

VisitBasis Tutorial for Admins

Introduction

By the end of this tutorial you will be able to:

1. Have a working account
2. Create and use divisions
3. Add new users manually with their respective security roles
4. Load locations in bulk
5. Validate location addresses in bulk and one by one
6. Search locations by state, city, user, or custom property
7. Link users to location(s)
8. Assign Territories
9. Add your product lines
10. Create tasks
11. Schedule visits
12. Use the mobile app check-in and perform data entries
13. Check-out/close visits on the mobile app
14. Perform real-time tracking on the Office Dashboard
15. Run Reports on Visit Summary, closed visits and timesheets

What you will need

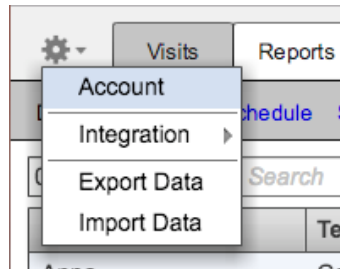
- Desktop Mac or PC with a current browser
- A valid (trial or subscribed) VisitBasis account
- An iOS or Android mobile device

1. Subscribing to VisitBasis

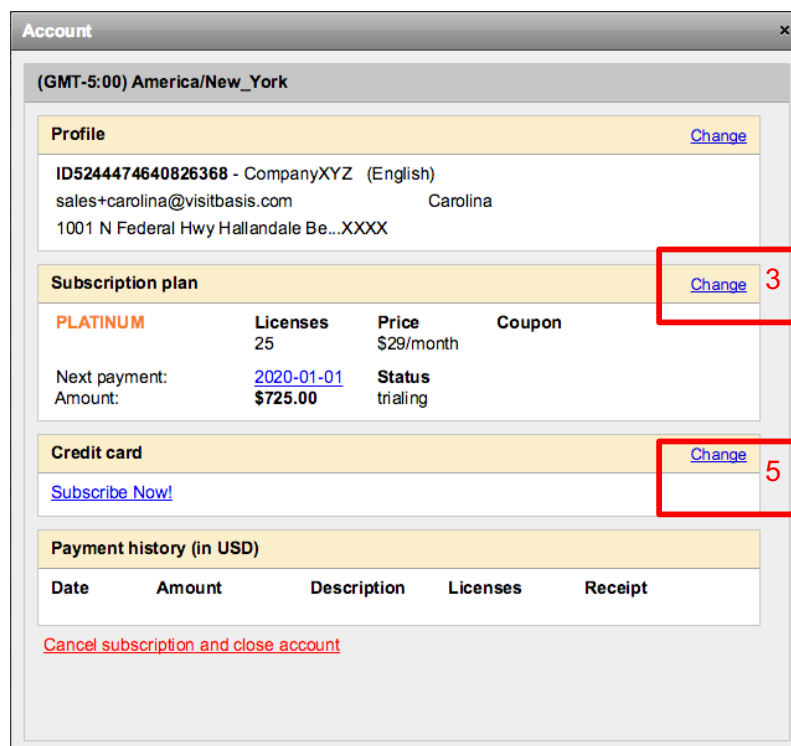
If you are reading this document, you should already be signed up for a VisitBasis trial account. If you don't have a trial account, go to www.VisitBasis.com and sign up.

To subscribe to VisitBasis:

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".

A screenshot of the 'Account' window in the VisitBasis application. The window title is 'Account' and it shows the user's profile and subscription details. The 'Subscription plan' section is highlighted with a red box and a red number '3' next to the 'Change' link. The 'Credit card' section is also highlighted with a red box and a red number '5' next to the 'Change' link. The 'Payment history' section is visible at the bottom.

(GMT-5:00) America/New_York

Profile [Change](#)

ID5244474640826368 - CompanyXYZ (English)
sales+carolina@visitbasis.com Carolina
1001 N Federal Hwy Hallandale Be...XXXX

Subscription plan [Change](#) 3

PLATINUM	Licenses	Price	Coupon
	25	\$29/month	
Next payment:	2020-01-01	Status	
Amount:	\$725.00	trialing	

Credit card [Change](#) 5

[Subscribe Now!](#)

Payment history (in USD)

Date	Amount	Description	Licenses	Receipt
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[Cancel subscription and close account](#)

2. Creating Divisions

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

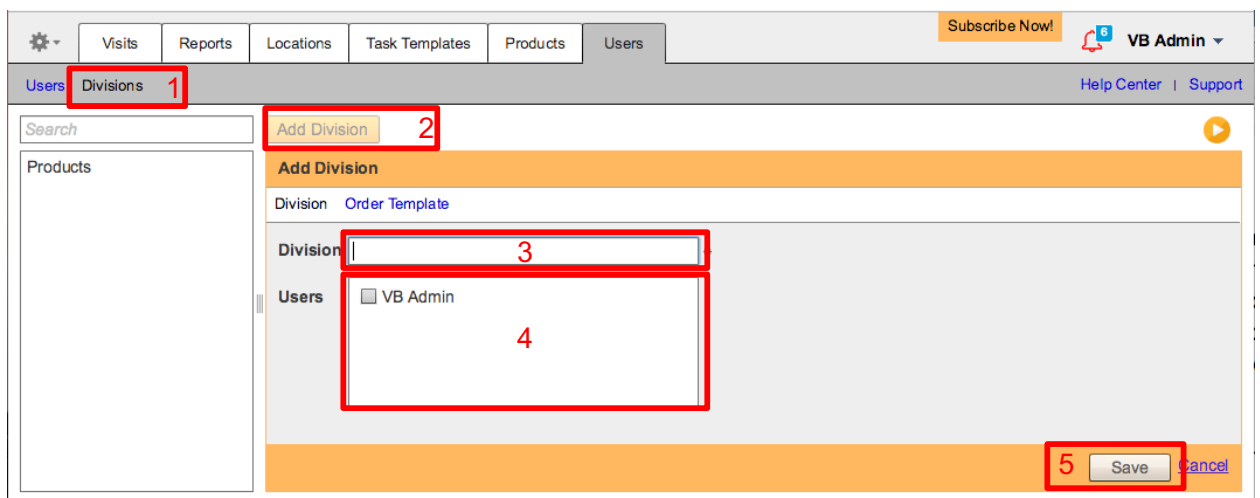
- Products and tasks are division-specific.
- Users can be linked to one or more divisions. Depending on their security roles, users will only be able to see information for their own divisions.
- If you are subscribed for VisitBasis Platinum (sales), you are also allowed to have custom invoices for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

To create Divisions:

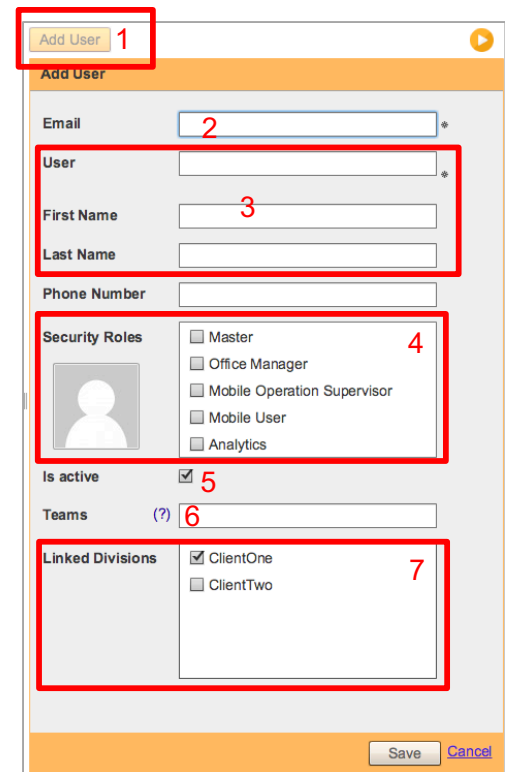
1. Go to the Divisions window on the Users tab.
2. Click on [Add Division](#)
3. Enter a name for your new division.
4. Select any already existing users to be linked to it, if applicable.
5. Save.



The screenshot shows the 'Add Division' form in the VisitBasis application. The form is titled 'Add Division' and has a sub-header 'Division Order Template'. It contains a 'Division' text input field, a 'Users' section with a checkbox for 'VB Admin', and 'Save' and 'Cancel' buttons at the bottom right. Red boxes and numbers 1 through 5 highlight the following elements: 1. The 'Divisions' tab in the top navigation bar. 2. The 'Add Division' button. 3. The 'Division' text input field. 4. The 'Users' section containing the 'VB Admin' checkbox. 5. The 'Save' button.

3. Adding Users

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.



A confirmation/invite email message will be sent to the new user automatically.

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.

Security Role Access Table


Access / Roles	Master	Office Manager	Mobile Operation Supervisor	Mobile User	Analytics
Visits	✓	✓	✓ (teams)		
Locations	✓	✓	read only		
Territory	✓	✓	✓ (teams)		
Tasks	✓	✓	✓		
Export/Import data	✓	✓			
Products/Price lists	✓	✓	read only		
Users	✓	✓			
Standard Reports (Closed Visits, New Locations, Photos, Timesheets, Orders/ Returns, GPS, Simple Views)	✓	✓	✓ (teams)		
Task Reports (Task(Item/Action), Task(Action))	✓	✓	✓ (teams)		✓ (divisions)
Custom Reports	✓	✓	✓		
Report bookmarks	✓	✓	✓		
Account	✓				
VisitBasis Mobile App				✓	
Visit History tool	✓	✓	✓ (teams)	✓ (own data)	✓ (divisions)
VisitBasis Analytics tool	✓	✓			✓ (divisions)

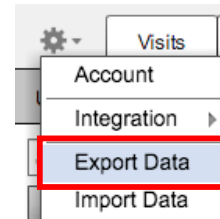
✓ - means the user can see the tab in the office app and update it, or will have access to the application.

