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

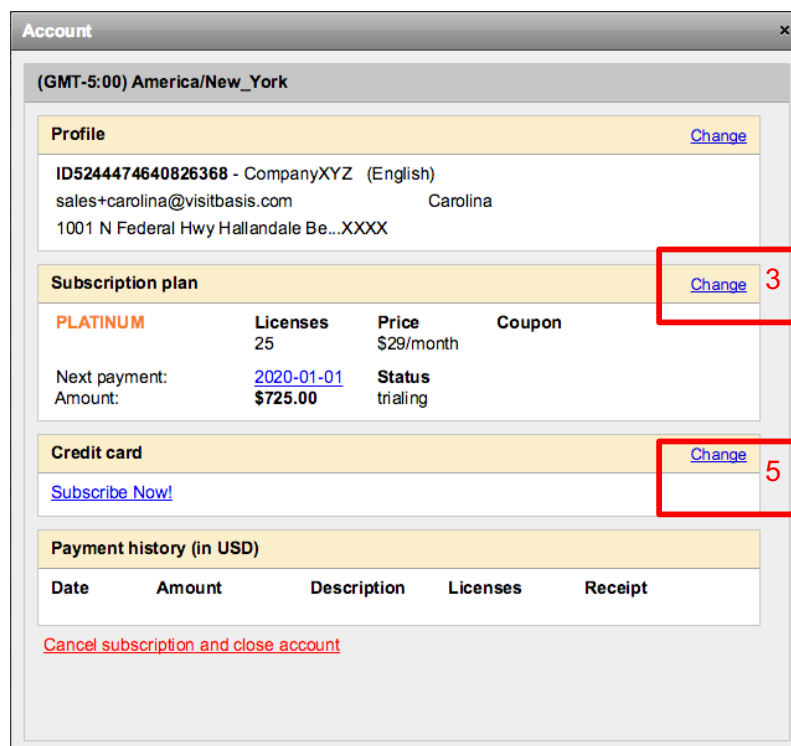## 1. Subscribing to VisitBasis

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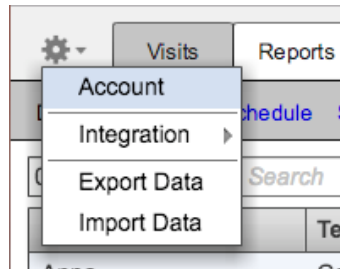
3. On the Account window, click on "change" under Subscription Plan to change the number of VisitBasis licenses (users) you are subscribing for.
4. Click on "Preview Changes" to see your updated invoice and then on "Save".
5. Click on "change" or "Subscribe now" next to Credit Card to enter your credit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

2. Creating Divisions

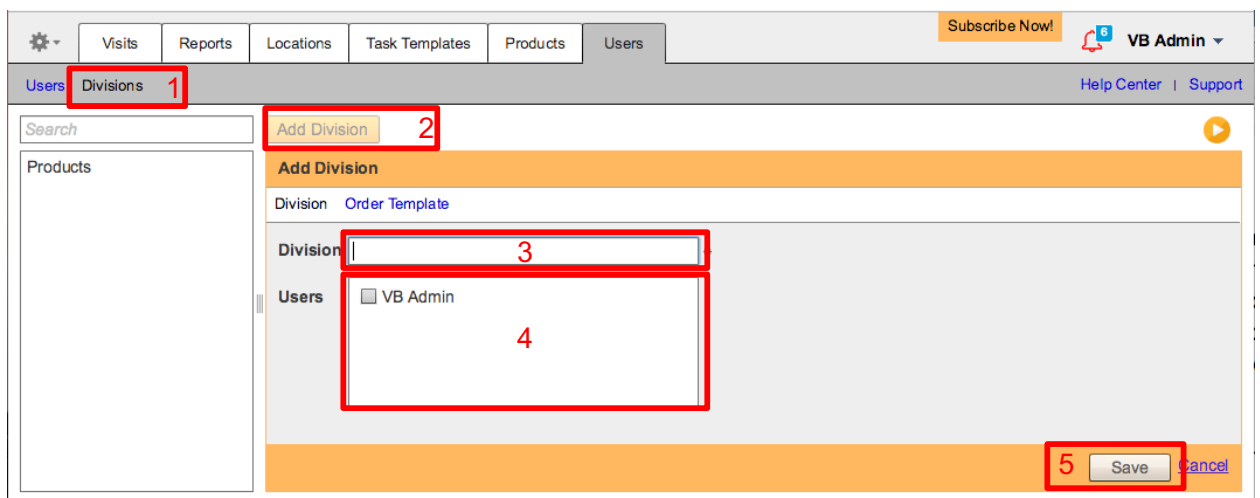In VisitBasis, Divisions is how you will organize your business:

- 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).
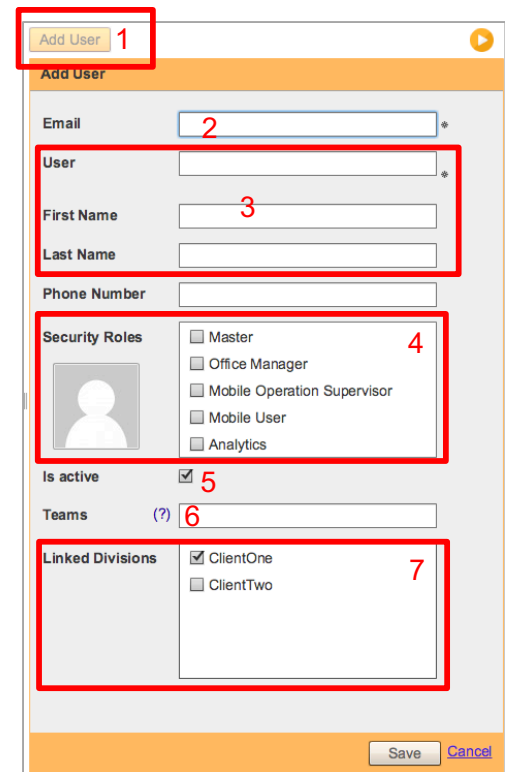
To create Divisions:

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.

