



FIELD SALES ACTIVITY MANAGEMENT PLATFORM

Empower Your Team. Drive Better Results.

Renforcez votre équipe. Générez de meilleurs résultats.

A smarter way to plan, verify and measure every day your sales team spends in the field — GPS-verified visits, live supervision, quotations and management-ready reporting in one bilingual application.

CONTENTS

What is inside this booklet

Everything a first-time reader needs: what CelioNav is, the problems it removes, how it is configured, how field teams use it every day, and what management gets back in dashboards, maps and reports.

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How to read the demo content

All screens, maps, charts and reports in this booklet are generated from one consistent demonstration dataset — **Summit Distribution Group Inc.**, Consumer Products Distribution, 4820 Congress Avenue, Suite 210, Austin, Texas 78745, USA — for the period May 2026. Figures reconcile across every page. Feature status is labelled as Available Configurable Optional / integration Roadmap.

One application for the entire field-sales day

CelioNav is a bilingual (English / French) field-sales activity platform. Delegates run their market day from a phone; supervisors and management see the same activity as it happens, verified by GPS, and turn it into reports without a single manual spreadsheet.

100%

GPS-VERIFIED VISITS
check-in & check-out

EN / FR

FULL BILINGUAL UI
incl. all exports

Offline

FIELD DATA CAPTURE
auto-sync on reconnect

1 min

FROM FIELD TO REPORT
live dashboards

Why it was created

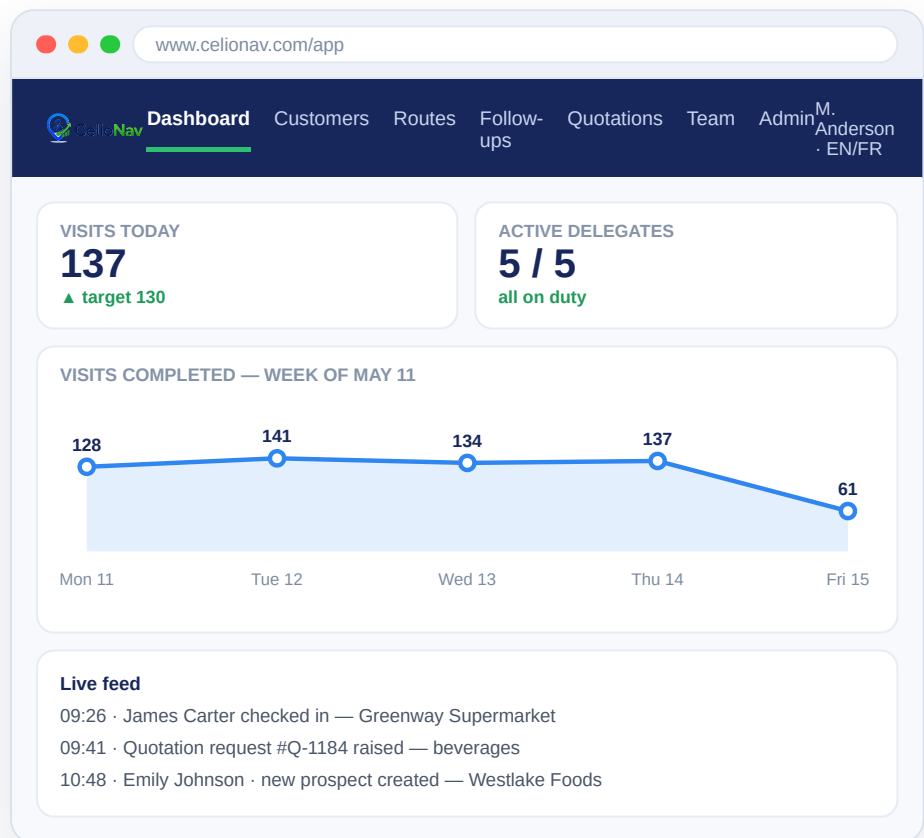
Distribution and commercial teams lose their most valuable information the moment a delegate leaves the office: who was really visited, for how long, what the customer asked for, and what still needs a follow-up. CelioNav captures it at the point of work and delivers it to management the same minute.

What it does

It opens and closes the workday, verifies location, records visits and prospects, plans routes, raises quotation requests, schedules follow-ups, scores KPI targets, records daily transportation expenses and produces branded reports.

Main business value

More visits per day, verified field presence and decisions taken on real numbers.



Supervisor dashboard — Summit Distribution Group Inc., May 2026

What field operations cost you today

Six recurring problems that CelioNav was designed to remove. Each one has a direct, measurable effect on visits per day, order conversion and management control.



No real-time visibility

Managers only learn what happened in the field at the end of the week, when it is too late to correct a route or rescue a customer.



Manual reporting

Delegates rebuild their day from memory into notebooks and spreadsheets; supervisors re-key the same figures again.



Unverified field presence

Reported visits cannot be confirmed. Time on site, arrival and departure remain declarations rather than facts.



Slow quotation turnaround

Customer pricing requests travel by phone and messaging apps, get lost, and answers arrive days later.



Forgotten follow-ups

Promises made in front of a customer are never scheduled, so the second visit — where the order happens — never takes place.



Scattered records

Customer information lives in five phones and three notebooks. When a delegate leaves, the customer base leaves with them.

The compound effect

A team of five delegates losing one productive visit per day loses roughly **100 customer meetings a month**. On the demonstration dataset, one visit is worth **\$1,274** of quoted business — the equivalent of a full sales territory left uncovered.

The root cause

The information exists — it is simply never captured where and when the work happens. Everything downstream (reports, coaching, targets, pricing decisions) inherits that gap.

CelioNav closes the loop between field and management



Capture at the point of work

The delegate opens the workday, checks in at the customer, records the outcome and moves on. No paperwork after hours.



Verify with GPS

Arrival, departure and time on site are stamped with coordinates, with configurable intervals, quiet hours and adaptive reporting.



Plan and optimise the round

Route plans with nearest-neighbour optimisation, map previews and branded itinerary PDFs.



Mediated quotations

Delegates request pricing; head office replies with documents; the delegate delivers to the customer by WhatsApp, e-mail, print or download.



Measure against targets

KPI targets per delegate or role, daily / weekly / monthly, with achievement % and red-amber-green status.



Report automatically

Daily, weekly and per-delegate reports in PDF, Excel, Word, CSV and print — fully branded, in the selected language.

VALUE PROPOSITION

Every market day becomes a verified, measurable and reportable business asset — the same minute it happens.

92%

visit completion rate achieved on the demo dataset

306

quotation requests handled in one month, fully traced

\$766,100

quoted value generated from field activity

Design principle: condensed screens. Every page is built so a delegate on a phone and a manager on a laptop can see what matters without scrolling — a deliberate requirement for people working standing up, outdoors, in a hurry.

Who should use CelioNav

CelioNav fits any organisation whose revenue depends on people visiting customers in the field.

- 1 **Business owners & general managers**
Proof of field activity, coverage and commercial return — without asking anyone for a report.
- 2 **Commercial & sales managers**
Targets, performance ranking, quotation pipeline and territory decisions in one dashboard.
- 3 **Regional supervisors**
Live map of who is where, which visits are missing today, and which delegates need coaching.
- 4 **Sales delegates / field representatives**
A single tool for the whole day: route, check-in, prospect creation, quotation request, follow-up.
- 5 **Administrators / data managers**
Accounts, permissions, customers, currencies, branding, KPI targets and daily expenses.
- 6 **Finance & reporting teams**
Daily transportation expense records per delegate, multi-currency reporting and Excel exports.
- 7 **Read-only monitoring users**
Managers or auditors who must watch and export, but never change data or settings.

