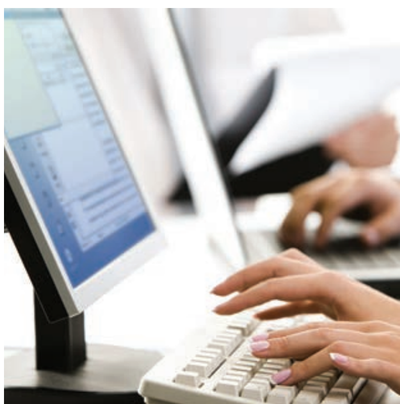
CANOPY ENHANCED MODULES

Aspen systems

Total Solutions for the Food Industry



Canopy Enhanced Modules

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Aspen Systems, Inc.
www.aspen-systems.com | 800-767-1970 | sales@aspen-systems.com
7241 East Princess Blvd | Scottsdale, Arizona 85255

Pulse

CANOPY ENHANCED MODULE

Monitor the Heartbeat of Your Company with Pulse

Pulse dashboards present a graphic display of Key Performance Indicators (KPIs) on your desktop. Up-to-the-minute access of vital company data enables you to quickly analyze and react to changing business conditions. Monitor performance company-wide or narrow your focus to a business unit or even a single process. Leverage your decision-making ability with real-time data that is instantly available in a visually intuitive snapshot.

What information is critical to you? Financial, inventory, warehousing, sales, production? You name it – it's all available to you because all data residing within the Canopy database is accessible. No data is off limits!

Pulse utilizes the power of Canopy's Aspen View Report Writer to isolate the data of your choosing and display it in a graphical presentation. Use the pre-defined dashboard items or design your own pie charts, gauges, charts, or lists. Real-time data refreshes on demand or at user defined intervals. The ability to drill down into the source data is available at your fingertips. Dashboard Manager makes it simple to copy, edit, share, import, and export displays. Aspen's advanced security features ensure your sensitive data is kept safe and accessible only to the users you select. Design an unlimited number of dashboards with your choice of desktop placement. A user-defined interactive list pulse gauge can be created and utilized in addition to the standard product search screen across the Canopy modules.

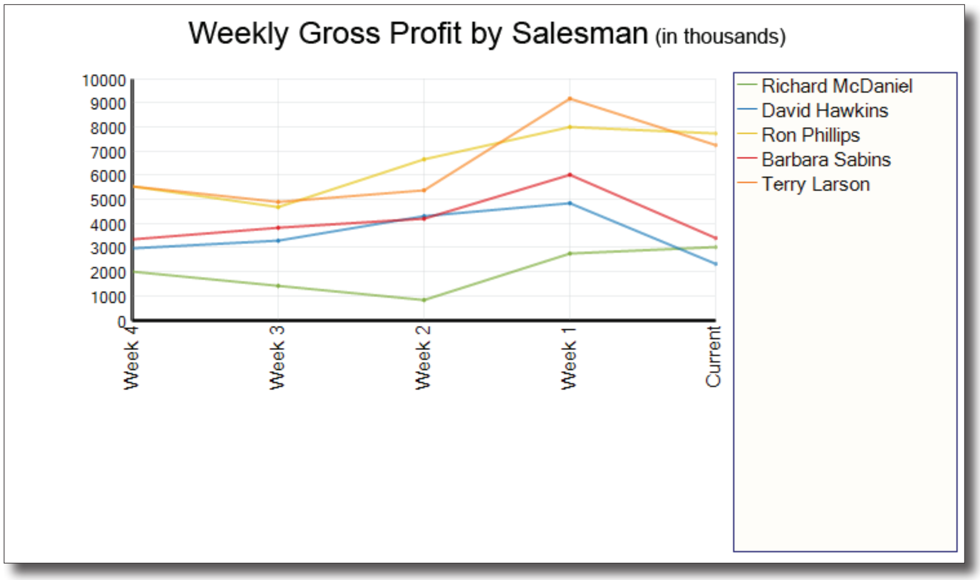
Because Pulse is fully integrated with Canopy, there is no need for cumbersome periodic data uploads and no worries about stale information. Plus there are no costly third-party packages to maintain!

Highlights

- Full integration with Canopy data
- Cost efficient, easy to use and maintain
- Executive snapshot of critical information on one screen
- Immediate results eliminate searching through lengthy reports
- Create unlimited dashboards, including:
    - Gauges
    - Graphs
    - Pie charts
    - Lists
    - Interactive Lists
- User-defined controls include:
    - Color schemes
    - Labels and legends
    - Control lines
    - Refresh rates
    - Minimum and maximum values
- User-definable placement of the dashboards
- Zoom and drill down into source data
- Advanced security features keep your sensitive data protected
- Easy to print or export dashboard items
- Presentations are enhanced with Pulse graphics
- Easy to build your own dashboards using:
    - Copy
    - Edit
    - Share
    - Import
    - Export

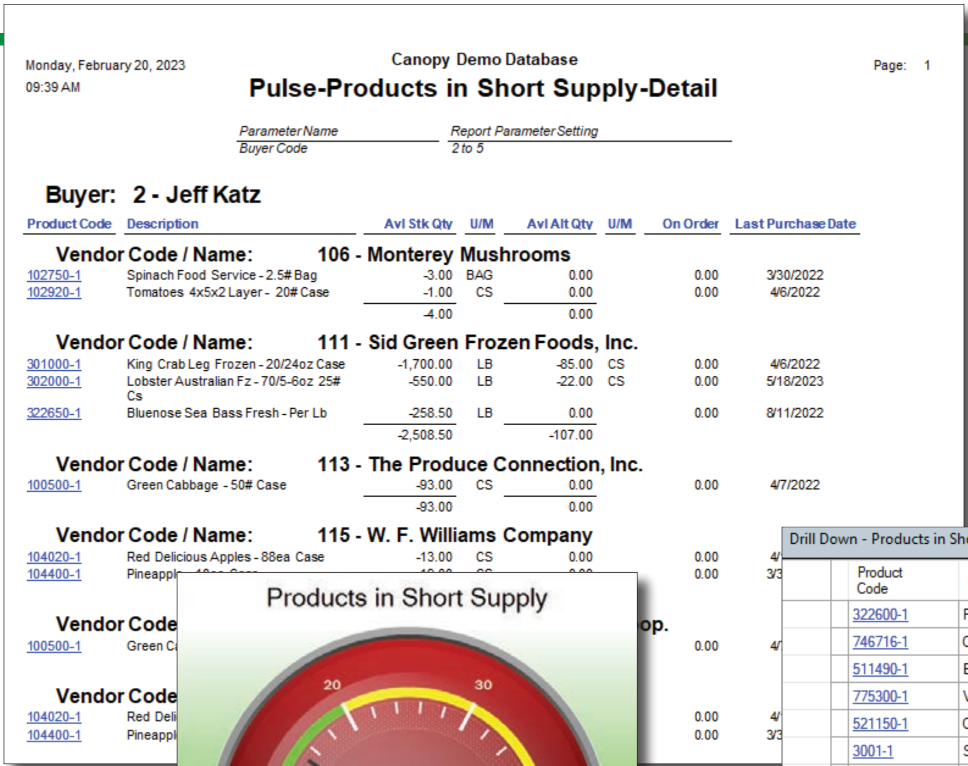
Weekly Gross Profit by Salesperson

Monitor gross profit trends by week for each salesperson. An insightful visual representation of your sales staff's performance presents an accurate view of what each salesperson is truly contributing to your company's bottom line. Managers are no longer left to guess at performance and profitability – quickly identify your stars and your poor performers and take action.



Inventory Shortage

How many products will you short on your customers' orders today? Monitor your inventory levels at a glance and know your number of products in short supply. Drill into the data to identify which customers will be affected and what products are in short supply, enabling you to make critical decisions to allocate available inventory.



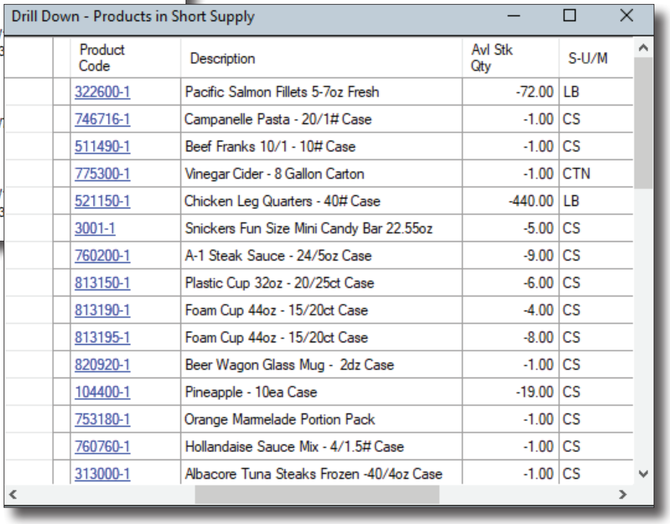
Monday, February 20, 2023 Canopy Demo Database Page: 1
09:39 AM

Pulse-Products in Short Supply-Detail

Parameter Name	Report Parameter Setting
Buyer Code	2 to 5

Buyer: 2 - Jeff Katz

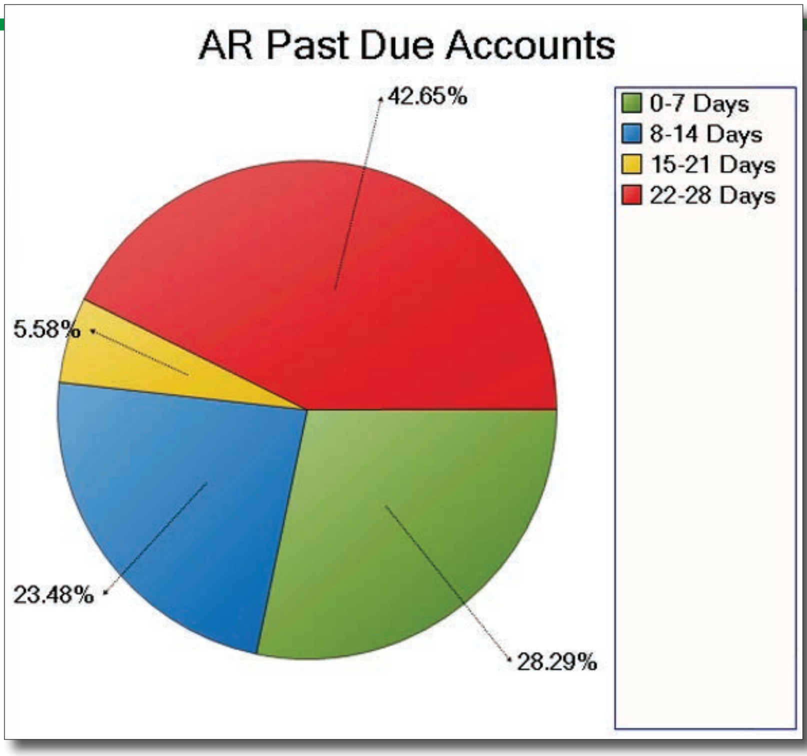
Product Code	Description	Avl Stk Qty	U/M	Avl Alt Qty	U/M	On Order	Last Purchase Date
Vendor Code / Name:	**106 - Monterey Mushrooms**						
102750-1	Spinach Food Service - 2.5# Bag	-3.00	BAG	0.00		0.00	3/30/2022
102920-1	Tomatoes 4x5x2 Layer - 20# Case	-1.00	CS	0.00		0.00	4/6/2022
		-4.00		0.00			
Vendor Code / Name:	**111 - Sid Green Frozen Foods, Inc.**						
301000-1	King Crab Leg Frozen - 20/24oz Case	-1,700.00	LB	-85.00	CS	0.00	4/6/2022
302000-1	Lobster Australian Fz - 70/5-6oz 25# Cs	-550.00	LB	-22.00	CS	0.00	5/18/2023
322650-1	Bluenose Sea Bass Fresh - Per Lb	-258.50	LB	0.00		0.00	8/11/2022
		-2,508.50		-107.00			
Vendor Code / Name:	**113 - The Produce Connection, Inc.**						
100500-1	Green Cabbage - 50# Case	-93.00	CS	0.00		0.00	4/7/2022
		-93.00		0.00			
Vendor Code / Name:	**115 - W. F. Williams Company**						
104020-1	Red Delicious Apples - 88ea Case	-13.00	CS	0.00		0.00	4/
104400-1	Pineappl					0.00	3/3
Vendor Code	**op.**						
100500-1	Green C					0.00	4/
Vendor Code							
104020-1	Red Deli					0.00	4/
104400-1	Pineappl					0.00	3/3



Drill Down - Products in Short Supply

Product Code	Description	Avl Stk Qty	S-U/M
322600-1	Pacific Salmon Fillets 5-7oz Fresh	-72.00	LB
746716-1	Campanelle Pasta - 20/1# Case	-1.00	CS
511490-1	Beef Franks 10/1 - 10# Case	-1.00	CS
775300-1	Vinegar Cider - 8 Gallon Carton	-1.00	CTN
521150-1	Chicken Leg Quarters - 40# Case	-440.00	LB
3001-1	Snickers Fun Size Mini Candy Bar 22.55oz	-5.00	CS
760200-1	A-1 Steak Sauce - 24/5oz Case	-9.00	CS
813150-1	Plastic Cup 32oz - 20/25ct Case	-6.00	CS
813190-1	Foam Cup 44oz - 15/20ct Case	-4.00	CS
813195-1	Foam Cup 44oz - 15/20ct Case	-8.00	CS
820920-1	Beer Wagon Glass Mug - 2dz Case	-1.00	CS
104400-1	Pineapple - 10ea Case	-19.00	CS
753180-1	Orange Mamelade Portion Pack	-1.00	CS
760760-1	Hollandaise Sauce Mix - 4/1.5# Case	-1.00	CS
313000-1	Albacore Tuna Steaks Frozen -40/4oz Case	-1.00	CS

SELECTED FEATURES OF PULSE

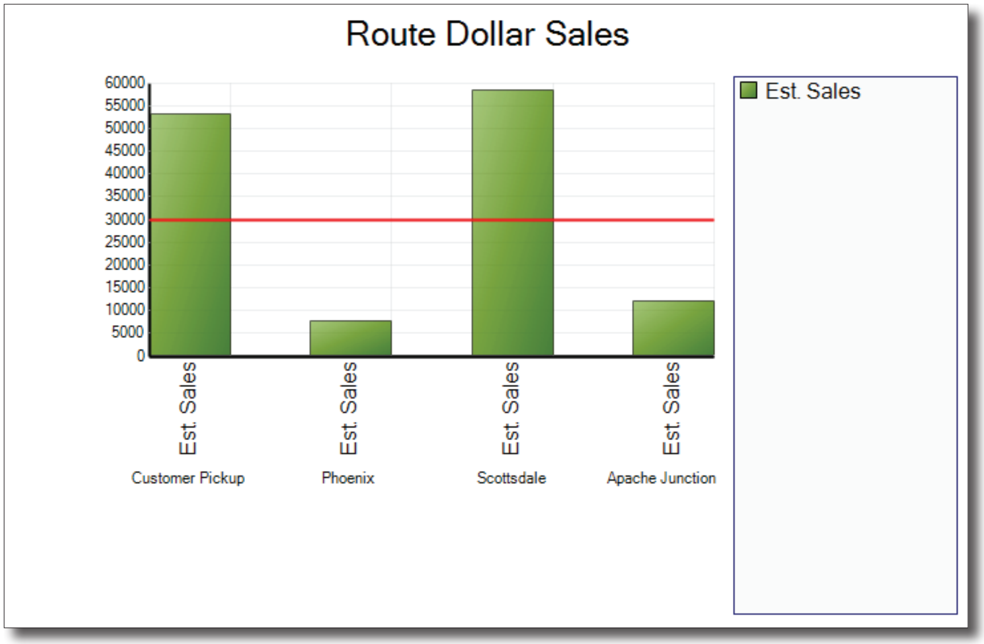


A/R Past Due

Analyze the status of past due accounts. Pulse allows you to exclude accounts that are current so you can accurately focus on collection problems. You set the parameters. Display what percentage of your accounts are past due. Drill down to the supporting data and sort aging columns from largest to smallest. Then view customers in past due status, even down to individual invoices, and make informed management decisions on collection.