4. Adding Locations in Bulk

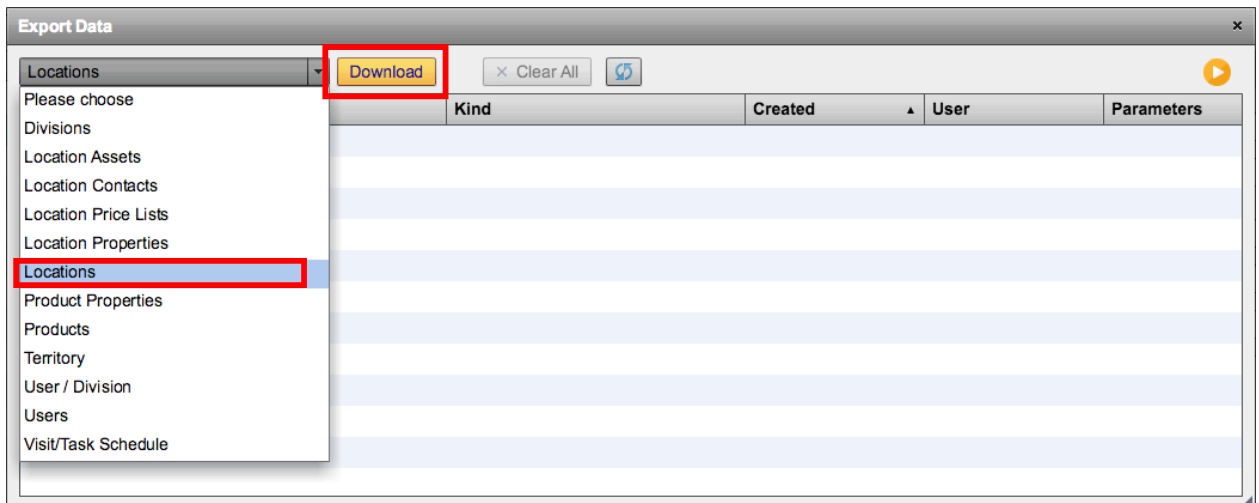
You can add Locations in bulk to VisitBasis by importing a comma-separated spreadsheet (Excel, Google Sheets, etc) of your customers.

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

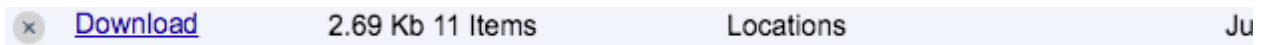
1. Click on the Settings menu  and select Export Data.



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.

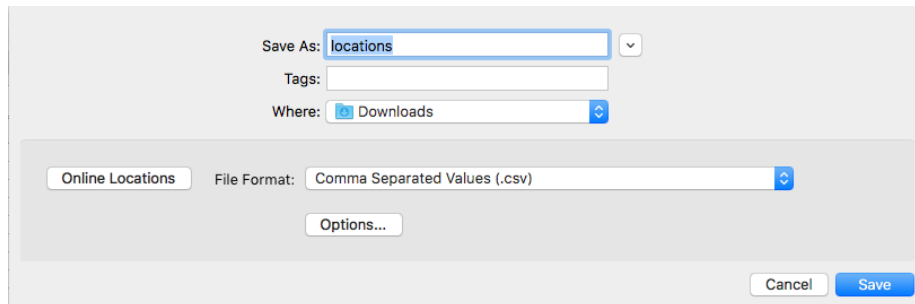
If you don't know the location latitude¹ and longitude², leave the fields blank. You will be able to validate the location coordinates once the data is loaded into VisitBasis.

Important: Fill in all the "active" fields with TRUE³, so all locations will already be imported as active.

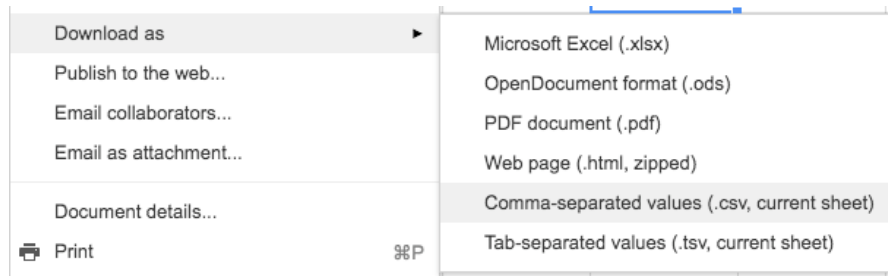
	A	B	C	D	E	F	G	H	I	J	K
1	active	city	country	latitude	locationCode	locationName	longitude	postCode	state	street1	street2
2	TRUE	Hollywood			pres33020	Presidente Supermarket		33020	FL	1510 S Federal Hwy	
3	TRUE	Hollywood			pbx33020	Publix		33020	FL	1735 E Young Cir	
4	TRUE	Hollywood		1	sed33024	Sedanos	2	33024	FL	2319 N State Rd 7	
5	TRUE	Hollywood			pbx33020b	Publix		33020	FL	1700 Sheridan St	
6	TRUE	Hollywood			sav33030	Save-a-lot		33020	FL	2420 N Dixie Hwy	
7	3										

4. Save the file as "Comma Separated Values (.csv)" (Excel) or download as "Comma-separated values (.csv, current sheet)" (Google sheets).

Microsoft Excel



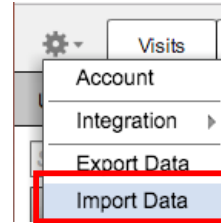
Google Sheets



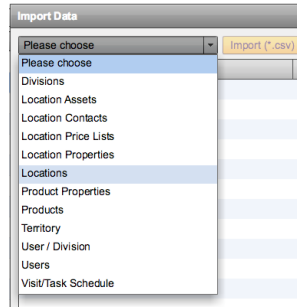
5. Close the file


Back to VisitBasis, import the file you just edited:

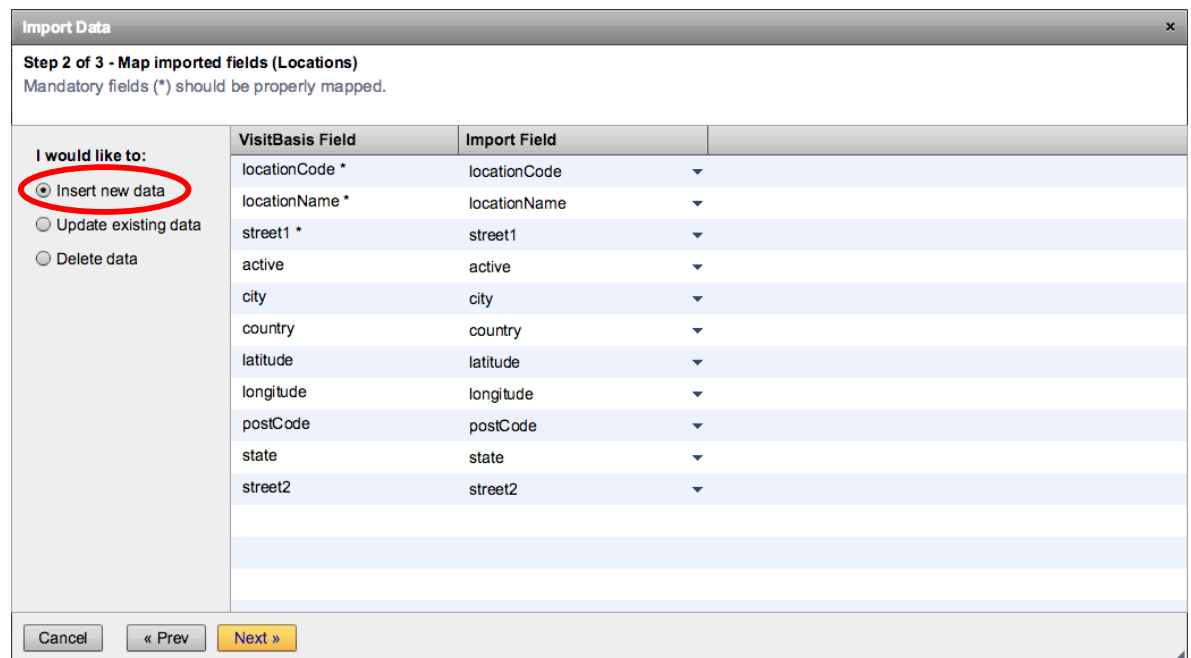
1. Click on the Settings menu and select Import Data.



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.

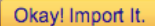


Import Data

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

I would like to:	VisitBasis Field	Import Field
<input checked="" type="radio"/> Insert new data	locationCode *	locationCode
<input type="radio"/> Update existing data	locationName *	locationName
<input type="radio"/> Delete data	street1 *	street1
	active	active
	city	city
	country	country
	latitude	latitude
	longitude	longitude
	postCode	postCode
	state	state
	street2	street2

Buttons: Cancel, « Prev, 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.

5. Validating Location Addresses

Now that the new Locations are in your database, you need to validate the new addresses so they will have the correct GPS coordinates (latitude and longitude) assigned to them. Locations without validated addresses cannot be mapped.

To validate addresses in bulk

1. On the Locations window, click on the "Validate # addresses" button.
2. The system will validate the addresses automatically.