Industries served

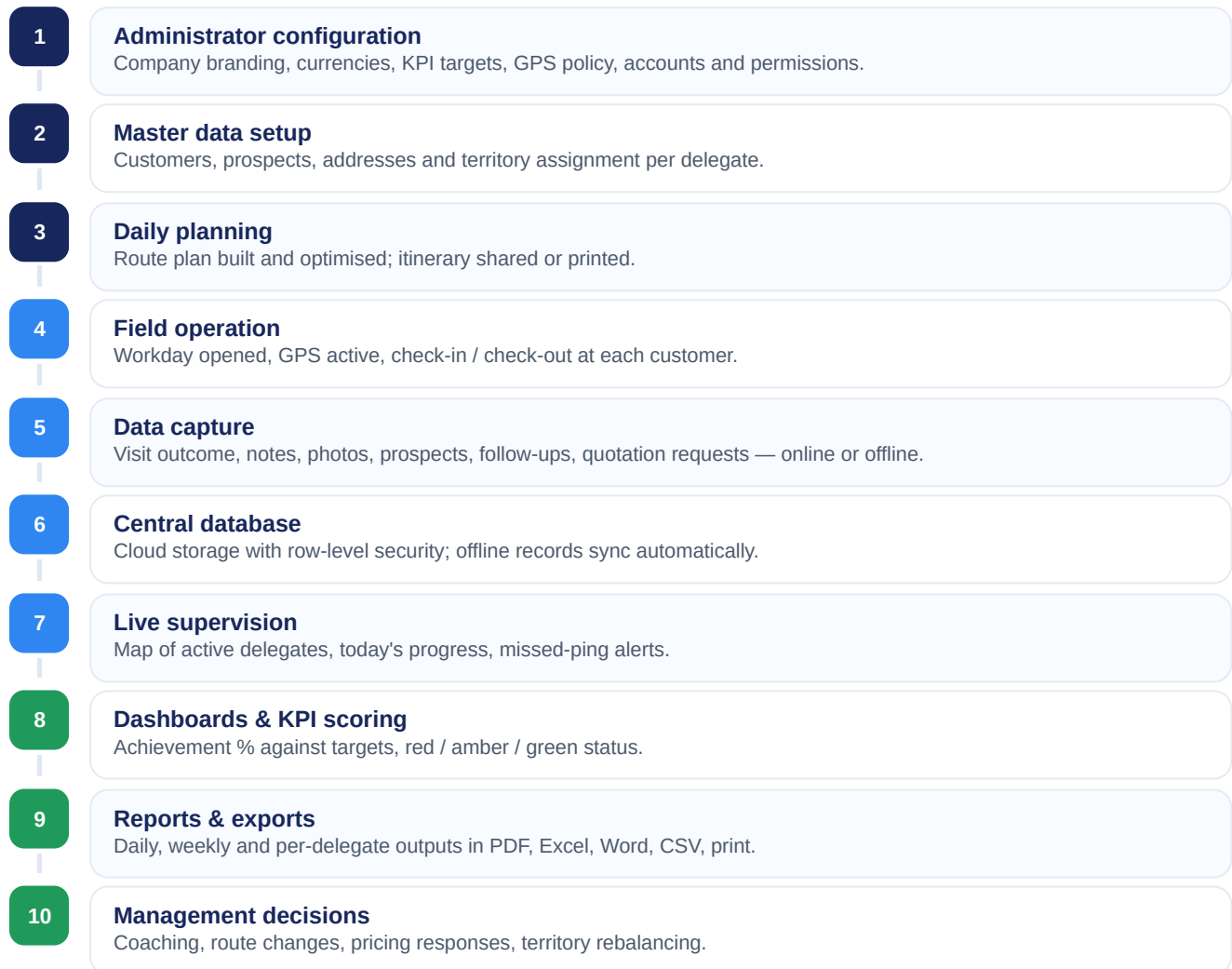
- Consumer goods distribution
- Wholesale & trading
- Pharmaceutical field forces
- Building materials
- Agri-inputs
- Telecom & utilities field sales
- Insurance & financial agents
- Service & maintenance rounds

Team size

The platform is cloud-hosted and account-based: it runs the same way for a single delegate, for the five-person demonstration team used in this booklet, or for several regional teams working under different supervisors.

From configuration to management decision

The platform follows one continuous loop. Each stage feeds the next automatically — nothing is re-typed along the way.



Set up once

Steps 1–2 are performed by the administrator and rarely change.

Runs daily

Steps 3–6 are the delegate's working day, on a phone, with or without network.

Delivers continuously

Steps 7–10 run for management in real time, with no data entry.

What the administrator configures first

Initial configuration is a single administrative session. Only an administrator can create accounts — there is no self-signup, no invitation link and no e-mail confirmation step.

1. Company & branding

Company name, full address, e-mail, website, logo, accent colour and footer text — applied to every PDF, Word, Excel and print output.

2. User accounts

Username, password, primary & secondary phone, contact e-mail, profile photo and ID document (stored in private, admin-only storage).

3. Permissions

Categorised checkboxes per module — the delegate template, or a fully custom permission set.

4. Customers & prospects

Name, type, address, coordinates, contacts, assigned delegate and territory.

5. Currencies

USD as main currency; every other currency defined with an operator (× or ÷) and a rate, applied automatically.

6. KPI targets

Visit, productive-visit and follow-up targets per delegate or per role, on daily / weekly / monthly periods.

7. GPS policy

Reporting interval per delegate, quiet hours, adaptive interval bounds, missed-ping alerts, on/off and reset to defaults.

8. Notifications

Per-event preferences: due reminders, quotation nudges and manager alerts.

9. Expenses

Daily transportation amount per delegate, in USD or any configured currency.

The screenshot shows the admin panel at www.celionav.com/admin. The top navigation bar includes links for Dashboard, Customers, Routes, Follow-ups, Quotations, Team, and Admin. The user is logged in as M. Anderson (EN/FR). The main content area is divided into two sections:

CREATE USER ACCOUNT

Fields for creating a user account:

- Username:
- Password:
- Primary phone:
- Secondary phone:
- Contact e-mail:
- Profile photo:
- ID document:

Account type: Delegate template · activated immediately

CURRENCIES

CODE	OP.	RATE
USD	—	1.0000
EUR	/	1.0850
XAF	/	612.5000
LBP	/	89500.0000

Admin panel — account creation and currency formulas

Typical configuration time

Branding, currencies and GPS policy: under one hour. Accounts and permissions: about five minutes per user. Customer master data can be created in the app by administrators or captured by delegates in the field as prospects.

Roles and granular permissions

CelioNav does not rely on role-implied rights. An administrator assigns every single permission explicitly, module by module, with checkboxes — either from the delegate template or as a fully custom account.

Super administrator
Configurator of the system: accounts, permissions, settings, currencies, branding, expenses. Never a delegate — no prospects, no visits, no expense claims.

Manager
Dashboards, team performance, KPI targets, quotation responses, all reports and exports.

Supervisor
Live map, team monitoring, follow-up oversight and operational reports for the assigned team.

Delegate
Own workday, own customers and prospects, visits, routes, follow-ups, quotation requests and own reports.