Route Fill Report

What is the dollar value (or quantity) per route on orders delivering today? Evaluate whether trucks are ready to roll at maximum profit levels. Proactively decide whether to combine routes, add stops, reschedule deliveries, etc. Create control lines on the bar graph to identify the target level each truck must meet before leaving the dock. Confidently manage your resources to their most efficient and profitable levels.



EVENT WATCH

CANOPY ENHANCED MODULE

Stay on Top of Critical Events

Have you ever started your work day only to discover that something important happened but nobody notified you? Event Watch is a Canopy enhanced module that allows work flow management to be event driven, creating notifications to be sent to individuals or groups automatically.

Unlimited Events can be setup and monitored in Canopy. If an Event occurs, doesn't happen, or falls outside of a desired range, a notification is automatically sent through Canopy by email, fax, printing a report, or cell phone text message to one or more individuals. A complete history of all notifications sent is kept, and can be reported on by Event, notification, and date.

The various events for personnel to receive notifications on are as broad as the individual job duties within your company. With Event Watch, you'll never be left in the dark again.

Highlights

- Events can be scheduled at any time interval
- Events can be sent by fax, email, text message, or printed report
- Events can be sent to an individual or a group
- All notifications are logged in a history file and can be retrieved by date, notification, or event
- Emailed events can contain links that will open related Canopy screens, including:
  - Customer Inquiry
  - Product Inquiry
  - Vendor Inquiry
  - Order Entry
- Alerts & Notification examples include:
  - Notify the Credit Manager when an order goes on hold
  - Notify Salesperson when a Customer places an order
  - Send Customers Order Confirmations when an order is placed
  - Alert Buyer or Inventory Manager if a purchase order does not arrive on time
  - Warn Controller if a bank balance falls below a certain level
  - Notify Buyer or Inventory Manager if a product's inventory falls below a critical level
  - Notify Salesperson if a customer's account is past due
  - Alert QA Manager when a lot goes on hold
  - Warn Inventory Manager if a product is about to expire
  - The possibilities are unlimited - you decide
  - Warn Accounting if an important A/P Invoice needs to be paid soon

SELECTED FEATURES OF EVENT WATCH

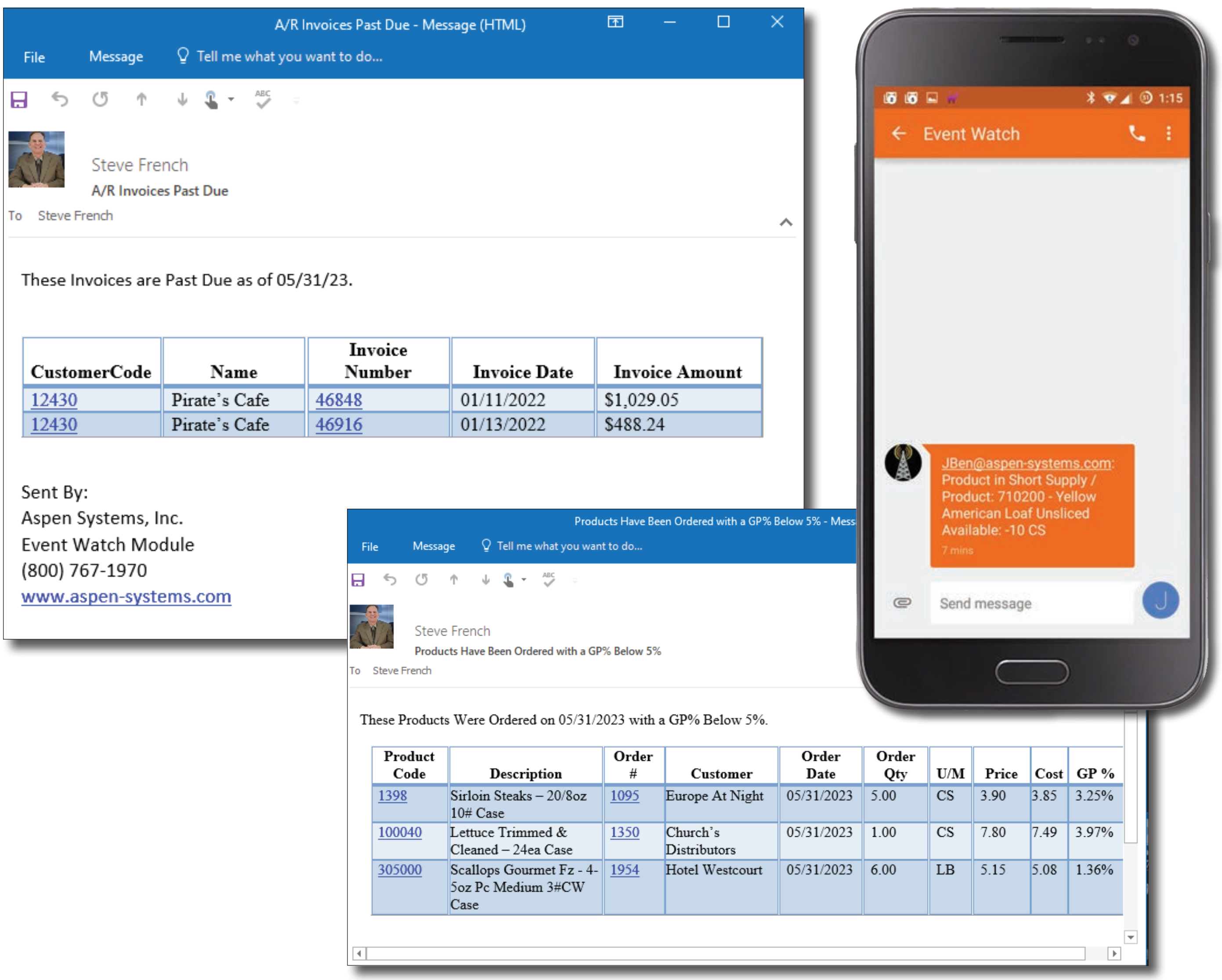
Example Notifications

Event Watch will send out notifications by email or text message to your employees, customers, or vendors based on the criteria you have selected. The possibilities are as endless as your imagination. Allow Event Watch to monitor the details of your business and alert you when there is a need to take action.

You can use Event Watch to notify your buyers, salespeople, or production managers when you have products that fall below your expected inventory levels to avoid shorting your customer's orders. You can also monitor the age of your products or turnover to avoid costly inventory writedowns because you have too much inventory on hand.

Past due customer accounts impact your cash flow and sometimes the customer just needs a little reminder that their invoice is coming due or is past due. Event Watch can be used in combination with Document Imaging to send a copy of the customer's invoice and proof of delivery just before the invoice is due or after it has become past due if it has not been paid. You decide when to remind them about the invoice and then let Event Watch do the rest.

Achieving a maximum gross profit is a goal of every business and Event Watch will monitor the gross profit of your orders, either by line item or by invoice, and notify you if an order falls below your expected margin or if your price for a line item falls below cost or below your pre-defined minimum price.



DOCUMENT IMAGING

CANOPY ENHANCED MODULE

Documents at Your Fingertips

Document management can be a major undertaking for any organization. Manually filing paperwork, retrieving signed documents, and storing boxes of paper are all an expensive and time consuming process. Document Imaging is Canopy's solution to this problem. It gives you the tools to electronically store and retrieve your documents that are critical to your operations.

Getting started with Document Imaging is fast and easy. Simply choose the documents you want to scan, set them up in Canopy, map the document, and start scanning. Documents can be scanned individually or by customized Scan Groups all at once. Because Document Imaging uses OCR technology and document mapping, there is no need to organize or separate your paperwork prior to scanning. Documents can be imported from a scanner or from multiple file types. The imported documents are then automatically recognized by type and linked to the vendor/customer and their Canopy transaction. The results of each scan are displayed and can be reviewed or edited before being electronically filed. After documents are filed, they are instantly accessible through Canopy and/or the Document Viewer. Users with permission can view, print, email, or fax any document instantly with just the click of a mouse.

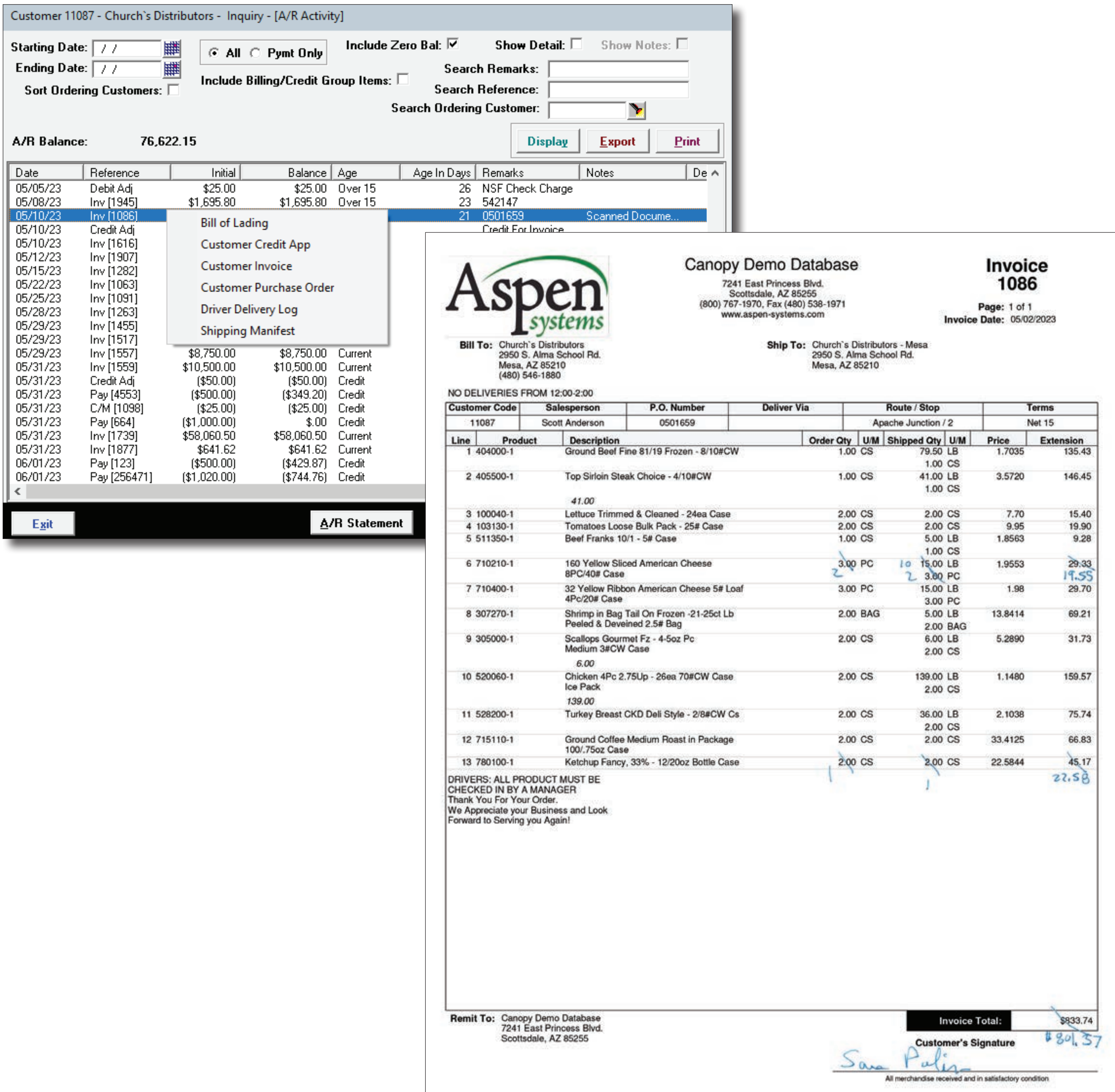
Highlights

- View documents in Canopy or with the Document Viewer
- Search for documents using multiple search fields and criteria
- Recognize and identify different document types automatically
- Tighten document security
- Eliminate manual filing
- Import documents from a scanner or file
- Supports multiple file types, including:
  - BMP
  - JPG
  - GIF
  - PNG
  - TIF
  - PDF
- View, print, fax, and email documents
- Restrict document access with security settings for:
  - Viewing
  - Distributing
  - Creating
  - Deleting
- Recognizes OCR Text, Barcodes, and Images
- Import or scan documents without sortation
- Make adjustments using advanced filters, including:
  - Brightness
  - Contrast
  - Blurriness
- Choose your resolution and color depth
- Store images in:
  - Full color
  - Black and white
  - Grayscale
- Review and correct scanned documents on the fly
- Use Aspen View to send scheduled reports of scanned documents
- Use with Event Watch to automatically send customers a copy of their signed invoice
- Works with Non-Canopy related documents, such as:
  - Human Resource
  - Legal
  - Letters & emails
  - Insurance information

SELECTED FEATURES OF DOCUMENT IMAGING

Drill Down from a Transaction

Document Imaging gives you the ability to retrieve supporting documents within Canopy. Documents are instantly accessible with the simple click of a mouse. Canopy's drill down menus offer a right-click option to view all supporting documents for that transaction. For example, you can view the signed Invoice, Shipping Manifest, or the customer's Purchase Order. Do you keep pictures of received products that you reject? These images can be retrieved instantly as well. All documents can then be emailed, faxed, or printed to provide proof of delivery, verify pricing, or resolve a dispute.



