

VisitBasis FAQs

Operation

What are the minimum VisitBasis system requirements?

VisitBasis Office App works in any Windows / Mac / Linux system with a browser supporting the Flash plug-in.

VisitBasis Mobile App works on:

- iPhones or iPads with iOS version 7 or newer.
- Android smartphones and tablets with Jelly Bean (4.1) and above.

With which systems is VisitBasis compatible?

VisitBasis Office App: Windows / Mac / Linux

VisitBasis Mobile App: Apple's iPhone and iPad iOs and Android smartphones and tablets.

Is the VisitBasis app compatible with Android devices?

Yes. We advise Android Jelly Bean (4.1) and above.

Is the VisitBasis app compatible with Apple/ iOS devices?

Yes. We advise iOS version 7 or newer.

Is the VisitBasis app compatible with tablets?

Yes, both iPads and Android tablets.

Our reps use very simple, affordable Android devices. Will the VisitBasis app work on them?

We have personally tested VisitBasis on really inexpensive tablets with only wi-fi connection, and it worked fine. Naturally, the less processing power and memory a device has, the slower VisitBasis will run and synchronize.

I have an Apple desktop at work but a Windows notebook at home. Is the VisitBasis Office App compatible with both systems?

Yes. Make sure you have the Flash plug-in installed on all your browsers.

How much space does the VisitBasis App take on the mobile device?

The VisitBasis app per se does not take that much space (around 25MB), but the total storage it uses depends on the amount of information that will be loaded into the device so the rep can

access it even while offline. This includes data on: Locations (customers), products, visits, tasks, attachments, etc.

It has been taking my reps up to two minutes to synchronize. Is there a problem with your system?

Our system runs on the extremely reliable and fast Google Cloud, so any delays with synchronizing can be attributed to one of the following: Slow internet connection (Wi-Fi or cellular), weak cellular signal, cell phone carrier bandwidth limits, little storage left on device, or poor device processing power.

Is there any warranty about back ups?

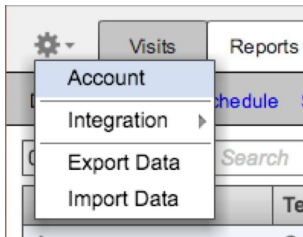
Google Cloud service does data replication automatically. Our client cannot lose data for technical reasons. You can make your own back as frequently as you like using VisitBasis export wizard

Account

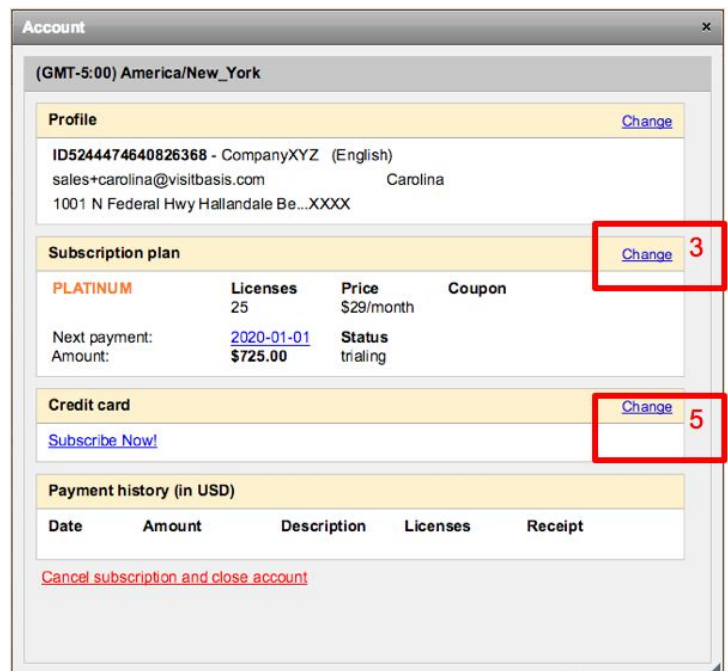
How do I convert my VisitBasis free trial to a paid account?

In the VisitBasis Office App:

1. Login to your VisitBasis account.
2. Go to the Settings menu -> Account



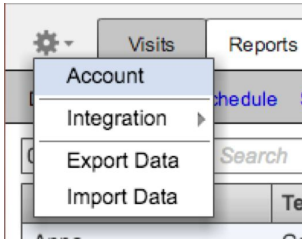
3. On the Account window, click on "change" under Subscription Plan to change the number of VisitBasis licenses (users) you are subscribing for.
4. Click on "Preview Changes" to see your updated invoice and then on "Save".
5. Click on "change" or "Subscribe now" next to Credit Card to enter your credit card information. Click "Save".



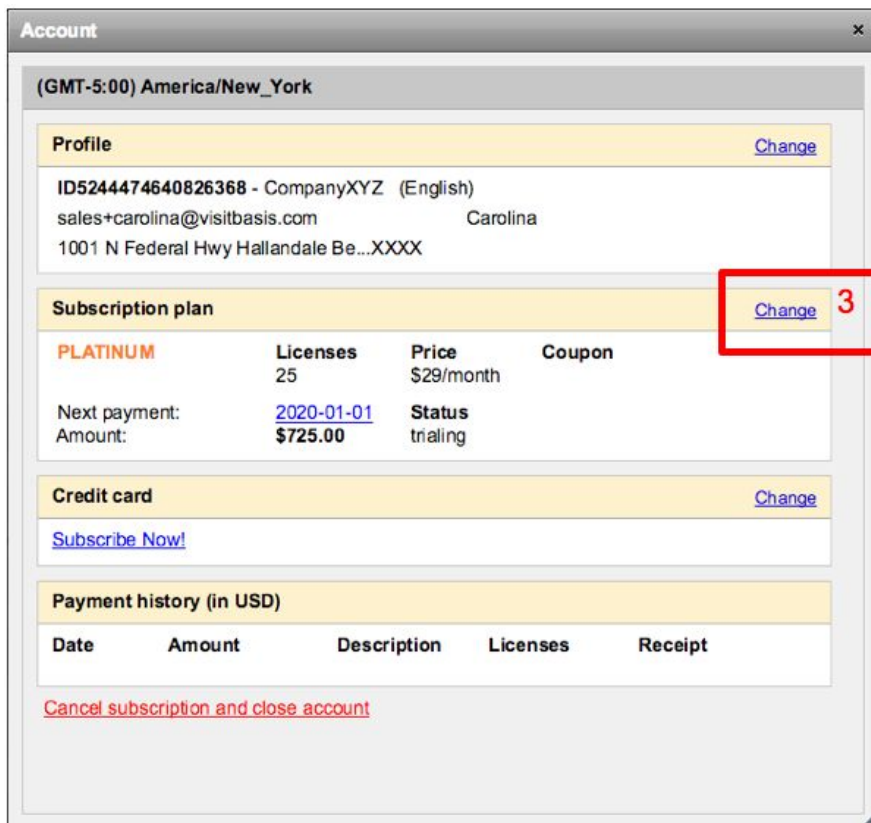
How do I change the number of users on my VisitBasis account?

In the VisitBasis Office App:

1. Login to your VisitBasis account.
2. Go to the Settings menu -> Account



3. On the Account window, click on "change" under Subscription Plan to change the number of VisitBasis licenses (users) you are subscribing for.
4. Click on "Preview Changes" to see your updated invoice and then on "Save".



If I add more users, then realize I don't need as many, will I be charged for a whole month?

No. Our payment system automatically pro-rates subscriptions. So, for instance, if you subscribe for 20 users today and realizes two days later that only need 18, you will only be charged for the 2 extra users for 2 days.

I am on trial now. I want your Platinum service which is \$29. I'd like to start with 1 user to try for a couple of months and see what happens. Is it possible to pay monthly for only 1 user ?

Minimum license count is 2 for any package (1 admin and 1 mobile user) totalling, in the case of VisitBasis Platinum, \$58 per month.

Once I subscribe, is there any minimum period? Or I can stop it any time I want?

Once you subscribe, you can cancel at any time. There is a "Cancel subscription and close account" at the bottom of the Settings-> Account window.

How do I cancel my VisitBasis account?

1. Login to your VisitBasis account.
2. Go to the Settings menu -> Account
3. On the Account window, click on "Cancel subscription and close account".

I cancelled my subscription by mistake. Can I recover my account and data?

Should a Master User accidentally or wrongfully terminate/cancel your organization's account, contact support@visitbasis.com within 24 hours to revert such accidental termination in order to avoid Account reactivation charges. Your account data will be permanently deleted from our servers 30 days after the termination date. For more information, please refer to the [VisitBasis Terms and Conditions](#).

Divisions

What are Divisions on VisitBasis?

In VisitBasis, Divisions is how you will organize your business:

- Products and tasks are division-specific.
- Users can be linked to one or more divisions. Depending on their security roles, users will only be able to see information for their own divisions.
- If you are subscribed for VisitBasis Platinum (sales), you are also allowed to have custom invoices for each division.

As a general guideline:

- For sales and marketing agencies, Divisions should be each one of your client companies.
- For CPG and FMCG manufacturers, Divisions can be each one of your business units (beauty, confections, home cleaning, etc.) or product lines (dairy, confections, snacks).

How do I create Divisions?

To create Divisions:

1. Go to the Divisions window on the Users tab.

2. Click on "Add Division".
3. Enter a name for your new division.
4. Select any already existing users to be linked to it, if applicable.
5. Save.

How do I change my purchase order template?