MODULE	CAPABILITY	ADMIN	MANAGER	DELEGATE	VIEWER
Customers & prospects	view / create / edit	✓	✓	view	✓
Visits & check-in	record own visits	—	—	✓	✓
Route planning	create & optimise	✓	✓	✓	✓
Live map & GPS trails	supervision	✓	✓	own	view
Follow-ups	create & close	✓	✓	✓	view
Quotation requests	raise / respond	respond	respond	raise	view
Team & KPI dashboards	analysis	✓	✓	own	✓
Reports, exports & print	all formats	✓	✓	own	✓
Expenses	daily entry	✓	view	own	view
Accounts & permissions	administration	✓	—	—	—
Settings, currencies, branding	configuration	✓	—	—	—

Illustrative matrix. Because every permission is individually assignable, administrators can create profiles such as the read-only monitoring account used by Sarah Mitchell's management — full reporting, export and print rights with no access to settings, parameters or data changes.

Enforced on the server

Permissions are not a front-end convenience. Roles are stored separately from user profiles and every read and write is checked by database row-level security policies, so an unauthorised request fails even outside the app.

Customers & prospects

One shared, permanent customer base owned by the company — not by the phone of whoever created the record.

What it does

Stores every customer and prospect with address, coordinates, contact details, assigned delegate and type. Delegates create prospects directly in the field; the record is immediately visible to supervision and available for routing, follow-ups and quotations.

Who uses it

Delegates (create prospects, consult their own portfolio), administrators (full master data management, including cascading deletion of a customer and all its related records) and management (coverage analysis).

Key benefits

- Customer knowledge stays with the company
- Prospect capture takes seconds, in front of the customer
- Every visit, quote, note and follow-up is attached to the record
- Photos and documents can be attached to a customer file
- Territory and delegate assignment drives routing and reporting

New prospect

BUSINESS NAME
Oak Street Grocery

TYPE
Prospect

ADDRESS
312 Oak Street, Cedar Park, TX

CONTACT
Store owner · +1 512 555 0177

GPS
30.5052, -97.8203 · captured

PHOTO
storefront.jpg ✓

NEXT FOLLOW-UP
May 21, 2026

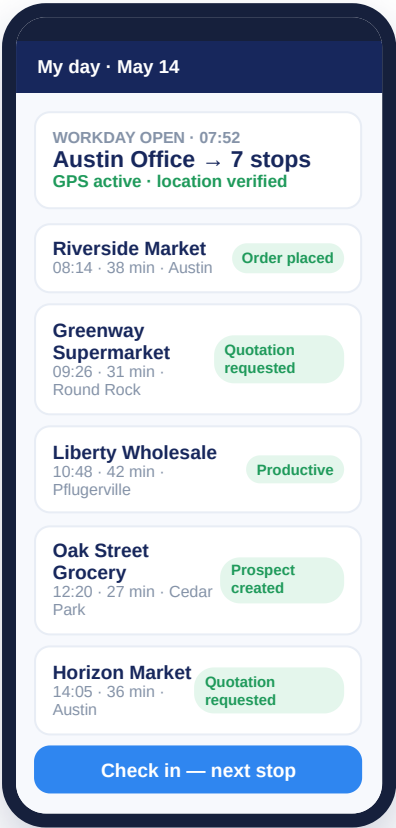
Save prospect

Customer master data — Summit Distribution Group Inc.

CUSTOMER	ADDRESS	TYPE	ASSIGNED DELEGATE
Riverside Market	1180 Riverside Drive, Austin, TX	Existing	James Carter
Greenway Supermarket	705 Greenway Blvd, Round Rock, TX	Existing	James Carter
Central Foods	230 E 5th Street, Austin, TX	Existing	Emily Johnson
Liberty Wholesale	1440 Liberty Way, Pflugerville, TX	Existing	James Carter
Metro Retail Center	88 Metro Park Drive, Austin, TX	Existing	Daniel Wilson
Oak Street Grocery	312 Oak Street, Cedar Park, TX	Prospect	James Carter
Blue Ridge Trading	914 Blue Ridge Road, Georgetown, TX	Existing	Olivia Martinez
Horizon Market	2605 Horizon Lane, Austin, TX	Existing	James Carter
Westlake Foods	1502 Westlake Drive, Austin, TX	Prospect	Christopher Brown
Downtown Convenience Store	44 Congress Avenue, Austin, TX	Existing	Emily Johnson

Workday, check-in and visit capture

The core of the daily operation: a workday that can be proven, and visits that carry their own evidence.



How it works in practice

The delegate opens the workday when leaving the office. A location gate confirms that positioning is available and guides the user if the device permission is off. At every customer the delegate checks in — coordinates and time are recorded — captures the purpose, the result, notes and photos, then checks out. Time on site is calculated, not declared.

Recorded for each visit

- Arrival and departure time with coordinates
- Purpose and result (productive, quotation requested, prospect created, not completed)
- Duration on site and travel between stops
- Notes, photo attachments and follow-up date

Works without network

Visits, prospects and notes captured out of coverage are stored on the device and synchronised automatically as soon as connectivity returns — with a visible pending-items indicator.

6

VISITS COMPLETED
of 7 planned

3h 24m

TIME WITH
CUSTOMERS
avg 34 min

Visit outcomes recorded — James Carter, May 14, 2026

TIME	CUSTOMER	PURPOSE	RESULT	DURATION
08:14	Riverside Market	Stock review	Order placed	38 min
09:26	Greenway Supermarket	Follow-up	Quotation requested	31 min
10:48	Liberty Wholesale	Collection + review	Productive	42 min
12:20	Oak Street Grocery	New prospect	Prospect created	27 min
14:05	Horizon Market	Presentation	Quotation requested	36 min
15:31	Westlake Foods	New prospect	Prospect created	24 min
16:40	Central Foods	Follow-up	Not completed	—

GPS tracking & live supervision

Location is what turns reported activity into verified activity — controlled delegate by delegate, and switchable off.

Location capabilities

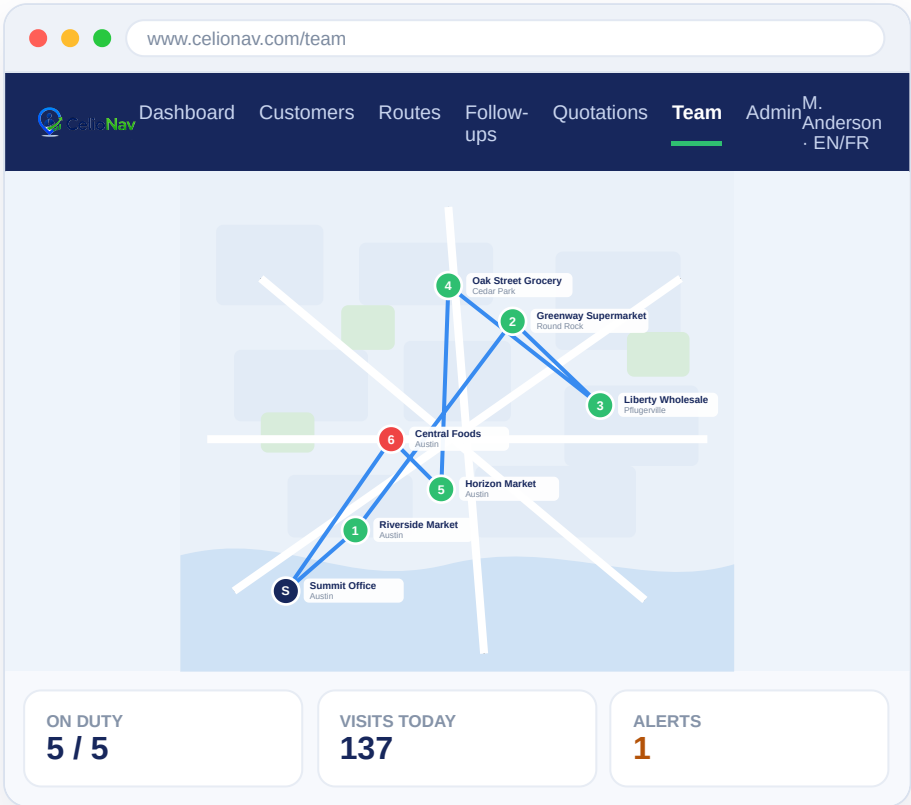
- Position of every delegate on a live supervisor map
- Customer locations and check-in / check-out coordinates
- Visit sequence, travel trail and distance covered
- Time spent at each customer, computed from the stamps
- Geographic distribution of customers and territory coverage
- Missed-ping alerts when a device stops reporting

Per-delegate parameters

Configurable

Every setting below is defined individually for each delegate, can be switched off completely, and reset to defaults at any time.