Aspen systems

Canopy Demo Database
7241 East Princess Blvd.
Scottsdale, AZ 85255
(800) 767-1970, Fax (480) 538-1971
www.aspen-systems.com

Invoice 1086
Page: 1 of 1
Invoice Date: 05/02/2023

Bill To: Church`s Distributors
2950 S. Alma School Rd.
Mesa, AZ 85210
(480) 546-1880

Ship To: Church`s Distributors - Mesa
2950 S. Alma School Rd.
Mesa, AZ 85210

NO DELIVERIES FROM 12:00-2:00

Customer Code	Salesperson	P.O. Number	Deliver Via	Route / Stop	Terms
11087	Scott Anderson	0501659		Apache Junction / 2	Net 15

Line	Product	Description	Order Qty	U/M	Shipped Qty	U/M	Price	Extension
1	404000-1	Ground Beef Fine 81/19 Frozen - 8/10#CW	1.00	CS	79.50 1.00	LB CS	1.7035	135.43
2	405500-1	Top Sirloin Steak Choice - 4/10#CW 41.00	1.00	CS	41.00 1.00	LB CS	3.5720	146.45
3	100040-1	Lettuce Trimmed & Cleaned - 24ea Case	2.00	CS	2.00	CS	7.70	15.40
4	103130-1	Tomatoes Loose Bulk Pack - 25# Case	2.00	CS	2.00	CS	9.95	19.90
5	511350-1	Beef Franks 10/1 - 5# Case	1.00	CS	5.00 1.00	LB CS	1.8563	9.28
6	710210-1	160 Yellow Sliced American Cheese 8PC/40# Case	~~3.00~~ 2	PC	10 ~~15.00~~ 2 ~~3.00~~	LB PC	1.9553	~~29.33~~ 19.55
7	710400-1	32 Yellow Ribbon American Cheese 5# Loaf 4Pc/20# Case	3.00	PC	15.00 3.00	LB PC	1.98	29.70
8	307270-1	Shrimp in Bag Tail On Frozen -21-25ct Lb Peeled & Deveined 2.5# Bag	2.00	BAG	5.00 2.00	LB BAG	13.8414	69.21
9	305000-1	Scallops Gourmet Fz - 4-5oz Pc Medium 3#CW Case 6.00	2.00	CS	6.00 2.00	LB CS	5.2890	31.73
10	520060-1	Chicken 4Pc 2.75Up - 26ea 70#CW Case Ice Pack 139.00	2.00	CS	139.00 2.00	LB CS	1.1480	159.57
11	528200-1	Turkey Breast CKD Deli Style - 2/8#CW Cs	2.00	CS	36.00 2.00	LB CS	2.1038	75.74
12	715110-1	Ground Coffee Medium Roast in Package 100/.75oz Case	2.00	CS	2.00	CS	33.4125	66.83
13	780100-1	Ketchup Fancy, 33% - 12/20oz Bottle Case	~~2.00~~ 1	CS	~~2.00~~ 1	CS	22.5844	~~45.17~~ 22.58

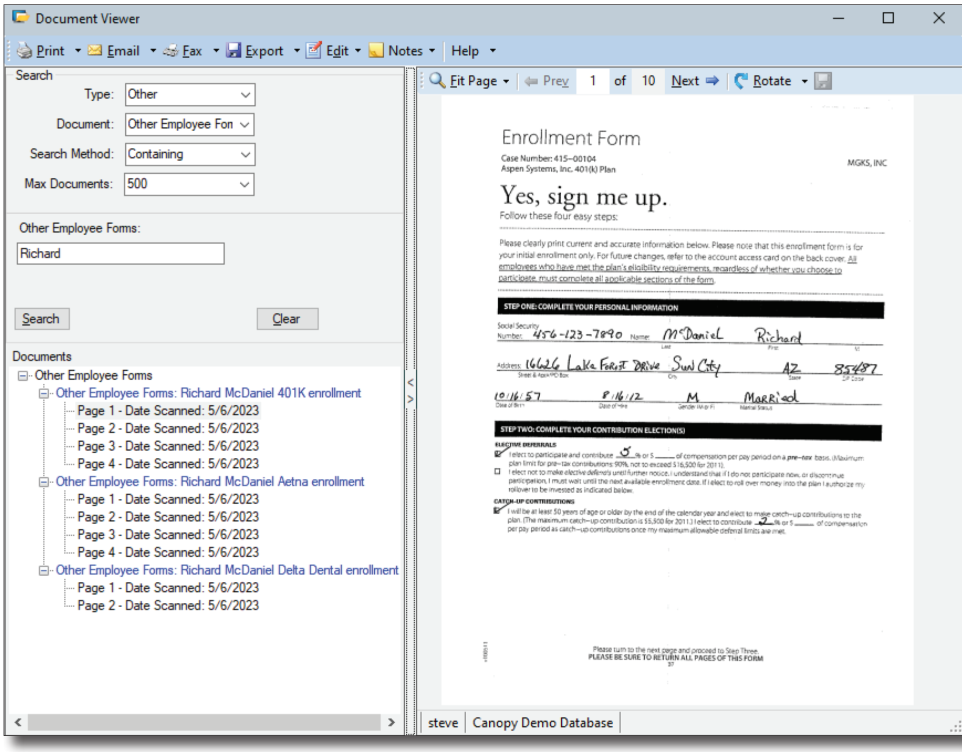
DRIVERS: ALL PRODUCT MUST BE
CHECKED IN BY A MANAGER
Thank You For Your Order.
We Appreciate your Business and Look
Forward to Serving you Again!

Remit To: Canopy Demo Database
7241 East Princess Blvd.
Scottsdale, AZ 85255

Invoice Total: ~~$833.74~~ $801.37

Customer's Signature
All merchandise received and in satisfactory condition

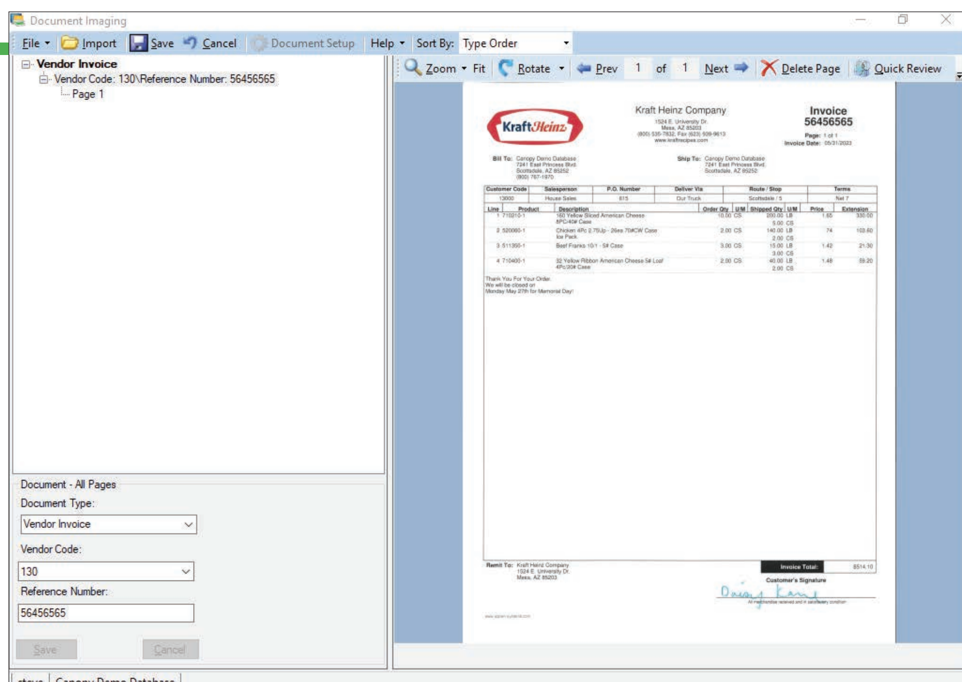
Document Viewer



The Document Viewer is a second way to retrieve documents. Because it runs as an icon on your desktop, anyone, including employees who don't use Canopy, can search for and view documents. With multiple search fields, documents are instantly retrieved and can also be faxed, emailed, or printed. The Document Viewer is used to retrieve all Non-Canopy related documents as well. Document security will limit the documents individuals can retrieve.

Preview Screen

After documents are imported, the preview screen shows the identified documents along with any documents that weren't recognized and allows you to make manual corrections on the fly. Documents are grouped together in the preview screen by document type and vendor/customer, making the review process easy. With the integration to Canopy, Document Imaging knows if a transaction does not exist or has already been saved. Previously saved documents can be appended or overwritten. Documents that exist outside of Canopy can be manually identified here as well.



SMART EXTRACT

CANOPY ENHANCED MODULE

Auto process A/P Invoices and Related Documents

Vendor accounts payable invoices and related documents can vary significantly in layout, making it challenging and time-consuming to manually extract data, match receipts, and input information into an ERP module. Canopy's Smart Extract module addresses this issue by utilizing machine learning to thoroughly comprehend the data in vendor invoices and related documents, automatically entering the information directly into Canopy's database. Smart Extract requires no templates and seamlessly adapts to changes in document formats and styles.

Smart Extract finds relevant data from vendor invoices and matches the vendor invoice to corresponding purchase orders and inventory receipts within Canopy's database. The data is displayed in a Smart Extract entry grid, which includes the vendor code and name, reference number, invoice date, purchase order number, receipt total, invoice total, and gross amount. Users can easily verify this information before it is created into a Canopy Accounts Payable (A/P) Invoice Batch. The standard A/P Journal and Accept processes are then executed to finalize the posting in Canopy. This entire process requires only a minimal amount of manual labor to automatically load and match transactions into Canopy.

Smart Extract can simultaneously load documents, including vendor invoices, shipping manifests, bills of lading, and receiving documents, into Canopy's Document Imaging module while vendor invoices are being processed into the Accounts Payable module.

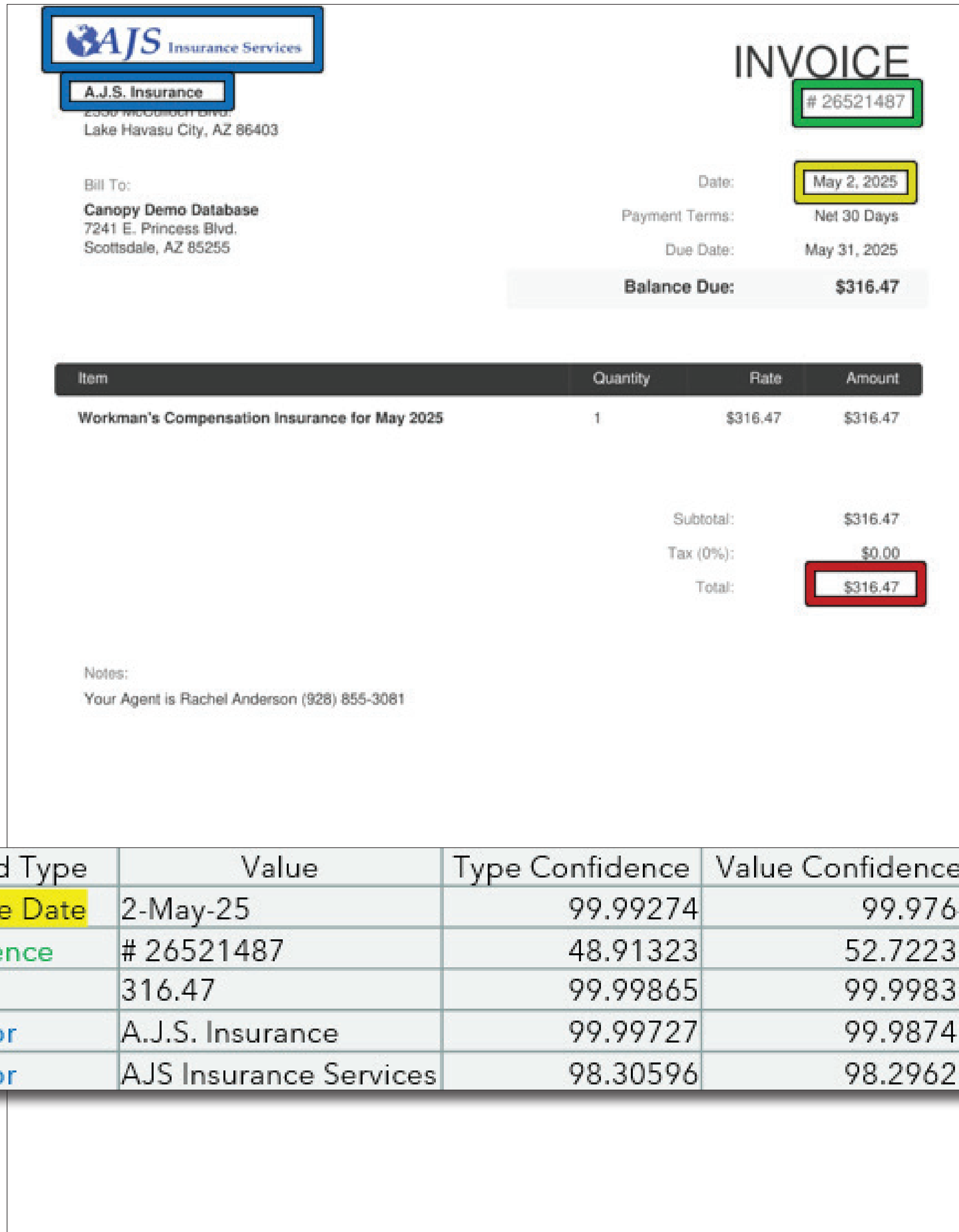
Highlights

- Template free A/P Invoice Capture
- Does not require mapping invoice formats or layouts
- Understands the vendor code and name, reference number, invoice date, purchase order, receipt amount, invoice total, and gross dollar amount etc.
- Intelligent three way matching with vendor invoices, purchase orders, and inventory receipts to ensure accuracy
- Processes vendor invoices and credit memos
- Automatically distributes General Ledger postings
- Supports multiple page documents
- Instant alerts for transaction discrepancies
- Eliminates manual data entry
- Reduces labor expenses
- Works for service vendors who do not have purchase orders
- Checks for duplicate vendor invoice numbers
- Supports scheduled tasks to automatically process documents
- Speed up turnaround times
- Processes data from PDF, TIF, PNG, and JPG formats
- Automatically filters out extraneous data
- Supports optional document stamp pre-process
- Works for groups of related vendors who have centralized billing
- Improve vendor relationships
- Supports optional vendor cross reference names
- Fully integrated with Canopy's A/P and Document Imaging modules

SELECTED FEATURES OF SMART EXTRACT

Detected Field Values

Smart Extract employs machine learning to identify key values from invoices without requiring templates or mapping. Below is an example of an invoice where Smart Extract recognizes the vendor highlighted in the blue box, the invoice or reference number indicated in the green box, the invoice date marked in the yellow box, and the invoice amount displayed in the red box.