1. Go to the Divisions window on the Users tab.
2. Select a Division.
3. Click on "Order Template" on the Edit Division Window.
4. Select "Edit Template".
5. Make any changes to the Order Template code.
6. Save.
7. Select "Preview" to see the updated template.

The encoding for order templates is markup-language based and should be straightforward to understand for those with some basic coding experience. Should you have any questions on editing your order template, and to send us a logo, please contact us at support@visitbasis.com.

Users

How do I add Users on VisitBasis?

1. On **Users screen**: Hit "Add User" button, or if you see the "Add User" orange header continue to step 2.
2. Enter user's email (Important: email should be a valid address since the user will get an automated message to this address with his/her log-in credentials for VisitBasis).
3. Enter Username (as a nickname), First Name and Last Name.
4. Choose the Security Role for the user (see the reference table below). See table on next page for the access level of each Security Role. **Important: Users can have multiple security roles.**
5. Check/un check the **Is Active** box. For active users, the **Is Active** box should be checked.
6. **Teams** field is used to show or hide **user, report and visit** information from users for security

reasons. For example, Mobile Operation Supervisors and Mobile Users from team "Paris" will not see users, reports and visits of users from team "London". Multiple teams should be separated by commas (Paris,London).

7. Choose the Divisions this User will belong.
8. Click on the **Save** button on the bottom right corner.

What do each one of the Security Roles mean?

Please refer to the below Security Roles Access table:

Access / Roles	Master	Office Manager	Mobile Operation Supervisor	Mobile User	Analytics
Visits Tab	✓	✓	✓ (own teams)		
Locations Tab	✓	✓	✓		
Tasks Tab	✓	✓	✓		
Products Tab	✓	✓	read only		
Users Tab	✓	✓			
Reports Tab	✓	✓	✓ (own teams)		✓ (division)
Settings Menu	✓	✓			
Account	✓				
VisitBasis Mobile App				✓	
Visit History tool	✓	✓	✓ (own teams)	✓ (own data)	✓ (division)
VisitBasis Analytics tool	✓	✓			✓ (division)

How many Security Roles can a User have?

A user must have at least one Security Role, and can have as many as necessary.

Some sample user scenarios:

- A rep at your merchandising company will be a "Mobile User" and perform field activities for divisions "ClientOne" and "ClientTwo". He is a member of team "area1".
- A district manager at your merchandising company with occasional field activities will be a "Mobile Operation Supervisor" and "Mobile User" for divisions "ClientOne" and "ClientTwo". He manages team "area1".

- A director at “ClientOne” who will have access to reports for only his company’s activities will have a “Analytics” security role for division “ClientOne” only.

What are Teams?

Teams field is used to show or hide user, report and visit information from users for security reasons. For example, Mobile Operation Supervisors and Mobile Users from team "Paris" will not see users, reports and visits of users from team "London". Multiple teams should be separated by commas (Paris,London).

If the "Teams" field is left blank, then Mobile Operation supervisors will have full view of each other’s mobile users and their activities.

We want our local sales managers to see information only on their reps, and our regional sales managers/ VPs to see information on all the local teams under them. How can we accomplish that on VisitBasis?

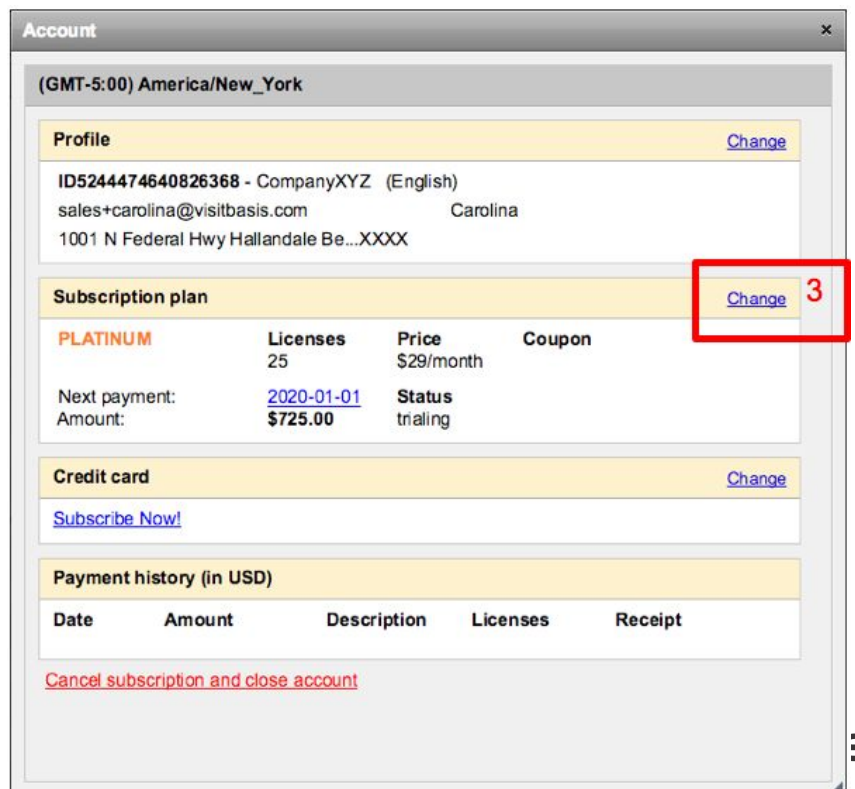
The field "Teams", in the user window, can help you with that:

1. Define one team for each sales manager and his/her reps (i.e. "Paris"). This way the manager will be only able to see user, report, and visit information on his/her reps.
2. Regional managers / VPs will have all the teams for which they are responsible, separated by commas (i.e. "Paris,London"), in the "Teams" field. This way, upper-level management will be able to see information on all the teams under them, but not on anybody else.

I am trying to add more Users but I keep getting a message saying that I don’t have enough licenses. How do I purchase more licenses?

In the VisitBasis Office App:

1. Login to your VisitBasis account.
2. Go to the Settings menu -> Account
3. On the Account window, click on "change" under Subscription Plan to change the number of VisitBasis licenses (users) you are subscribing for.
4. Click on "Preview Changes" to see your updated invoice and then on "Save



We want our field reps to be able to access the Office App to generate reports on their territory. Is this possible?

Yes. Besides the "Mobile User" role, they must also have "Analytics". This way, they will also access the VisitBasis Office App, but their view will be restricted to the Reports tab.

Our Office App-only users (Mobile Operation Supervisors and/or Analytics) cannot see any information or run any reports. What can be the problem?

Please make sure that their view is not limited by the "Teams" field:

- Make sure that "Mobile Operation Supervisors" have the same team(s) as the "Mobile Users" they are supposed to see.
- If "Mobile Operation Supervisors" are supposed to see everything, make sure that the "Teams" field on their user profile is blank.
- If external, "Analytics"-only users, make sure that the "Teams" field on their user profile is blank.

Our regional/ district managers/ supervisors periodically visit the customers on their rep's territories. How can I be sure that they will have all the information they need on their mobile devices so they can register these visits on VisitBasis?

Make sure of the following:

1. That your regional/ district managers/ supervisors have the security roles "Mobile Operation Supervisor", "Mobile User", and "Analytics".
2. That the locations in each rep's territory are also assigned to their respective regional/ district managers/ supervisors.

We are a marketing/ merchandising / sales agency and we want to give VisitBasis access to our clients so they can see and run their own reports. Can this be done while limiting their view so they can only see information on their company and their company only?

Yes. To make sure that a manager/director at "ClientOne", for instance, has access to reports for only his company's activities:

- Create a Division for your customer (in this case, "ClientOne"), that will be specified in all this customer's products and task templates, as well as for the mobile users performing activities for this customer.
- Create a User for the the manager/director at "ClientOne", with the security role "Analytics" and division "ClientOne". He/she will receive his credentials via e-mail and will have access to the "Reports" tab only.

Locations

How do I add locations in bulk?

Yes. You can add Locations in bulk to VisitBasis by importing a comma-separated spreadsheet (Excel, Google Sheets, etc) of your customers.

If you prefer to watch a video of this tutorial, [click here](#).

First, you will need to export a template for editing:

1. Click on the Settings menu and select Export Data.
2. On the drop-down, select Locations and click on the button Download. Your Locations file will be prepared for download.
3. Once the blue "Download" link shows up, click on it to download the file and save it to your computer.

On Excel, Google Sheets or other spreadsheet editor:

1. Open the file you just downloaded.
2. Leave the column headers and delete any rows of already existing data.
3. Populate the file according to the column headers.
If you don't know the location latitude and longitude, you can leave the fields blank. You will be able to validate the location coordinates once the data is loaded into VisitBasis. If you are using Google Sheets, you are able to load certain geocode add-ons that will automatically calculate latitude and longitude, such as "Geocode by Awesome Table".
Important: Fill in all the "active" fields with TRUE, so all locations will already be imported as active.
4. Save the file as CSV(,), CSV(;) or TXT().
5. Close the file

Back to VisitBasis, import the file you just edited:

1. Click on the Settings menu and select Import Data.
2. On the drop-down, select **Locations** and click on the button Import.
3. Select the spreadsheet file you just saved.
4. Step 1 of 3: Preview the uploaded file and check for any inconsistencies. Click next.
5. Step 2 of 3: Choose to "Insert new Data", check field equivalency, and click next.
6. Step 3 of 3: Give the data a final review and click on "OK! Import it."