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.

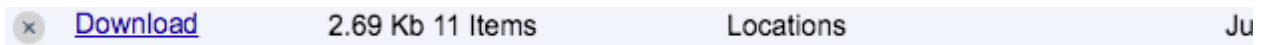First, you will need to export a template for editing:

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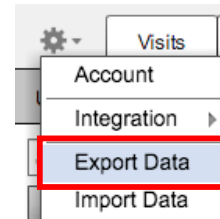
2. On the drop-down, select Locations and click on the button Download. Your Locations file will be prepared for download.
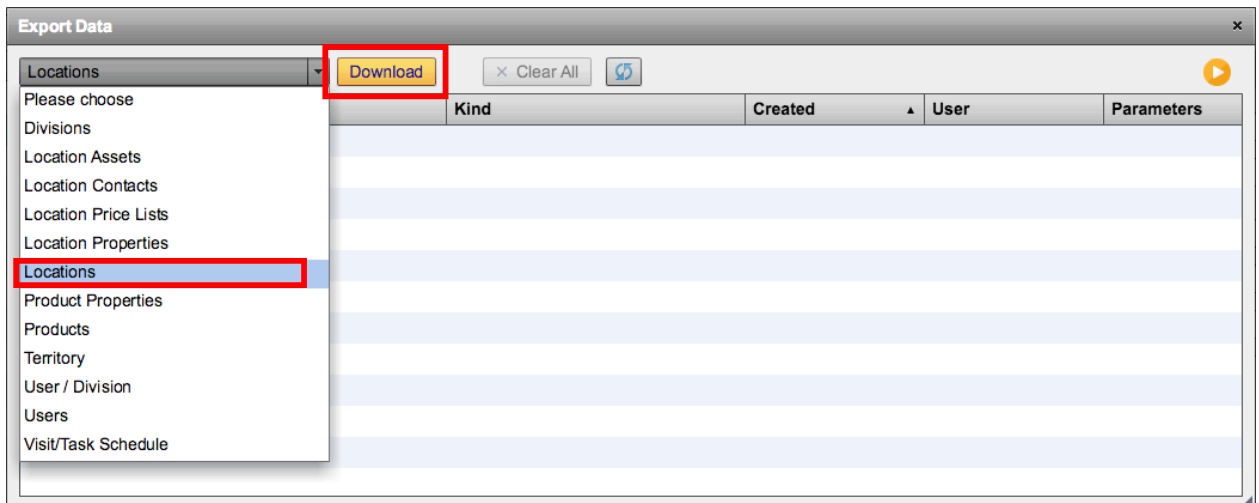
3. Once the blue "Download" link shows up, click on it to download the file and save it to your computer.

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 latitude[1] and longitude[2], 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 TRUE[3], so all locations will already be imported as active.
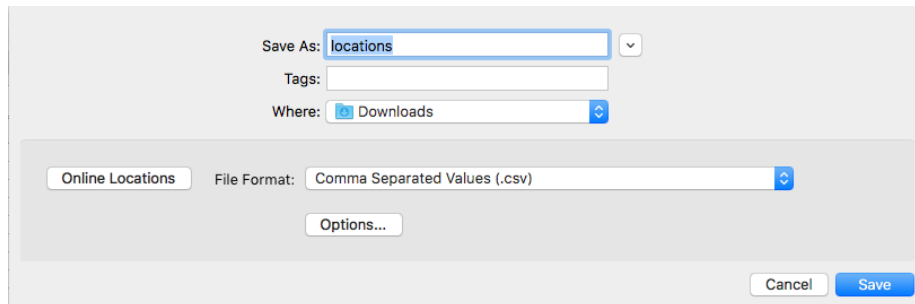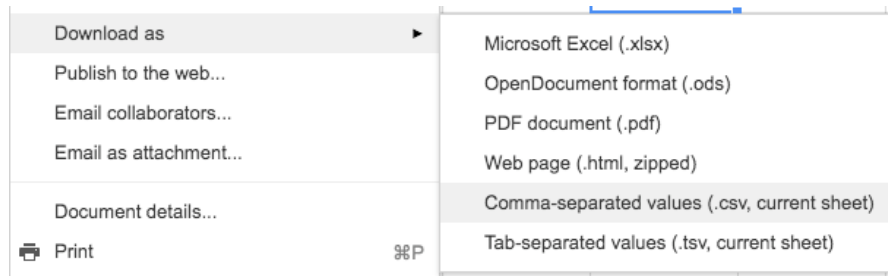
	A	B	C	D	E	F	G	H	I	J	K
1	active	city	country	latitude	locationCode	locationName	longitude	postCode	state	street1	street2
2	TRUE	Hollywood			pres33020	Presidente Supermarket		33020	FL	1510 S Federal Hwy	
3	TRUE	Hollywood			pbx33020	Publix		33020	FL	1735 E Young Cir	
4	TRUE	Hollywood		1	sed33024	Sedanos	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).