AJS Insurance Services

INVOICE

26521487

A.J.S. Insurance

Lake Havasu City, AZ 86403

Bill To:

Canopy Demo Database
7241 E. Princess Blvd.
Scottsdale, AZ 85255

Date:	May 2, 2025
Payment Terms:	Net 30 Days
Due Date:	May 31, 2025
Balance Due:	**$316.47**

Item	Quantity	Rate	Amount
Workman's Compensation Insurance for May 2025	1	$316.47	$316.47

Subtotal:	$316.47
Tax (0%):	$0.00
Total:	$316.47

Notes:

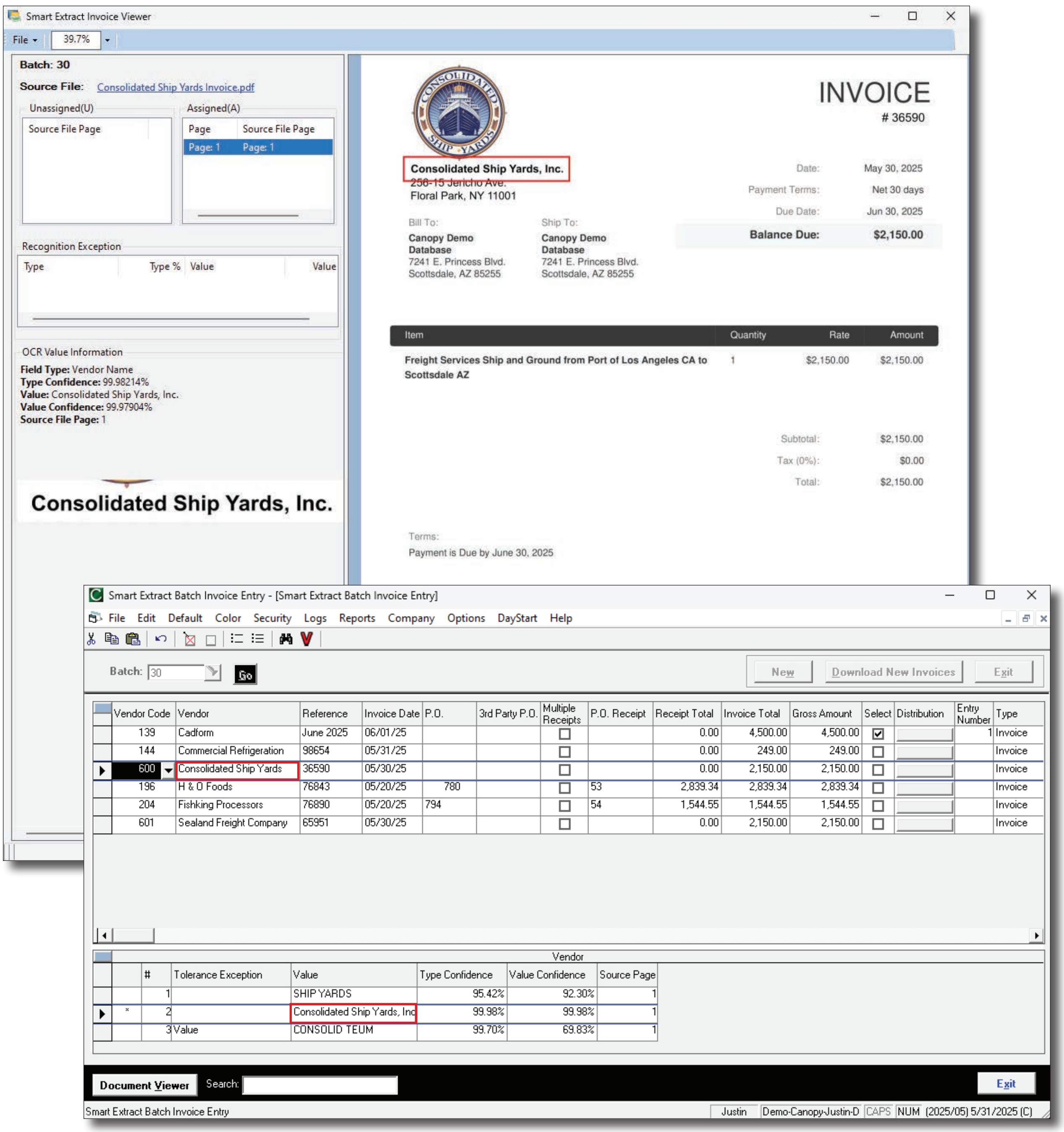
Your Agent is Rachel Anderson (928) 855-3081

Field Type	Value	Type Confidence	Value Confidence	Page
Invoice Date	2-May-25	99.99274	99.9764	1
Reference	# 26521487	48.91323	52.72238	1
Total	316.47	99.99865	99.99832	1
Vendor	A.J.S. Insurance	99.99727	99.98741	1
Vendor	AJS Insurance Services	98.30596	98.29623	1

SELECTED FEATURES OF SMART EXTRACT

Review Imported Invoices

Shown below is a display of a batch of Accounts Payable invoices extracted by Smart Extract, along with a sample invoice. The values can be verified and edited if necessary before they are posted to the Canopy Accounts Payable tables.



CoPilot

CANOPY ENHANCED MODULE

Driver Support, Location Tracking, Signature Capture, & More

CoPilot can streamline your delivery operations, get more timely delivery status information, reduce printing and paper handling, and track your deliveries' progress and location as they are happening.

CoPilot uses any Android mobile device (either phone or tablet) to make all of this happen. As a Canopy Enhanced Module, integration with Canopy is complete and seamless, with your information available in Canopy the moment it's transmitted. Security is assured by an encrypted (SSL) connection, and managed through your Canopy system.

Stop printing invoices, organizing them for drivers, then copying and filing signed invoices when they return. CoPilot will display the customer's invoice, and any line item details (including catchweights and lot numbers, if applicable).

Get delivery status and other information in Canopy as it happens, continuously along the route, instead of at the end of your driver's shift.

Location Logging begins when you start CoPilot on the mobile device. Location, date and time are automatically recorded at a regular interval selected by the administrator. Arrival and departure times at each scheduled stop are also logged automatically, so you have a verifiable record of when deliveries occurred.

CoPilot works even if you don't have an Internet connection. All data is stored locally on the device and transmitted to the server as soon as a connection is available.

CoPilot can capture the customer's signature electronically, and immediately store the signed invoice in Document Imaging as proof of delivery.* If desired, CoPilot can email a copy to the customer at the same time. The proof of delivery is instantly available in Canopy and Document Imaging, possibly even before your truck leaves the receiving dock.

**Requires Canopy's Document Imaging module (sold separately)*

Highlights

CoPilot Dashboard

- Track driver progress throughout their routes
- Display driver location history on a map
- Verifiable record of arrival and departure times
- Quickly see a driver's most recent logged location and time

CoPilot Mobile

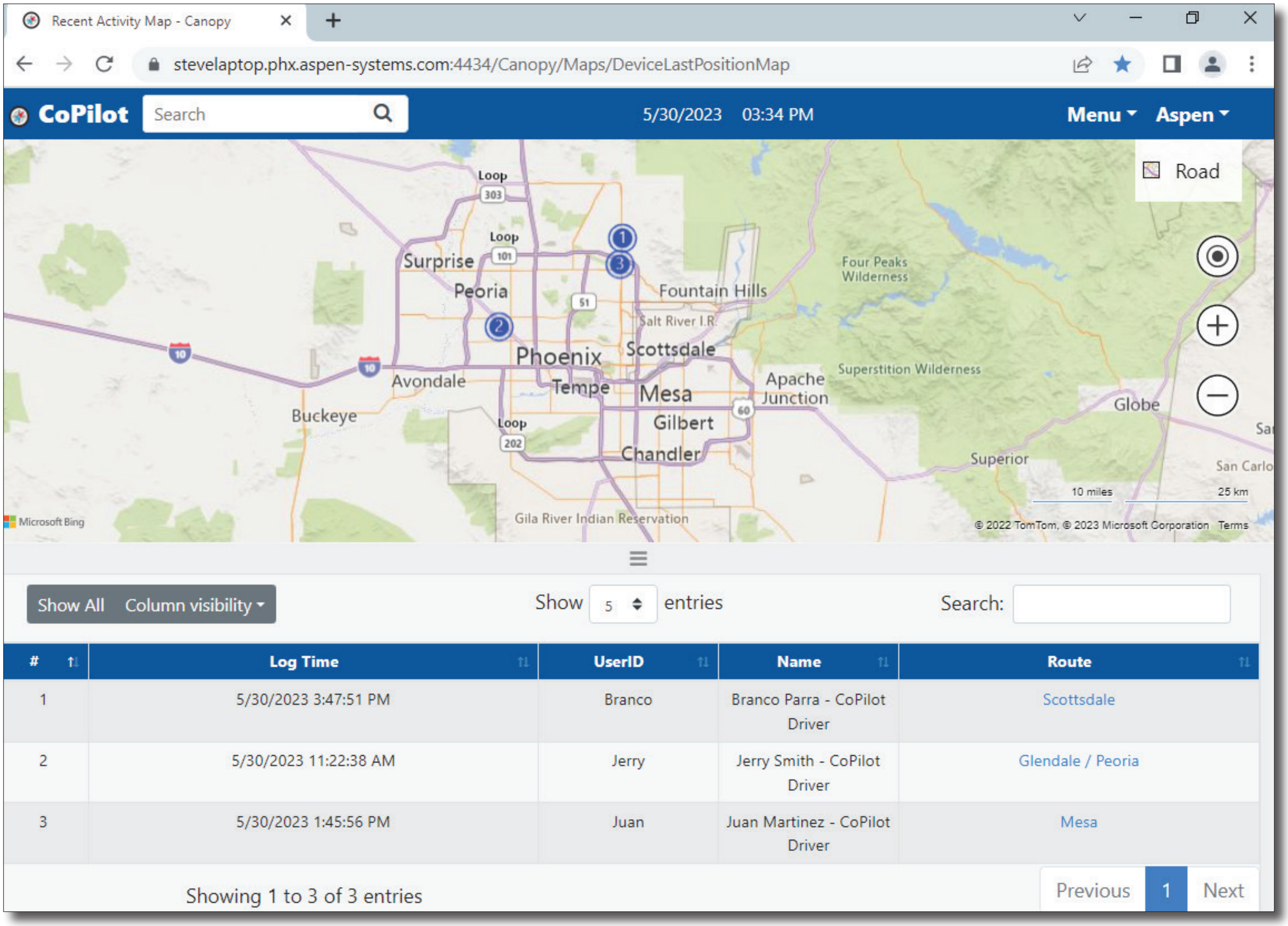
- Works offline
  (app will auto-sync when wireless connection is present)
- Each delivery completion is immediately recorded in Canopy
- Arrival and departure times are automatically logged for each scheduled stop
- Display Invoices, Purchase Orders, and Customer Tasks
- Drill into line item details including lot and catchweight information
- Special instructions can be entered for each route, and for individual stops
- Unique user ID for each driver, for accountability
- Driver Notes for route or individual stops
- Orders, Stops, and Routes are marked as Complete as deliveries progress
- Supports Android tablets and phones
- Document Money Pickups
- Verify delivery by individual line item or by scanning the case barcode
- Record customer product returns

CoPilot Mobile *(with Canopy's Document Imaging)**

- Eliminates the need to carry paper invoice/delivery records
- Capture customer's signature electronically on invoices as proof of delivery
- Signed invoice is immediately stored in Canopy Document Imaging
- Automatically email a signed invoice to customer within minutes of signing
- Take and upload photos for orders, purchase orders, and task issues

SELECTED FEATURES OF COPILOT

CoPilot Dashboard



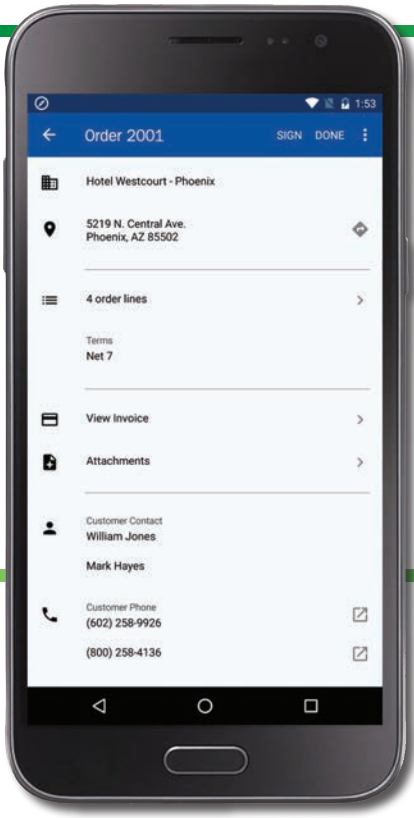
CoPilot's Dashboard offers a consolidated view of the location logs for all devices, plotted on a map and in a list. Filter the map and log with a variety of parameters to display only the information you need. In the log list, click any entry to display it on the map.

The Dashboard's map clearly shows your drivers' location trail, and their progress on the route. Simply click any item in the list to display it on the map. Click any dot on the map for more detail. The dashboard is also where an Administrator can easily add or remove mobile devices and assign each a descriptive name for clarity on reports and logs.

Location logging also enhances driver safety in an emergency: the log's last location can be used in dispatching assistance if the driver cannot be reached.

The CoPilot Dashboard is accessible to authorized users by any computer browser or Internet connected mobile device, so the user need not be at a computer. Staff in the field can have full access via their smartphone.