The "Import Data" window will display the upload process progress and you will receive a "Success" message once importing is complete. Close the Import Data window.

You might need to refresh the location search (just hit enter on the search box), refresh the browser window or login again to VisitBasis to see the new locations.

Can the reps add locations themselves on the VisitBasis Mobile App?

Yes. To add locations on the VisitBasis Mobile App:

1. Click on the "+" on the top-left of the Visits screen.
2. Click on "New location". A "New Location" will be added to the bottom of the visit list.
3. Select the "New Location" visit to go to the Visit Summary.
4. Click on "edit".
5. Click on "location name" to change it, then click on the top "back" arrow.
6. Click on "location address" to change it. Input location address. Then, if the mobile user is at the actual location, on a separate line right below the address, click on the "gps" button. This will capture the current GPS coordinates

Locations added by mobile users will be viewable on the Dashboard and User Schedule screen, but will not be added immediately to the Location database, so any inconsistencies can be verified and duplicates can be avoided.

To add new locations captured by mobile users to the Location database, run a "New Locations" report, download or save it to Google Drive, verify the data on Excel or Google sheets (changing location codes to conform to your standards, if needed), save the file as CSV(,), CSV(;) or TXT(), then import it into VisitBasis.

How can I find out the GPS coordinates of my locations so I don't have to validate every single address?

Google Sheets, a free web-based spreadsheet editor, has some third-party add-ons that allow you to easily find the latitude and longitude for most addresses.

Those add-ons can be found by searching for "geocode" on the "Add-Ons -> Get Add-ons" menu item.

We have used with success the following add-ons: "Geocode by Awesome Table" and "ezGeocode".

In my country, there are no addresses. How can we add locations on VisitBasis?

There are two ways to add locations when they don't have a specific address:

1. Find out each location's latitude and longitude.
2. Ask your mobile users to add the locations themselves on their first VisitBasis visit and capture the GPS coordinates. This information will have to be verified before "officially" being added to your Location database. To do so:
 - Click on the "+" on the top-left of the Visits screen.
 - Click on "New location". A "New Location" will be added to the bottom of the visit list.
 - Select the "New Location" visit to go to the Visit Summary.
 - Click on "edit".
 - Click on "location name" to change it, then click on the top "back" arrow.

- Click on "location address" to change it. Input location address. Then, if the mobile user is at the actual location, on a separate line right below the address, click on the "gps" button. This will capture the current GPS coordinates

Locations added by mobile users will be viewable on the Dashboard and User Schedule screen, but will not be added immediately to the Location database, so any inconsistencies can be verified and duplicates can be avoided.

To add new locations captured by mobile users to the Location database, run a "New Locations" report, download or save it to Google Drive, verify the data on Excel or Google sheets (changing location codes to conform to your standards, if needed), save the file as CSV, then import it into VisitBasis.

What are location properties and how can I use them?

Location properties are fields that you can customize and help you search and filter locations by such fields. For instance, you can have a property named "type", with values such as "warehouse", "supermarket", and "convenience store".

Then, when scheduling visits, assigning territories, etc, you can perform a search like this:

(?)

1 - 3 of 3

Code	Name	Valid	Active
sed33027	Sedanos 33027 17171 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes
wf33027	Whole Foods 33027 14956 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes

type:supermarket

or

"type=supermarket"

or full syntax:

properties:"type=supermarket"

What is the GPS accuracy/ tolerance on VisitBasis?

The GPS accuracy/ tolerance for tasks and visit verification on VisitBasis is 200 meters.

How do I search locations?

The Search bar (on Locations and Territory tabs) will help you filter locations so you can more easily find what you need. Here is how the Search bar works:

- Global Search
Global search is a string that contains only field values. If I want to search a specific store, for instance, I can just type the store name. For instance, in the below example I am searching for all Target stores:

target (?) Search

1 - 1 of 1

Code	Name	Valid	Active
tgt33027	Target 33027 16901 Miramar Pkwy, Pembroke Pines,...	Yes	Yes

If you are searching for a field that contains space or special characters, enclose the value in quotes, as is the case of "Miami Beach".

- Specific Search

Specific search can contain one or more terms, each naming a field and a constraint on the field's value. For instance, you want to search for all Publix stores in the city of Pembroke Pines, you can perform a search like this:

city:"pembroke pines" AND name:publix (?) Search

1 - 1 of 1

Code	Name	Valid	Active
p01	Publix 15675 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes

- Search by properties

Example - If you would like to search by location property "type" and value "supermarket":

type:supermarket

or

"type=supermarket"

or full syntax:

properties:"type=supermarket"

"type:supermarket" (?) Search

1 - 3 of 3

Code	Name	Valid	Active
sed33027	Sedanos 33027 17171 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes
wf33027	Whole Foods 33027 14956 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes

The fields supported by location search are:

active, city, code, country, geoPoint, name, postCode, properties, state, street1, street2, city, user.

Example - searching by zip code only:

postCode:"33027"

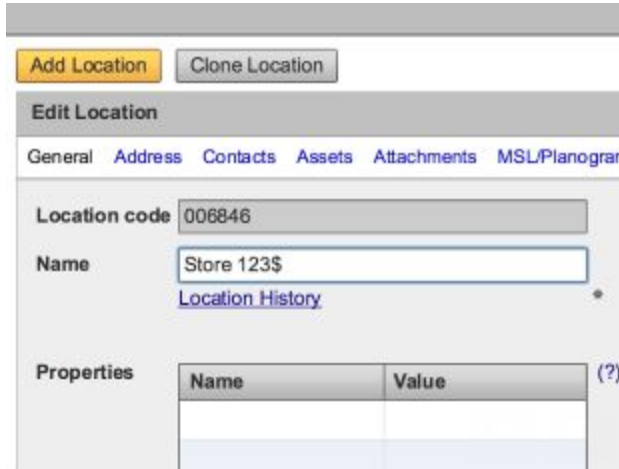
postCode:"33027" (?) Search

1 - 3 of 3

Code	Name	Valid	Active
tgt33027	Target 33027 16901 Miramar Pkwy, Pembroke Pines,...	Yes	Yes
sed33027	Sedanos 33027 17171 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes
wf33027	Whole Foods 33027 14956 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes

On the "Add Visit or Tasks" window, I want see more columns like "last activity", "last order", etc. Can I customize this?

Last activity per location can be accessed via Location History link located on Location/ General window:



When I add locations, products, etc, can i customize them by adding more information?

Yes, you can add custom properties to locations and products. For instance, in locations you can have a property named "type", with values such as "warehouse", "supermarket", and "convenience store".

Then, when scheduling visits, assigning territories, etc, you can perform a search like this:

type:supermarket

or

"type=supermarket"

or full syntax:

properties:"type=supermarket"

"type:supermarket" (?) Search

1 - 3 of 3

Code	Name	Valid	Active
sed33027	Sedanos 33027 17171 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes
wf33027	Whole Foods 33027 14956 Pines Blvd, Pembroke Pines, FL,...	Yes	Yes

I have 500+ customers. I uploaded one address and your system could not validate that address. So i validated through the Google Map. Do i have to validate my locations one by one using the Google Map?

Google Sheets, a free web-based spreadsheet editor, has some third-party add-ons that allow you to easily find the latitude and longitude for most worldwide addresses.

Those add-ons can be found by searching for "geocode" on the "Add-Ons -> Get Add-ons" menu item.

We have used with success the following add-ons: "Geocode by Awesome Table" and "ezGeocode".

After uploading all the customer data, if i'd like to change information of each one of the locations, what do i do? (for example, if i need to change the name of 50 locations because the owner of these locations changed)

The Import Data feature on VisitBasis also allows to update existing data. So, to change/edit/update location information:

1. Download your existing location database with the Export Data feature.
2. Open the downloaded file on Excel or Google Sheets (preffered).
3. Edit the information on the spreadsheet, keeping the field "locationCode" intact.
4. Save the file as CSV(,), CSV(;) or TXT().
5. Close the file

Back to VisitBasis, import the file you just edited:

1. Click on the Settings menu and select Import Data.
2. On the drop-down, select **Locations** and click on the button Import.
3. Select the spreadsheet file you just saved.
4. Step 1 of 3: Preview the uploaded file and check for any inconsistencies. Click next.
5. Step 2 of 3: Choose to "Update existing Data" (see below), check field equivalency, and click next.
6. Step 3 of 3: Give the data a final review and click on "OK! Import it."

Import Data

Step 2 of 3 - Map imported fields (Locations)
Mandatory fields (*) should be properly mapped.

I would like to:

- Insert new data
- Update existing data
- Delete data

VisitBasis Field	Import Field	
locationCode *	locationCode	▼
locationName *	locationName	▼
street1 *	street1	▼
active	active	▼
city	city	▼
country	country	▼
latitude	Latitude	▼
longitude	Longitude	▼
postCode	postCode	▼
state	state	▼
street2	street2	▼

Cancel « Prev Next »

Territory

How do I assign territories?

