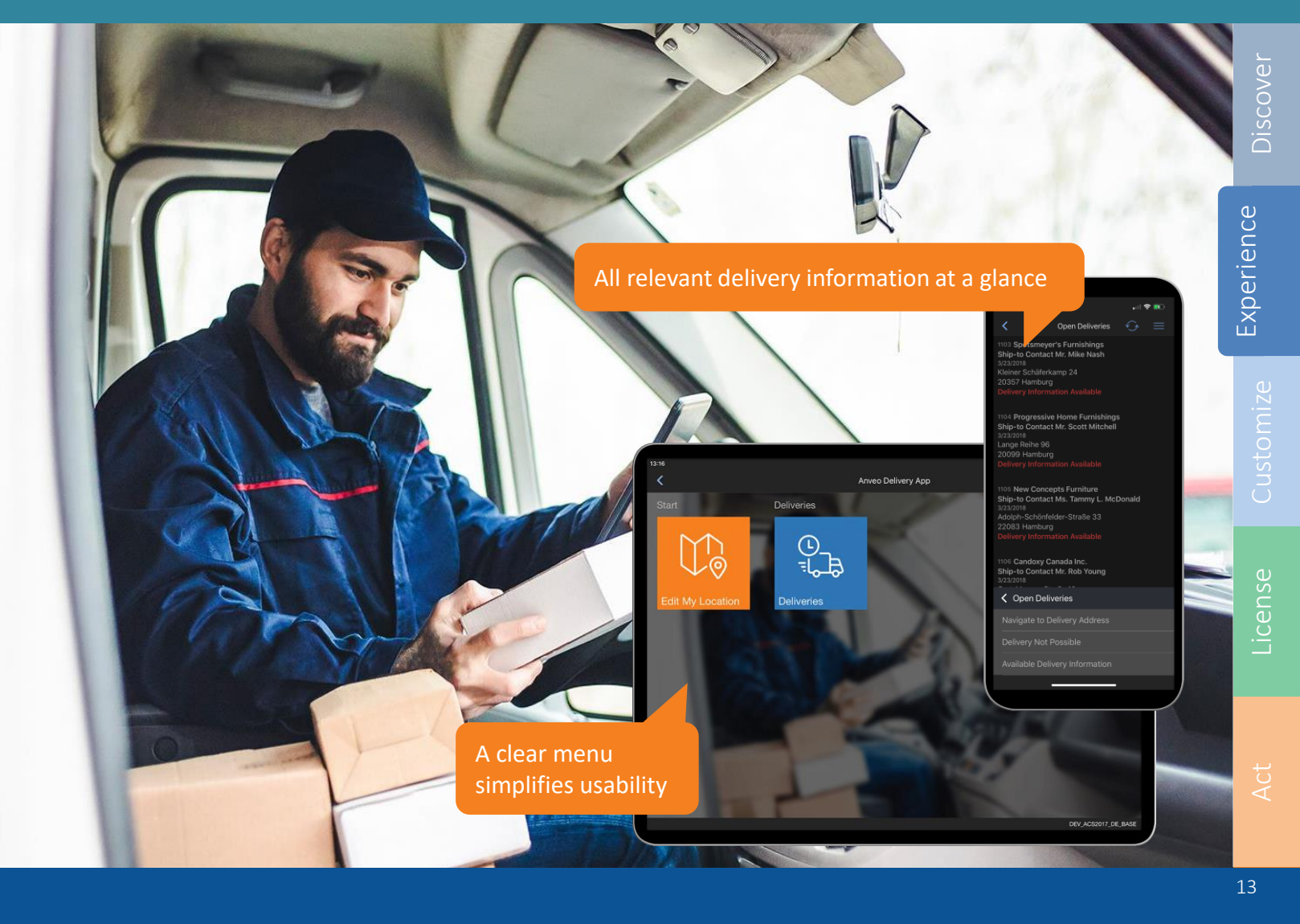
All relevant delivery information at a glance