PARAMETER	DEMO VALUE
Tracking enabled	On
Reporting interval	120 s
Adaptive interval	60 s moving / 300 s stationary
Quiet hours	19:00 – 07:00
Missed-ping alert	after 15 min silence



Live supervisor board — May 2026

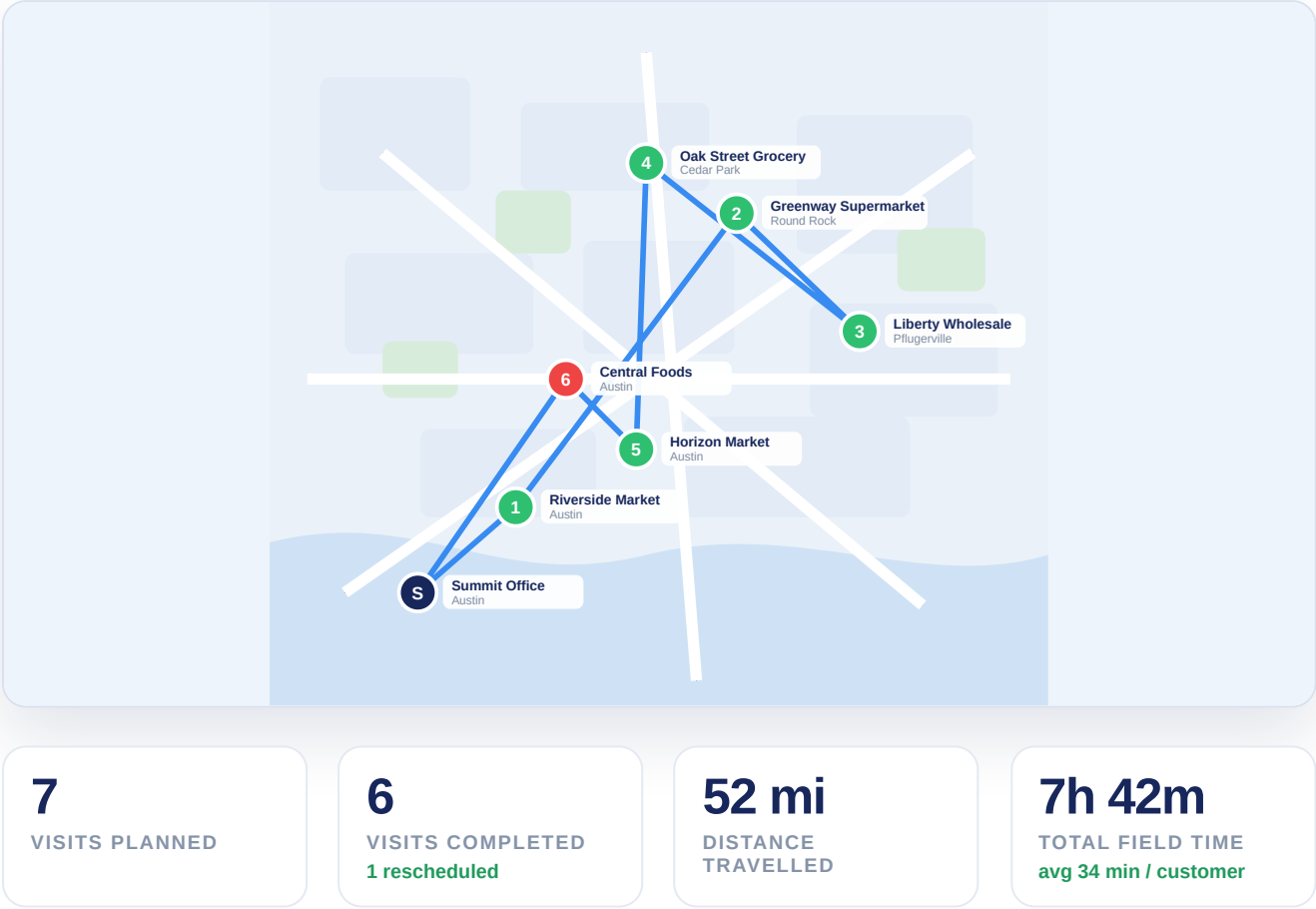
Transparency by design

Tracking runs only while the workday is open and inside the configured windows. Quiet hours and the on/off switch make the policy explicit for both the company and the employee.

On Android and iOS the browser asks for the location permission; a device cannot be forced on by any web application. CelioNav therefore includes a permission gate that requests access, explains how to enable it in the device settings, and blocks location-dependent actions until it is granted.

Route plan and daily map report

James Carter — daily round, Austin area, May 14, 2026. Planned in the evening, optimised by the system, verified by GPS during the day.



Stop sequence

#	STOP	AREA	STATUS
S	Summit Office	Austin	office
1	Riverside Market	Austin	visited
2	Greenway Supermarket	Round Rock	visited
3	Liberty Wholesale	Pflugerville	visited
4	Oak Street Grocery	Cedar Park	visited
5	Horizon Market	Austin	visited
6	Central Foods	Austin	missed

What the map report shows

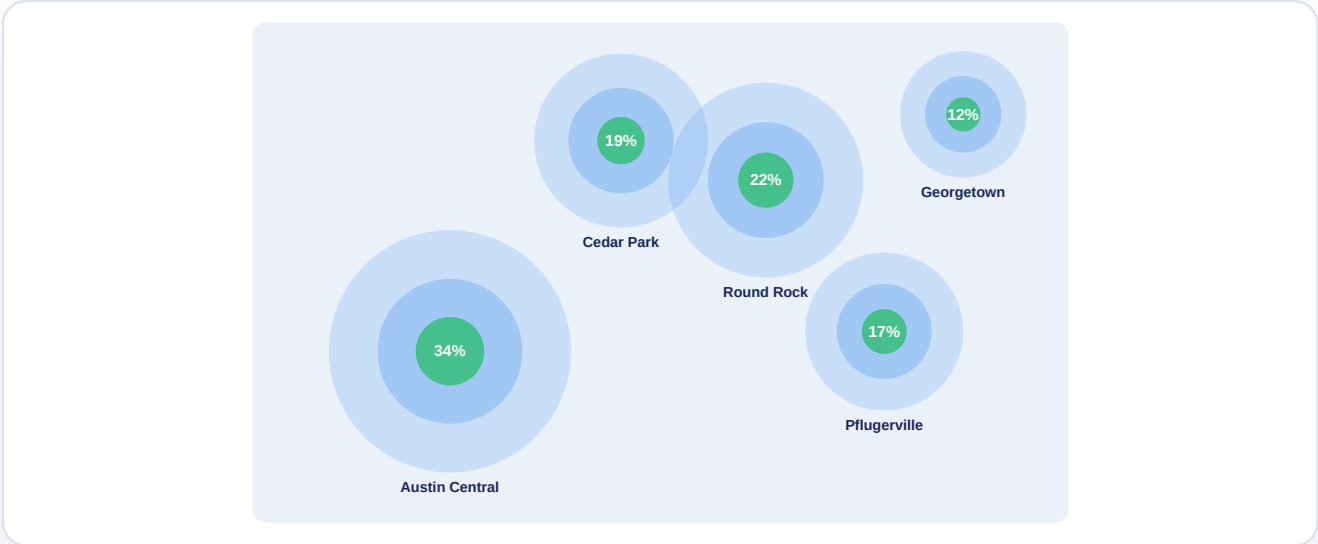
Numbered stops in the real order they were served, the travel trail between them, start and end at the office, status of each stop, distance covered and duration. The same information is exported as a branded itinerary PDF and can be shared with the delegate before the round.