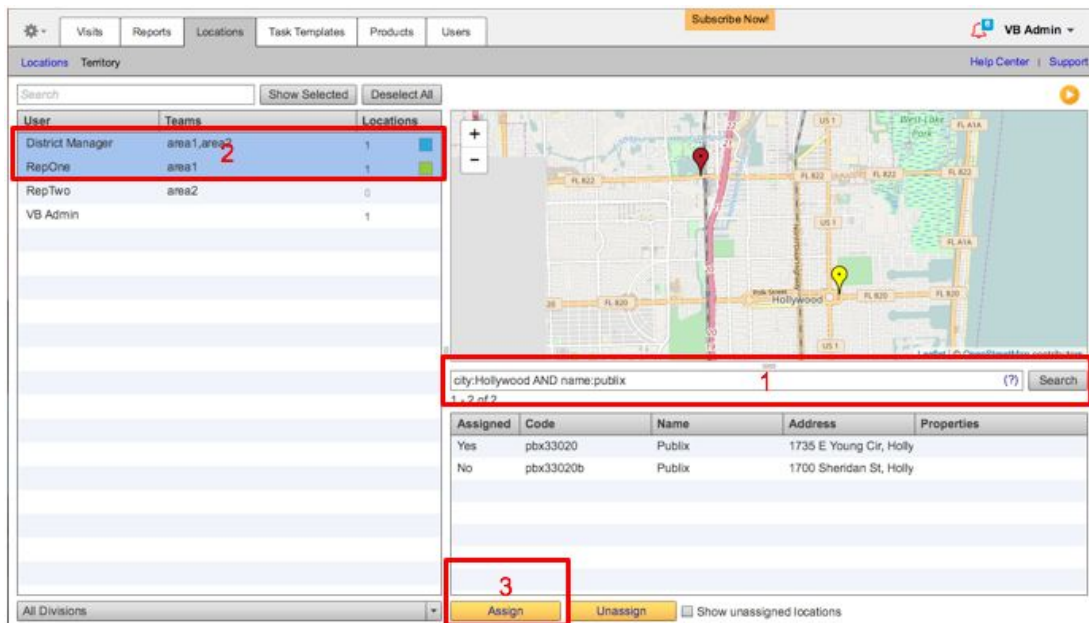
There are 3 ways to assign territories on VisitBasis:

1. Assigning reps to each individual location on the Locations / Edit Location window.
2. Assigning stores in bulk to one or multiple reps on the Territory window.
3. Importing spreadsheets that "connect" locations to users.

How can I assign territories in bulk?

On the Locations->Territory window, you can assign users to locations in bulk. For instance, I might want to assign all the stores of a certain supermarket chain on a certain city or zip code to a rep and a supervisor. To do so:

1. On the Territory window (right panel), type in the search string for the location or locations you are looking for. Use our topic "Searching Locations" as reference.
2. Select the user (or users – shift+click) to whom you want to assign the location(s).
3. Click on the button Assign.
4. Confirm that you want to assign locations to users.



The screenshot shows the VisitBasis interface for assigning territories. The left panel displays a table of users and their assigned locations. The right panel shows a map of Hollywood, Florida, with a search bar and a table of results. Red boxes highlight the search bar (1), the selected user 'RepOne' (2), and the 'Assign' button (3).

User	Teams	Locations
District Manager	area1,area2	1
RepOne	area1	1
RepTwo	area2	0
VB Admin		1

Assigned	Code	Name	Address	Properties
Yes	ptx33020	Publix	1735 E Young Cir, Holly	
No	ptx33020b	Publix	1700 Sheridan St, Holly	

How does a territory table for importing look like?

Importing territory tables is the easiest way to assign territories on VisitBasis. As you can see in this sample table, the territory table is very simple, since it only has two columns:

"LocationCode" for location and "nickname" for user. So it basically tells VisitBasis: "This location is assigned to this user".

Please note:

- The field "nickname" is the "User" field on the Users -> Edit User window.
- One location can be assigned to multiple users, as on you can see the records marked in yellow.

	A	B
1	locationCode	nickname
2	wg33027	Field Rep 2
3	dd33029	Field Rep 2
4	pbx33027	Field Rep 2
5	sb33029	Field Rep 2
6	tgt33027	Field Rep 2
7	pbx33027	Field Rep 1
8	wgn33027	Field Rep 1
9	pbx33331	Field Rep 1
10	wfds33027	Field Rep 1
11	tgt33027	Field Rep 1
12	pbx33027	Admin User
13	tgt33027	Admin User

Our regional/ district managers/ supervisors periodically visit the customers on their rep's territories. Do they need to have locations assigned to them if they want to perform the visits on VisitBasis?

Only if they want to make unplanned visits, meaning that they didn't schedule them on the VisitBasis Office App and instead just want to add the visit on the mobile app. If so, make sure of the following:

1. That your regional/ district managers/ supervisors have the security roles "Mobile Operation Supervisor" and "Mobile User".
2. That the locations in each rep's territory are also assigned to their respective regional/ district managers/ supervisors.

If, however, the managers will be scheduling the visits previously on the Office App, they just need to use the "Reschedule" feature on the Visits -> User Schedule window and assign themselves a visit sequence originally assigned to one of their reps.

Products

What is the difference between Divisions and Product Categories?

On VisitBasis, Divisions allow you to filter reps, products, task templates and analytics-only users in activities and reports. For instance, Divisions will make sure that:

- In sales, a rep will not sell products from a line he/she is not trained in.
- In merchandising agencies, a client will not be able to see information from other clients when running reports.

- In category management, a merchandiser will be blocked from seeing tasks for products he is not supposed to audit.

Product categories and subcategories, in the other hand, are just a way to help you organize your products so they become easier to find both in the VisitBasis Office App as well as on the VisitBasis Mobile App.

Can I add my product database in bulk to VisitBasis?

Yes. You can add Products in bulk to VisitBasis by importing a comma-separated spreadsheet (Excel, Google Sheets, etc).

If you prefer to watch a video of this tutorial, [click here](#).

First, you will need to export a template for editing:

4. Click on the Settings menu and select Export Data.
5. On the drop-down, select Products and click on the button Download. Your Products file will be prepared for download.
6. Once the blue "Download" link shows up, click on it to download the file and save it to your computer.

On Excel, Google Sheets or other spreadsheet editor:

6. Open the file you just downloaded.
7. Leave the column headers and delete any rows of already existing data.
8. Populate the file according to the column headers.
Important: Fill in all the "active" fields with TRUE, so all products will already be imported as active.
9. Save the file as CSV(,), CSV(;) or TXT().
10. Close the file

Back to VisitBasis, import the file you just edited:

7. Click on the Settings menu and select Import Data.
8. On the drop-down, select **Products** and click on the button Import.
9. Select the spreadsheet file you just saved.
10. Step 1 of 3: Preview the uploaded file and check for any inconsistencies. Click next.
11. Step 2 of 3: Choose to "Insert new Data", check field equivalency, and click next.
12. Step 3 of 3: Give the data a final review and click on "OK! Import it."

The "Import Data" window will display the upload process progress and you will receive a "Success" message once importing is complete. Close the Import Data window.

Your products are now on VisitBasis. As an optional next step, you might choose to manually add up to three pictures for each product.

Can I add pictures to my products?

Yes, you can add up to three pictures for each product.



What are product properties and how can I use them?

Product properties are fields that you can customize and help you search and filter products by such fields, and also to inform your reps of any additional relevant product information. For instance, you can have a property named "organic", with values "yes" or "no".

Then, when searching products on VisitBasis Office, your search string will look like this:

organic:yes or "organic=yes" or full syntax properties:"organic=yes"

organic:yes		
Code	Description	Active
052000000955	Dark Chocolate2	Yes

How can the rep access product information on the VisitBasis app?

Your reps can access product information on the VisitBasis Mobile App by accessing the menu on the bottom-right corner, selecting "Products", and then searching or browsing for the product.

The barcode scanner does not seem to work on the VisitBasis mobile app. What could be the problem?

If the barcode scanner search is not working properly on the VisitBasis mobile app, please check if the product barcodes were entered as digit-only numbers with no spaces, dashes or other special characters.

When I add locations, products, etc, can i customize them by adding more information?

Yes, you can add custom properties to locations and products. For instance, you can have a property named "organic", with values "yes" or "no".

Then, when searching products on VisitBasis Office, your search string will look like this:

organic:yes or "organic=yes" or full syntax properties:"organic=yes"

organic:yes		
Code	Description	Active
052000000955	Dark Chocolate2	Yes

How can I make Plan-O-Gram (or specific product list)?

You can set up a planogram for each individual store by going to Locations -> select location -> Edit Location/ MSL/Planogram. Here you can specify whether a product is in the location's Must-Stock-List, and the recommended quantity. Please see below screenshot:

Edit Location				
General Address Contacts Assets Attachments MSL/Planogram Price Lists				
Search				Copy To Excel
Code	Product Description	Product Category	MSL	Recommended Qty
bo1300	Baby oil	babyandchildcare/hygiene	<input checked="" type="checkbox"/>	1
bw1201	Unscented baby wipes	babyandchildcare/hygiene	<input checked="" type="checkbox"/>	1
bw1200	Baby scent baby wipes	babyandchildcare/hygiene	<input checked="" type="checkbox"/>	1
bws1600	Baby head and body wash	babyandchildcare/hygiene	<input checked="" type="checkbox"/>	1
pw2g	2 1-gallon pack nursery water	babyandchildcare/water	<input checked="" type="checkbox"/>	1
pw1g	1-gallon nursery water	babyandchildcare/water	<input checked="" type="checkbox"/>	1
pw48	48 pack water minis	babyandchildcare/water	<input checked="" type="checkbox"/>	1
cl01522r	Refill - Glass cleaner - Organic formula - non-c	cleaners	<input type="checkbox"/>	0
817939012505	Dryer-activated Fabric Softener	cleaners	<input type="checkbox"/>	0
cl01520r	Refill - Multipurpose household cleaner - Organi	cleaners	<input type="checkbox"/>	0
clorox	Clorox - Disinfecting Wipes	cleaners	<input type="checkbox"/>	0
041415523265	Multipurpose household cleaner - Organic form	cleaners	<input type="checkbox"/>	0

Tasks

What are Tasks on VisitBasis?