Due to discrepancies to the standard address format, the system might not be able to validate all addresses automatically. In that case, the "Validate # addresses" button will still be active and will need to validate the remaining addresses manually.

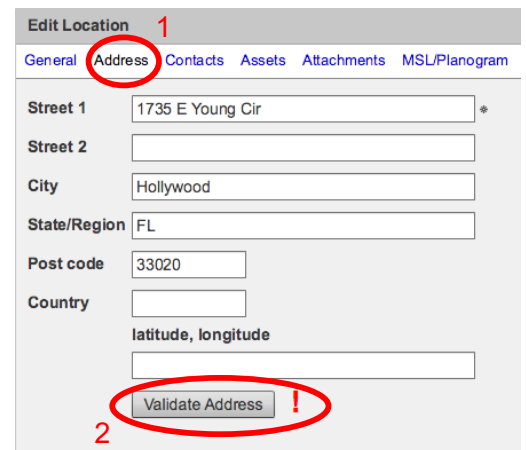
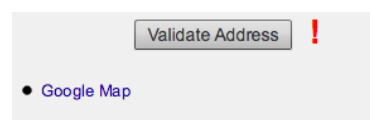
Validating addresses manually

If a Location address cannot be validated automatically, its address will appear in red in the location list:

Code	Name	Valid	Active
pbx33020	Publix 1735 E Young Cir, Hollywood, F...	No	Yes
sed33024	Sedanos 2319 N State Rd 7, Hollywood, ...	Yes	Yes
pres33020	Presidente Superm... 1510 S Federal Hwy, Hollywoo...	No	Yes

To validate the address manually:

1. Select the location.
2. Go to the Address tab on the Edit Location window.
3. Click on the "Validate Address" button.
4. If one or more alternative address syntax can be found, it will show up as a link underneath the Validate Address button. You can just click on the correct syntax link and the address will be validated. A link to Google Maps will also show up, and you can use it to place the marker right above the Location where addresses are not accurate, as in the case of plazas and malls. Click on Update to save the location coordinates.
5. If alternative address syntaxes cannot be found, the link to Google Maps will show up. Just click on it, hit enter on the address bar to search for the location, move the marker if needed, and close the Google Maps window. Click on Update to save the location coordinates.

6. Searching Locations

Now that your Locations have been uploaded and addresses verified, the next step is to assign locations to users. In order to do so, we need to find the new locations we just added. The Search bar (on Locations and Territory tabs) will help us filter the locations so we can find what we 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, valid

Example - searching by zip code only:

postCode:"33027"

postCode:"33027" (?) Search

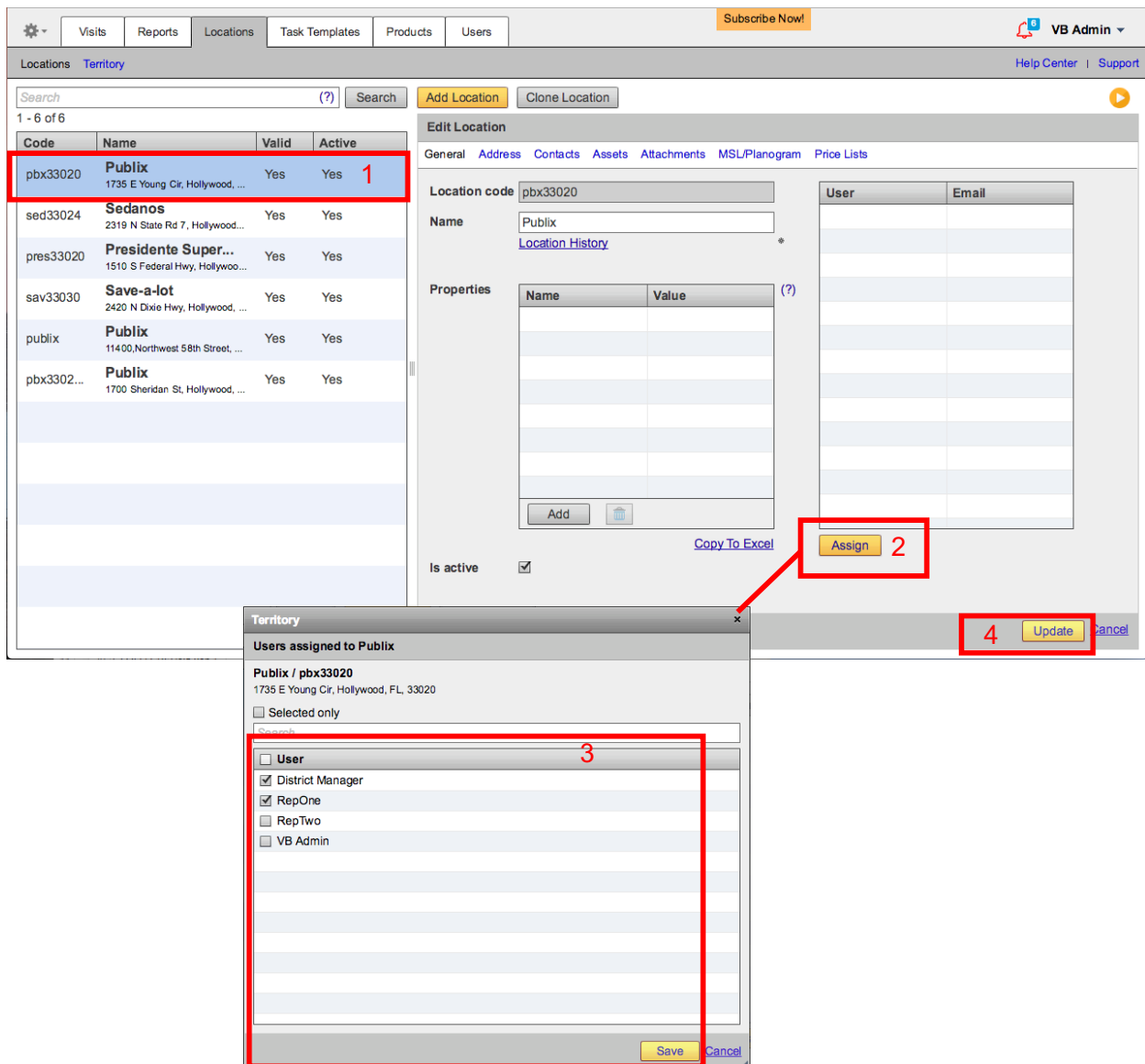
1 - 3 of 3

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

7. Linking Users to Locations

Now that the locations have been imported and validated, we need to link users to them so they can be visited. To link users to a location:

1. On the Locations tab, select a location.
2. On the Edit location window, click on the Assign button.
3. On the pop-up window, select one or more users (you can also search) and click Save.
4. Click on the Update button to save the changes.



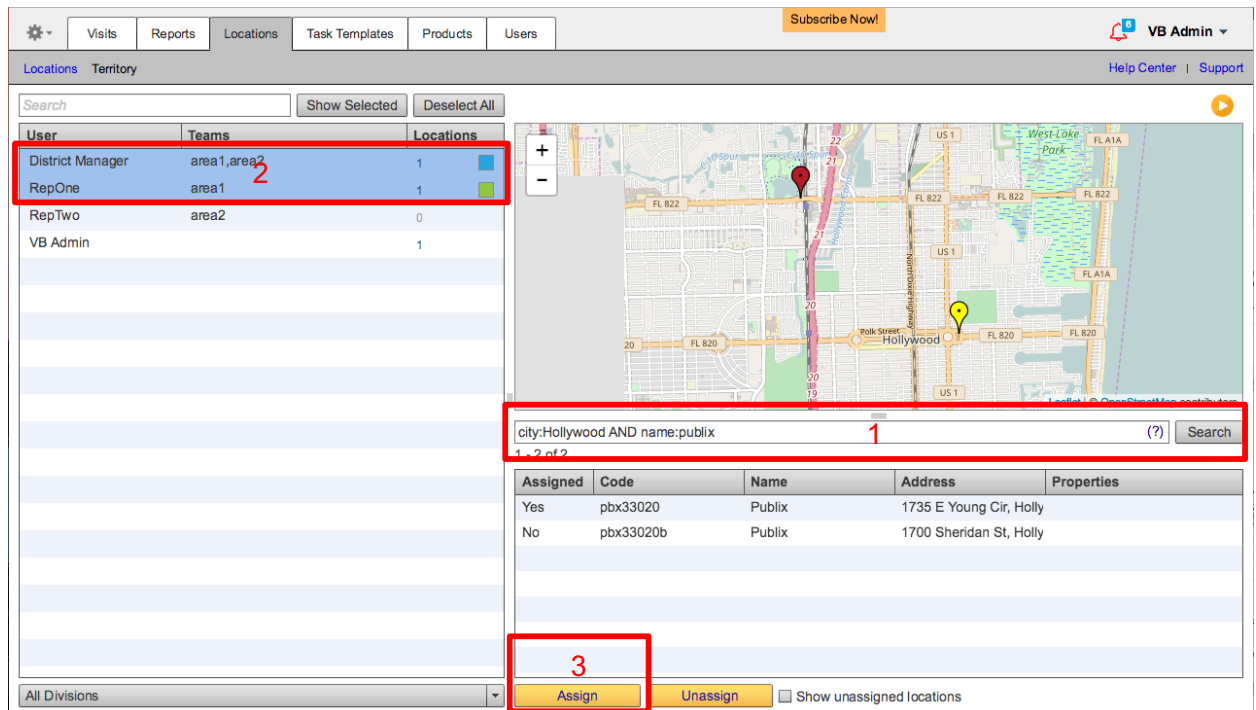
The screenshot displays the VisitBasis interface with the following components and annotations:

- Locations Table:** A table with columns 'Code', 'Name', 'Valid', and 'Active'. The first row, 'Publix' (code pbx33020), is highlighted with a red box and labeled '1'.
- Edit Location Window:** A modal window for editing the selected location. It contains fields for 'Location code', 'Name', and 'Properties'. The 'Assign' button is highlighted with a red box and labeled '2'.
- Users assigned to Publix Window:** A pop-up window showing a list of users with checkboxes. The 'User' header and the first few rows are highlighted with a red box and labeled '3'.
- Update Button:** The 'Update' button in the bottom right corner of the 'Edit Location' window is highlighted with a red box and labeled '4'.