A clear menu simplifies usability
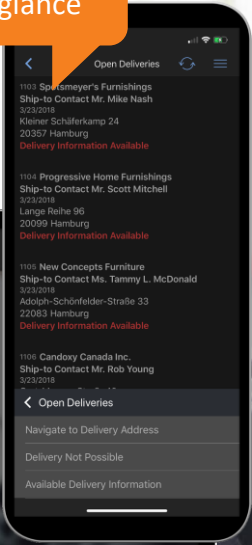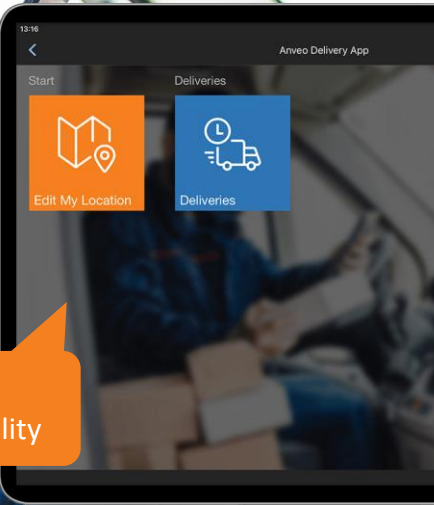
Anveo Delivery App

Digitally display your complete goods delivery process - individual customizations can be quickly implemented thanks to the preconfigured Anveo Delivery App.

DELIVERY REQUEST

- ✓ Create a delivery request in Dynamics
- ✓ Select delivery vehicle
- ✓ Select stored delivery address
- ✓ Enter custom delivery address
- ✓ Add specific delivery details
- ✓ Assign the delivery request to a driver

DELIVERY

- ✓ Clearly display of all deliveries
- ✓ Specific delivery instructions
- ✓ GPS navigation to the location
- ✓ Note quantity discrepancies
- ✓ Text and photo documentation
- ✓ Proof of delivery with digital signature
- ✓ Collect returns

SIMPLE HANDLING

- ✓ Easy access to all relevant data
- ✓ Can be used offline at all times
- ✓ Fast and secure data exchange between back office and driver

"Our Microsoft Dynamics NAV experts evaluated different solutions on the market. We finally chose Anveo because the Anveo Mobile App met all of our requirements and impressed us with its usability."

Carol Stephens, H. Weston & Sons Ltd

Your Individual App For Microsoft Dynamics

Create your own individual app according to your requirements - the Anveo Mobile App will adapt flexibly to your processes.

Your Benefits

✓ Significant **increase in efficiency** due to **faster response times**

✓ Simple and **intuitive customization** to your application areas and processes

✓ **Easy implementation** at your company with an experienced partner at your side.

Simply adapt the design of the app by yourself in just a few clicks – directly in Microsoft Dynamics 365 Business Central or Dynamics NAV 2009 R2 - 2018 (from Navision 3.6).

"We have been very well supported by the Anveo team throughout the entire project. The technical support team was a great help to us. We really enjoyed working on this project."