Tasks are the sequence of activities that your field users will perform on their mobile devices. On VisitBasis, you can create task templates that are:

- Action-only, or that pertain to an in-store activity such as: setting up a display, verifying safety checklists, verifying general category or store visuals, etc.
- Product-specific, such as counting faces, verifying out-of-stocks or prices, etc:
 - That applies to one or more products.
 - That applies to all the products in the location's must-stock-list (MSL).

I want to have the same Task Template for several divisions. How do I do that?

You can create the first task template, save it, then click on the "Clone Task Template" button, choose a different division, and save.

What does the box "Field reps can schedule this task" mean?

When this box is selected, users are able to add them to their own visits on the mobile app.

What does the box “Confirm task start with GPS” mean?

When this box is selected, mobile users will only be able to perform the task if they are within a 200 meter radius of the location for which it is scheduled.

What does the box “Is active” mean?

The "Is active" box means the task template is available for scheduling. You might have seasonal or project-specific tasks, for instance, that you might want not to be active so it is not subject to accidental scheduling and/or it doesn't clutter your task template lists.

What will checking the box “Load products” in the Items window do?

Checking the box "Load products" will pull up the division products so you are able to select which ones you want the task to apply to. This allows you to create product-specific tasks.

What will checking the box “Load Location’s MSL/Planogram” do?

Checking the box “Load Location’s MSL/Planogram” will cross-reference the task with the Location MSL/Planogram information so the task will apply to all the products that are supposed to be available at each location. You can define each location's MSL/Planogram by going to: Locations tab -> Locations -> select location -> on Edit Location window, click on MSL/Planogram (see below).

Code	Name	Valid	Active
br14	Bravo 2004 Tamiami Tr, Bradenton, FL, 34205	Yes	Yes
br11	Bravo 1206 S Dixie Hwy, Lake Worth, FL, 33462	Yes	Yes
br16	Bravo 238 Cranbrook Dr, Kissimmee, FL, 34758	Yes	Yes
br5	Bravo 4065 W Oak Ridge Rd, Orlando, FL, 328...	Yes	Yes
br3	Bravo 2921 S Orlando Dr, Sanford, FL, 32773	Yes	Yes
br9	Bravo 10400 Nw 7th Ave, Miami, FL, 33150	Yes	Yes

Code	Product Description	Product Category	MSL	Recommended Qty
041415523265	Multipurpose household cleaner - Organic form...	cleaners	<input checked="" type="checkbox"/>	1
041415523265	Heavy Duty - plastic combo	confections	<input checked="" type="checkbox"/>	1
041415523265x	24-pack _TEST	water	<input checked="" type="checkbox"/>	1
0422383022040	Gummy bears 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
0422383022041	Gummy bears 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
042238302777	Gummy bears3 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
042238306778	Gummy bears4 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
05200000965	Dark Chocolate2	confections	<input checked="" type="checkbox"/>	1

How do I create a planogram audit task that will load the products from each store’s must-stock list or planogram?

Checking the box “Load Location’s MSL/Planogram” on the add or edit task window will cross-reference the task with the Location MSL/Planogram information so the task will apply to all the products that are supposed to be available at each location. You can define each location's MSL/Planogram by going to: Locations tab -> Locations -> select location -> on Edit Location window, click on MSL/Planogram (see below).

Code	Name	Valid	Active
bv14	Bravo 2004 Tamiami Trl, Bradenton, FL, 34205	Yes	Yes
bv11	Bravo 1206 S Dixie Hwy, Lake Worth, FL, 33462	Yes	Yes
bv16	Bravo 238 Cranbrook Dr, Kissimmee, FL, 34758	Yes	Yes
bv5	Bravo 4065 W Oak Ridge Rd, Orlando, FL, 328...	Yes	Yes
bv3	Bravo 2921 S Orlando Dr, Sanford, FL, 32773	Yes	Yes
bv9	Bravo 10400 Nw 7th Ave, Miami, FL, 33150	Yes	Yes

Code	Product Description	Product Category	MSL	Recommended Qty
041415523265	Multipurpose household cleaner - Organic form...	cleaners	<input checked="" type="checkbox"/>	1
041415523265	Heavy Duty - plastic combo	confections	<input checked="" type="checkbox"/>	1
041415523265x	24-pack _TEST	water	<input checked="" type="checkbox"/>	1
0422383022040	Gummy bears 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
0422383022041	Gummy bears 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
042238302777	Gummy bears3 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
042238306778	Gummy bears4 5oz	confections/gummies/gelt	<input checked="" type="checkbox"/>	1
05200000965	Dark Chocolate2	confections	<input checked="" type="checkbox"/>	1

What are Actions?

Actions are the questions your mobile users need to answer while performing their activities at the locations. You can customize your actions so the answers (i.e. the data captured by them) will be easy to report on and later analyse.

What are the different action types available on VisitBasis?

In VisitBasis there are five action answer types, correspondent to the type of data they capture: text, number, selection (single or multiple choice), photo, and signature.

Can my reps capture video on VisitBasis?

Capturing videos is not currently a feature on VisitBasis.

If I check the “Is Required” box next to the action, what will happen?

If the "Is Required" box is selected, it will be mandatory for the mobile user to answer the question before closing the visit. If they don't answer the question - and consequently don't close the visit - they run the risk of losing the data captured during their visits. Data collected during a visit will only be "safe" when the visit has been synchronized and closed.

When saving a task, the rep is getting an alert saying “Cannot save. You are not at the desired location”. What can be the problem?

In this case, the task template's “Confirm task start with GPS” box is checked, meaning that mobile users will only be able to perform the task if they are within a 200 meter radius of the location for which it is scheduled. Therefore, the most common cause for this issue is that the mobile user is not physically present at the location where he/she should be.

My reps are constantly getting the alert “Cannot save. You are not at the desired location”, even while at the correct location. How can I solve this issue?

When getting repeated “Cannot save. You are not at the desired location” alerts, even while knowingly at the correct location, the GPS at the specific geographic location is probably inaccurate. It could be a country, topographic, or phone carrier issue. In this case, we

recommend unchecking the “Confirm task start with GPS” box, so the mobile users are able to save their activities.

What is the GPS accuracy/ tolerance for performing tasks on VisitBasis?

When the task template's “Confirm task start with GPS” box is checked, mobile users will only be able to perform the task if they are within a 200 meter radius of the location for which it is scheduled.

What types of task attachments can be viewed on VisitBasis?

Task attachments can be images (jpg, png) or PDF documents.

Can mobile users add MSL/Planogram tasks on the app?

Yes. Mobile users can add MSL/Planogram tasks on the app, as long as the task template box “Field reps can schedule this task” is checked.

Scheduling and Planning Visits

I want my rep to follow the same route every Monday, for instance. How can do that without having to schedule the same sequence every week?

1. Create the typical Monday visit sequence.
2. Select all the visits and tasks by clicking on the checkbox on the header of the daily location/task table (picture).
3. Click on the “Reschedule” button.
4. On the right-hand panel, select the dates when you want the same visit/task sequence.
5. Click on “Reschedule”, on the bottom left.



<input checked="" type="checkbox"/>	Location / Task	
<input checked="" type="checkbox"/>	Bravo - bv3 2921 S Orlando Dr, Sanford,, FL, 32773	(1)
<input checked="" type="checkbox"/>	Test task HOME DEPO	
<input checked="" type="checkbox"/>	Bravo - bv17 502 Owltree Way, Ocoee,, FL, 34761	(1)

The “Estimated time” always says “08:00 – 09:00”. What is this field for and how can I change that?

The “Estimated time” is just a standardized timing format that you can modify according to your needs. You can use it as it is and just change the time slot, leave it blank, change to the estimated duration of the visit (“40 mins”, for instance), or you can just specify a more general window (“morning” or “afternoon”).

Is there a maximum number of visits that can be scheduled for each day?

On the Visit Schedule window, you can schedule up to 50 visits on any given day. We do understand, however, that some business needs might require, at the same time or day, visiting

all stores in a certain store chain, sales territory, or in a city or zip. So, in the Schedule by Location window you can go over that limit and schedule as many visits needed. To see all locations on a certain user's territory, type "user:JaneDoe" on the search box. Please refer to the topic "Searching Locations" on our document [VisitBasis Tutorial for Admins](#) for additional tips on how to search locations.

I want my rep to visit 60 locations over 2 or 3 days and I want him to be able to calculate the shortest route for those visits. How can I do that?

First, you can schedule all 60 location visits for the first day on the "Schedule by Location" window. When your rep opens up the app he can they click on Route (top-left corner) and then on "Optimize".

I run a "mystery shopping" operation, and want several reps to visit the same stores with the same tasks to perform. What is the fastest way to do this on VisitBasis?

On the Schedule by Location window you can create visits to several locations at a time, for all the users assigned to those locations. To do so:

1. Click on the "+" button.
2. Search and select the locations as needed, click next.
3. Select the dates when the visits will be performed, click next.
4. Select the tasks that the mobile users should perform at the locations. Click on "Create visits and tasks".

Can a rep perform a visit/task on a different day than assigned? How long are visits "valid"?