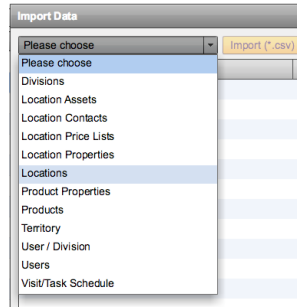Microsoft Excel

Google Sheets

5. Close the file

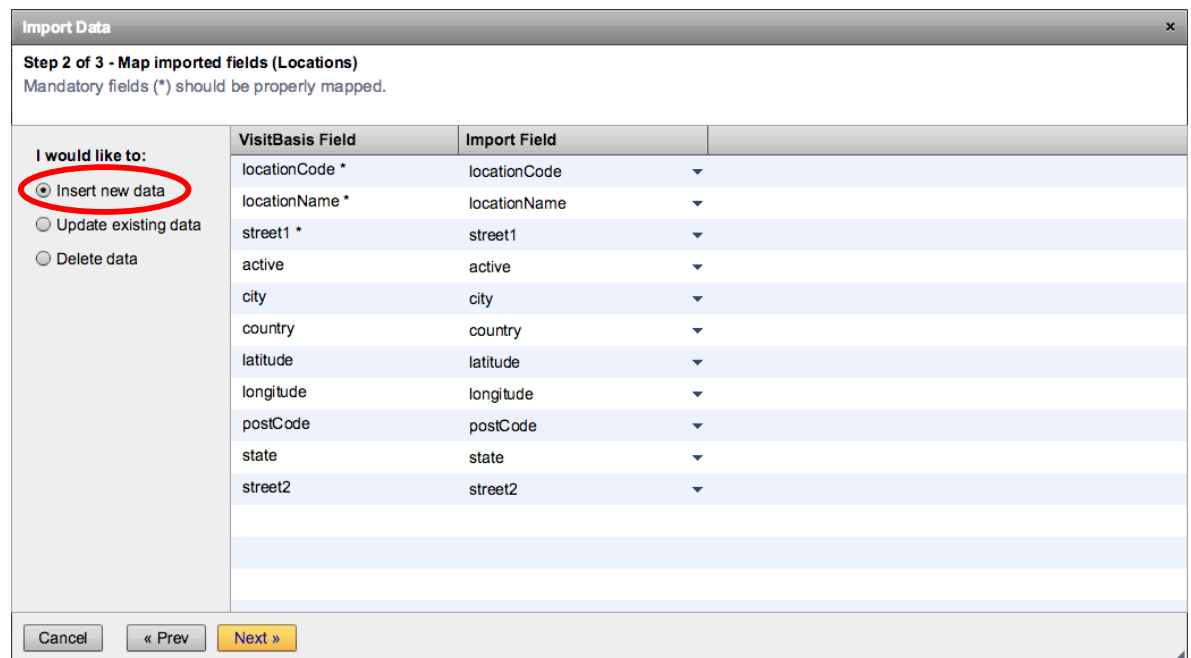Back to VisitBasis, import the file you just edited:

1. Click on the Settings menu and select Import Data.
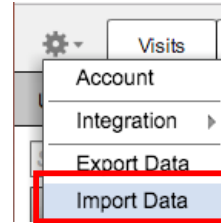
2. On the drop-down, select **Locations** and click on the button Import.

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.
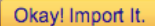
6. Step 3 of 3: Give the data a final review and click on "OK! Import it.".

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. | Validate 5 Addresses |
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.
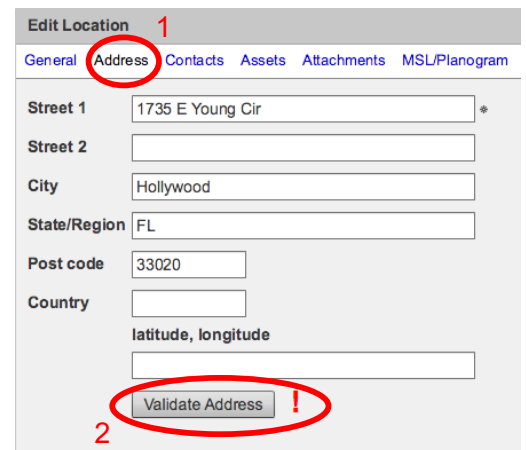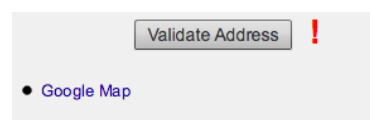
Validating addresses manually
If a Location address cannot be validated automatically, its address will appear in red in the location list:

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:

  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:

- **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"