Astrid Grottke, Sahle Wohnen
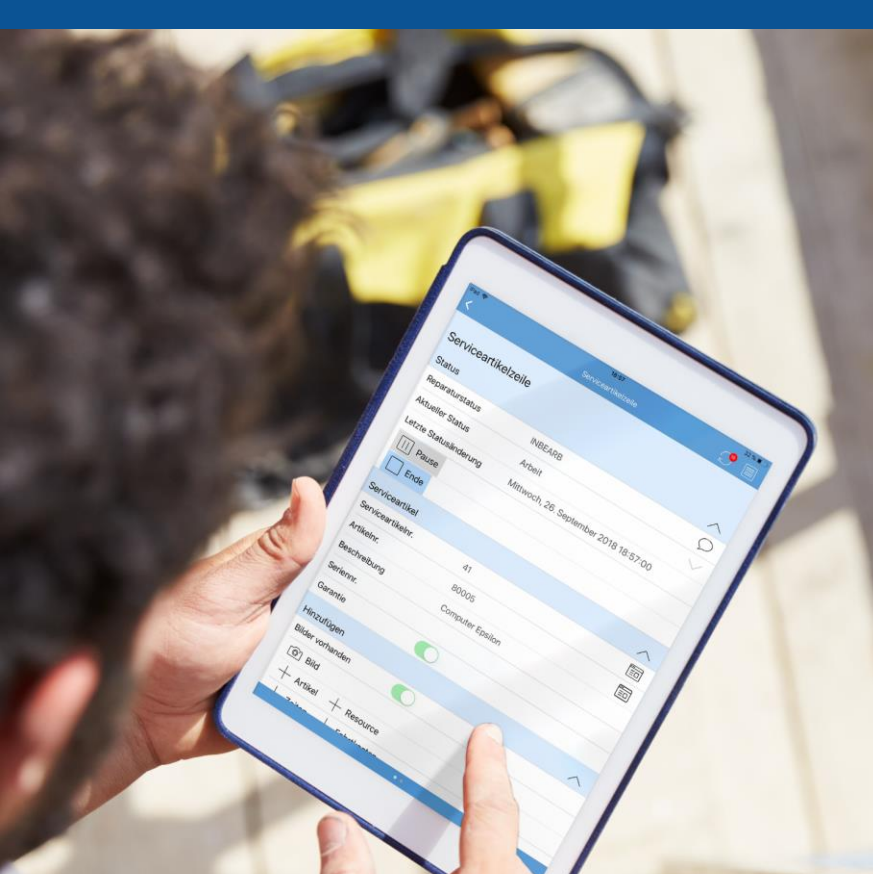
Possible fields of application

- ✓ Device maintenance
- ✓ Project planning / documentation
- ✓ Truck tours / delivery of goods
- ✓ Apartment handover
- ✓ Heating meter reading
- ✓ Polls
- ✓ Tracking by GPS
- ✓ Productions counts
- ✓ Project documentation
- ✓ Retail sales
- ✓ Digital item catalogue
- ✓ Time & travel expenses
- ✓ CRM contacts and history
- ✓ Mobile purchasing
- ✓ Conferences / Exhibition
- ✓ Warehouses
- ✓ Your individual field of application

"We are very satisfied with the Anveo Mobile App and have achieved significant business value by optimizing our procurement process. Further implementation of the solution in warehouse and sales division is already planned."
Daniel Lapp, DSHwood

Discover

Experience

Customize

License

Act

Always Available App Due To Full Offline Capability

The Anveo Mobile App gives access to your Microsoft Dynamics data from anywhere.

AIRPLANE TRAIN

RURAL AREAS

CONCRETE BUILDING

MACHINE, SERVER AND TECHNICAL ROOMS

SLOW INTERNET

SAVE ON ROAMING COSTS

Technical Structure Of Anveo Mobile App (On Premises)

The Anveo infrastructure provides the most sophisticated offline synchronization solution for Microsoft Dynamics with encrypted data transmission and storage on the mobile device.

Save Time & Money
Only changes are transferred.

Maximum Security
Dynamics Web Service is protected.

FIREWALL

ANVEO SERVER

Private Cloud or On-Premises

FIREWALL

DYNAMICS WEB SERVICE

Private Cloud or On-Premises

SQL SERVER

ANVEO DELTA SERVER

24/7 App Availability
Work without network coverage.

Fastest synchronization
Identification of data changes in seconds

Full On Premises & BC Online Support
The Anveo Mobile App is available for both **On Premises** and **BC Online** versions.
For BC Online, the infrastructure is provided as a SaaS solution and is ready to use.

Anveo Mobile App Components On Premises

Anveo Mobile App Extension or FOB-Download

*Provided by
conion media GmbH*

Free of charge

Installation ⬇

Microsoft Dynamics 365 BC or Dynamics NAV

On Premises or Private Cloud

*Operated by end customer
or other service provider*

⬅ Data exchange ➡

License Key

*Provided by
conion media GmbH
obtained via Anveo Partner*

According to price list

Installation and
Activation ⬇

Anveo Server

Data synchronization with
Microsoft Dynamics
On Premises or Private Cloud

*Operated by end customer
or other service provider.*

⬅ Data exchange ➡

Anveo Mobile App Client
App Store, Google Play,
Microsoft Store or man. inst.