Route optimisation

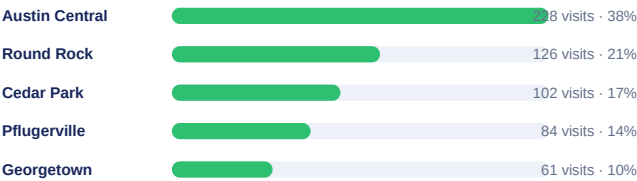
Stops are re-ordered automatically with a nearest-neighbour optimisation to cut travel time — the demonstration round covers six customers across four municipalities in 52 miles.

Territory & coverage report

Where the effort actually goes. Visit density by area, compared with the customer base, exposes over-served and abandoned territories.



Visit share by territory



Total 601 completed visits, May 2026. Percentages are calculated from the same figures used in the dashboard and performance report.

Coverage analysis

TERRITORY	VISITS	CUSTOMERS	VISITS / CUSTOMER
Austin Central	228	34	6.7
Round Rock	126	22	5.7
Cedar Park	102	19	5.4
Pflugerville	84	17	4.9
Georgetown	61	12	5.1

Management insight

Austin Central absorbs 38% of all visits while Georgetown receives 10%. Redistributing two stops per week per delegate rebalances coverage without adding a single working hour.

Executive dashboard

Summit Distribution Group Inc. — May 2026. Every figure on this page comes from the same demonstration dataset.



Team performance report

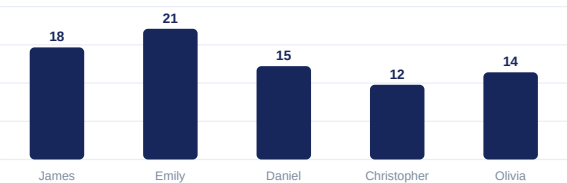
Monthly comparison of the field team, May 2026. Produced automatically — no delegate prepares a report by hand.

DELEGATE	PLANNED	COMPLETED	COMPLETION	PROSPECTS	QUOTES	QUOTED VALUE	DISTANCE
James Carter	142	135	95%	18	74	\$184,500	962 mi
Emily Johnson	138	129	93%	21	68	\$172,300	918 mi
Daniel Wilson	130	121	93%	15	63	\$158,700	874 mi
Christopher Brown	125	112	90%	12	52	\$131,200	806 mi
Olivia Martinez	118	104	88%	14	49	\$119,400	771 mi
TEAM TOTAL	653	601	92%	80	306	\$766,100	4,331 mi

Quoted value by delegate (USD)



New prospects created



Top performer

James Carter — 135 visits, 95% completion and \$184,500 quoted.

Best prospector

Emily Johnson — 21 new prospects created in the month.

Coaching priority

Olivia Martinez — 88% completion; route density in Georgetown to review.

Daily activity report

The standard end-of-day output for one delegate. Generated from the recorded visits — the delegate writes nothing after work.

Summit Distribution Group Inc.

Daily activity report · May 14, 2026



4820 Congress Avenue, Suite 210, Austin, Texas 78745, USA · info@summitdg.com · www.summitdg.com

Carter

DELEGATE

James

9h 42m

TIME ON DUTY

07:52 – 17:34

3h 24m

TIME WITH CUSTOMERS

\$38.00

TRANSPORTATION PAID

USD

TIME	CUSTOMER	LOCATION	PURPOSE	RESULT	DUR.	NOTES
08:14	Riverside Market	Austin	Stock review	Order placed	38 min	Reordered 4 SKUs — \$3,250 quotation raised
09:26	Greenway Supermarket	Round Rock	Follow-up	Quotation requested	31 min	Awaiting head-office pricing on beverages
10:48	Liberty Wholesale	Pflugerville	Collection + review	Productive	42 min	Shelf share increased to 3 facings
12:20	Oak Street Grocery	Cedar Park	New prospect	Prospect created	27 min	Owner interested, sample pack delivered
14:05	Horizon Market	Austin	Presentation	Quotation requested	36 min	Requested proforma + product catalogue
15:31	Westlake Foods	Austin	New prospect	Prospect created	24 min	Decision maker absent — follow-up May 21
16:40	Central Foods	Austin	Follow-up	Not completed	—	Store closed early — rescheduled

Visits: 6/7 Productive: 3 New prospects: 2 Quotation requests: 3 Distance: 52 mi

Generated by CelioNav · www.celionav.com · page 1 / 1

Available in both languages

The same report prints as “Rapport d’activité journalier”, with French dates, numbers and status labels, when the user selects French.

Fully branded

Company name, detailed address, e-mail, website, logo and footer text come from the branding settings and appear on every export.

Shareable instantly

Download as PDF or Excel, print with correct pagination, or send by WhatsApp or e-mail from the device.

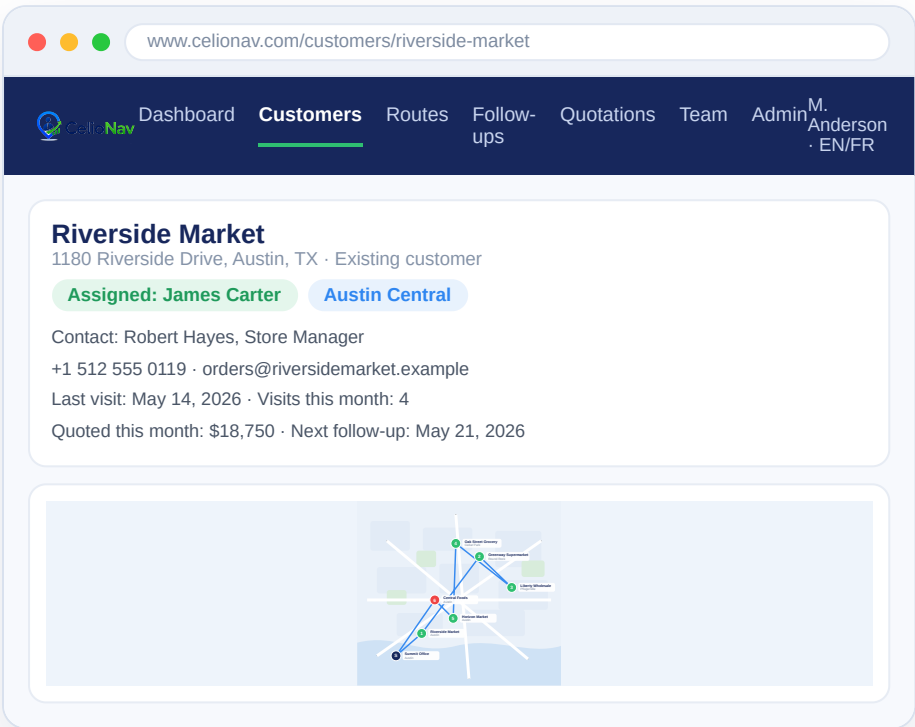
CelioNav — Daily activity report

www.celionav.com

Page 17

Customer profile and visit timeline

Every interaction with a customer, in chronological order, on one screen.