8. Assigning Territories

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, 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 'Locations Territory' window with the following components:

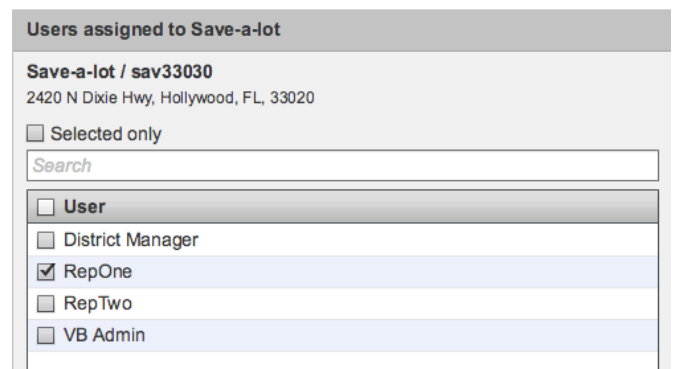
- Search Bar:** Contains the text "city:Hollywood AND name:publix" (labeled 1).
- User Table:**

User	Teams	Locations
District Manager	area1,area2	1
RepOne	area1	1
RepTwo	area2	0
VB Admin		1
- Map:** Shows a map of Hollywood, FL, with a red pin and a yellow location marker.
- Search Results Table:**

Assigned	Code	Name	Address	Properties
Yes	pbx33020	Publix	1735 E Young Cir, Holly	
No	pbx33020b	Publix	1700 Sheridan St, Holly	
- Buttons:** "Assign" (labeled 3) and "Unassign" buttons are at the bottom.

Tips:

- You can also click on the box "Show unassigned locations" to only display the locations within your search that have no users assigned to them.
- You can use the same process to unassign locations from users. Just follow steps 1 to 3 above, then click on the button "Unassign".
- By clicking on any specific location marker, you will open a window with the assigned users to that location. Here you can make any assignment changes, as needed, and click on Save.




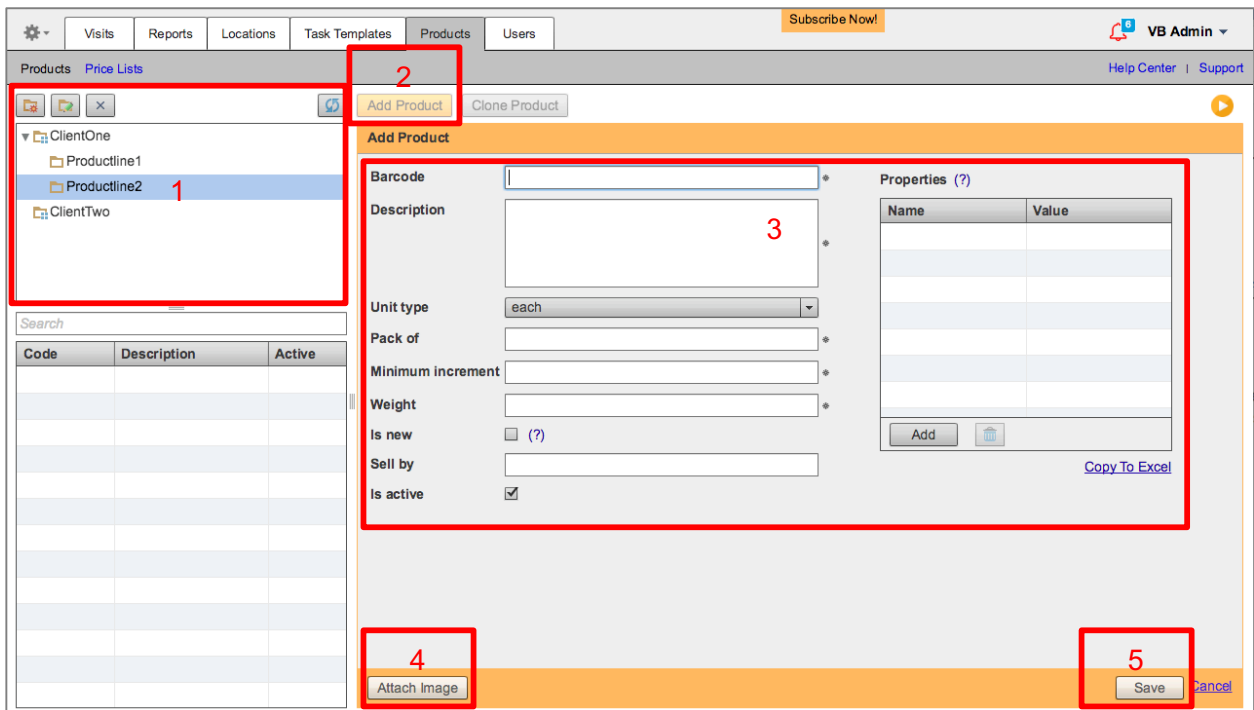
The 'Users assigned to Save-a-lot' window displays the following information:

- Location:** Save-a-lot / sav33030, 2420 N Dixie Hwy, Hollywood, FL, 33020
- Search:** A search bar with the text "Search".
- User Selection:**
 - District Manager
 - RepOne
 - RepTwo
 - VB Admin

9. Adding your Products to VisitBasis

Now that your locations have been uploaded and territories assigned, the next step is to add your products to VisitBasis. To do so:

1. Create product categories and sub-categories (if needed) within your product divisions by selecting the appropriate division and clicking on .
2. Select the appropriate category and click on Add Product.
3. Fill in the product information.
Important: Barcode must be a continuous number, as in 123456789987.
4. Attach any product pictures.
5. Click on Save.



The screenshot shows the 'Add Product' form in the VisitBasis interface. The form is divided into several sections:

- 1:** A tree view on the left showing the product hierarchy. 'Productline2' is selected.
- 2:** The 'Add Product' button at the top of the form.
- 3:** The main form fields including Barcode, Description, Unit type, Pack of, Minimum increment, Weight, Is new, Sell by, and Is active.
- 4:** The 'Attach Image' button at the bottom left.
- 5:** The 'Save' button at the bottom right.

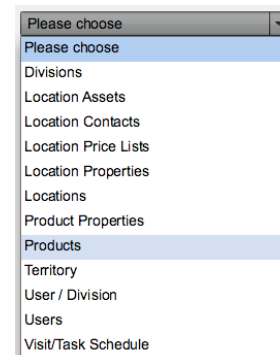
The 'Properties' table on the right is currently empty:

Name	Value

Another way to add products it is to follow similar steps to [Adding Locations in Bulk](#) but choosing “Products” from the drop-downs in the Export Data and Import Data windows.

Important:

- On your Excel or Google Sheets spreadsheet, make sure that barcodes that start with “0” are stored as text, so barcode search functions properly.
- **Barcode must be a continuous number, as in 123456789987.**



The dropdown menu shows the following options:

- Please choose
- Please choose
- Divisions
- Location Assets
- Location Contacts
- Location Price Lists
- Location Properties
- Locations
- Product Properties
- Products**
- Territory
- User / Division
- Users
- Visit/Task Schedule

