Introduction to The New Navigation System

| vemcount | | | | |
|------------------|-----------|---------|----------|--------|
| Dashboard | | | | |
| Manage | | | | |
| 2 Reports | 88 | igodot | • | |
| Saved reports | Dashboard | Reports | Tracking | Tenant |
| Saved reports v2 | | | Î | |
| Calendar | | | | |
| | | | | |

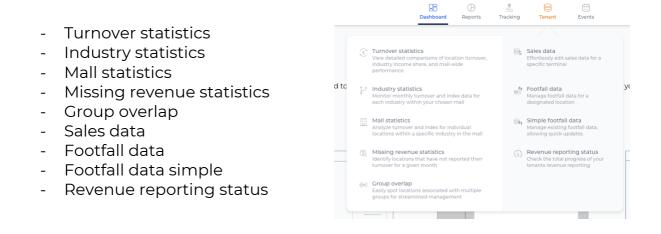
In the new navigation system, some of the menu points have been merged into one menu point.

The Dashboard remains the same

The Calendar is renamed to Events

Maps is renamed to Tracking

Manage is renamed to Tenant and will include:



Reports + Saved reports + Saved reports v2 + Shared reports are merged into one system \rightarrow Reports, which is further explained in the section "Introduction to The New Folder System".

Setup Pages

| | | | | 0 | 🙆 Setup 🕚 🕕 |
|-----------------------|-----------------------------|----------------|-----------------------------|-----------------------------|--------------------------|
| Maps | Locations | | | | Ð |
| Maps v2 (BETA) | | | | | |
| | Search for locations | | Order by name | a v Order by ascending v Sh | sw all 🗸 🗸 🔍 |
| O Locations | ld Name | Custom shop id | M ² Parent group | Group | Active date Closing date |
| Contacts | × | | | | |
| Groups | × | | | | |
| Tags | | | | | |
| Roles | Showing 1 to 3 of 3 results | | | | |
| Opening hours | | | | | |
| Health checks | | | | | |
| Sensor export | | | | | |
| Data import | | | | | |
| Data templates | | | | | |
| Email templates | | | | | |
| GDPR | | | | | |
| Custom fields | | | | | |
| Assets | | | | | |
| Notes | | | | | |
| Log activity | | | | | |
| Default user settings | | | | | |
| Password policy | | | | | |
| < | | | | | |

The menu points shown on the picture above have been moved from the side to the top middle as shown on the picture below.

| Home > Companies > | > Lo | cations | | | | | | | |
|--------------------|-----------|-------------|----------------|---------------------|----------------------|------------------|-------------|--------------|---|
| | Sources ~ | Templates 🖌 | Data Manager 🗸 | Employee settings 🗸 | Customization \sim | Logs 🗸 🛛 Other 🗸 | | | |
| Locations | | | | | | | | | |
| Q Search locations | | | | | | | | | + |
| ID Name | | | Custom shop ID | M² | Parent group | Group | Active date | Closing date | |
| | | | | | | | | | |
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Some menu items have been grouped together:

| In Sources you will find: | Sources ¥ |
|---|--|
| - Locations | |
| - Tags | 🗋 Tags |
| - Groups | 🏽 Groups |
| In Data manager you will find: | Data Manager 🗸 |
| - Sensor export | 🐝 Sensor export |
| - Data import | B→ Data import |
| - Data templates | Data templates |
| In Employee settings you will find: - Roles | Employee settings 🗸 |
| - Password Policy | , 𝔅 Roles |
| - Default user settings | ∞ Password Policy |
| - Contacts | 요리 Default user settings |
| In Customization you will find: - Custom fields - Assets - Notes - Email templates | Customization V Custom fields Assets Notes Email templates |
| In Logs you will find: - GDPR - Activity log | Logs ✓ Other ⓐ CDPR ⓐ Activity log |
| In Other you will find: - Opening hours - Health checks | Other V Opening hours Health checks |

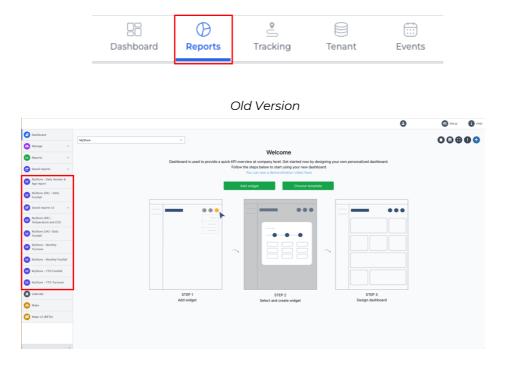
The other pages which also have a side menu like in the location list, for example *Users, Views, Services* and more will have the same layout as the picture shown above.

Introduction to The New Folder System

Where will the legacy/existing reports be placed in the new folder system?

All legacy/existing reports will be placed inside *My Files* which can be found inside the Reports.

Press the Reports button and all reports will be shown (See picture New Version).



New Version

|) My Files | Q Search | | ه ک |
|-----------------|--|------------|------------------|
| > Favorites | Nyfiles > | | |
| Shared with me | 🧉 My Files | | |
| , Exports | Name # | Shared | Last updated |
|] Deleted files | MyStore (UK) - Daily Footfall | Not shared | 3 minutes ago |
| | MyStore (DK) - Temperature and CO2 | Not shared | 4 minutes ago |
| | MyStore (DK) - Daily Footfall Footsal | Not shared | 7 minutes ago |
| | MyStore - YTD Turnover | Not shared | 2 seconds ago 🔅 |
| | MyStore - YTD Footfall | Not shared | 39 seconds ago 🔅 |
| | MyStore - Monthly Turnover | Not shared | 2 minutes ago |
| | MyStore - Monthly Footfall | Not shared | 1 minute ago |

The users will be able to create their own folders and place their reports in which ever structure they want.