SELECTED FEATURES OF COPILOT



CoPilot Mobile *Designed for Ease of Use for the Driver*

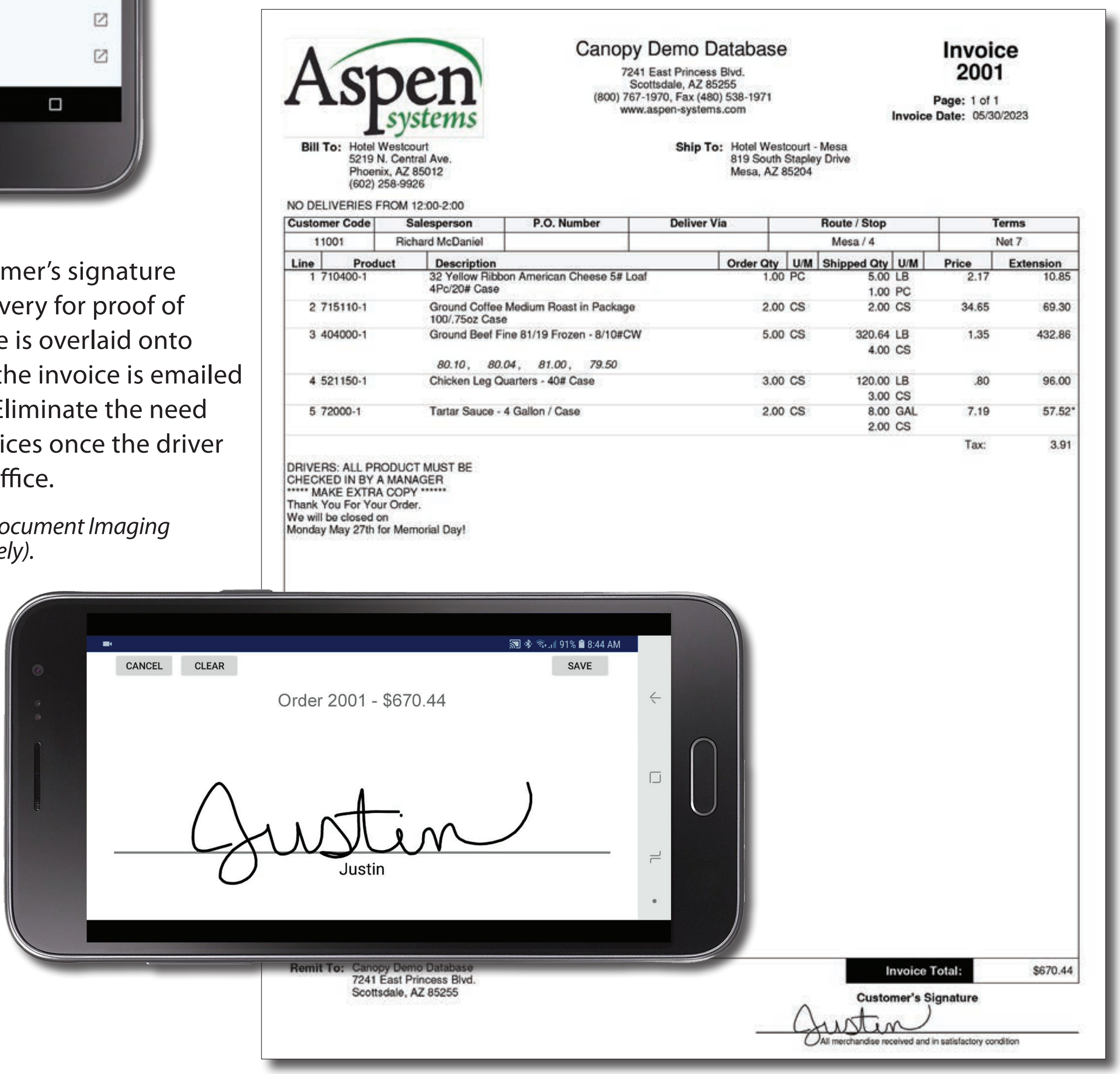
CoPilot displays all stops for the selected route, and necessary details for delivery on each order. Order number, route, customer name, address, contact names and phone numbers are all on one screen. The driver can display the entire invoice, or the individual order lines, including lot and catchweight details. They can also attach notes for the order or payment pickup information. Special instructions and driver messages can also be added for a route or any stop.

CoPilot handles the pickup of purchase orders, returns and payments as well as deliveries. If cell coverage is not available, CoPilot stores all information on the mobile device and promptly transmits it to Canopy when coverage becomes available. CoPilot reconnects automatically. The driver can also easily check at anytime to see if there is data waiting to be sent.

CoPilot Mobile *(with Canopy's Document Imaging)**

Capture the customer's signature at the time of delivery for proof of delivery. Signature is overlaid onto their invoice and the invoice is emailed directly to them. Eliminate the need to file signed invoices once the driver gets back to the office.

**Requires Canopy's Document Imaging module (sold separately).*



Aspen systems

Canopy Demo Database
7241 East Princess Blvd.
Scottsdale, AZ 85255
(800) 767-1970, Fax (480) 538-1971
www.aspen-systems.com

Invoice 2001
Page: 1 of 1
Invoice Date: 05/30/2023

Bill To: Hotel Westcourt
5219 N. Central Ave.
Phoenix, AZ 85012
(602) 258-9926

Ship To: Hotel Westcourt - Mesa
819 South Stapley Drive
Mesa, AZ 85204

NO DELIVERIES FROM 12:00-2:00

Customer Code	Salesperson	P.O. Number	Deliver Via	Route / Stop	Terms
11001	Richard McDaniel			Mesa / 4	Net 7

Line	Product	Description	Order Qty	U/M	Shipped Qty	U/M	Price	Extension
1	710400-1	32 Yellow Ribbon American Cheese 5# Loaf 4Pc/20# Case	1.00	PC	5.00 1.00	LB PC	2.17	10.85
2	715110-1	Ground Coffee Medium Roast in Package 100/.75oz Case	2.00	CS	2.00	CS	34.65	69.30
3	404000-1	Ground Beef Fine 81/19 Frozen - 8/10#CW 80.10, 80.04, 81.00, 79.50	5.00	CS	320.64 4.00	LB CS	1.35	432.86
4	521150-1	Chicken Leg Quarters - 40# Case	3.00	CS	120.00 3.00	LB CS	.80	96.00
5	72000-1	Tartar Sauce - 4 Gallon / Case	2.00	CS	8.00 2.00	GAL CS	7.19	57.52*
							Tax:	3.91

DRIVERS: ALL PRODUCT MUST BE CHECKED IN BY A MANAGER
***** MAKE EXTRA COPY ******
Thank You For Your Order.
We will be closed on Monday May 27th for Memorial Day!

Remit To: Canopy Demo Database
7241 East Princess Blvd.
Scottsdale, AZ 85255

Invoice Total: $670.44

Customer's Signature
Justin
All merchandise received and in satisfactory condition

CANOPY ENHANCED MODULE

Customer & Prospect Relationship Management

Canopy's CRM module tracks all interactions with prospects and customers and offers a full suite of marketing, prospecting, and customer service capabilities. Build relationships with your prospects and customers. Improve your customer service. Track the total number of sales calls each salesperson makes.

Complete contact history is kept for prospects and customers, which includes unlimited notes, actions, price quotes, phone calls, visits, emails, faxes, etc. Each completed task is automatically date and time stamped. Create your own user defined tasks and fields. Customize the screens any way you wish. Track as many contacts for a company as you need. The CRM module is fully integrated with Canopy, and prospect and customer price quotes can be created using Canopy's product and pricing tables. A prospect is easily moved to a customer in Canopy's database.

Setup and maintain hyperlinks for company websites and social media, such as LinkedIn and Facebook. Salespersons can maintain their own calendars with daily, weekly, and monthly task views. Customer service representatives can record customer suggestions, complaints, returns, and many other interactions.

Canopy's CRM module comes with a full suite of standard reports, including the Prospect Report, which allows each salesperson to print their prospects. The Salesperson Performance Report will compute the total number of sales calls each salesperson makes over the specified date range.

Highlights

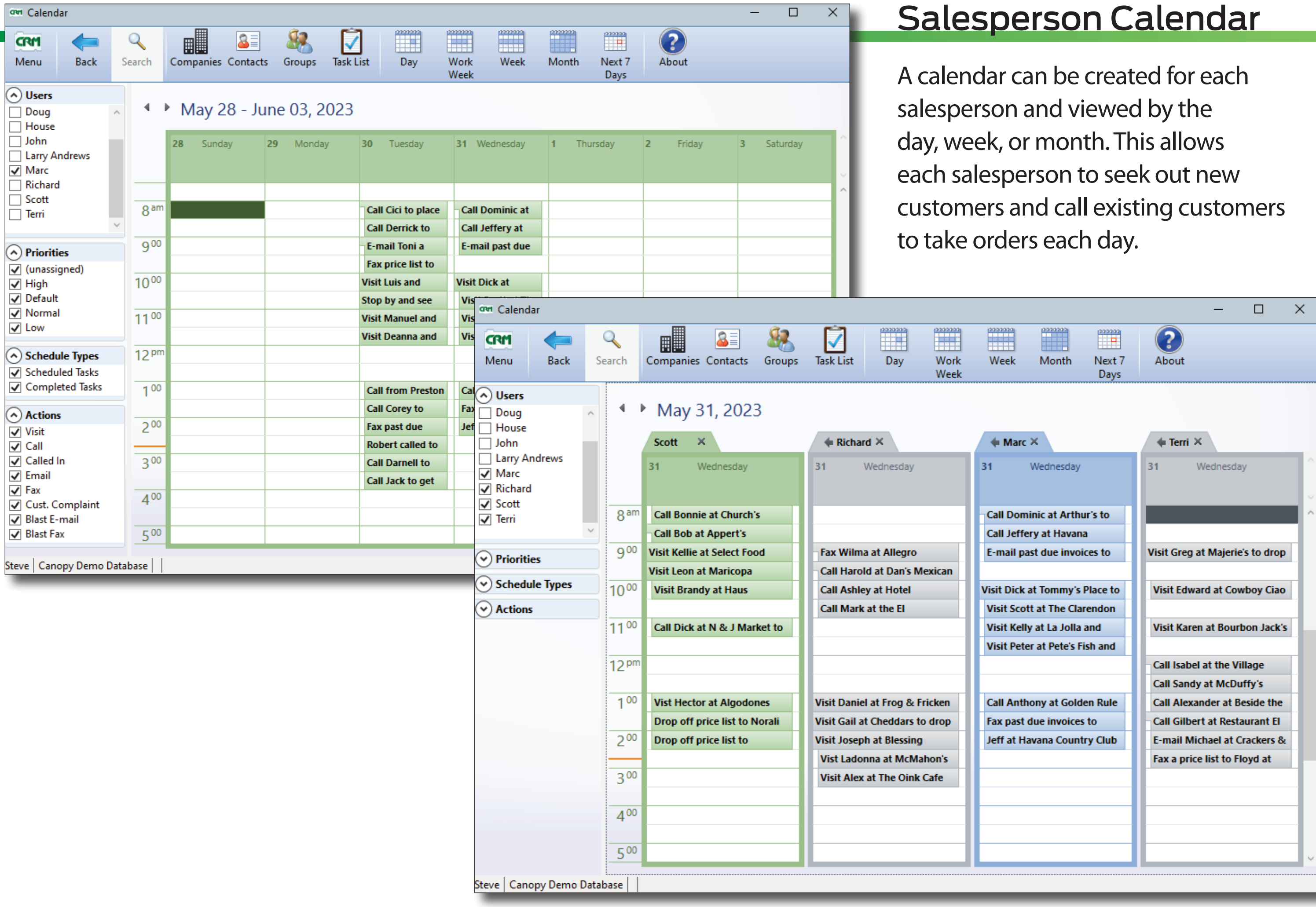
- Fully integrated with Canopy
- Create and schedule appointments and meetings
- Track prospect interactions made by salespersons
- Manage requests made by customers
- Built-in calendar and task lists
- Automatically date and time-stamp notes and events
- View daily, weekly, and monthly events
- Set up company and contact hyperlinks for websites and social media
- Create prospect and customer quotes
- Salesperson performance reporting
- Customize task priorities by color
- Fully customizable screens with field security by user
- Create unlimited action codes and user defined fields
- Multiple language capability
- Create custom filters for built-in reports
- Assign custom images to companies and contacts
- Conduct sales email campaigns
- Phone/Tablet/Web Interface
  - Search contacts and companies
  - View/Add/Edit contacts and companies
  - Fully customizable company and contact view and edit screens
  - View/Add/Edit Tasks

SELECTED FEATURES OF CRM

Company and Contact Maintenance

Canopy's CRM Entry screens are easy to use and navigate. Companies can be created and linked together for common ownership. An unlimited number of contacts can be created for each company. User defined fields, classifications, and marketing programs can be defined and tracked. The fields and arrangements shown on the screen are completely customizable.

SELECTED FEATURES OF CRM

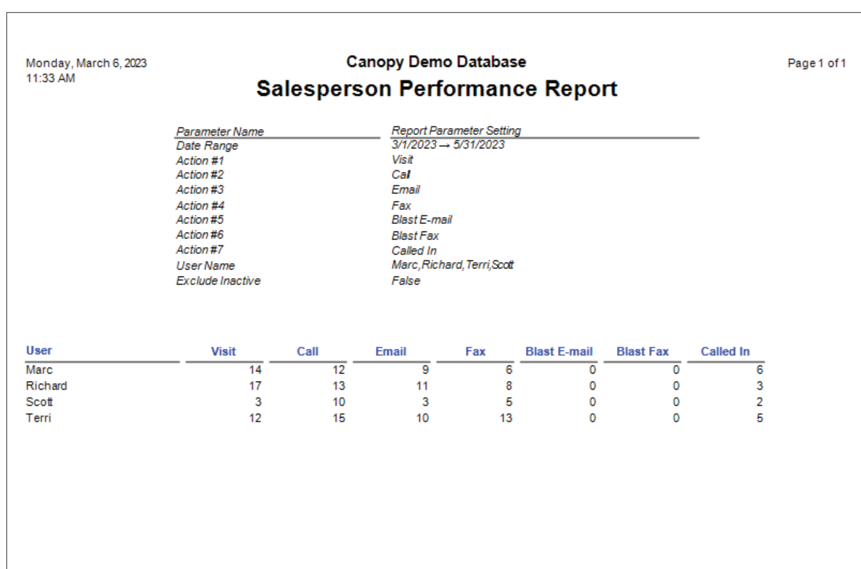


Salesperson Calendar

A calendar can be created for each salesperson and viewed by the day, week, or month. This allows each salesperson to seek out new customers and call existing customers to take orders each day.

Salesperson Performance Report

The Salesperson Performance Report will allow you to measure the number of sales calls an inside or outside salesperson makes over any time frame in the past. Questions about the number of sales calls made during a specific time period per salesperson, and how many prospects are turned into customers, can be answered. Because the CRM module is built into Canopy, salesperson and customer sales reports can be printed right from Canopy's sales reporting module.



Monday, March 6, 2023
11:33 AM

Canopy Demo Database

Salesperson Performance Report

Page 1 of 1

Parameter Name	Report Parameter Setting
Date Range	3/1/2023 → 5/31/2023
Action #1	Visit
Action #2	Call
Action #3	Email
Action #4	Fax
Action #5	Blast E-mail
Action #6	Blast Fax
Action #7	Called In
User Name	Marc,Richard,Terri,Scott
Exclude Inactive	False

User	Visit	Call	Email	Fax	Blast E-mail	Blast Fax	Called In
Marc	14	12	9	6	0	0	6
Richard	17	13	11	8	0	0	3
Scott	3	10	3	5	0	0	2
Terri	12	15	10	13	0	0	5

eCommerce

CANOPY ENHANCED MODULE

Customer Online Ordering

In today's world, online sales are changing the way companies do business. Customers come from a variety of sources. Some are established customers who have an account with your company while others wish to purchase products but are not current account holders. Having an online sales presence is vital for maximizing your company's sales. Expand your sales efforts by using Canopy's eCommerce module, a fully integrated web and mobile-optimized application for business transactions.