Provided by conion media GmbH

Free of charge

App Installation ⬇

End user devices

*Owned and managed
by the end customer*

Anveo Mobile App Components BC Online (SaaS)

Anveo Mobile App Extension from Microsoft AppSource

Provided by conion media GmbH

Free of charge

License Key

Provided by Anveo IT Services GmbH obtained via Anveo Partner

According to price list

Anveo Mobile App Client
App Store, Google Play, Microsoft Store or man. inst.

Provided by conion media GmbH

Free of charge

Extension Installation   Activation   App Installation

Microsoft Dynamics 365 Business Central Online
Public Cloud / SaaS
Operated by Microsoft

Data exchange

Anveo Mobile App Cloud Service

Data synchronization with Microsoft Dynamics 365

Operated by Anveo IT Services GmbH as a SaaS solution.

Data exchange

End user devices

Owned and managed by the end customer

Customize

Create your own solution

Experience the simple setup of the Anveo Mobile App in Microsoft Dynamics. The following examples show you how to either adapt the existing Anveo Mobile Apps or how to create a completely new app.

Define your solution in just four steps.

1 ▶ 2 ▶ 3 ▶ 4

Define Layout

What features to offer in the mobile app? You can set up the layout in just a few clicks.
Select tables, fields, and the layout directly in your Microsoft Dynamics Client.

Discover

Experience

Customize

License

Act

Choose a Table

Elements		Menu	Fields	Additional Properties	Description Translations	Position
		TABLE NO.	TABLE NAME		ELEMENT TYPE	REA
⋮		18	Customer		Mobile App - List	

Use any tables of Microsoft Dynamics

Define Fields and Layout

TYPE		FIELD NO.	DESCRIPTION	EDITABLE	VISIBILITY
Field	⋮	2	Name	Read Only	Visible
Field		1	No.	Read Only	Invisible
Field		8	Contact	Read Only	Visible
Field		5	Address	Read Only	Visible
Field	⋮	7	City	Read Only	Visible

Anveo offers a large variety of layout settings

Setup of Main Menu

The main menu organizes access to the app features. Each menu entry has its own color and symbol. Different user groups may have different main menu entries.

Setup in Microsoft Dynamics 365 Business Central or Dynamics NAV 2009 R2 - 2018 (from Navision 3.6)

Result shown in the app

DESCRIPTION		LINKED ANVEO PAGE	ACTION CODE
Search	⋮		ASLS_OPN:SEAF
My Messages		ASLS_NOTIFICATIONS	
CRM			
My Customers		ASLS_CUSTOMERS	
My Contacts		ASLS_CONTACTS	
My Meeting Reports			ASLS_OPN:OPE
My Opportunities		ASLS_OPPORTUNITIES	
Sales			
My Quotes		ASLS_QUOTES	
My Orders		ASLS_ORDERS	
My Return Orders		ASLS_RET_ORDERS	
Sales Presentation			ASLS_OPN:SPLIS

⊕ Anveo Sales A

My Customers

ortunities   My Return Or

My Contacts   My Quotes   My Sales Pre

My Messages   My Orders
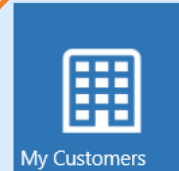
Configure Processes

Use *Anveo Script* to define your mobile business processes and offline reports.
The pre-configured *Anveo Events* codeunit, located in Microsoft Dynamics, controls the behavior of the data processing during mobile app synchronization.

```lua
if Rec:GETVALUE('No.') ~= '' then
    local Qty = Rec:GETVALUE_DOUBLE('Quantity');
    Qty = Qty + 1;
    Rec:VALIDATE('Quantity',Qty);
    Rec:MODIFY(true);
else
    ERROR(GETTEXT('ITEMNOEMPTYQTY'));
end;
```

File   Edit   Selection   View   Go   Debug   Terminal   QTY-PLUS.lua

QTY-PLUS.lua ✕

Write your own business code for your app in an AL-like language called *Anveo Script*

Define the behavior in Microsoft Dynamics or your favorite editor

Setup Anveo User

Assign your Anveo Users to a Salesperson/Purchaser, Customer, Vendor or Resource.
Automatically use this relation as a global data filter for all views.