Chronological timeline

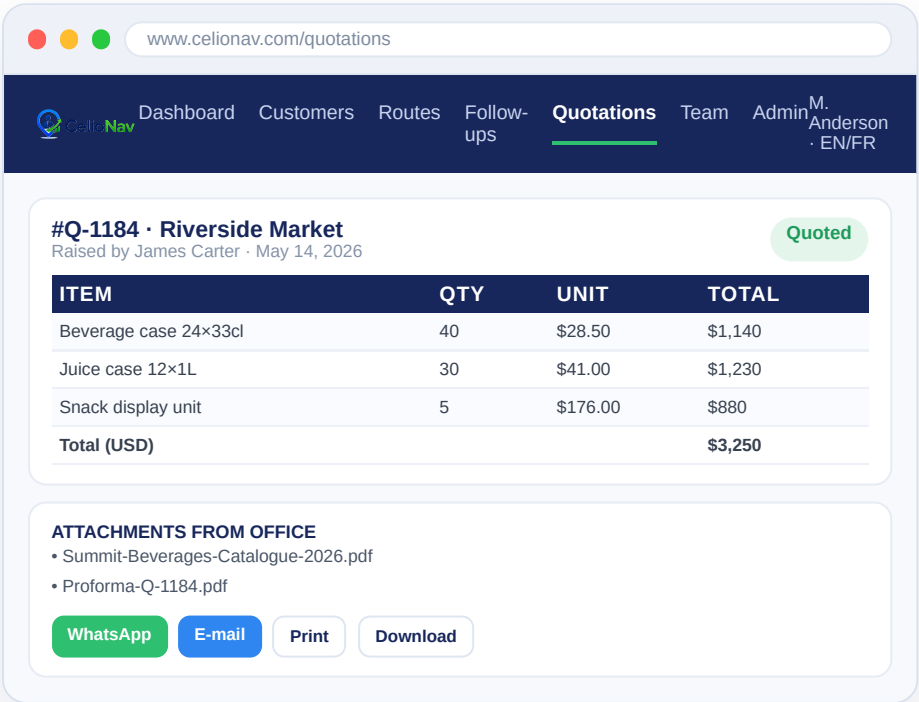
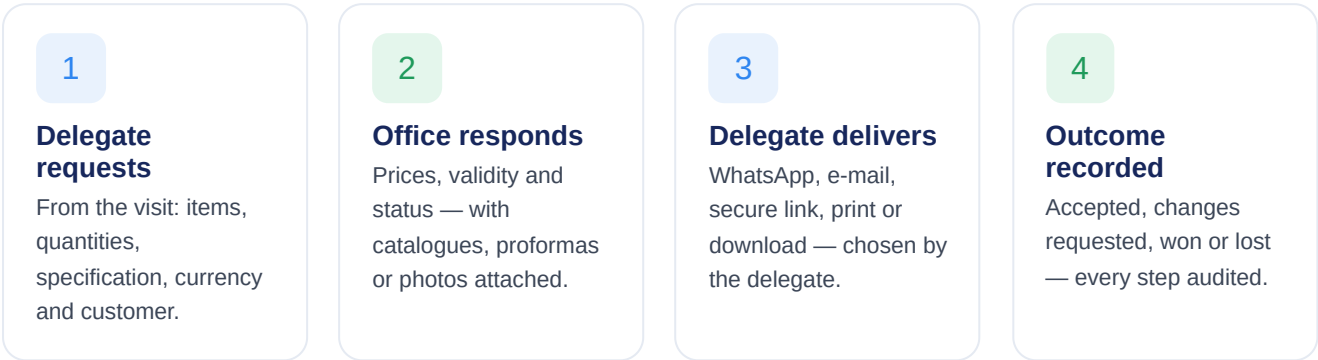
- May 14 · 08:14**
Visit by James Carter — stock review, 38 min on site. Order placed, 4 SKUs reordered.
- May 14 · 08:41**
Quotation request #Q-1184 raised — \$3,250, beverages range.
- May 15 · 11:05**
Head office responded with price list and product catalogue (2 attachments).
- May 15 · 14:20**
Delegate delivered the quotation to the customer by WhatsApp.
- May 18 · 09:30**
Follow-up call logged — customer reviewing with owner.
- May 21**
Follow-up scheduled — confirm order and delivery window.
- May 07 · 10:12**
Previous visit — shelf audit, 2 photos attached.
- Apr 24 · 09:48**
Visit — promotional display installed, productive.

Why it matters

A new delegate taking over the territory reads three months of customer history in thirty seconds — including quotations, promises and photos.

Quotation workflow — mediated delivery

Head office prices the request; the delegate remains the only contact with the customer. Nothing is sent to the client behind the delegate's back.



Why mediated delivery matters

The delegate owns the customer relationship. Head office never contacts the client directly: it supplies the price and the documents, and the delegate decides how and when to hand them over.

Recorded on every quotation

- Requesting delegate, customer, date and currency
- Line items with quantity, unit price and line total
- Status history: new, in review, quoted, accepted, changes requested, won, lost
- Office attachments and the delivery action taken

Multi-currency

Any configured currency can be used; USD equivalents come from the rate formula.

306
REQUESTS
IN THE
MONTH

< 24
h
TYPICAL
OFFICE
RESPONSE

Follow-ups, KPI targets and alerts

The two mechanisms that turn activity into discipline: nothing promised is forgotten, and nothing measured is vague.

Follow-ups

Every visit can schedule its own next step, with a due date, the customer, the reason and the responsible delegate. Due items appear on the delegate's screen and in the supervisor's overview, and reminders are sent automatically.

DUE	CUSTOMER	DELEGATE	STATUS
May 21	Riverside Market	James Carter	Open
May 21	Westlake Foods	Christopher Brown	Open
May 20	Oak Street Grocery	James Carter	Due today
May 18	Central Foods	Emily Johnson	Overdue
May 15	Blue Ridge Trading	Olivia Martinez	Closed

Notifications & alerts Configurable

- Follow-up reminders as the due date arrives
- Quotation nudges when a request waits too long
- Manager alerts on field activity and quotation status changes
- Missed GPS ping alerts for connectivity problems
- In-app notification centre with real-time delivery

Each event type can be enabled or disabled individually in the notification preferences screen. Device push notifications depend on the browser and operating system permission.

KPI targets and scoring

Targets are defined per delegate or per role, for daily, weekly or monthly periods, on visits, productive visits and follow-ups. The system computes achievement % and an overall red / amber / green status.

DELEGATE	TARGET	ACTUAL	ACHIEVED	STATUS
James C.	142	135	95%	On target
Emily J.	138	129	93%	On target
Daniel W.	130	121	93%	On target
Christopher B.	125	112	90%	Watch
Olivia M.	118	104	88%	Watch

92%

TEAM ACHIEVEMENT
target 90%

3 / 5

DELEGATES ON TARGET

Monthly target vs. actual



Coaching, not policing

Because targets are explicit and the same numbers are visible to the delegate and the manager, the weekly review starts from an agreed fact base.