Business to Business (B2B)

With Canopy's eCommerce module, you can review order history, print invoices, view current price lists and statements using a web browser. All major web browsers are compatible. eCommerce is directly connected to Canopy with real-time communication and current information. Self-service ordering has never been easier.

A customer can only see their own information, such as prices, orders, and history. Customers can even create their own order guides to facilitate effortless ordering. A firewall protects your data and network. High-level security restricts customers to allow them to perform only certain tasks. Sales representatives can also utilize the eCommerce module to create orders for their customers while visiting them or when working remotely.

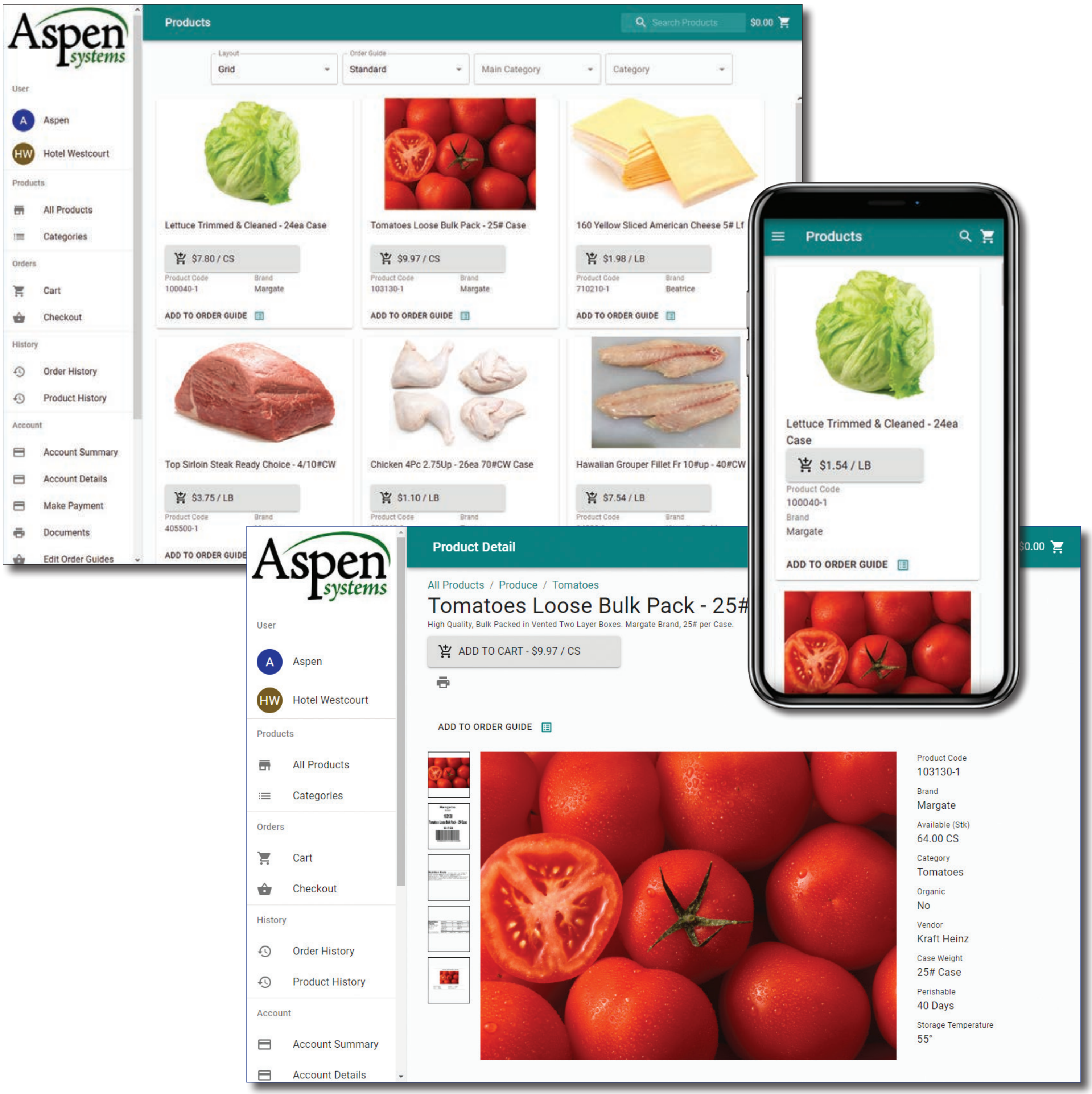
Highlights

- Online sales to existing Customers (B2B)
- Provide customers with access to your services from the Internet at any time of the day
- High security restricts customers from unauthorized data
- Realize cost savings and provide flexibility for customers to place their own orders
- Maintain a cut-off time for placing orders to guarantee next day delivery
- Restrict certain products and categories of products from being ordered
- Define order quantity limits for certain products as needed
- Setup and display product catalog descriptions
- Enable customers to access account inquiry
- View order history
- View product pricing
- View A/R account balances
- Allow customers to make payments to their account
- Customers can view their scanned documents stored within the system including signed invoices, shipping manifests, and bill of ladings
- Add your own product pictures to the order guide
- Customers can easily create custom order guides

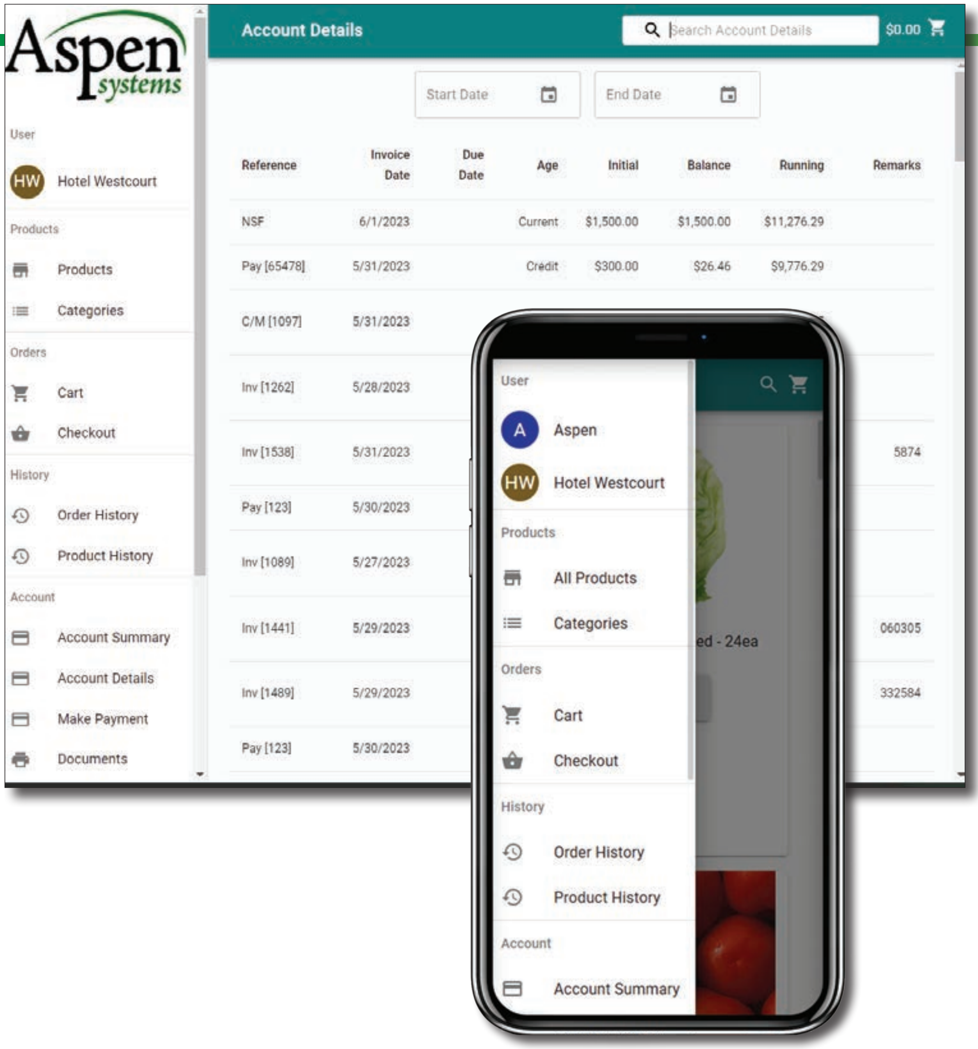
SELECTED FEATURES OF eCommerce

Placing Orders

The ability for your customer to place their own orders in Canopy's eCommerce module will save you time and money. Your customers are presented with an easy to use Order Entry screen, including the ability to view only products that they purchase, view all products, create their own order guides, or search for new products based on the product description. Unleashing this power to your customers will improve their experience, resulting in an improvement to your bottom line.



SELECTED FEATURES OF eCommerce

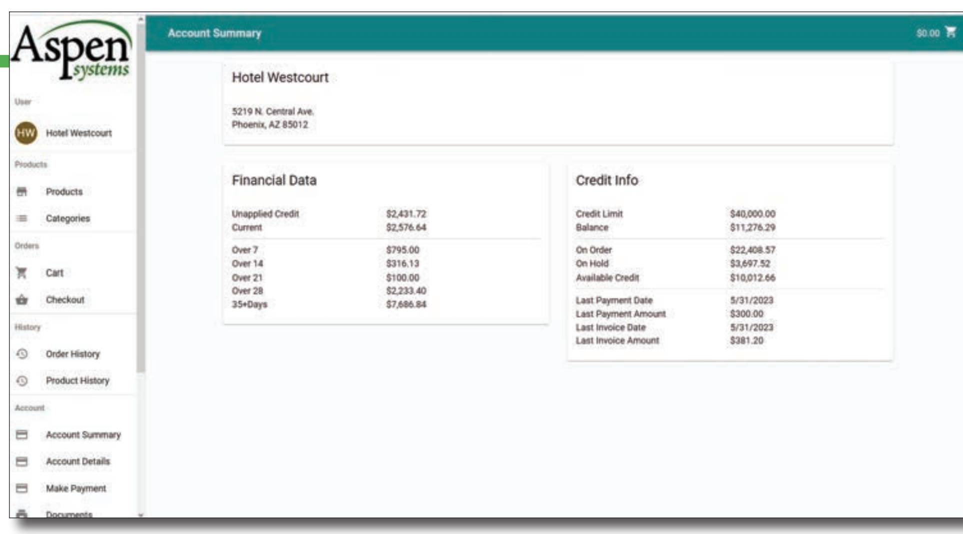


Main Menu

As shown, the Main Menu for Canopy's eCommerce module is presented in a simple, easy to use format. Add as many customers as you wish; training is minimal when new customers are authorized to use the eCommerce module. All the expected buttons and features are simple for a user to learn, and it works with most standard browsers.

Account Summary

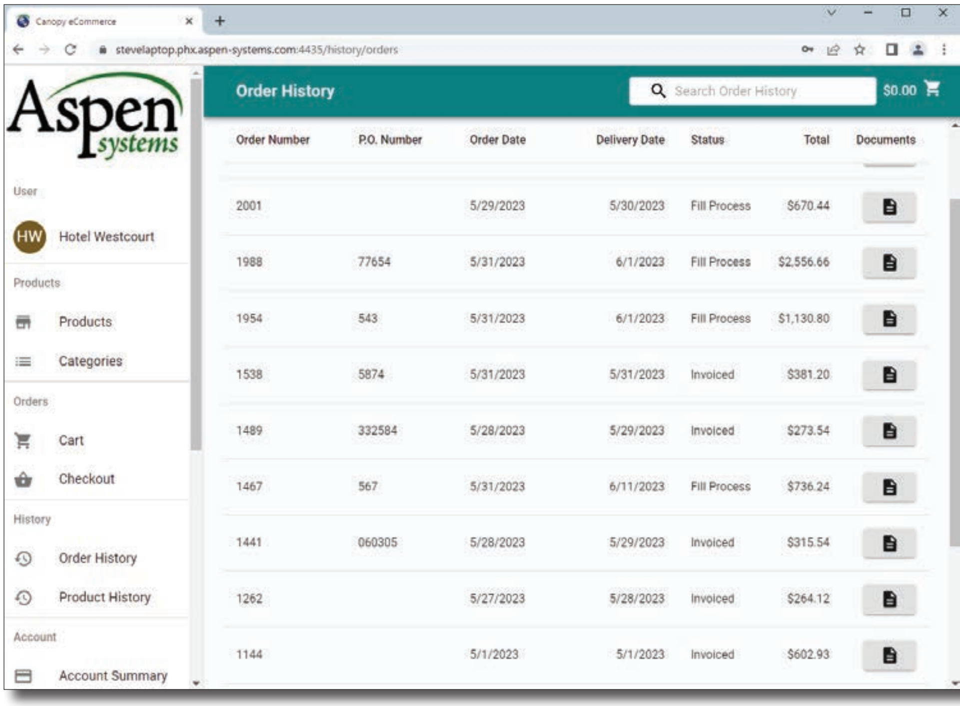
Customers can easily review a summary of their account information, such as the current name, address, financial data, and credit information.