Yes. Visits and tasks are "valid" for up to two weeks and, as long as they are not closed, they can be edited. On the VisitBasis mobile app, users can see the previous week's schedule so on any given Friday he/she will be able to see and perform visits and tasks from the previous Monday.

When I optimize the route for my rep on the Office App, it gives me a route that is in the opposite way as the rep would be moving. How can I change that?

The VisitBasis Office App calculates the routes according to the most logical pattern. If your rep optimizes the route on the Mobile App, though, it will take into consideration the rep's current location to calculate the starting point for the most effective route.

Can I set up all the visits for a certain week on Monday, and the reps will complete them as the week progresses?

Yes. Visits and tasks are "valid" for up to two weeks and, as long as they are not closed, they can be edited. On the VisitBasis mobile app, users can see the previous week's schedule so on any given Friday he/she will be able to see and perform visits and tasks from the previous Monday.

What is the Schedule by Location window?

The Schedule by Location window allows you to view the status of all open visits scheduled for a certain date range, and to see the progress as they are being completed.

On the Schedule by Location window you can also create visits to several locations at a time, for all the users assigned to those locations. To do so:

5. Click on the "+" button.
6. Search and select the locations as needed, click next.
7. Select the dates when the visits will be performed, click next.
8. Select the tasks that the mobile users should perform at the locations. Click on "Create visits and tasks".

What is the difference between the maps in the VisitBasis User Schedule window and the Dashboard?

On the User Schedule window map you will see what was planned for the day. On the Dashboard you will see what is actually happening, with the view of the actual mobile user's path, "last seen at" location, and the possibility of viewing more than one user's visits at a time. Some functions, however, are similar: clicking on a location marker will tell you if a visit was performed at the location, by whom, at what time, and if it has been GPS-verified.

Can I have mandatory tasks for each location, so every time the reps visit such locations they will be know which tasks must be performed?

Yes. You can setup pre-selected tasks for each location on the Location/General window, under Properties by following the below steps:

1. Add a new property with the property name "task_list".
2. For property values, go to the Task Templates tab, copy and then paste the values for the task(s) title(s). If more than one task, separate by commas (see picture).

Properties	Name	Value
	task_list	Audit,Out-of-stocks

Now, when your reps choose to add tasks to the visit they are performing, the tasks on the task list will be pre-selected for them.

You can also insert or update the task list property in bulk for several locations by importing a CSV(,), CSV(;), or TXT table with the column headers: location code, property name, and property value.

On the "Add Visit or Tasks" window, I want see more columns like "last activity", "last order", etc. Can I customize this?

Previous activity per location can be accessed via Location History link located on Location/General window:

There are some location properties I have to see when I plan the schedule to save my time. When i click "Visit"->"Schedule by Location", I can see 'code','name','valid'and 'Active" I want to see Territory,Last Order,Last Visit etc. I know I need to input these manually every time. But I have 500+ customer so I can't remember all the customer. Is this customizing possible?

While the customizing is not possible, when Scheduling by Location you can use the search box on the Location window to search for locations with certain properties. The syntax should be similar to the following:

Example - If you would like to search by location property "type" and value "supermarket":

type:supermarket

or

"type=supermarket"

or full syntax:

properties:"type=supermarket"

As you can see below, I can search for locations with a property "lastOrder" and value "April 2017":

Code	Name	Valid	Active
p14	Publix 2160 megregos blvd, fl, 33901, usa	Yes	Yes

For territory search, you can use the syntax "user:JaneDoe" on the search box.

How do I reschedule tasks that are still open?

You can reschedule still open tasks for the whole team in bulk and save a lot of time. Here is how:

1. Go to Visits/Schedule by Location and choose the period in the past to see still open tasks for all users
2. Select the first row with a click and hold the shift button and click on the last row to select all records.
3. Copy/Paste the data into Excel or other spreadsheet editor.
4. Change the visit date to the future date, making sure it is as text in yyyyymmdd format.
5. Save as a CSV(,), CSV(;), or TXT () file.
6. Go to VisitBasis Settings/Import Data wizard and import the file.

How do I schedule visits on the Visit Calendar screen?

The Visit Calendar window on VisitBasis is an easy and straightforward way to schedule visits, as well as to see the schedules in a visual format.

To schedule a visit for a location on the Visit Calendar window:

1. Locate the store where the visit will be performed.
2. Locate the date on the top bar,
3. Click to put a check on the box where the location line and date column intersect, and then click on Save.

This will create visits on such date for all the users assigned to the location.

Other tips on the Visit Calendar screen:

- To delete a visit, just click over the checkmark corresponding to the location and date.
- If the box background is in red, the visit has not been saved yet.
- You can view past schedules, but cannot create, edit, or delete visits in the past.
- You can filter the information by several parameters:
 - To filter by user, on the search box type "user:Username".
 - To filter by location name, type "name:LocationName".
 - You can also filter locations by property. Properties could indicate store chain or other parameters that make sense for your business. For instance, I want to see the schedule for all my drugstores, and I have a property named size that indicates that. So I type in the search box: "properties:"size=drugstore"".
- If I want to view different dates, I can just click on the date box to choose when my Visit Calendar view starts.
- To fill in your visit schedule in bulk, you can also import a spreadsheet with the column headers location code, nickname, task template and visit date. Visit date must be in YYYYMMDD format, and you can also add the tasks to be performed at the locations on the task template field, separated by commas.

Mobile App

What login and password should my rep use on the VisitBasis App?

Your rep should use his email address as login and the password he received from VisitBasis.

How do I change the order of the visits on the VisitBasis App?

On the Visits window, you can click on Route (top-left corner) and then on:

- "Optimize" to automatically calculate the shortest route for the visits or
- the up and down arrows to change the visit order manually.

How do I optimize route on the VisitBasis App?

On the Visits window, you can click on Route (top-left corner) and then on "Optimize" to automatically calculate the shortest route for the visits.

What does the number in the circle next to the visit mean?

The number inside the circle indicates the number of tasks that have been planned for the visit. The outer circle will serve as an extra reminder for mobile users: If it is fully closed, it indicates that all tasks on the visit have been completed. If open, it will serve as an indication of how many tasks are still incomplete, according to the angle.

What happens if the rep forgets to synchronize or close the visit?

If the rep forgets to synchronize or close the visit, he/she runs the risk of losing data if he/she logs out of the app or if he/she "kills" it.

If the rep has synchronized the information but not closed the visit, VisitBasis Office App users with view of this rep's activities can close the visits by going to the "Schedule by Location" window.

When saving a task, the rep is getting an alert saying "Cannot save. You are not at the desired location". What can be the problem?

In this case, the task template's "Confirm task start with GPS" box is checked, meaning that mobile users will only be able to perform the task if they are within a 200 meter radius of the location for which it is scheduled. Therefore, the most common cause for this issue is that the mobile user is not physically present at the location where he/she should be.

Can I schedule visits in the future on the mobile app?

Yes. You can schedule visits up to three weeks in the future. Just swipe to the desired week, select the appropriate day, and add visits by clicking on "+".

How can I access information from previous visits?

You can access information from previous visits:

1. If the visit has been performed on the current or previous week, you can swipe the week header right and access information right on the VisitBasis Mobile App.
2. If the visit was performed longer than a week before, you can access the VisitBasis Search History Tool by going to menu (bottom right of screen) -> settings, and they going to VisitBasis Online. There you might have to log in again with your VisitBasis credentials. Then click on "Visits and Tasks", enter the search criteria, and click on Search. Once the results come back, you can click on each visit link to see its respective report.

How do I add a new customer on the mobile app?


To add a new customer on the mobile app:

1. Click on "+" on the Visits screen.
2. Click on "New Location".
3. Select the new location from the visit list.
4. Click on "edit".
5. Click on "location name" to edit it. Go back.
6. Click on "enter address & gps". Enter the address, skip to the next line (return), and click on the "gps" button to capture the location's coordinates.
7. Go back to the location screen, perform any tasks and/or close the visit.

Attention: In order to avoid bogus/ incorrect information, any new locations added on the VisitBasis Mobile App will have to be verified at the Office App by a manager/supervisor by running a report on "New Locations", downloading the information, and importing it to the Locations database.

Does the rep need to close a visit immediately after finishing it, or can he/she close all visits at the same time?

Reps can close several or all visits at the same time either by:

- On the Visits screen, checking the boxes and selecting "Close" or
- by clicking on the to-do icon  , selecting the visits he/she wants to close and clicking on "Close".

What does the double check mean?

The double check means the visit has been closed and the information has been synchronized. It a guarantee that the Office App received the information captured during the visit. One check only means that the data has been synchronized but the visit is not yet closed.

How can the rep be sure he is at the correct location?

When the rep is at the correct location for the scheduled visit he/she will see a red "on-site" message.

I have a problem will one of the members of my team: Her tasks/locations have disappeared from the mobile app. I can see the stores on my desktop but not on the mobile app. She still had work that hadn't been completed.

If the visit has been scheduled for the current or previous week, she can swipe the week header right, choose the date when the visit was originally scheduled, and proceed with completing tasks and closing visits. The history limit of 7 days is hard-coded into the VisitBasis App and cannot be changed. We designed this so that we do not exceed available storage space for photos on a phone.