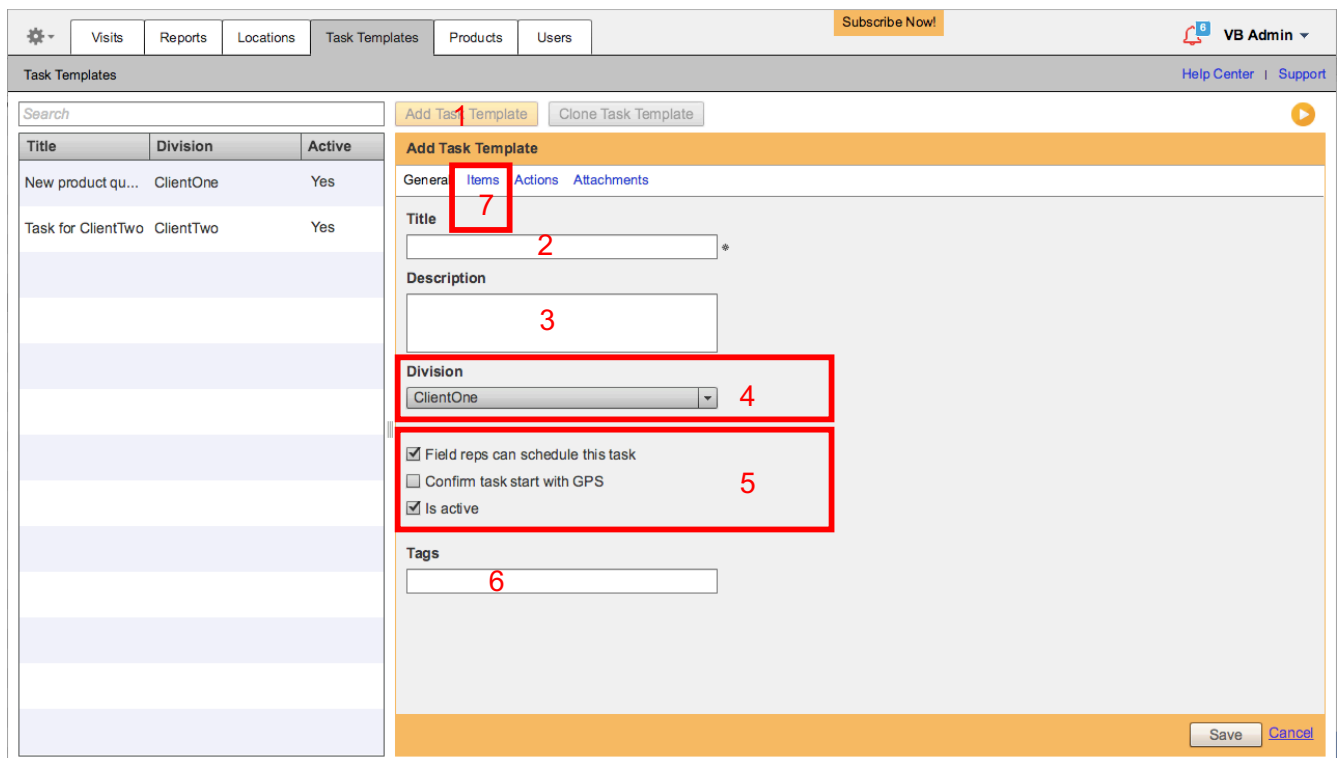
10. Creating Tasks

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).

To create a task:

1. On the Task Templates tab, click on Add Task Template.
2. Type a title.
3. Type a description – here is a great place to include any instructions.
4. Choose a division.
5. Check or un-check the selection boxes:
 - a. A checked “Field reps can schedule this task” means that mobile users will be able to add the task themselves while at the locations.
 - b. A checked “Confirm task start with GPS” means that the mobile users will only be able to perform the task at the specified location. If the mobile users try to perform it at a different location, they will get an error message.
 - c. A checked “Is active” means that the task is available for assigning. Some seasonal or period-specific tasks (such as “Install Xmas display”, or “Product intro questionnaire”, for instance) can be un-checked when not in use.
6. Add any tags, if needed, separated by commas. Tags make it easier to search for tasks.
7. Go to “Items”.



The screenshot shows the 'Add Task Template' form in the VisitBasis application. The form is divided into several sections, with numbered callouts (1-7) highlighting specific elements:

- 1:** The 'Add Task Template' button at the top of the form.
- 2:** The 'Title' input field.
- 3:** The 'Description' text area.
- 4:** The 'Division' dropdown menu, currently set to 'ClientOne'.
- 5:** The selection checkboxes: 'Field reps can schedule this task' (checked), 'Confirm task start with GPS' (unchecked), and 'Is active' (checked).
- 6:** The 'Tags' input field.
- 7:** The 'Items' tab in the top navigation bar of the form.

The form also includes a 'Save' button and a 'Cancel' button at the bottom right. The background shows the 'Task Templates' table with columns for Title, Division, and Active.

- Select if the task is product-specific or if must be applied to all the products in the location's must-stock list. If not, do not check any boxes and move on to step 9.

Check and the task will apply to all products in a location's must-stock list / planogram. Must-stock lists are set up in the Location -> MSL/Planogram window.

Check to load products, then select the products to which the task will apply.

Add Task Template

General Items Actions Attachments

Load Products (?) Load Location's MSL/Planogram (?) Only Active Products Selected Products

Search


<input type="checkbox"/>	Code	Product Description	Product Category
<input type="checkbox"/>	123456789987	ProductOne	clientone/productline1
<input type="checkbox"/>	123456789988	ProductTwo	clientone/productline1

- Go to Actions and add the questions your mobile users will answer to complete the task. Check the "Required" box if the question is mandatory. See below sample questions with the corresponding answer types:

Add Task Template

General Items Actions Attachments [Copy To Excel \(?\)](#)

Action	Answer Type	Required
Comment on the	Text	<input type="checkbox"/>
What is the price of the product? *	Number	<input checked="" type="checkbox"/>
"Select competing brands available" (multiple choice) OR "Out-of-stock?" (single choice yes/no)	Selection edit	<input type="checkbox"/>
Take a picture of category shelving	Photo	<input type="checkbox"/>
Get manager's signature	Signature	<input type="checkbox"/>

Add [up/down arrows] Clone 

Save [Cancel](#)

- If needed, go to Attachments and attach reference materials (such as sample images or instruction PDFs) for your mobile users.

- Click Save.

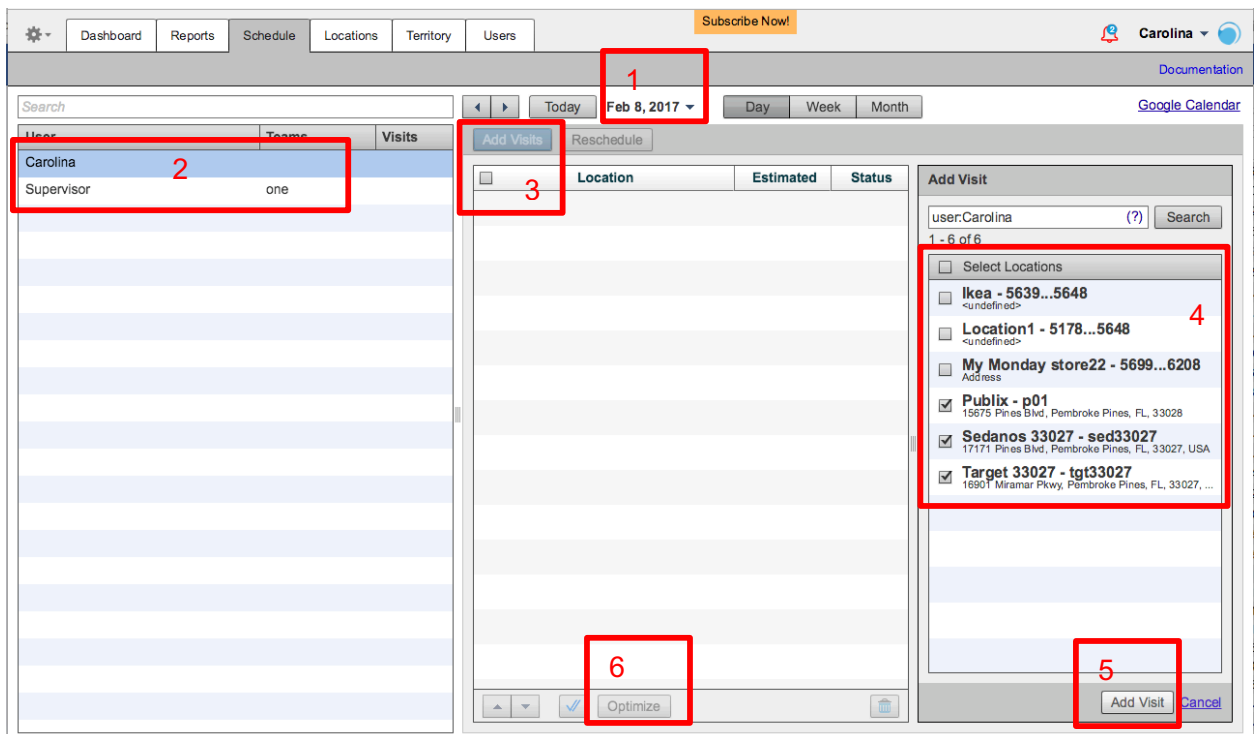
11. Scheduling and Planning Visits

On the Visits -> User Schedule window you can:

- Schedule visits
- Verify visit status
- See in real time the results coming from the field
- Sort mobile users by name or team
- Search mobile users by name or team


To schedule a visit:

2. Select a date.
3. Search and select a rep.
4. Click on the "Add Visits" button.
5. Select the location(s) where the visits will be held.
6. Click on the "Add Visit" button.
7. Click on the "Optimize" button to calculate the sequence of visits with the shortest travel time between customers.



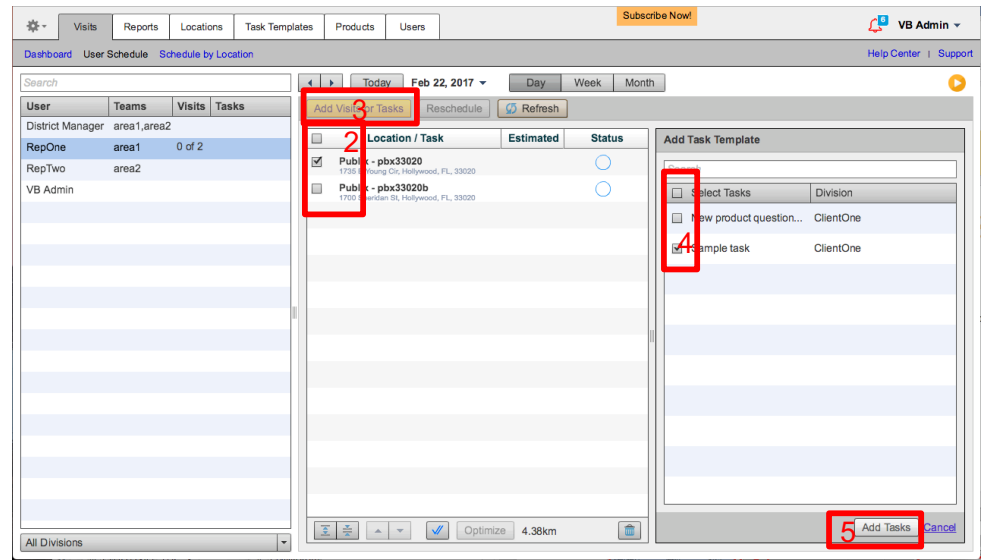
The screenshot shows the 'User Schedule' window for user 'Carolina'. The interface includes a navigation bar with 'Dashboard', 'Reports', 'Schedule', 'Locations', 'Territory', and 'Users'. A date selector is set to 'Feb 8, 2017'. A table lists users, with 'Carolina Supervisor' selected. An 'Add Visits' button is highlighted. A 'Location' table is visible, and an 'Add Visit' panel on the right shows a list of locations with checkboxes. An 'Optimize' button is at the bottom of the location table, and an 'Add Visit' button is at the bottom of the 'Add Visit' panel.