SELECTED FEATURES OF eCommerce

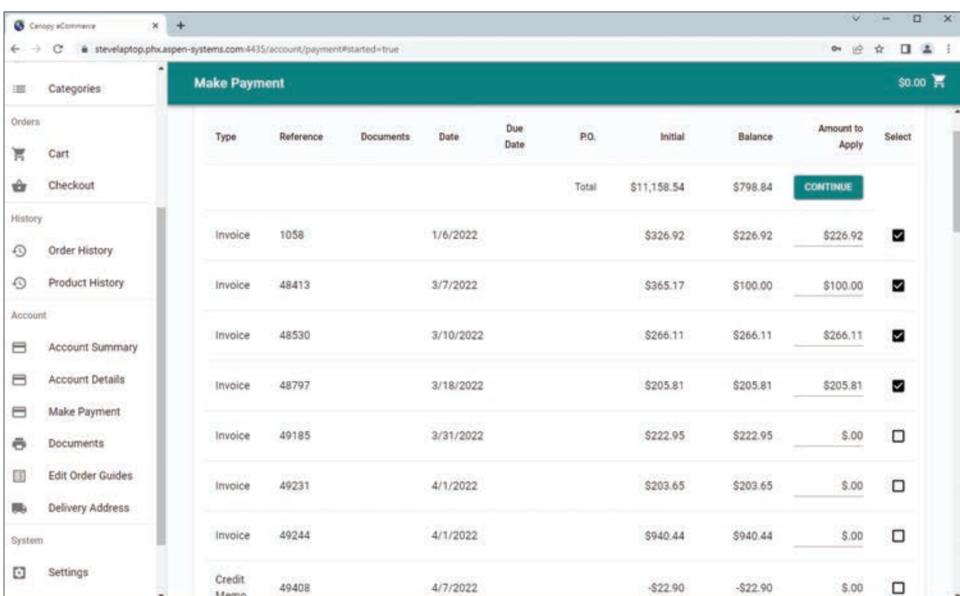
Order History

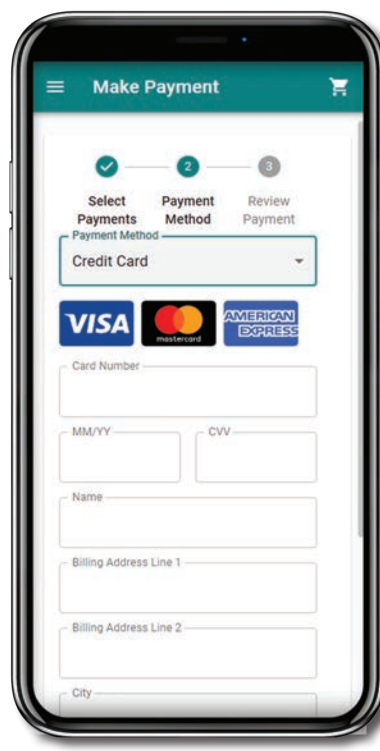
The Order History screen lists both current and past orders. The user can sort the list by column or click the print button to print either an order confirmation or invoice, depending on the order's status.



Make Payments

B2B customers can make payments on their account. eCommerce works with several payment processors with options for credit cards and checking accounts.





element

CANOPY ENHANCED MODULE

Continuously Track Sensor Devices

Logging critical data that may affect the quality of your products is a constant challenge. Regulatory agencies and customers require evidence that certain elements are being tracked and recorded.

Element is a Canopy enhanced module designed to log data, such as temperature and humidity, in critical areas, like freezers, coolers, and warehouses, using external sensor devices. With Element, critical reads of a device are an automated process. Measurements are continuously tracked and data is automatically logged and available for reporting.

Coupled with Aspen's Pulse dashboard module, the device reads can be presented graphically to display the desirable level. Go a step further and add Event Watch so a notification of out of range measurements can be sent to an individual or a designated group for appropriate action.

Element will help you meet regulatory and/or customer specifications requiring proof that certain criteria has been met in the handling or storing of your product. History reports are easily generated and can be emailed, printed, or faxed.

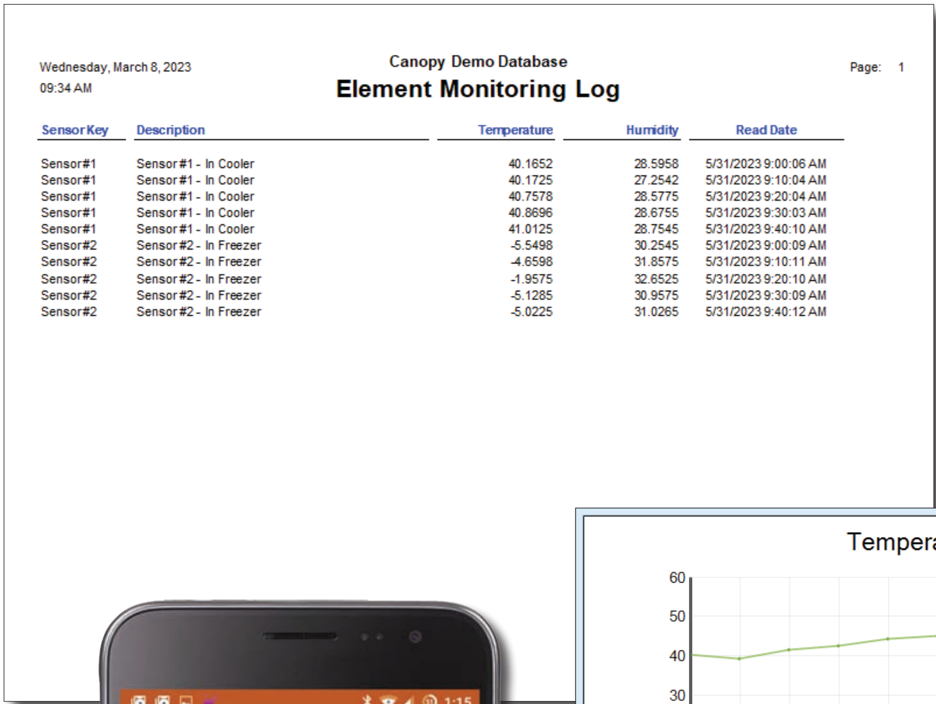
Highlights

- Track unlimited number of external sensor devices
- User defined tracking time intervals
- Complete history of all log events
- External sensor devices can be wired or wireless
- Real time reporting
- Track temperature and humidity
- Use with Event Watch for notification of measurements that are out of range
- Use with Pulse to create graphs and charts, updated at user defined time intervals
- Easy to setup devices
- Save labor by allowing the system to track your devices

- Useful examples include:
  - Protect your controlled environments that are subject to audit
  - Log temperatures within your freezers, coolers, and warehouses
  - Meet regulatory requirements by providing a history of compliance
  - Protect and prolong product shelf life
  - Meet customer requirements to prove that products are stored under certain conditions

Monitor Temperatures and Humidity Effortlessly

Element uses a variety of devices to monitor the temperature and humidity in your facility 24 hours a day. When used in combination with Event Watch or Pulse, you can be alerted anytime the temperature or humidity falls outside of your acceptable range to avoid the costly loss of product. You can provide your customers and quality assurance representatives with a log ensuring that the product was kept at a safe temperature or brought back to a safe temperature quickly.



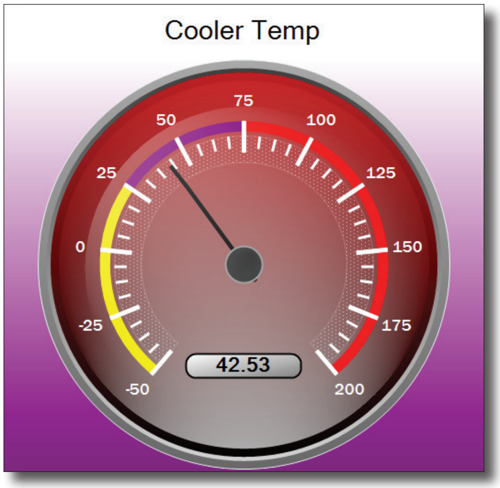
Wednesday, March 8, 2023
09:34 AM

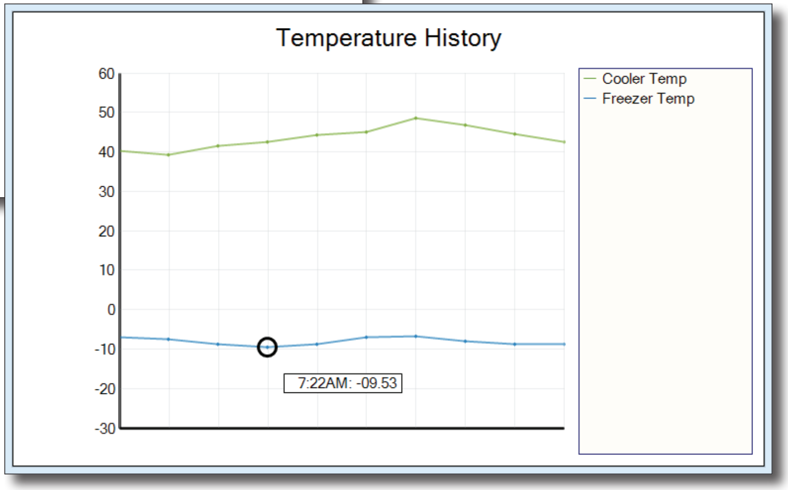
Canopy Demo Database

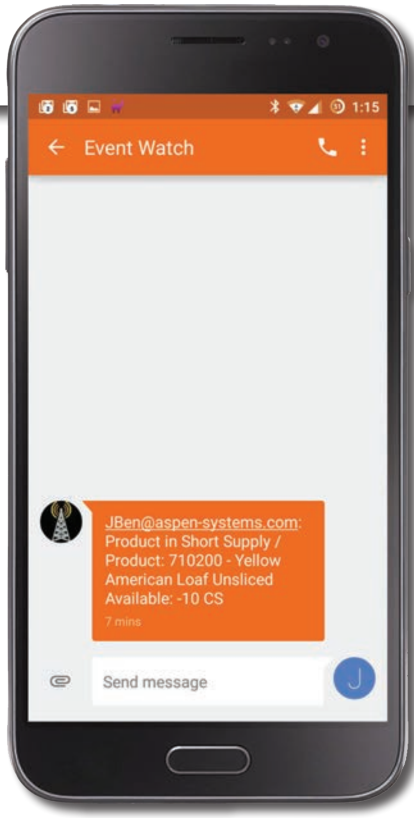
Element Monitoring Log

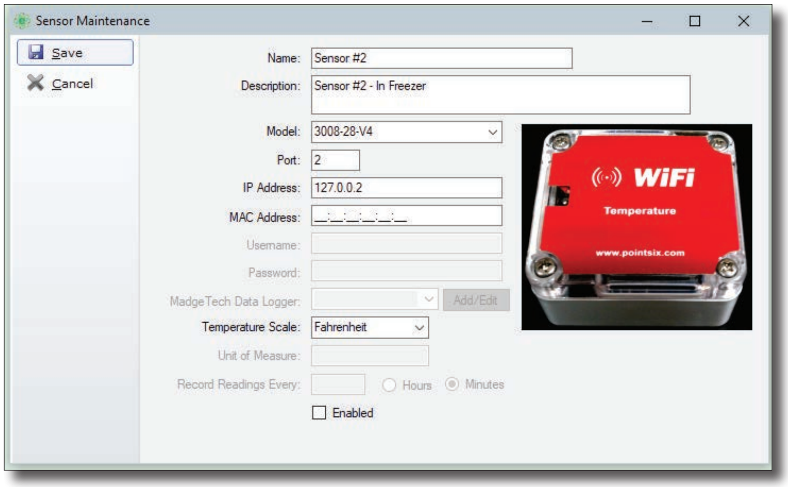
Page: 1

Sensor Key	Description	Temperature	Humidity	Read Date
Sensor#1	Sensor #1 - In Cooler	40.1652	28.5958	5/31/2023 9:00:06 AM
Sensor#1	Sensor #1 - In Cooler	40.1725	27.2542	5/31/2023 9:10:04 AM
Sensor#1	Sensor #1 - In Cooler	40.7578	28.5775	5/31/2023 9:20:04 AM
Sensor#1	Sensor #1 - In Cooler	40.8696	28.6755	5/31/2023 9:30:03 AM
Sensor#1	Sensor #1 - In Cooler	41.0125	28.7545	5/31/2023 9:40:10 AM
Sensor#2	Sensor #2 - In Freezer	-5.5498	30.2545	5/31/2023 9:00:09 AM
Sensor#2	Sensor #2 - In Freezer	-4.6598	31.8575	5/31/2023 9:10:11 AM
Sensor#2	Sensor #2 - In Freezer	-1.9575	32.6525	5/31/2023 9:20:10 AM
Sensor#2	Sensor #2 - In Freezer	-5.1285	30.9575	5/31/2023 9:30:09 AM
Sensor#2	Sensor #2 - In Freezer	-5.0225	31.0265	5/31/2023 9:40:12 AM









Forecasting

CANOPY ENHANCED MODULE

Get a Handle on Future Product Demands

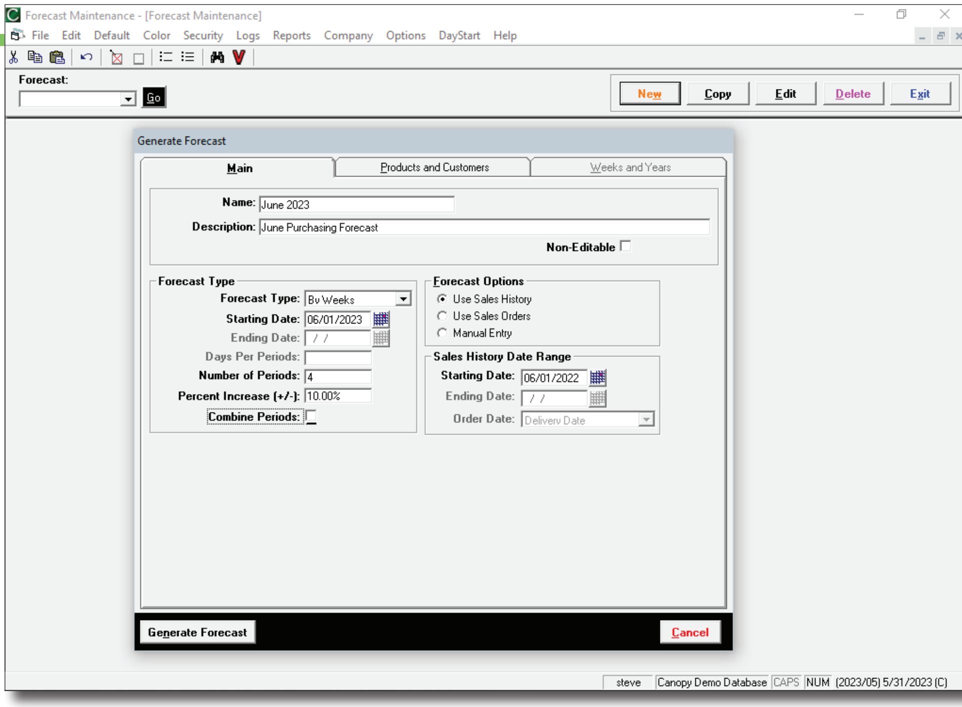
The need for a comprehensive understanding of future product demand is crucial in today's industry for both distributors and processors. Too much product and you are faced with the decision on what to do with it; too little product and you are missing sales revenue. Product Demand is either in the process of increasing or decreasing, but the one thing that is always constant is that future demand is always changing.

This is where an easy-to-use forecasting module can bring great benefits by giving you the ability to create a forecast that can be used within multiple areas of your company. You can quickly create a forecast based on percentage increases or decreases over past sales. Salespersons can easily modify a forecast by adding additional product demand or even future customer specific requirements that have yet to be recorded. No expensive interfaces to third-party software packages are required, nor is there a need to export data to spreadsheets for creating forecasts. Accurately forecast future demand in just minutes.