To find out all tasks that are not yet completed, go to Visits/Schedule by Location and enter date range (optional search filter and see status being "-"). Closed visits and tasks will be automatically removed from this list.

visit date	user	location code	name	address	division	teams	task title	status
2017-05-08	Carolina	5691338674667520-5f	Corner Bakery	14810 pines blvd pembro	Confections	Southwest	1. Merchandising Audit Tasi	-
2017-05-08	Carolina	p42	Publix	15729 Pines Blvd, Pembr	Confections	Southwest	Order	In-progress
2017-05-08	Carolina	s2	Sedano's	10333 Pines Blvd, Pembr	Confections	Southwest	1. Merchandising Audit Tasi	-
2017-05-09	Anna	wf1	Whole Foods	14956 Pines Blvd, Pembr	Confections	Central	1. Merchandising Audit Tasi	-
2017-05-09	Ian	bv3	Bravo	2921 S Orlando Dr, Sanfo	HOME DEPO	IanTeam	Test task	-
2017-05-09	Ian	bv1	Bravo	519 S Orange Blossom Tr	HOME DEPO	IanTeam	Test task	-
2017-05-09	Carolina	bv3	Bravo	2921 S Orlando Dr, Sanfo	HOME DEPO	Southwest	Test task	-
2017-05-09	Cate	s2	Sedano's	10333 Pines Blvd, Pembr	Confections	Delivery	1. Merchandising Audit Tasi	-
2017-05-09	Cate	d1	Doris' Italian Market	10020 Pines Blvd, Pembr	Confections	Delivery	1. Merchandising Audit Tasi	-
2017-05-09	Carolina	bv1	Bravo	519 S Orange Blossom Tr	HOME DEPO	Southwest	Test task	-
2017-05-09	Cate	s1	Sedano's	17171 Pines Blvd, Pembr	Confections	Delivery	Pictures	-
2017-05-09	Carolina	bv17	Bravo	502 Owltree Way, Ocoee,	HOME DEPO	Southwest	Test task	-
2017-05-09	Cate	p43	Publix	170 S Flamingo Rd, Pemt	Confections	Delivery	1. Merchandising Audit Tasi	-
2017-05-09	Cate	s1	Sedano's	17171 Pines Blvd, Pembr	Confections	Delivery	1. Merchandising Audit Tasi	-
2017-05-09	Cate	5691338674667520-5f	Corner Bakery	14810 pines blvd pembro	Confections	Delivery	1. Merchandising Audit Tasi	-
2017-05-09	Cate	wf1	Whole Foods	14956 Pines Blvd, Pembr	Confections	Delivery	1. Merchandising Audit Tasi	-
2017-05-09	Cate	p42	Publix	15729 Pines Blvd, Pembr	Confections	Delivery	1. Merchandising Audit Tasi	-
2017-05-09	Ian	bv17	Bravo	502 Owltree Way, Ocoee,	HOME DEPO	IanTeam	Test task	-
2017-05-09	Anna	s2	Sedano's	10333 Pines Blvd, Pembr	Confections	Central	1. Merchandising Audit Tasi	-
2017-05-09	Anna	p42	Publix	15729 Pines Blvd, Pembr	Confections	Central	1. Merchandising Audit Tasi	-
2017-05-09	Anna	p43	Publix	170 S Flamingo Rd, Pemt	Confections	Central	1. Merchandising Audit Tasi	-
2017-05-09	Anna	d1	Doris' Italian Market	10020 Pines Blvd, Pembr	Confections	Central	1. Merchandising Audit Tasi	-
2017-05-09	Anna	s1	Sedano's	17171 Pines Blvd, Pembr	Confections	Central	1. Merchandising Audit Tasi	-

To reschedule still open visits or tasks that are older than a week go to Visits/ User Schedule tab and select date in the past and user and use checkboxes for still open visits/tasks and click Reschedule button. See below screenshot.

The screenshot shows the VisitBasis software interface. At the top, there is a navigation menu with options like Visits, Reports, Locations, Task Templates, Products, Users, and a Billboard button. The main header displays 'Today May 8, 2017' and navigation options for Day, Week, and Month. Below this, there are buttons for 'Add Visits or Tasks', 'Reschedule', and 'Refresh'. On the left, a table lists users and their assigned teams. The central part of the screen shows a list of visits and tasks for the selected date, including details like location, estimated time, and status. On the right, a 'Clone/Repeat Selected Visits and Tasks' dialog is open, showing a calendar for May 2017 with the date May 22, 2017 selected. The dialog also includes a 'Copy to user' dropdown menu.

With the reschedule method you can also assign the open work for another user (in case of vacation, sick days, etc) on any future date.

Can I make the schedule and order on my mobile?

Yes, absolutely. The top-right "+" on the Visits window allows you add visits and then, when already on the visit, you can select Tasks> and add tasks by clicking on "+".

How to order on my mobile phone? I tried it but it was different from your video.

The Order task is only available on the Mobile App and is already pre-built into the system. You would just need to select a Location where the visit is taking place and then select "Tasks", click on the top-right "+" and search for "Order". However, in order to be able to even view the Order task template on the mobile app, some settings need to be configured on the VisitBasis Office App:

- The division must have products.
- The mobile user must be assigned to the appropriate division (User window).
- The products must have price lists (Products/ Price Lists window).
- The location must have at least one price list selected (Location/ Price Lists window).

Please make sure that all the above criteria are met before trying to add an order task to a visit on a mobile device.

Real-time Tracking

What is the difference between the Dashboard and the User Schedule maps?

On the User Schedule window map you will see what was planned for the day. On the Dashboard you will see what is actually happening, with the view of the actual mobile user's path, "last seen at" location, and the possibility of viewing more than one user's visits at a time. Some functions, however, are similar: clicking on a location marker will tell you if a visit was performed at the location, by whom, at what time, and if it has been GPS-verified.

In the User Schedule map, what does the red marker mean?

In the User Schedule map the red marker marks the starting location for the mobile user's schedule for the day.

On the maps, what does the larger blue circle mean?

The larger blue circle marks the "last seen at" location for the selected mobile user. Clicking on it will display a window with a summary of the user's activities for the day.

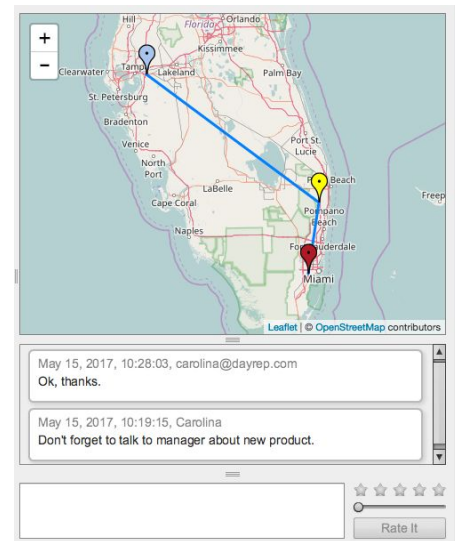
How do I know the rep's current location?

The larger blue circle marks the "last seen at" location for the selected mobile user, and is the most recent GPS coordinate captured for the rep. Clicking on it will display a window with a summary of the user's activities for the day.

Can I send the rep a message through the VisitBasis App?

Yes. You can send messages to the rep through VisitBasis in the form of visit notes. On the "User Schedule" window, select a user, select a visit, then - on the white box below the map, type your message, select a star rating (if needed), and click on "Rate it". The rep will see the note on the VisitBasis Mobile App and also via email. The box between the white box and the map will display the note exchange for the selected visit.

You can also integrate VisitBasis with HipChat for free and use the HipChat messenger app.



How do I set up instant notifications?

You can integrate VisitBasis with HipChat for free and implement instant notifications of events relative to specific tasks, location, or user. [Watch this video with detailed instructions](#), or follow the below steps.

1. Go to the settings menu -> Integrations -> HipChat Messenger. Follow the instructions.
2. On a new tab or window, go to www.hipchat.com. To configure HipChat, one of the VisitBasis account admins, or Master, will have to sign up first with their VisitBasis credentials. So sign up using your full name and email (the same used on your VisitBasis account) or, if you are already signed up, then login to HipChat.
3. Now go to the Group Admin menu, click on Integrations. Then click on "Build your own integration". Scroll down and select "Install an integration from a descriptor URL". Now copy and paste the url on step 4 of the instructions. Click on install.
4. Now, on the HipChat admin window, we can go to users and see that my team has been already invited. We can re-send email to the users who have not answered their invitations.
5. Back to VisitBasis, we can see that the Messenger integration has been configured. You can test the connection at any time.
6. Your chat rooms are now easily accessible though the hipchat desktop and mobile apps. You can also bookmark your rooms if you prefer to use your browser. Let' now create a room to send my alerts to. We will call it Supermarkets.
7. Now let's configure alerts on VisitBasis. We want to receive alerts for any activity performed at the location with code supermarket2. So "Add" an event trigger an "supermarket2" and the alert room is Supermarkets.
8. Now you can configure chat rooms and alerts as needed. Event triggers can be a location code, user name or task name. For instance, it could be related to a specific store, a seasonal task or a certain user.

What is the Schedule by Location window?

The Schedule by Location window allows you to view the status of all open visits scheduled for a certain date range, and to see the progress as they are being completed.

On the Schedule by Location window you can also create visits to several locations at a time, for all the users assigned to those locations. To do so:

1. Click on the "+" button.
2. Search and select the locations as needed, click next.
3. Select the dates when the visits will be performed, click next.
4. Select the tasks that the mobile users should perform at the locations. Click on "Create visits and tasks".