Anveo Users control data access
restrictions for your mobile users

TOM · Tom Smith

| Process | Help | Show Attached | More options |

General

Anveo User	TOM	Active
User Name	Tom Smith	Last Login
Comment		Last Action

Select an *Anveo User
Relation* to filter data

User Language	ENU	Relation Type	None
Expiration Date		Relation Code	None
Disallow Password Changes		Anveo User Protocol Level	User
New Password		Logging Level	Customer
Locked until			Vendor
			Contact
			Salesperson/Purchaser
			Employee

Salesperson/Purchaser

Login

✓ Done – it's just four steps to
setup your own app

The Right Solution For Every Area Of Application

Microsoft Dynamics App	Microsoft Power Apps	Anveo Mobile App
Dynamics Desktop Processes as a Template, No Mobile Processes	No dynamic templates, Just a Development Environment	Ready-to-use Solutions For mobile sales, Service, and delivery
Online Only, Requires stable Internet connection	Mostly Online, Limited data caching	Always Available Due to full Offline capability
Mobile processes Written by Dynamics Developers	Implemented by Dynamics developers and Power Apps experts	Setup in Dynamics by Users, partners And/or Anveo
Moderate effort	Extensive investment and project risk	Rapid Implementation with less resources req.
For occasional mobile use	Optimal for mini apps	App as a daily working tool

License

The licensing of Anveo

Anveo offers flexible licensing to suit any usage scenario:

- ✓ Licensing by number of users
- ✓ Licensing by solution size
- ✓ Parallel use of several mobile solutions
  e.g. Anveo Sales and Anveo Service App

The Anveo Mobile App license is bound to the Microsoft Dynamics license number. For each Microsoft Dynamics license, an Anveo license is required.

Anveo Subscription License

The Anveo Subscription license is a rental model and is available for both On Premises and BC Online versions. The license includes the Anveo Mobile App Cloud Service which is required for BC Online.

Take advantage of the full range of functions with a flexible license.

> Low initial costs

> License can be extended to meet your requirements at any time

> Service plan for latest Anveo versions is already included.

€ 16

Per month per Anveo App User

Term is until 30.06. or 31.12. of a year (at least one full month), thereafter every six months. One month corresponds to 30 days for monthly shares. Reduction of the license or termination 30 days prior to the end of the term possible. Invoice and payment on the first day of the respective performance period.

License Packages Anveo App Users

Anveo App Users licensing is a one-time purchase model and is only available for On Premises versions.

License the number of users with Anveo-Login (Named User with max. 3 devices per user), the solution size is unlimited.

The packages can be extended.