Data in your Canopy database can be utilized to establish the demand requirements for both purchasing and production, as the Forecasting module is directly integrated with the Canopy Production and Purchasing modules. Within the Production module, the Production Requirements Worksheet can leverage forecasts of finished products to more accurately predict future production needs. In the Purchasing module, the Purchase Advice report can automatically generate purchase orders for the raw materials required for future production, as well as for products that you buy and sell.

Highlights

- Create as many forecasts as needed for different demand scenarios
- Forecasts can be created based on:
  - Date ranges
  - Days, months, weeks, years
  - Fiscal periods
  - Prior forecasts
- Forecasts can be based on:
  - Sales History
  - Sales Orders
  - Manual Entry
  - Combination of the three options
- Forecasts can be created in:
  - Pounds
  - Cases
  - Kilograms
  - Any other unit of measure
  - Sales Dollars
- Use percent increases or decreases to create a new forecast from an existing forecast or from history
- Copy and rename forecasts
- View forecast product detail at the customer level
- Edit the product detail at the customer level
- View sales history for user defined ranges
- View open order history for user defined ranges
- View product summary
- Edit summary product quantity
- Use any forecast in place of normal demand logic for
  - Scheduling purchasing
  - Scheduling production
- Standard reporting included for forecast analysis

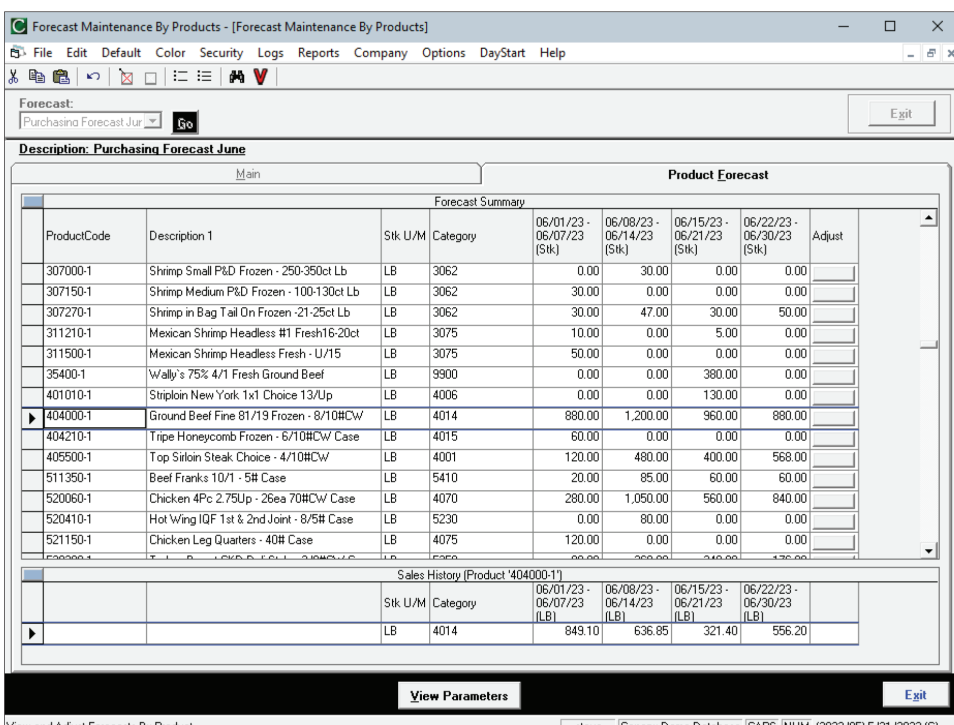


Forecast Creation

Create Forecasts based on Sales History, Sales Orders, or Manual Entry. Forecasts can be presented based on Date Ranges, Days, Fiscal Periods, Months, Weeks, Years, or a Prior Forecast with a percentage increase or percentage decrease. Forecasts are used in Canopy's Purchasing and Production modules. Create as many forecasts as needed for different demand scenarios within your company.

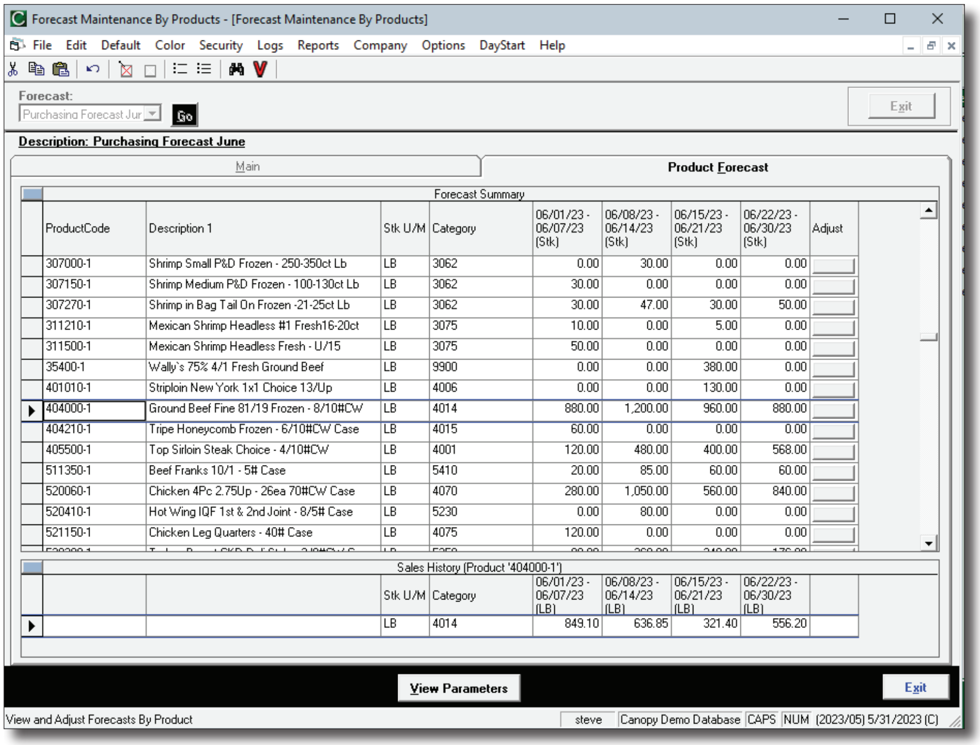
Forecast by Customer by Product

View the results in detail of any generated forecast for multiple time frames of your choice. Edit any quantity for any time frame of the forecast. You can also view multiple time frames of customer product sales history.



Product Forecast Adjustments

This screen gives the user the ability to view the product summary totals along with sales history and future orders for multiple time frames. It allows the user to edit any product quantity for any time frame of the forecast. This gives the user the ability to adjust the forecast for special deals that have not been input into the system. Forecasts can be used in place of normal demand logic in purchase reports and production scheduling functions.

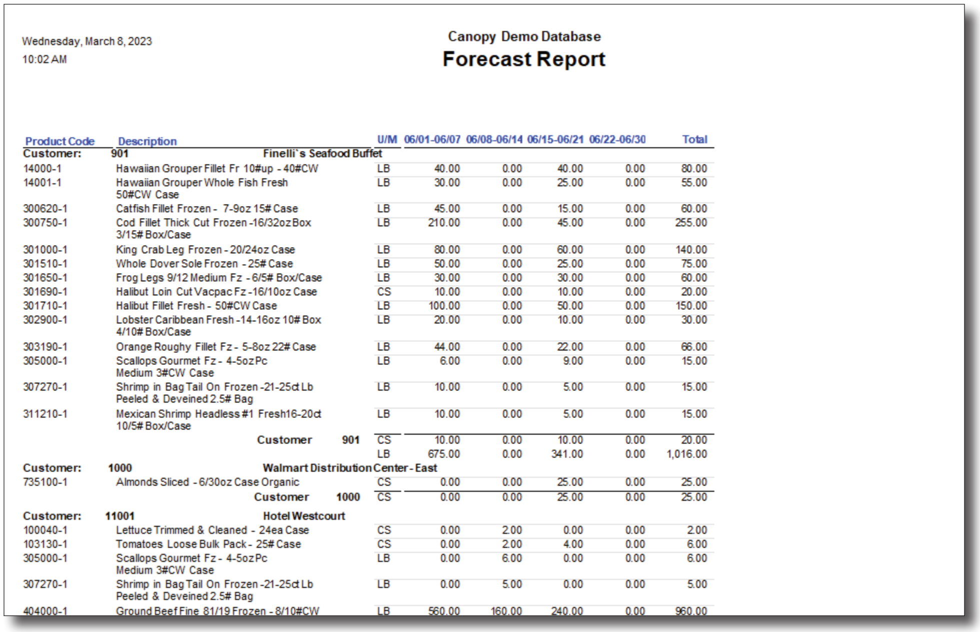


Forecast Summary

ProductCode	Description 1	Stk U/M	Category	06/01/23 - 06/07/23 (Stk)	06/08/23 - 06/14/23 (Stk)	06/15/23 - 06/21/23 (Stk)	06/22/23 - 06/30/23 (Stk)	Adjust
307000-1	Shrimp Small P&D Frozen - 250-350ct Lb	LB	3062	0.00	30.00	0.00	0.00	
307150-1	Shrimp Medium P&D Frozen - 100-130ct Lb	LB	3062	30.00	0.00	0.00	0.00	
307270-1	Shrimp in Bag Tail On Frozen -21-25ct Lb	LB	3062	30.00	47.00	30.00	50.00	
311210-1	Mexican Shrimp Headless #1 Fresh16-20ct	LB	3075	10.00	0.00	5.00	0.00	
311500-1	Mexican Shrimp Headless Fresh - U/15	LB	3075	50.00	0.00	0.00	0.00	
35400-1	Wally`s 75% 4/1 Fresh Ground Beef	LB	9900	0.00	0.00	380.00	0.00	
401010-1	Striploin New York 1x1 Choice 13/Up	LB	4006	0.00	0.00	130.00	0.00	
404000-1	Ground Beef Fine 81/19 Frozen - 8/10#CW	LB	4014	880.00	1,200.00	960.00	880.00	
404210-1	Tripe Honeycomb Frozen - 6/10#CW Case	LB	4015	60.00	0.00	0.00	0.00	
405500-1	Top Sirloin Steak Choice - 4/10#CW	LB	4001	120.00	480.00	400.00	568.00	
511350-1	Beef Franks 10/1 - 5# Case	LB	5410	20.00	85.00	60.00	60.00	
520060-1	Chicken 4Pc 2.75Up - 26ea 70#CW Case	LB	4070	280.00	1,050.00	560.00	840.00	
520410-1	Hot Wing IQF 1st & 2nd Joint - 8/5# Case	LB	5230	0.00	80.00	0.00	0.00	
521150-1	Chicken Leg Quarters - 40# Case	LB	4075	120.00	0.00	0.00	0.00	

Sales History (Product '404000-1')

		Stk U/M	Category	06/01/23 - 06/07/23 (LB)	06/08/23 - 06/14/23 (LB)	06/15/23 - 06/21/23 (LB)	06/22/23 - 06/30/23 (LB)
		LB	4014	849.10	636.85	321.40	556.20



Wednesday, March 8, 2023
10:02 AM

Canopy Demo Database

Forecast Report

Product Code	Description	U/M	06/01-06/07	06/08-06/14	06/15-06/21	06/22-06/30	Total
Customer: 901	**Finelli`s Seafood Buffet**						
14000-1	Hawaiian Grouper Fillet Fr 10#up - 40#CW	LB	40.00	0.00	40.00	0.00	80.00
14001-1	Hawaiian Grouper Whole Fish Fresh 50#CW Case	LB	30.00	0.00	25.00	0.00	55.00
300620-1	Catfish Fillet Frozen - 7-9oz 15# Case	LB	45.00	0.00	15.00	0.00	60.00
300750-1	Cod Fillet Thick Cut Frozen -16/32oz Box 3/15# Box/Case	LB	210.00	0.00	45.00	0.00	255.00
301000-1	King Crab Leg Frozen - 20/24oz Case	LB	80.00	0.00	60.00	0.00	140.00
301510-1	Whole Dover Sole Frozen - 25# Case	LB	50.00	0.00	25.00	0.00	75.00
301650-1	Frog Legs 9/12 Medium Fz - 6/5# Box/Case	LB	30.00	0.00	30.00	0.00	60.00
301690-1	Halibut Loin Cut Vacpac Fz -16/10oz Case	CS	10.00	0.00	10.00	0.00	20.00
301710-1	Halibut Fillet Fresh - 50#CW Case	LB	100.00	0.00	50.00	0.00	150.00
302900-1	Lobster Caribbean Fresh -14-16oz 10# Box 4/10# Box/Case	LB	20.00	0.00	10.00	0.00	30.00
303190-1	Orange Roughy Fillet Fz - 5-8oz 22# Case	LB	44.00	0.00	22.00	0.00	66.00
305000-1	Scallops Gourmet Fz - 4-5oz Pc Medium 3#CW Case	LB	6.00	0.00	9.00	0.00	15.00
307270-1	Shrimp in Bag Tail On Frozen -21-25ct Lb Peeled & Deveined 2.5# Bag	LB	10.00	0.00	5.00	0.00	15.00
311210-1	Mexican Shrimp Headless #1 Fresh16-20ct 10/5# Box/Case	LB	10.00	0.00	5.00	0.00	15.00
	Customer 901	CS	10.00	0.00	10.00	0.00	20.00
		LB	675.00	0.00	341.00	0.00	1,016.00
Customer: 1000	**Walmart Distribution Center - East**						
735100-1	Almonds Sliced - 6/30oz Case Organic	CS	0.00	0.00	25.00	0.00	25.00
	Customer 1000	CS	0.00	0.00	25.00	0.00	25.00
Customer: 11001	**Hotel Westcourt**						
100040-1	Lettuce Trimmed & Cleaned - 24ea Case	CS	0.00	2.00	0.00	0.00	2.00
103130-1	Tomatoes Loose Bulk Pack - 25# Case	CS	0.00	2.00	4.00	0.00	6.00
305000-1	Scallops Gourmet Fz - 4-5oz Pc Medium 3#CW Case	LB	0.00	6.00	0.00	0.00	6.00
307270-1	Shrimp in Bag Tail On Frozen -21-25ct Lb Peeled & Deveined 2.5# Bag	LB	0.00	5.00	0.00	0.00	5.00
404000-1	Ground Beef Fine 81/19 Frozen - 8/10#CW	LB	560.00	160.00	240.00	0.00	960.00

ASPEN SYSTEMS, INC.

www.aspen-systems.com | 800-767-1970 | sales@aspen-systems.com
7241 East Princess Blvd | Scottsdale, Arizona 85255