Reports, filters and exports

Every screen that shows information can be filtered, exported and printed — in the user's language, with the company's branding.

Available reports

Daily activity report

Weekly team report

Per-delegate report

Customer & visit history

Route itinerary report

Territory coverage

Productivity & KPI scoring

Quotation pipeline

Follow-up status

GPS trail & time on site

Expenses by delegate

Multi-currency financial summary

Export formats

Available

PDF

Excel

Word

CSV

Print

WhatsApp share

Print output uses the same pagination, headers and footers as the PDF, so a printed report and a downloaded one are identical documents.

Branding on every export

Company name, detailed address, e-mail, website, logo, accent colour and footer text are inserted automatically into all generated documents.

www.celionav.com/report

CelioNav

Dashboard

Customers

Routes

Follow-ups

Quotations

Team

Admin

M. Anderson

EN/FR

FILTERS

Date range

May 1 – May 31, 2026

Delegate

All (5)

Territory

All

Customer

Any

Activity

Visits + prospects

Status

All

Language

English

Apply

PDF

Excel

Print

RESULT · 601 VISITS

DELEGATE	VISITS	PROSPECTS	VALUE
James Carter	135	18	\$184,500
Emily Johnson	129	21	\$172,300
Daniel Wilson	121	15	\$158,700
Christopher Brown	112	12	\$131,200
Olivia Martinez	104	14	\$119,400

Reporting screen with filters and export actions

Daily expenses & multi-currency

Field work costs money every day. CelioNav records it next to the activity that generated it.

Daily transportation expenses

The administrator records, for each delegate and each day, the transportation amount paid for the round — in USD or any configured currency. Expenses sit beside the visit and distance figures, so cost per visit is a fact rather than an estimate.

DATE	DELEGATE	AMOUNT	CURRENCY	USD
May 14	James Carter	38.00	USD	\$38.00
May 14	Emily Johnson	34.50	USD	\$34.50
May 14	Daniel Wilson	31.00	USD	\$31.00
May 14	Christopher Brown	29.75	USD	\$29.75
May 14	Olivia Martinez	36.25	USD	\$36.25
Team total — May 14				\$169.50

\$3,556
MONTHLY
TRANSPORTATION

\$5.92
COST PER
COMPLETED VISIT

Currency configuration Configurable

USD is the main currency. Every other currency is defined with a mathematical formula: the administrator selects the operator ($\times$ or $\div$) and enters the rate; conversion is then applied automatically wherever money appears.

CODE	CURRENCY	OPERATOR	RATE
USD	US Dollar	—	1.0000
EUR	Euro	/	1.0850
XAF	CFA Franc	/	612.5000
LBP	Lebanese Pound	/	89500.0000

Where currencies apply

Quotation requests and responses, delegate expenses and every financial figure in reports and dashboards — always with the USD equivalent for consolidated management reporting.

Live preview in the admin panel

When a rate is entered, the administrator immediately sees a worked example (for instance 1,000 units converted both ways) before saving, which removes the classic multiply-or-divide mistake.

Security and administration

Access control was designed first and the features were built inside it — not the other way round.

Username & password login

Authentication is username + password only. No public signup, no invitation links, no e-mail confirmation, no self-service password reset.

Administrator-controlled accounts

Only the administrator creates, edits, deactivates or deletes accounts, and assigns permissions explicitly.

Hashed credentials

Passwords are stored as one-way hashes and can never be read back — an administrator can only reset them. Leaked-password protection is enabled.

Row-level security

Every table is protected by database policies. A delegate's request can only return that delegate's data, even outside the application.

Private document storage

Profile photos and ID documents are held in private storage accessible to administrators only.

Server-side permission checks

Sensitive operations run as authenticated server functions; roles are stored in a dedicated table, never on the user profile.

Audit trail

Quotation status changes, visit records, GPS positions and follow-ups keep an author and timestamp history.

Managed cloud backups

The platform runs on managed cloud infrastructure with automated database backups and transport encryption (HTTPS/TLS).

Session management

Sessions are token-based and expire; signing out clears the session on the device.

Data ownership

Records are stamped with their author automatically at database level, so authorship cannot be spoofed by the client.

Deletion control

Deleting a customer removes its related records in a controlled cascade, performed only by an administrator.

Practical consequence

A read-only monitoring account can watch every delegate and export every report while being technically unable to alter a single parameter, visit or customer record.

Platforms, offline mode and integrations

Where it runs Available

- Installable web application (PWA) — no app-store distribution required
- Android phones and tablets (Chrome / Edge)
- iPhone and iPad (Safari 16+)
- Desktop browsers — Chrome, Edge, Firefox, Safari
- Add to home screen with the CelioNav icon and splash screen

Offline capability

The application shell is cached, and visits, prospects and notes captured without coverage are queued on the device and synchronised automatically when the connection returns, with a visible count of pending items. Live supervision, dashboards and exports require connectivity.

Integrations

Available

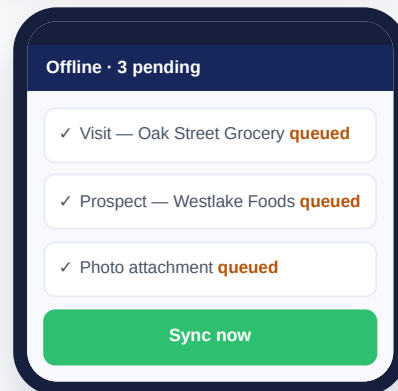
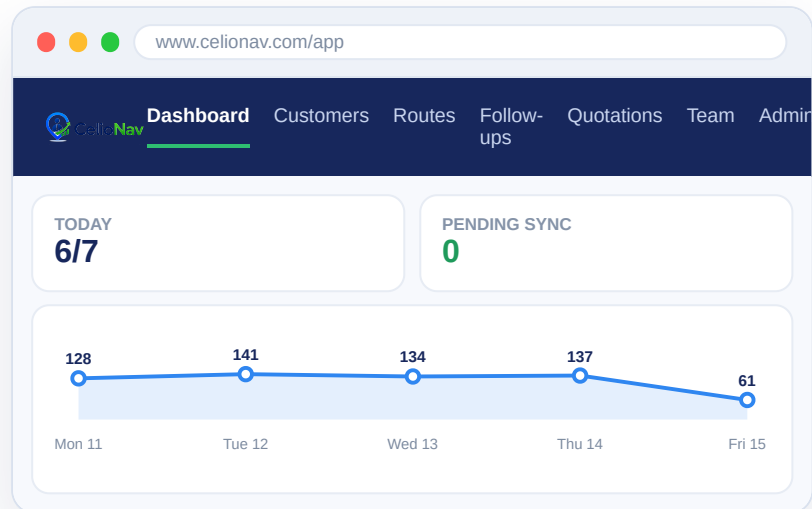
WhatsApp sharing · e-mail sharing · device print · map navigation links · public API endpoints for scheduled jobs and webhooks

Optional / project work

ERP, CRM or accounting synchronisation and SMS gateways can be connected through the platform's API layer.

Roadmap

Per-user language for server-generated reminder messages; bulk customer import from Excel; geofenced automatic check-in.



Ten reasons teams choose CelioNav



Real-time visibility

Management sees the field as it happens instead of reconstructing it a week later.



Verified activity

GPS-stamped check-in and check-out replace declarations with facts.



Higher productivity

No evening paperwork; optimised routes convert travel time into customer time.



Faster quotations

Requests reach head office instantly and come back with documents ready to hand over.