Where can office manager see the order that rep make on mobile phone? Can office manager change the order then send to distributor?

The order can be seen by the office manager once the visit is close and data synchronized:



1. On the Visits/ User Schedule window, by clicking on the "View" link next to the location name. This will open the visit summary PDF report and the link to the order summary will appear as a button on the page header. In this case, the order will be a PDF document.
2. On the Reports tab, where he/she can run a report on "Orders/Returns" or "Ordered Items" for a date or date range and then filter it according to distributor. In this case, the data can be downloaded or copied to Excel, where you can make changes before sending it.

Reports

How do I run reports on VisitBasis?

VisitBasis Reports tool extracts your data according to the selected parameters.

To run a report:

1. Choose a report type from the drop-down.
2. Select a start and end date.
3. Click on Run Report.

The screenshot shows the VisitBasis Reports interface. At the top, there are navigation tabs: Visits, Reports, Locations, Task Templates, Products, Users, and Billboard. The 'Reports' tab is active. Below the navigation, there is a dropdown menu for 'Closed Visits' (labeled 1) and a date range selector (labeled 2) showing '09/01/2016' to '02/22/2017'. Below the date selector, it says '1 filter(s) selected' and '164 values from 2016-09-06 to 2017-02-22'. A table of visit data is displayed with columns: row, visit date, username, location, address, total tasks, completed tasks, start time, end time, and proximity (m). The table contains 19 rows of data. At the bottom left, there is a 'Filters' button (labeled 4) and a 'Run Report' button (labeled 3). At the bottom right, there are buttons for 'Download', 'Table View', 'Photos', and 'Copy To Excel'. The page number '1 - 50 of 164' is also visible.

row	visit date	username	location	address	total tasks	completed tasks	start time	end time	proximity (m)
1	2016-09-06	Carolina	Aventura ...	21265 Bis...	1	0			
2	2016-09-06	Carolina	Boot Ranc...	900 E Lak...	1	1	11:35:22	11:36:01	325131
3	2016-09-06	Carolina	Altamonte...	686 W Sta...	2	1	11:50:03	11:50:18	312141
4	2016-09-06	Carolina	Aventura ...	21265 Bis...	1	0			
5	2016-09-08	Carolina	Sedano's	17171 Pin...	2	0			
6	2016-09-08	Carolina	Walgreens	18400 Pin...	2	0			
7	2016-09-08	Carolina	Whole Fo...	14956 Pin...	2	0			
8	2016-09-08	Carolina	CVS Phar...	17209 Pin...	2	2	08:39:19	08:41:17	64
9	2016-09-08	Carolina	Walgreens	15989 Pin...	2	0			
10	2016-09-08	Carolina	Publix	18341 Pin...	2	2	08:58:20	08:59:40	37
11	2016-09-08	Carolina	Publix	15729 Pin...	2	2	08:22:53	08:25:40	114
12	2016-09-09	Carolina	CVS	1001 n fe...	4	2	09:26:01	09:31:06	119
13	2016-09-13	Carolina	Bravo	10400 Nw...	2	1	09:50:11	09:50:18	22245
14	2016-09-13	Carolina	Bird Road...	7795 SW ...	1	1	09:41:06	09:42:21	31352
15	2016-09-13	Carolina	Boot Ranc...	900 E Lak...	1	1	11:38:19	11:46:15	325085
16	2016-09-15	Carolina	CVS	1001 n fe...	3	2	12:38:12	12:40:25	125
17	2016-09-20	Carolina	Bird Road...	7795 SW ...	1	1	10:25:37	10:26:22	31353
18	2016-09-22	Carolina	Aventura ...	21265 Bis...	1	1	14:59:33	15:01:37	28998
19	2016-09-23	Carolina	CVS	1001 n fe...	3	2	17:33:20	17:36:05	118

4. Once the data is retrieved, you can insert filters. Click on the Filters button and select the filters you want to add and click "Save".

Can I filter the report data on VisitBasis?



Yes. You can filter report data by clicking on "Filters", on the bottom-left of the Reports page, and selecting the appropriate filter for your report.

I want to see only the data collected at a certain supermarket chain. Is this possible?

Yes. You can filter report data by:

1. First, run a report.
2. Click on "Filters", on the bottom-left of the Reports page.
3. Select the appropriate filter for your report. In this case, the filter will be location. Check it and click on "Save".
4. You will now see the different filter options for location with the corresponding checkboxes. Select the ones you want to view and click on "Run Report".

Can I add more columns to the report?

Yes. You can add more columns by clicking on the "insert columns" button  on the bottom of the Reports window. You can also drag the columns around to adjust the layout and, at any time, you can click on the "adjust width" button  to adjust the column width to its contents.

What does "start time" and "end time" mean?

On VisitBasis, a visit's "start time" means the moment your rep starts performing the first task on the visit, or makes a visit note. "End time" is the moment your reps finishes performing the last task on a visit, or makes the last note. On a timesheet report, then, "start of work" refers the "start time" on the first visit on a day an "end of work" refers to the "end time" on the last visit of that day.

How do I run the monthly timesheets for my reps?

The "Timesheet" reports on VisitBasis will provide you tabulated activity information for your mobile users, with each line representing a day. When you filter the timesheet report by username, you will see the summary of the user's activity for the date range, such as in a monthly activity report for one of your field reps.

What are the different report types that VisitBasis generates?

VisitBasis has the following standard report views:

- **Closed Visits** - Will generate information on visits that have been completed and closed.
- **New Locations** – Will pull up information on the locations that have been recently added by reps while prospecting in the field. The New Locations report is ready to be downloaded, edited as necessary, and then imported as a CSV(,), CSV(;) or TXT() . file to your location database.
- **Photos** - Photo reports will show you the pictures taken during visits for the selected date range.
- **Timesheets** - Tabulated activity information for your reps, with each line representing a day. When you filter the timesheet report by username, you will see the summary of the

user's activity for the date range, such as in a monthly activity report for one of your field reps.

- **Orders>Returns** – Tabulated information on the orders and returns placed during the time period.
- **GPS** - Allows you to view timestamp and GPS positioning information for the date range selected. You might need to narrow the date range and add additional filters such as team or username, since VisitBasis will capture many GPS coordinates for each rep throughout the day.
- **Task (Item/Action)** – Useful for product-specific tasks, this report will tabulate the results, one product per line.
- **Task (Action)** – Allows you to view tabulated results of the questions provided to task answers.
- **Simple Views** – Straightforward report parameters that might make it easy for you to view the results coming from the field.

What are GPS reports?

GPS Reports on VisitBasis allow you to view timestamp and GPS positioning information for the date range selected. You might need to narrow the date range and add additional filters such as team or username, since VisitBasis will capture many GPS coordinates for each rep throughout the day.

Orders (VisitBasis Platinum)

I can't find anything about order/invoice on your trial version. Is it possible to place an order on the office computer?

Orders can only be placed via mobile app. The order task template is native to the mobile app, and can only be added by the mobile user.

However, in order to place an order, some settings need to be configured on the VisitBasis Office App:

1. The division must have products.
2. The mobile user must be assigned to the appropriate division (User window).
3. The products must have price lists (Products/ Price Lists window).
4. The location must have at least one price list selected (Location/ Price Lists window).

To edit your company's Order Template:

1. Go to the Divisions window on the Users tab.
2. Select a Division.
3. Click on "Order Template" on the Edit Division Window.
4. Select "Edit Template".

5. Make any changes to the Order Template code.
6. Save.
7. Select "Preview" to see the updated template.

The encoding for order templates is markup-language based and should be straightforward to understand for those with some basic coding experience. Should you have any questions on editing your order template, and to send us a logo, please contact us at support@visitbasis.com.

Data Import

Besides customer and product, can data on activity history and order be uploaded?

Locations, product and other standing data can be uploaded. Visit/Task history is built only via mobile data capture and read-only.

After uploading all the customer data, if i'd like to change information of each one of the locations, what do i do? (for example, if i need to change the name of 50 locations because the owner of these locations changed)

The Import Data feature on VisitBasis also allows to update existing data. So, to change/edit/update location information:

6. Download your existing location database with the Export Data feature.
7. Open the downloaded file on Excel or Google Sheets (preferred).
8. Edit the information on the spreadsheet, keeping the field "locationCode" intact.
9. Save the file as CSV(,), CSV(;) or TXT().
10. Close the file

Back to VisitBasis, import the file you just edited:

7. Click on the Settings menu and select Import Data.
8. On the drop-down, select **Locations** and click on the button Import.
9. Select the spreadsheet file you just saved.
10. Step 1 of 3: Preview the uploaded file and check for any inconsistencies. Click next.
11. Step 2 of 3: Choose to "Update existing Data" (see screenshot), check field equivalency, and click next.
12. Step 3 of 3: Give the data a final review and click on "OK! Import it."

Import Data

Step 2 of 3 - Map imported fields (Locations)
Mandatory fields (*) should be properly mapped.

I would like to:

Insert new data

Update existing data

Delete data

VisitBasis Field	Import Field
locationCode *	locationCode ▾
locationName *	locationName ▾
street1 *	street1 ▾
active	active ▾
city	city ▾
country	country ▾
latitude	Latitude ▾
longitude	Longitude ▾
postCode	postCode ▾
state	state ▾
street2	street2 ▾

Cancel « Prev Next »

Data Format Converter

Use this online utility to convert external popular file formats for MSL and VisitCalendar into VisitBasis proprietary format:

<http://www.visitbasis.com/convert>