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"
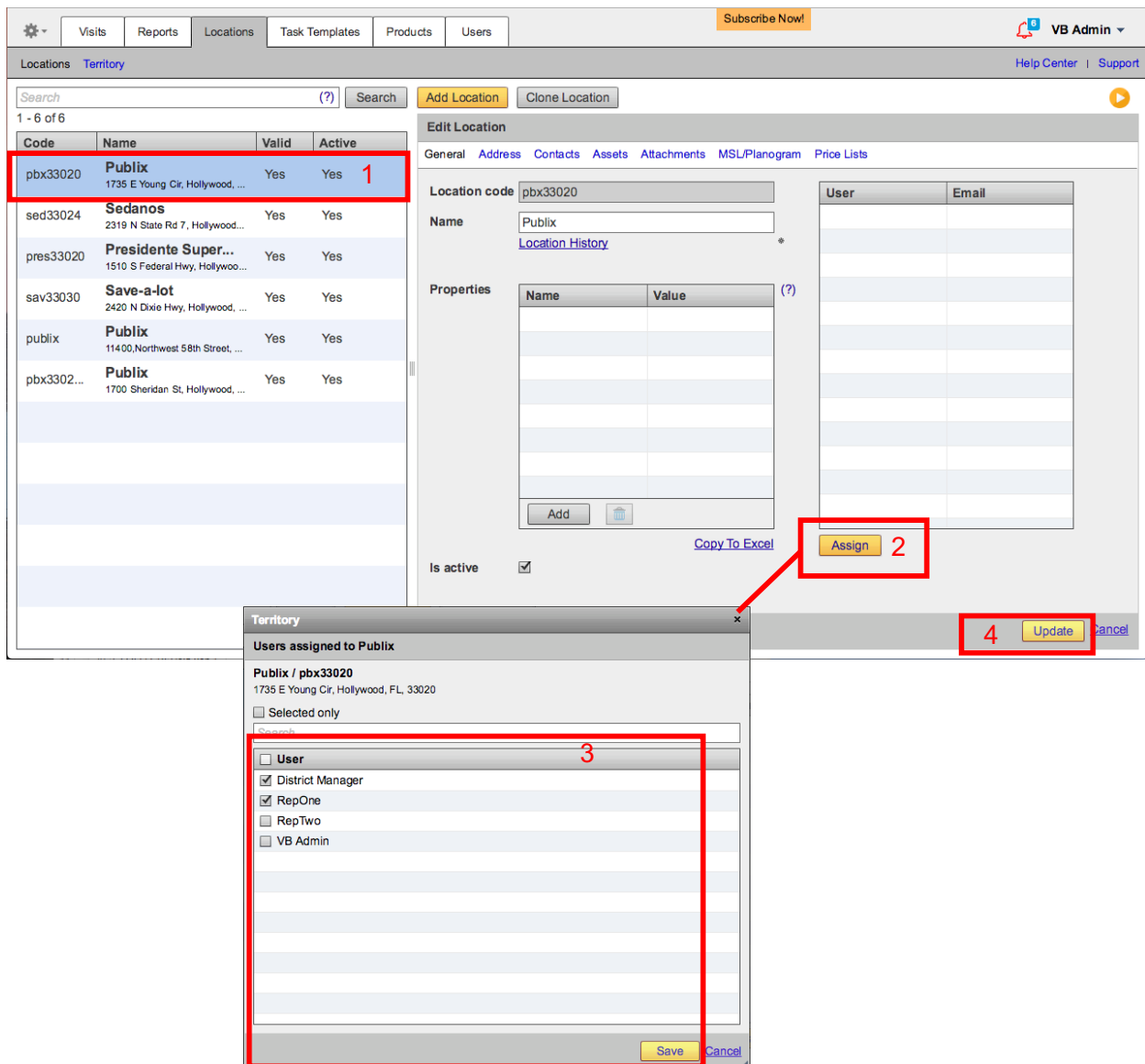
7. Linking Users to Locations

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.

![visitbasis logo]

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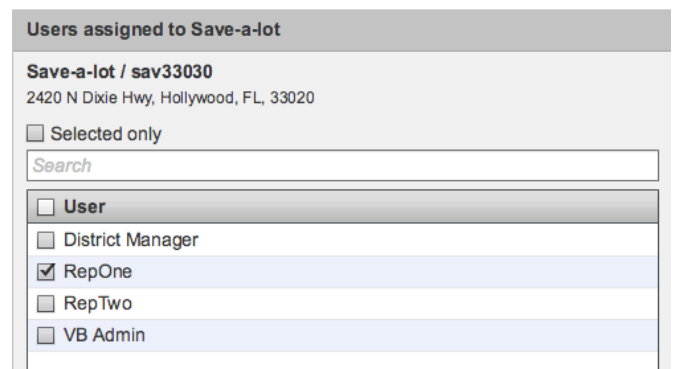
1. On the Territory window, type in the search string for the location or locations you are looking for. Use our topic "Searching Locations" as reference.
2. Select the user (or users – shift+click) to whom you want to assign the location(s).
3. Click on the button Assign.
4. Confirm that you want to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