To delete/remove visits:

1. Select the visits/tasks to be deleted.
2. Click on the trashcan button 

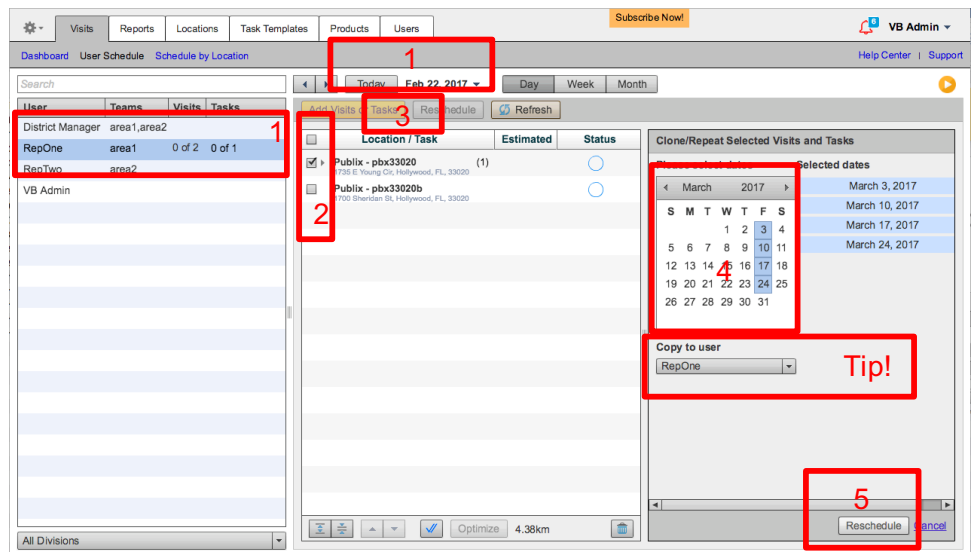
To plan (add tasks to) the visits:

1. First, schedule a visit.
2. Select the checkbox(s) of the visits where the task(s) will be performed.
3. Click on the "Add Visits or Tasks"-> "Add Task Template" button.
4. On the "Add Task Template" window, select the task(s) to be performed at the visit(s).
5. Click on the "Add Tasks" button of the "Add Task" window.



To repeat a planned visit or visit sequence on other dates:

1. Select the user and date for the original visit(s).
2. Check the individual visit or the "select all" box for the visit sequence.
3. Click on "Reschedule".
4. Select the dates when the visits will be repeated.
5. Click on "Reschedule".



Tip:

- The reschedule tool can also be used to assign a visit sequence to another user without having to change territories (in case of absence, for instance). In addition to the above steps, just select another user from the "Copy to user" drop-down list before clicking on Reschedule.

12. Using the VisitBasis Mobile App

If you have not loaded the VisitBasis mobile app into your device yet, follow the below links to download it from the appropriate source:

- Apple iOS devices - App Store:
<https://itunes.apple.com/us/app/visitbasis-mobile-data-collection/id830921428?mt=8>
- Android devices - Google Play:
<https://play.google.com/store/apps/details?id=air.com.visitbasis&hl=en>

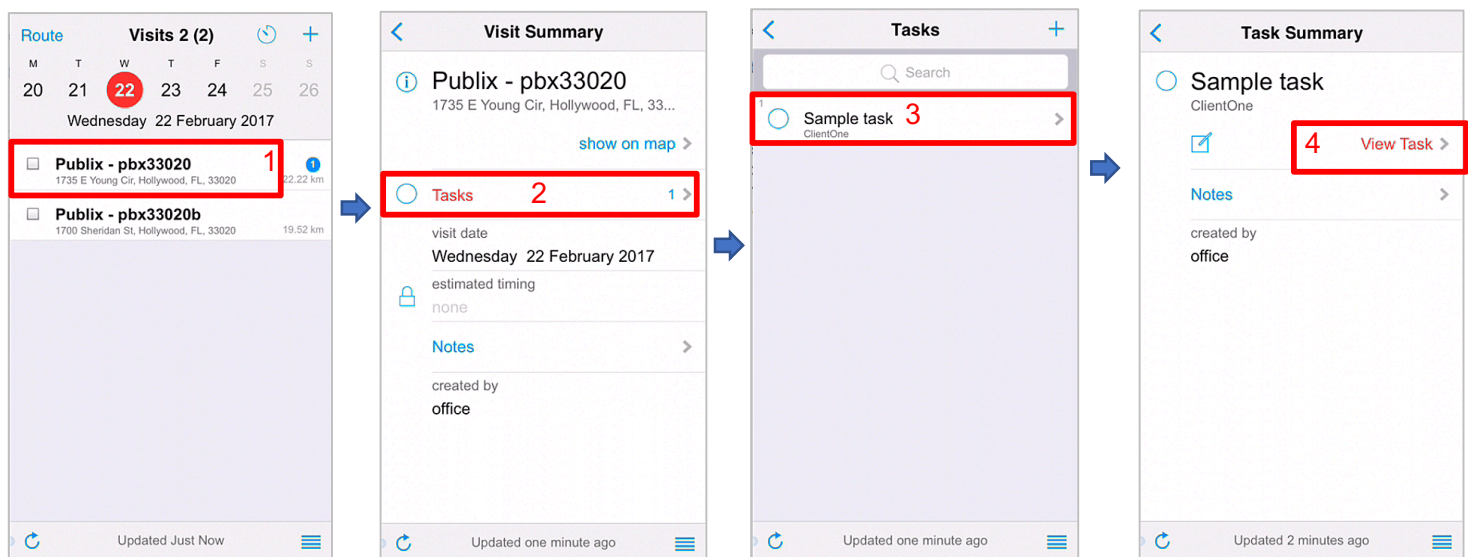
Load the app and login with your VisitBasis credentials.


Checking-in and Entering data

VisitBasis App will open up on the "Visits" screen, showing the visits scheduled for the day.

To perform a visit:

1. Click on the location.
2. Click on "Tasks".
3. Select the task.
4. Click on "View Task".



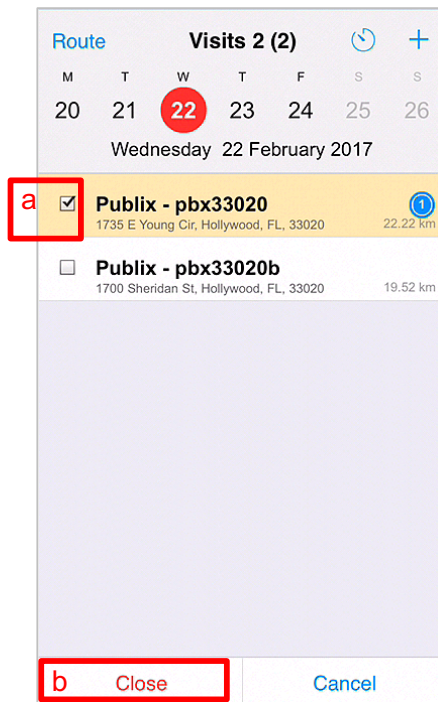
5. Answer the questions on the task.
6. Go back to the "Visits" screen.
7. Click on the round arrow symbol  on the bottom-left to synchronize.

Now that the data is synchronized with the servers, it is time to close the visit.

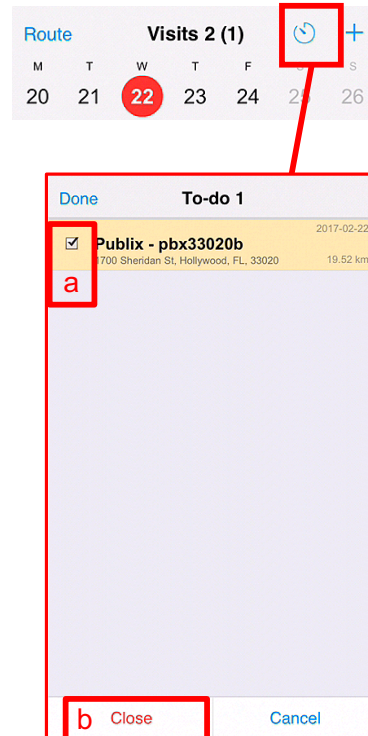
Closing visits on the mobile app

There are two ways to close (check out off) a visit on VisitBasis:

1. Checking the box next to the visit/visits on the **Visits window** (a) and then clicking on "Close" (b).

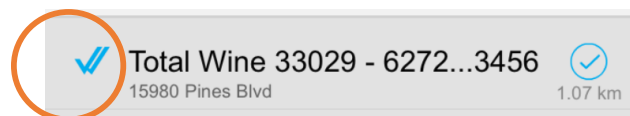


2. Clicking on the "To-do List" (icon) on the **Visits window**, which will show the visits still to be closed for the current day, selecting the visits to be closed (a) and then clicking on close (b).