Creating a new folder

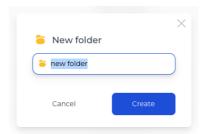
To create a new folder simply click the folder button on the top right corner.

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New folder button placement

| | 28 Dashboard Reports Ti | 🖞 📄 📅 acking Terrant Events | ۲ |
|------------------------------------|--|--------------------------------|-----------------|
| C My Files | Q. Search | | الحق الحق |
| ☆ Favorites | Myrfles > | | |
| shared with me | 🗧 My Files | | |
| 🛓 Exports | Name 4 | Shared | Last updated |
| Deleted files | MyStore (UK) - Daily Footfall | Not shared | 3 minutes ago |
| | MyStore (DK) - Temperature and CO2 | Not shared | 4 minutes ago 🔡 |
| | MyStore (DK) - Daily Footfall (Footfall) | Not shared | 7 minutes ago |
| | MyStore - YTD Turnover | Not shared | 2 seconds ago |
| | MyStore - YTD Footfall | Not shared | 39 seconds ago |
| | MyStore - Monthly Turnover | Not shared | 2 minutes ago 🔅 |
| | MyStore - Monthly Footfall | Not shared | 1 minute ago |

A pop up will appear, where you will be able to enter a folder name and then create the folder.



Modal/Pop up – enabling you to type a folder name

Through this feature, the users will be able to create their own folder structure and will enable the users to have a storing system, where they easily can find and sort their reports.

|) My Files | | Q Search | | a a |
|---|---|-----------------------------|-------------------|----------------|
| Regional Director Rep Demographics | | My files > | | |
| Environmental (IoT) Re Store manager reports | • | My Files | Shared | Last updated |
| 7 Favorites | | Environmental (IoT) Reports | Shared Not shared | Last updated 🔸 |
| Shared with me ↓ Exports | | Store manager reports | Not shared | 41 seconds ago |
|] Deleted files | | Regional Director Reports | Not shared | 1 minute ago |
| | | Demographics 1 file | Not shared | 1 minute ago 🕴 |
| | | MyStore - YTD Turnover | Not shared | 1 hour ago 🕴 |
| | | | | |
| | | | | |

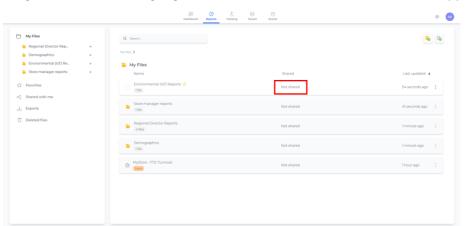
An example of a folder structure

Sharing a folder or report

In this update, the users will be able to share all their reports to roles and users no matter which report version they have.

If a folder is shared, all the folders content will automatically be shared with whoever the folder is shared with.

There are multiple ways to share a folder or report. You can click either on the specific report/folder share status (see picture below)



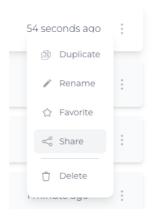
Clicking the "Not shared" highlighted with a red box, a share modal/box will appear

OR you can click on the icon with the three dots to the far right on the folder/report and from there click on the share button (see picture below).

The icon with the three dots

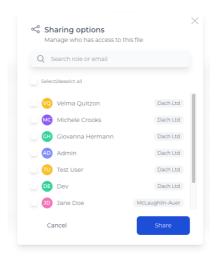
| My Files | Q Search_ | | ۵ ک |
|--|-------------------------------|------------|------------------|
| Demographics Environmental (IoT) Re | My Files | | |
| Store manager reports + | Name | Shared | Last updated 🔒 |
| Favorites | Environmental (IoT) Reports 😒 | Not shared | 54 seconds ago |
| Shared with me | Store manager reports Trie | Not shared | 41 seconds ago |
| Deleted files | Regional Director Reports | Not shared | 1 minute ago 🛛 🚦 |
| | Eemographics Trie | Not shared | 1 minute ago 🛛 🚦 |
| | MyStore - YID Turnover | Not shared | 1 hour ago 🕴 |
| | | | |
| | | | |

The menu pop up which will appear after pressing the icon with the three dots



A modal/pop up will appear where the users will see a list with all roles and users, they can share the folder or report with. Simply select the users or roles and click the share button.

Share modal/pop up with a list of roles and users



Drag n Drop

Folders and reports are draggable, enabling users to easily move their folders and reports to any folder.

Simply click and hold the mouse button down and then release the button once you are hovering over the folder you wish to place the folder/report in.

Multiselect

The users are also able to multiselect reports and folders, allowing to move or delete multiple reports and folders at the same time.

| | | B Dashiboard | | 0 |
|--|---|-----------------------------|--------------------------------------|----------------|
| My Files Regional Director Rep Demographics Environmental (IoT) Re | 4 | Q Search | | 6 |
| Store manager reports Favorites | * | MyStore - VT. | MyStore - Ma. | |
| \propto_0° Shared with me | | My Files Name + | Sharad | Last undated |
| ↓ Exports ① Deleted files | | Demographics 1 file | Not shared | 58 minutes ago |
| | | Environmental (IoT) Reports | Not shared | 58 minutes ago |
| | | MyStore - YTD Turnover ★ | Not shared | 2 hours ago |
| | | Regional Director Reports | Not shared | 59 minutes ago |
| | | Store manager reports | Not shared | 58 minutes ago |
| | | | 1item selected All None 10. 0 Delete | |