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.
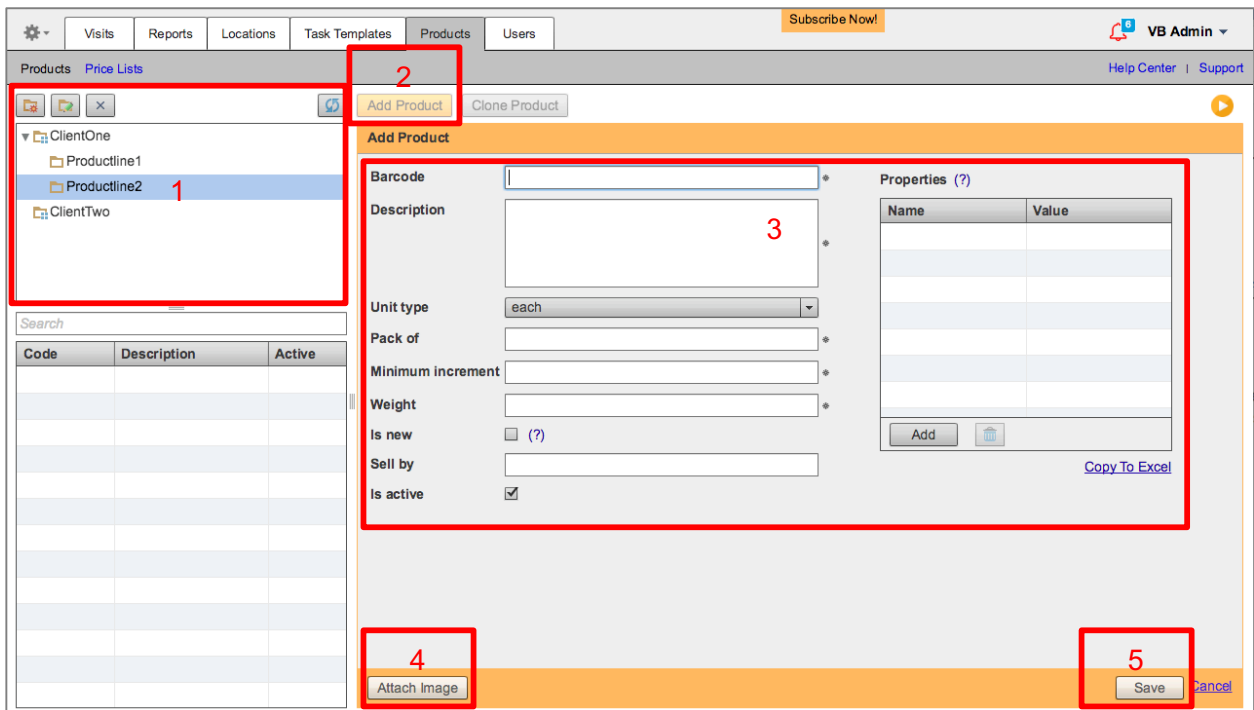
9. Adding your Products to VisitBasis

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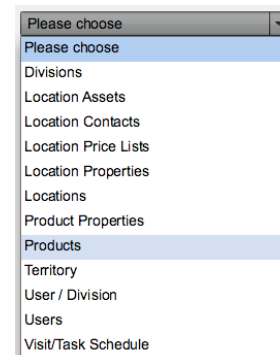
Another way to add products it is to follow similar steps to [Adding Locations in Bulk](#) but choosing "Products" from the drop-downs in the Export Data and Import Data windows.

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.**
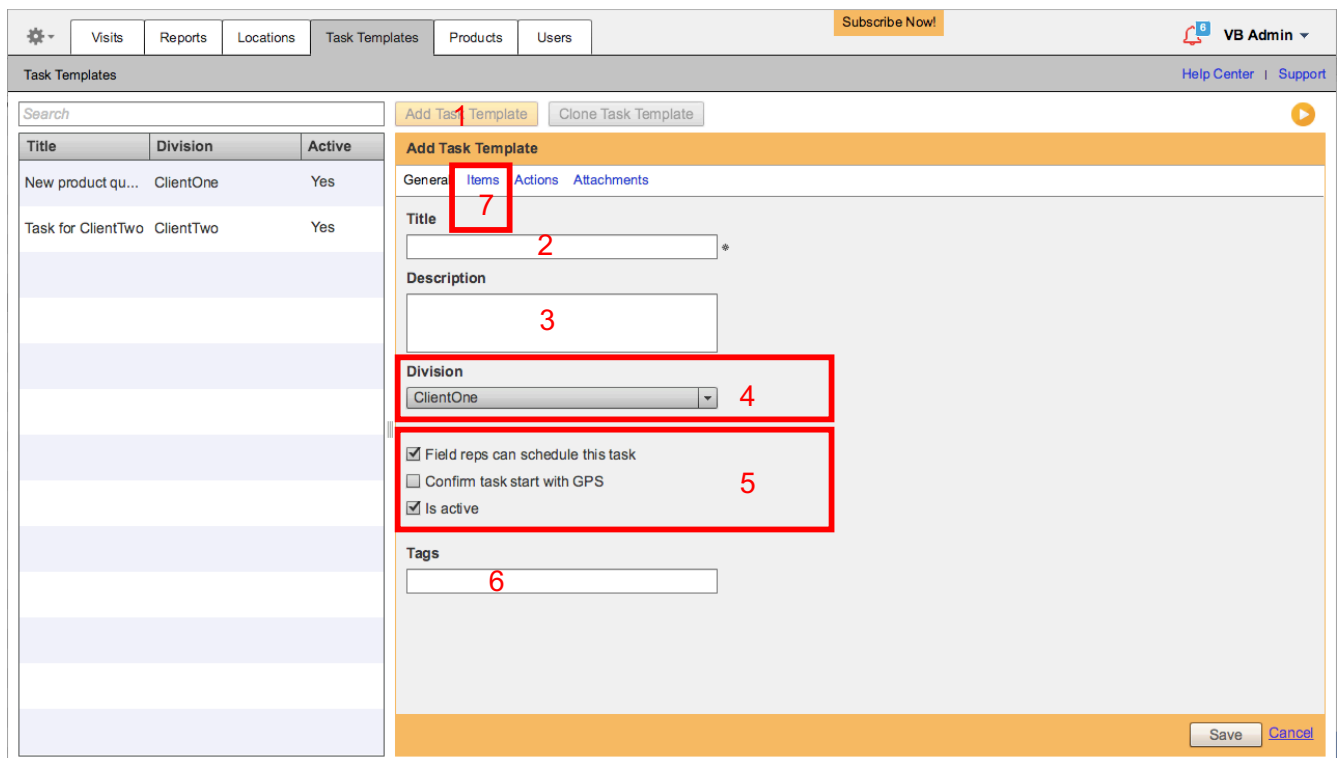
10. Creating Tasks

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:
  - o That applies to one or more products.
  - o 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".