+1   € 350

+1   € 400

+1 € 600

5

€ 3.000

20

€ 12.000

50

€ 24.000

∞

UNLIMITED

On Demand

Plus 18% Anveo service plan per year for the right to update to the latest Anveo version and to extend the Anveo license. Mandatory for the first year. Automatically renews for one year if not canceled 30 days prior to expiry .The installation of the update is not included in the service plan.
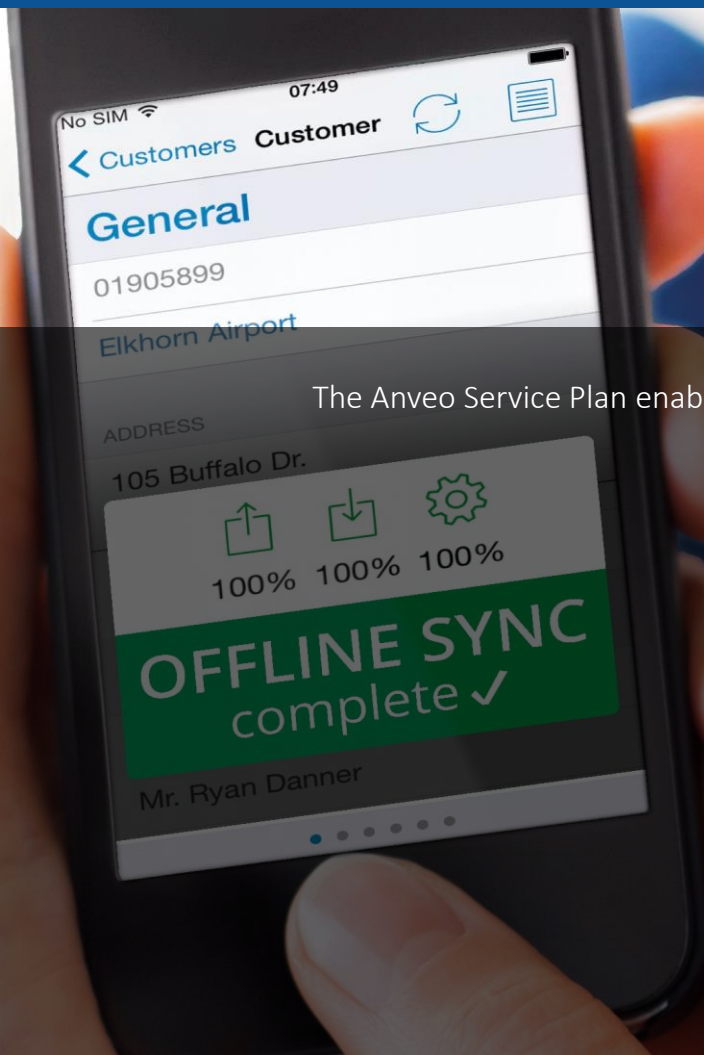
The Anveo Service Plan enables you to access the latest features at any time.

ANVEO SERVICE PLAN

The Anveo Service Plan protects your Anveo investment:
You get access to new features and optimizations.

Your Benefits
- Right of access to all Anveo Mobile App versions during
  the validity period of the Service Plan
  Installation as a service must be performed by the Anveo
  Partner or ordered separately at a charge
- Anveo license upgrade right for additional Anveo Mobile
  App Users or Anveo Page Elements
- Extends automatically for one year at a time
- Cancellation period 1 month before expiration
- Mandatory in the first year, optional from the 2nd year on

18% of the license value per year
Partially when adding a license

Anveo Mobile App – Quality Review Plan

Respond to constantly changing markets and companies by optimizing processes and infrastructure

The Anveo **Quality Review** provides regular reviews to identify meaningful changes and necessary maintenance tasks. This ensures that the desired increase in efficiency is sustained.

Take advantage of our experience from **countless projects** and secure **your investment results**.

INCLUDED SERVICES

- ✓ **Consistency check** of data processing
- ✓ Validation of existing **processes**
- ✓ Identification of relevant **updates**
- ✓ Checking **maintenance jobs**
- ✓ Optimization of **synchronization**

YOUR BENEFITS

- ✓ Increase your **efficiency** through better data quality and speed
- ✓ The solution is **more** stable, your team is **more satisfied**
- ✓ Secure your **investment**