A visit will be closed and synchronized when you see a "double check" next to the location name.

Closed and synchronized!



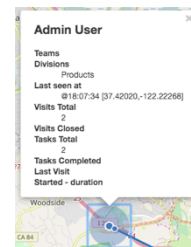
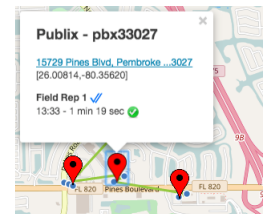
13. Real-time Tracking

The **Visits -> Dashboard** screen allows you to track your mobile users in real time.

Viewing options:

1. To **sort users by username**, click on the "User" header.
2. To **search for a user**, choose the appropriate division and/or type search parameters on the "Search" box. Examples:
 - User name
 - team:Dairy
3. To **change the date** being viewed: Select the desired date from the calendar.
4. To **view user's route and progress for the chosen date**, click on the rep's username. You can choose more than one user to see multiple routes and visits by holding Shift (PC) or Apple (Mac) and selecting the users with your mouse.
5. To **see location stats for the day**, click on the location marker on the map. Blue checks next to a user name means that a visit has been performed by such user at the location and a green check means the visit has been GPS verified (the user was actually at the location when the visit was performed).

6. The **larger blue circle** shows the last recorded location for the selected user(s). By clicking on it, you will see the user's stats for the selected date.



Dashboard interface showing user tracking data and a map view.

Navigation: Visits, Reports, Locations, Task Templates, Products, Users, Billboard

Calendar: 09/08/2016

Search: [Search] [All Divisions] Selected: 1

User	Teams	Visits	Last Visit	Started - duration
Carolina	Southwest	7 of 7	Publix - p46	08:58 - 1 min 20 sec
Anna	Central	0 of 7		
Gerald	Southwest			
GoogleUser	GoogleCalendar			
Ian	IanTeam			
John	Southwest			
Mary	Southwest			
Michael	GoogleCalendar			
Paul				
Peter				
Robert				
Ruth	Panhandle			
Seth				
sales@visitbasis.com				
sean				

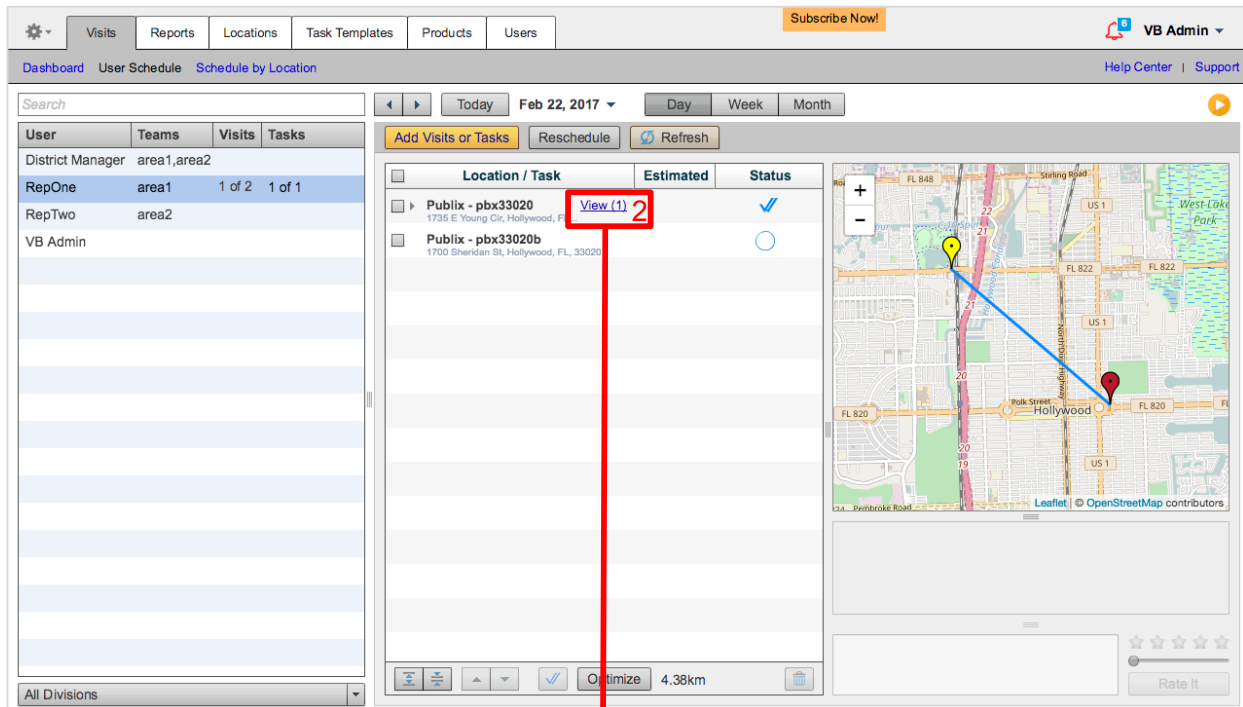
Map view showing user routes and location markers. A larger blue circle indicates the last recorded location for the selected user(s).

Active Field Reps	Visits Total	Visits Closed	Tasks Total	Tasks Completed
2	14	7	21	6

URL: https://visitbasis1.appspot.com/app/fastdash.html?2.5.0+2017-02-21.16-13-24#close

The **Visits -> User Schedule** screen allows you to follow in real time the information coming from the field.

1. You can also use the described above user search and sorting, as well as view user route and location stats on the Schedule window.
2. Once a **visit has been closed and synchronized**, a double check will appear on the Status column and a "View" link will show up next to the location name. Click on the "View" link to load the **visit summary report**.



VB Admin Wed Feb 22 2017

Publix/pbx33020

RepOne 2017-02-22
1735 E Young Cir

Sample task ClientOne

Started at	Ended at	Duration (sec)	Distance to location (m)
2017-02-22 13:38:59	2017-02-22 13:39:45	46	22.218

Answers

Comment on the
Looks good

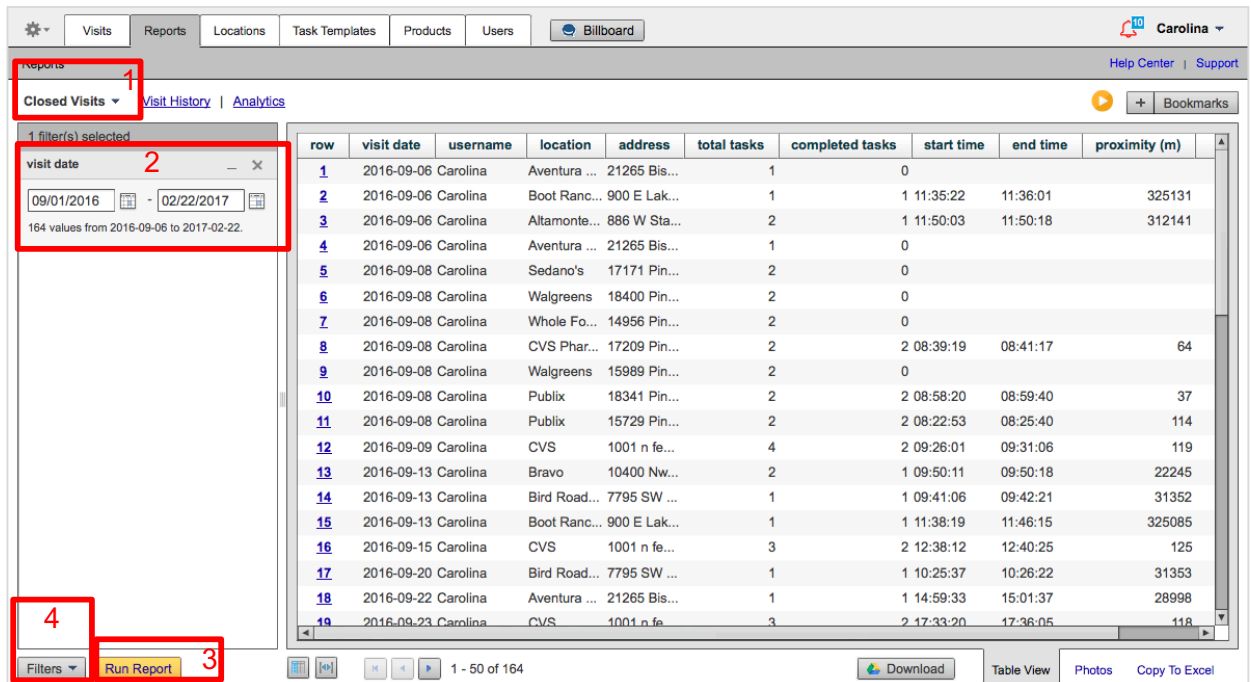
What is the price of the product? *
5.19

14. Running Reports

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

To run a report:

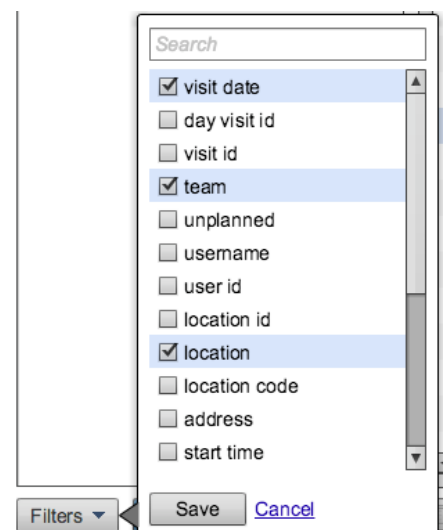
1. Choose a report type from the drop-down.
2. Select a start and end date.
3. Click on Run Report.