8. 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

☐	Code	Product Description	Product Category
☐	123456789987	ProductOne	clientone/productline1
☐	123456789988	ProductTwo	clientone/productline1

9. 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 ▼	☐
What is the price of the product? *	Number ▼	☑
"Select competing brands available" (multiple choice) OR "Out-of-stock?" (single choice yes/no)	Selection edit ▼	☐
Take a picture of category shelving	Photo ▼	☐
Get manager's signature	Signature ▼	☐

Add   ▲ ▼   Clone   🗑

Save   Cancel

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

11. Click Save.
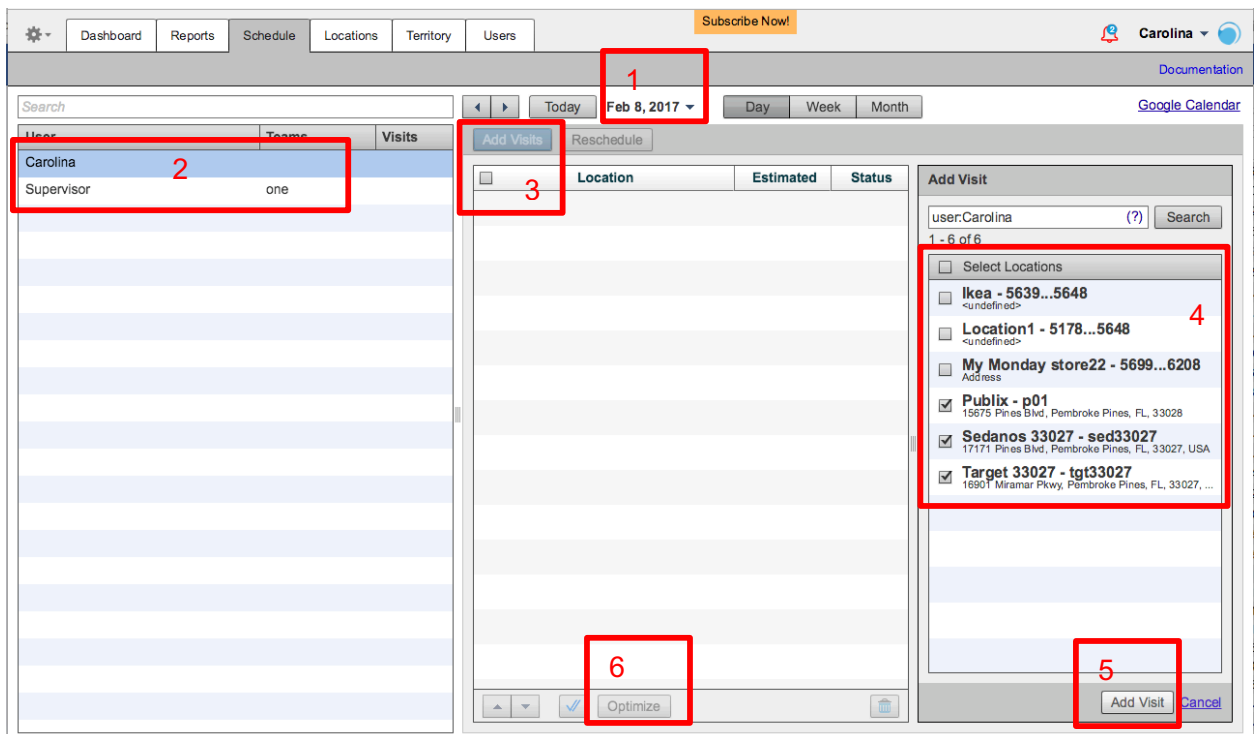
11. Scheduling and Planning Visits

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.

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 checkboxe(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.
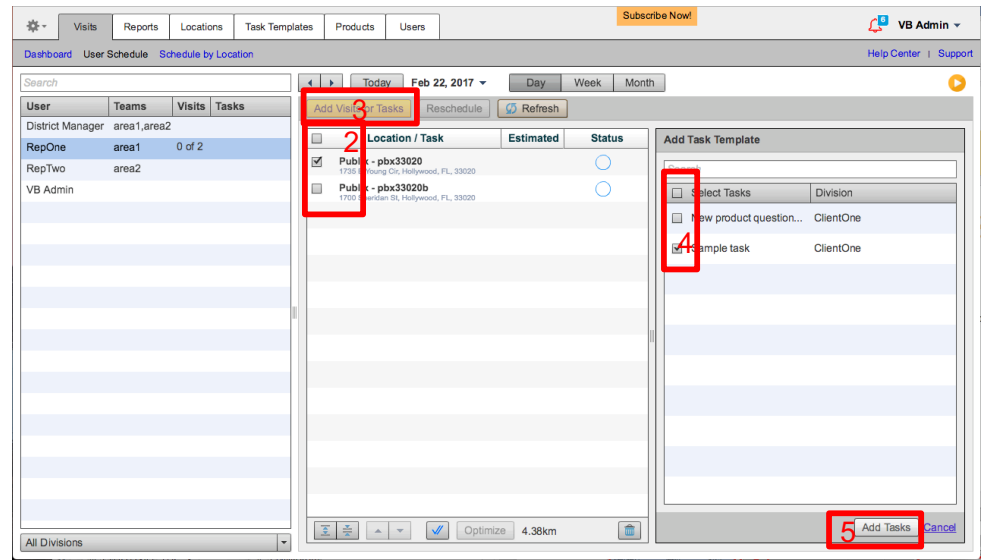
To repeat a planned visit or visit sequence on other dates:

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".
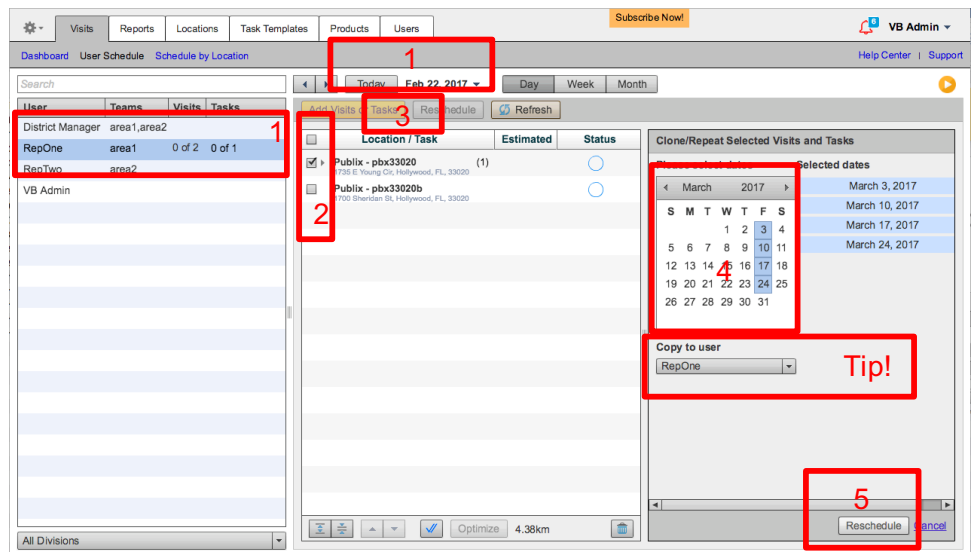
Tip:

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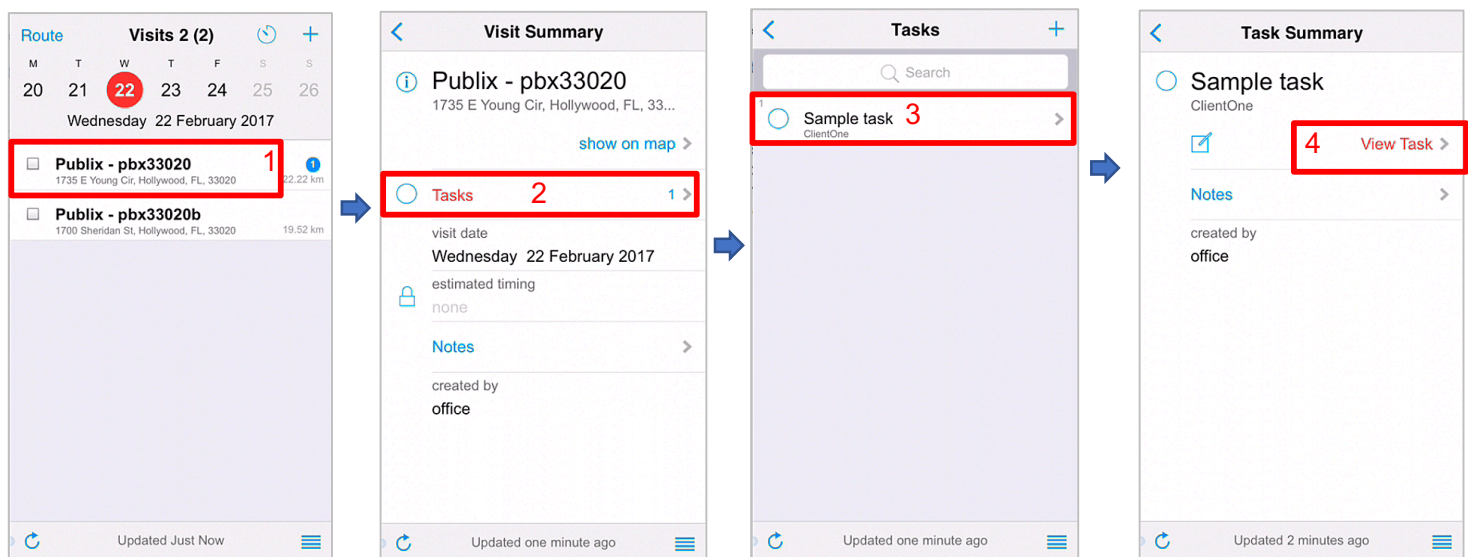
5. Answer the questions on the task.
6. Go back to the "Visits" screen.
7. Click on the round arrow symbol [icon] on the bottom-left to synchronize.