€ 120
monthly, per
Anveo installation

Available for a minimum of 12 months and will automatically renew if not canceled at least one month prior to expiration. An active Anveo Service Plan or Anveo Subscription License is mandatory. Many services are included in the price of the regular checks, such as reviewing maintenance jobs, optimizing synchronization, and verifying data processing consistency. However, some checks may incur follow-up costs, especially in the validation of existing processes, which cannot be included in the price due to their varying scope and are therefore chargeable. A quote will be provided for this prior to any services being provided. The exact scope of services can be found here.
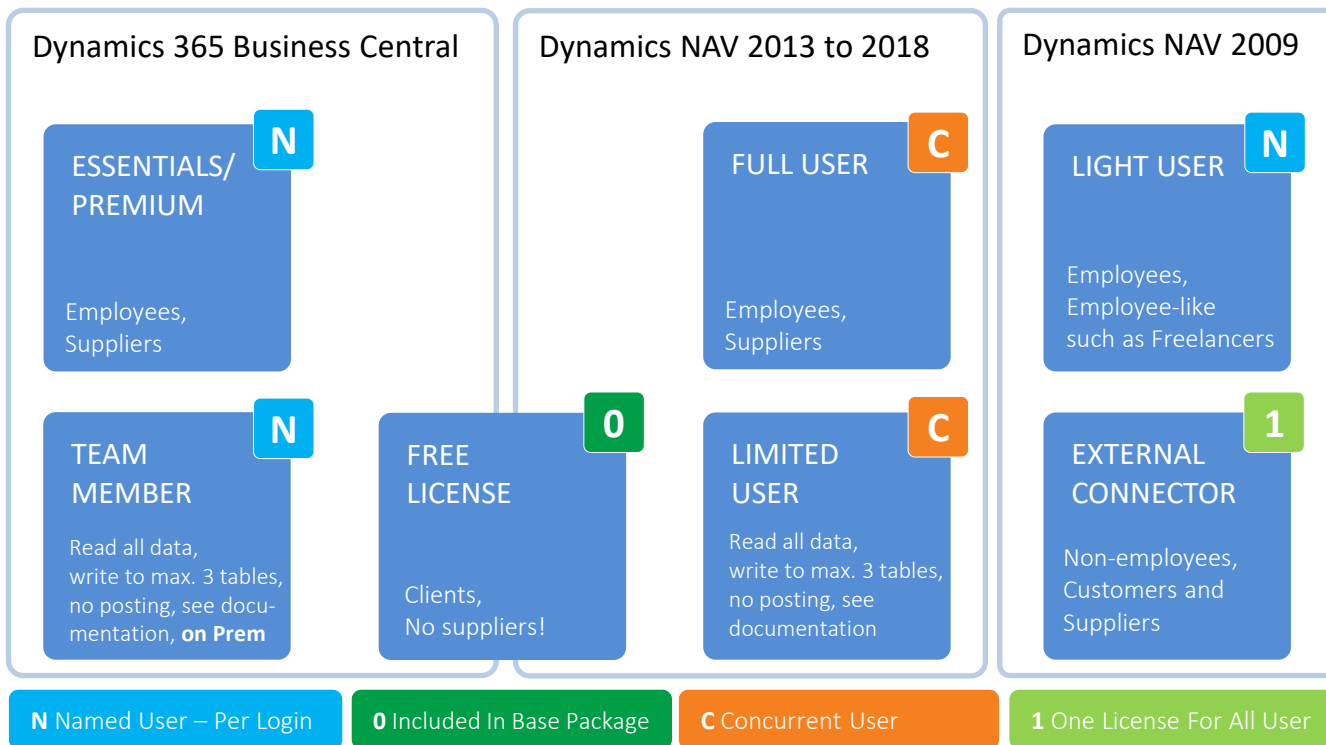
Licensing Requirements

Anveo requires Microsoft Dynamics and possibly additional licenses

Dynamics 365 Business Central

ESSENTIALS/ PREMIUM **N**

Employees,
Suppliers

TEAM MEMBER **N**

Read all data,
write to max. 3 tables,
no posting, see docu-
mentation, **on Prem**

FREE LICENSE **0**

Clients,
No suppliers!

Dynamics NAV 2013 to 2018

FULL USER **C**

Employees,
Suppliers

LIMITED USER **C**

Read all data,
write to max. 3 tables,
no posting, see
documentation

Dynamics NAV 2009

LIGHT USER **N**

Employees,
Employee-like
such as Freelancers

EXTERNAL CONNECTOR **1**

Non-employees,
Customers and
Suppliers

| **N** Named User – Per Login | **0** Included In Base Package | **C** Concurrent User | **1** One License For All User |

Depending on the installation, additional Microsoft Windows Server and Microsoft SQL Server and/or Microsoft SQL Server CALs may be required. This page is only non-binding preliminary information. Binding information is only available directly from Microsoft, e.g. in the Licensing Guide on Microsoft Partner Source.

Act

First Steps with Anveo

We will be glad to assist you in evaluating the
Anveo Mobile App. We offer the following services:

- ✓ Free access to the Anveo Mobile App demo system
- ✓ Demonstration and training videos on our website
- ✓ Personal online presentation
- ✓ Individual consulting - we are happy to answer your
  questions

The Next Steps

EXPERIENCE ANVEO FOR YOURSELF

Try the Anveo Mobile App for free for Microsoft Dynamics on your laptop, tablet PC or smartphone.