The screenshot shows the VisitBasis Reports tool interface. The 'Reports' tab is active, and the report type is set to 'Closed Visits'. A date filter is applied for the period from 09/01/2016 to 02/22/2017. The data table displays 19 rows of visit information, including visit date, username, location, address, total tasks, completed tasks, start time, end time, and proximity (m). The 'Run Report' button is highlighted with a red box and the number 3.

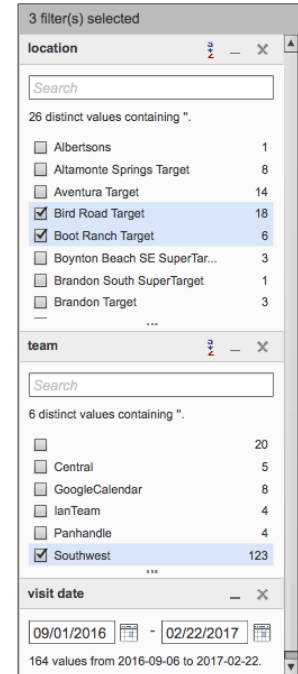
row	visit date	username	location	address	total tasks	completed tasks	start time	end time	proximity (m)
1	2016-09-06	Carolina	Aventura ...	21265 Bis...	1	0			
2	2016-09-06	Carolina	Boot Ranc...	900 E Lak...	1	1	11:35:22	11:36:01	325131
3	2016-09-06	Carolina	Altamonte...	886 W Sta...	2	1	11:50:03	11:50:18	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".



The screenshot shows the Filters dialog box. The 'Filters' button is highlighted with a red box and the number 4. The dialog contains a search field and a list of filters with checkboxes. The selected filters are 'visit date', 'team', and 'location'. The 'Save' button is highlighted with a red box and the number 3.

- Select or type the parameters you want for your filters, and click on Run Report again.



3 filter(s) selected

location

Search

26 distinct values containing "

- Albertsons 1
- Altamonte Springs Target 8
- Aventura Target 14
- Bird Road Target 18
- Boot Ranch Target 6
- Boynton Beach SE SuperTar... 3
- Brandon South SuperTarget 1
- Brandon Target 3

team

Search

6 distinct values containing "

- 20
- Central 5
- GoogleCalendar 8
- IanTeam 4
- Panhandle 4
- Southwest 123

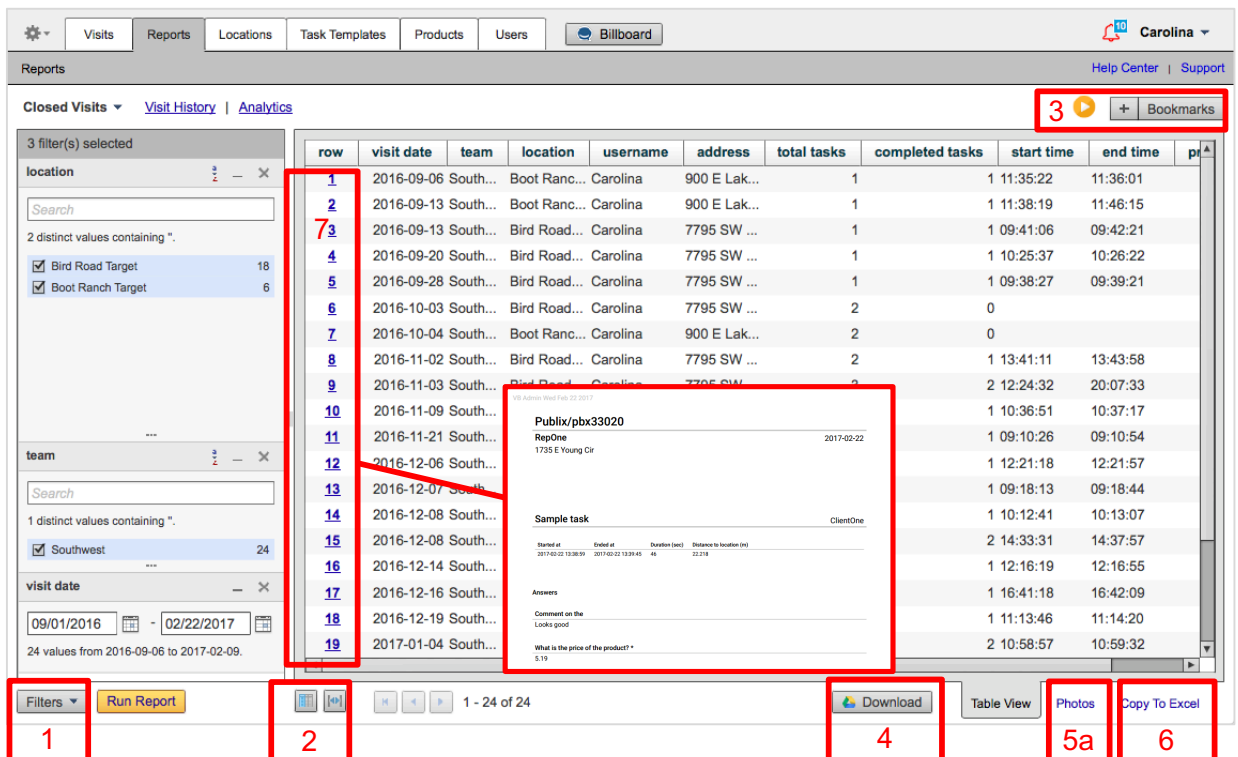
visit date

09/01/2016 - 02/22/2017

164 values from 2016-09-06 to 2017-02-22.

Now you can:

- Select and apply additional filters.
- Customize the report columns.
- Create a bookmark for your favorite views.
- Download or save data to Google Drive.
- View only the photos within the report parameters you chose (5a) and then generate an HTML version of them (5b).
- See and copy data to Excel.
- If a record number has a link, you can click on it to open a Visit Summary report for the corresponding visit.



3 filter(s) selected

location

Search

2 distinct values containing "

- Bird Road Target 18
- Boot Ranch Target 6

team

Search

1 distinct values containing "

- Southwest 24

visit date

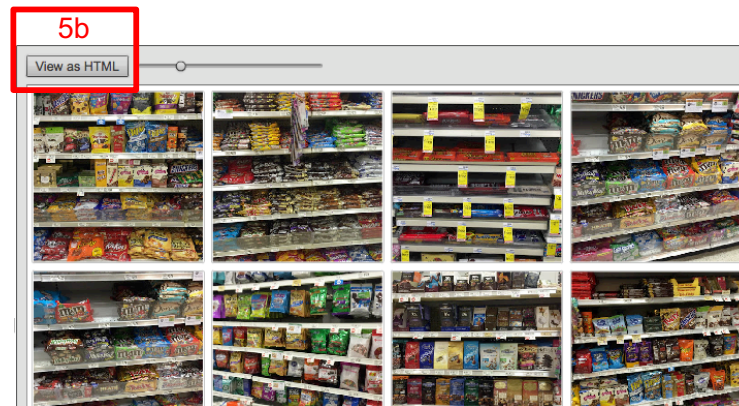
09/01/2016 - 02/22/2017

24 values from 2016-09-06 to 2017-02-09.

row	visit date	team	location	username	address	total tasks	completed tasks	start time	end time	photo
1	2016-09-06	South...	Boot Ranc...	Carolina	900 E Lak...	1	1	11:35:22	11:36:01	
2	2016-09-13	South...	Boot Ranc...	Carolina	900 E Lak...	1	1	11:38:19	11:46:15	
3	2016-09-13	South...	Bird Road...	Carolina	7795 SW ...	1	1	09:41:06	09:42:21	
4	2016-09-20	South...	Bird Road...	Carolina	7795 SW ...	1	1	10:25:37	10:26:22	
5	2016-09-28	South...	Bird Road...	Carolina	7795 SW ...	1	1	09:38:27	09:39:21	
6	2016-10-03	South...	Bird Road...	Carolina	7795 SW ...	2	0			
7	2016-10-04	South...	Boot Ranc...	Carolina	900 E Lak...	2	0			
8	2016-11-02	South...	Bird Road...	Carolina	7795 SW ...	2	2	13:41:11	13:43:58	
9	2016-11-03	South...	Bird Road...	Carolina	7795 SW ...	2	2	12:24:32	20:07:33	
10	2016-11-09	South...				1	1	10:36:51	10:37:17	
11	2016-11-21	South...				1	09:10:26	09:10:54		
12	2016-12-06	South...				1	12:21:18	12:21:57		
13	2016-12-07	South...				1	09:18:13	09:18:44		
14	2016-12-08	South...				1	10:12:41	10:13:07		
15	2016-12-08	South...				2	14:33:31	14:37:57		
16	2016-12-14	South...				1	12:16:19	12:16:55		
17	2016-12-16	South...				1	16:41:18	16:42:09		
18	2016-12-19	South...				1	11:13:46	11:14:20		
19	2017-01-04	South...				2	10:58:57	10:59:32		

1 - 24 of 24

Filters Run Report Download Table View Photos Copy To Excel



Other report types (choose from drop-down):

- **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 imported as a CSV 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.

15. Wrapping Up

Congratulations! You have just finished the VisitBasis tutorial.

Should you have any questions, don't hesitate in contacting us at support@visitbasis.com.