Accountability with fairness

Targets, achievement % and RAG status are the same for delegate and manager.



Geographic intelligence

Routes, trails and coverage maps expose where the effort really goes.



Bilingual by design

The full interface and every exported document in English or French.



Works where the network does not

Offline capture with automatic synchronisation.



Zero deployment friction

A web application installed from a link — no store approval, no device management.



Your brand, not ours

Company logo, address and colours on every report the customer sees.

MEASURED ON THE DEMONSTRATION MONTH

601

visits verified

92%

plan completion

80

new prospects

\$766,100

quoted from the field

Why choose CelioNav over an alternative

1 Permissions without assumptions

Most field-sales tools ship fixed roles. CelioNav lets the administrator tick every single permission per module, so a monitoring-only account or a hybrid supervisor is a configuration, not a compromise.

2 Administrator-only accounts

No public signup, no invitation links, no e-mail confirmation — a deliberate security decision for teams where accounts must never be self-created.

3 Mediated quotation delivery

The office prices, the delegate delivers. Very few tools protect the delegate's relationship with the customer this explicitly.

4 Formula-based currencies

Rates are entered as an operator plus a value, with a live preview — built for markets where quotes are issued in several currencies.

5 Truly bilingual output

Not just a translated menu: PDFs, Excel, Word and print output all follow the selected language, including dates, numbers and status labels.

6 Condensed, field-first screens

Layouts are designed to avoid scrolling on a phone held in one hand and on a manager's laptop.

7 GPS policy per delegate

Interval, adaptive behaviour, quiet hours, alerts, on/off and reset — per person, not a global switch.

8 Expenses inside the activity data

Daily transportation cost sits next to visits and distance, giving a real cost per visit.

Simple to deploy

A link, a username and a password. No installation project, no device management, no store approval.

Scales quietly

From one delegate to several regional teams under different supervisors, on the same configuration.

Fits emerging markets

Offline capture, WhatsApp delivery, multi-currency quoting and low-bandwidth screens.

A day with CelioNav

Two journeys through the same day: James Carter in the field, Michael Anderson in the office.

James Carter — Sales Representative, Austin

- 07:52**
Signs in with username and password; opens the workday. GPS verified.
- 08:00**
Reviews the optimised route for the day — 7 stops from the Austin office.
- 08:14**
Checks in at Riverside Market; records a stock review and an order.
- 08:41**
Raises quotation request #Q-1184 for the beverages range (\$3,250).
- 09:26**
Checks in at Greenway Supermarket, Round Rock; follow-up visit.
- 10:48**
Liberty Wholesale, Pflugerville — productive visit, shelf share increased.
- 12:20**
Creates a new prospect: Oak Street Grocery, Cedar Park, with photo and GPS.
- 14:05**
Horizon Market presentation; customer asks for a proforma and catalogue.
- 15:31**
Westlake Foods — decision maker absent; schedules a follow-up for May 21.
- 16:40**
Central Foods closed early; marks the visit not completed and reschedules.
- 17:34**
Closes the workday. The daily report is generated automatically.
- 17:36**
Supervisor Sarah Mitchell receives the updated dashboard and daily report.

9h 42m

ON DUTY

52 mi

TRAVELLED

Michael Anderson — Commercial Manager

- 08:05**
Michael Anderson signs in and opens the executive dashboard.
- 08:07**
Confirms 5 / 5 delegates on duty and yesterday's completion at 92%.
- 08:12**
Opens the live map — checks positions and this morning's progress.
- 08:20**
Reviews one missed-ping alert and contacts the delegate.
- 09:00**
Answers two quotation requests, attaching the catalogue and a proforma.
- 11:30**
Checks KPI scoring: three delegates on target, one to coach.
- 15:00**
Reviews the territory coverage map and rebalances two Georgetown stops.
- 17:45**
Exports the weekly team report to PDF and Excel for the management meeting.

Result

Neither person wrote a report, re-typed a figure or chased information by phone. The management meeting starts from data captured at the point of work.

Implementation and technical facts

A standard rollout is measured in days, not months — most of the effort is master data and training, not installation.

Implementation path

- 1 Create the company workspace
- 2 Configure branding, currencies and notification defaults
- 3 Create user accounts and assign permissions
- 4 Set the GPS policy per delegate
- 5 Load customers and assign territories
- 6 Define KPI targets per delegate or role
- 7 Train delegates with the in-app bilingual guide
- 8 Run the first market day
- 9 Monitor the live dashboard and map
- 10 Review reports and adjust targets

Training

A dedicated in-app delegate guide explains the professional working day step by step, in English and French, so onboarding does not depend on a trainer being available.

Technical summary

AREA	DETAIL
Hosting	Managed cloud platform; nothing to install on a server.
Database	Managed PostgreSQL with row-level security and automated backups.
Client	Modern browser; installable PWA on Android, iOS, tablet and desktop.
Connectivity	Broadband or mobile data; field capture continues offline and syncs later.
Location	Device GPS with per-delegate reporting policy; browser permission required.
Documents	PDF, Excel, Word and CSV generated on the device; private cloud storage for ID documents.
API	Public endpoints for scheduled jobs and webhooks, with signature/secret verification.
Languages	English and French, switchable per user at any time.

< 1 day

INITIAL
CONFIGURATION

~5 min

PER USER ACCOUNT

What the customer needs to provide

Company details and logo, the list of users, the customer base with addresses, the territory split, and the KPI targets to apply. Everything else is configured inside the application.

Frequently asked questions

How long does initial configuration take?

Branding, currencies, notifications and GPS policy take under a day. Accounts take about five minutes each; customer master data depends on the size of the base and can also be captured progressively in the field.

Can additional users be added later?

Yes. An administrator can create, edit, deactivate or delete accounts at any time, and change their permissions.

Can roles and permissions be customised?

Yes. Beside the delegate template, an administrator can build a fully custom account by ticking individual permissions per module — including read-only monitoring accounts.

Can managers see employees on a map?

Yes. A live supervisor map shows active delegates, their trail, check-in and check-out points and today's route progress.

Can information be exported?

Yes — PDF, Excel, Word, CSV and print, all branded with the company identity and produced in the selected language.

Does it work without internet?

Field capture works offline and synchronises automatically. Dashboards, the live map and exports need connectivity.

Is it available on mobile devices?

Yes. It installs from a link on Android and iOS as well as tablets and desktop browsers.

Can customers or locations be imported in bulk?

Customers are created in the application today; bulk spreadsheet import is on the roadmap and is not presented as an existing feature.

Can the system support several teams or branches?

Yes. Delegates are grouped under supervisors with territory assignment, and reporting can be filtered by delegate, team or territory.

Are passwords recoverable?

No — they are stored as one-way hashes. An administrator resets a password; there is no e-mail reset flow, by design.

Can quotations be issued in another currency?

Yes. Any configured currency can be used, with the USD equivalent calculated from the administrator's rate formula.

Who can see a delegate's ID document?

Administrators only. Profile photos and ID documents are held in private storage.

Feature honesty

Throughout this booklet, roadmap items are labelled **Roadmap** and are never presented as delivered functionality. Everything labelled **Available** exists in the application today.



Transform every market day into actionable business intelligence.

Empower Your Team. Drive Better Results.

Renforcez votre équipe. Générez de meilleurs résultats.

Ready to see CelioNav with your own team, your own customers and your own territories? Start with a single delegate and one market day — the difference is visible on the dashboard the same afternoon.

www.celionav.com

Web · Android · iOS · Desktop · English / Français · Offline capable

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