Download on the App Store

GET IT ON Google Play

Get it from Microsoft

FREE TRAINING VIDEOS

View the free training videos provided on our website.

Experience Anveo Live

REGISTER NOW

We present our Anveo Mobile App solution in a personal online presentation. We will be happy to answer your questions and help you with the conceptual design.

Register now at www.AnveoGroup.com.

Anveo Quick Start Package

1 day WORKSHOP or SUPPORT	**+**	INSTALLATION on your system	**+**	30 day TEST LICENSE

Your benefits:

- ✓ **On-site workshop:** Detailed presentation and requirements analysis by an experienced project manager

  or

  1-day support package: The Anveo support team helps with setup, implementation and / or trains you directly
- ✓ **Installation:** Evaluation of the Anveo solution on your own infrastructure
- ✓ **Test directly for 30 days** with your own data and devices
- ✓ **Compatibility with hardware and software** is checked in advance
- ✓ Working basis for **quotation**
- ✓ **Installation** can be used immediately for further development

Request a quote from your Anveo Partner.

The perfect first step.

Anveo Mobile App – Setup at a Fixed Price

Project implementation with maximum planning security

Benefit from our experience in **hundreds** of **successful projects** and book your Anveo Mobile App setup at a **fixed price**.

Sales App
€ 17.900
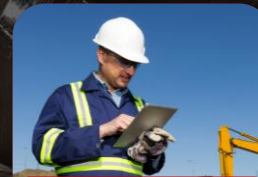
Service App
€ 17.900

Delivery App
€ 15.900

SERVICES

- ✓ Feasibility test incl. **project plan**
- ✓ **Customization of the app**
- ✓ Installation
- ✓ Key user & admin **training**
- ✓ Guided **Go-Live**

YOUR BENEFITS

- ✓ Benefit from our **experience**
- ✓ **Clearly defined scope** of **services**
- ✓ **project security** ensures **investment security**
- ✓ Best **user acceptance** thanks to best practices
- ✓ Free of charge: **Anveo Quality Review** Plan*

The package can only be booked after a feasibility check has been carried out and positively confirmed by Anveo. The offer will be based on a detailed project plan. The Anveo Mobile App is implemented on the basis of the Anveo Mobile Base Apps. Further information and the conditions for implementation can be found here. The Base Apps can be extended with additional components at additional costs. A valid Anveo Mobile App licence (at least 5 users) is required for implementation at the start of the project - this is not part of the fixed-price project.

*If you start the project within 4 weeks after receiving our quote, you will receive the first year of Anveo Quality Review free of charge. For more information on the Anveo Quality Review Plan, click here.

The Right Anveo Package For Every Situation

Anveo offers support services for every milestone of your project.

QUICK START

- ✓ Installation on your infrastructure
- ✓ Requirements workshop on site or training
- ✓ 30 days trial license

TRAINING

1 day (8h) practical training of your team for your own solution configuration

INSTALLATION

Installation of the Anveo Client Suite with all necessary components

UPDATE 1 system/ 2 systems

Complete update of all new Anveo Client Suite components in your infrastructure (for the same Dynamics version)

QUALITY REVIEW

- ✓ Regular system reviews
- ✓ Data consistency checks
- ✓ Checking and applying relevant Updates

FIXED PRICE SETUP

- ✓ Planning security
- ✓ Installation
- ✓ App Customization
- ✓ Key-User & Admin-Training

Please do not hesitate to contact us for individual packages.

The Anveo Product Family

The Anveo product family offers valuable extensions for **Microsoft Dynamics**.

The Anveo products are sold by more than 450 Microsoft partners worldwide.

MOBILE APPS

Create your individual, offline capable app in Microsoft Dynamics.

WEB APPS

Web-based solutions for Microsoft Dynamics 365 Business Central.

EDI

Electronic data exchange - 100%. in Microsoft Dynamics. Experience EDI/EDIFACT without an external converter.

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