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).
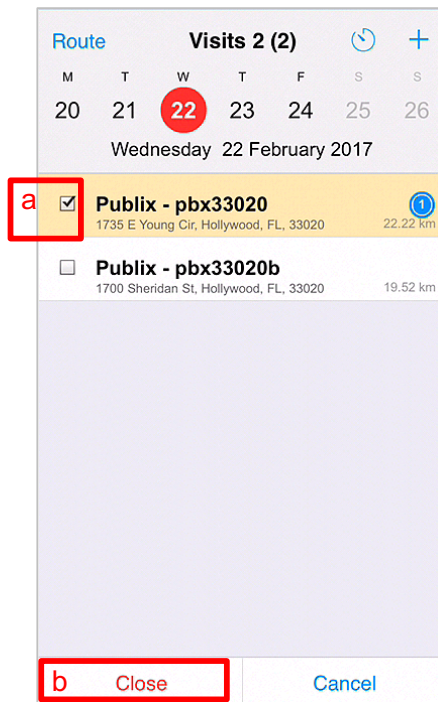
2. Clicking on the "To-do List" (icon) on the **Visits window**, which will show the visits still to be closed for the current day, selecting the visits to be closed (a) and then clicking on close (b).
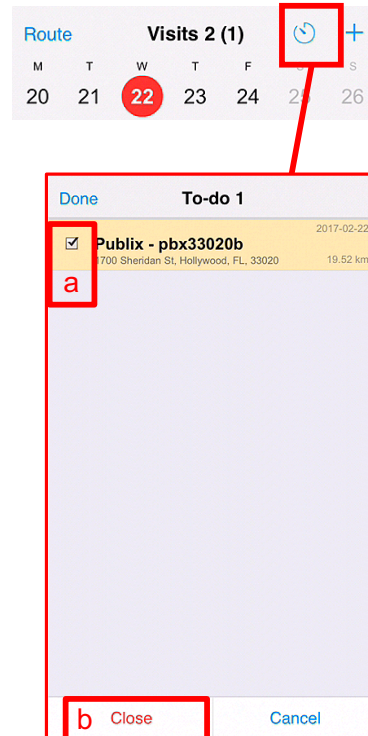
A visit will be closed and synchronized when you see a "double check" next to the location name.

Closed and synchronized!
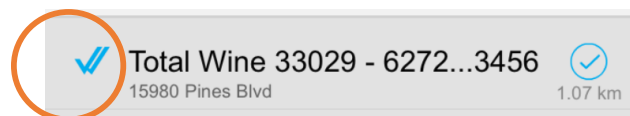
13. Real-time Tracking

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.

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**.
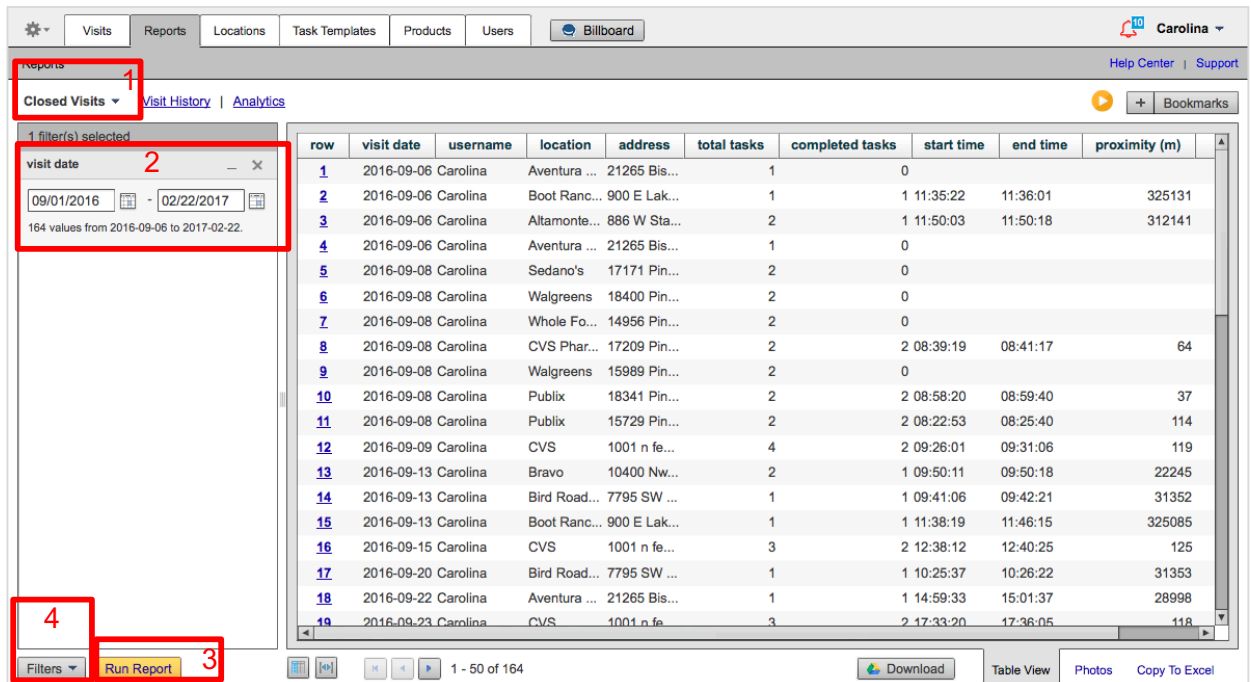
14. Running Reports

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

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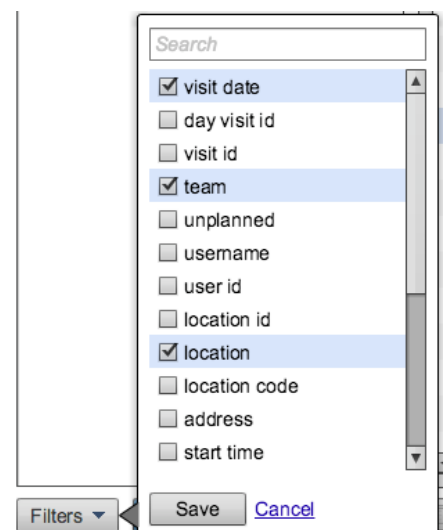
1. Choose a report type from the drop-down.
2. Select a start and end date.
3. Click on Run Report.

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".

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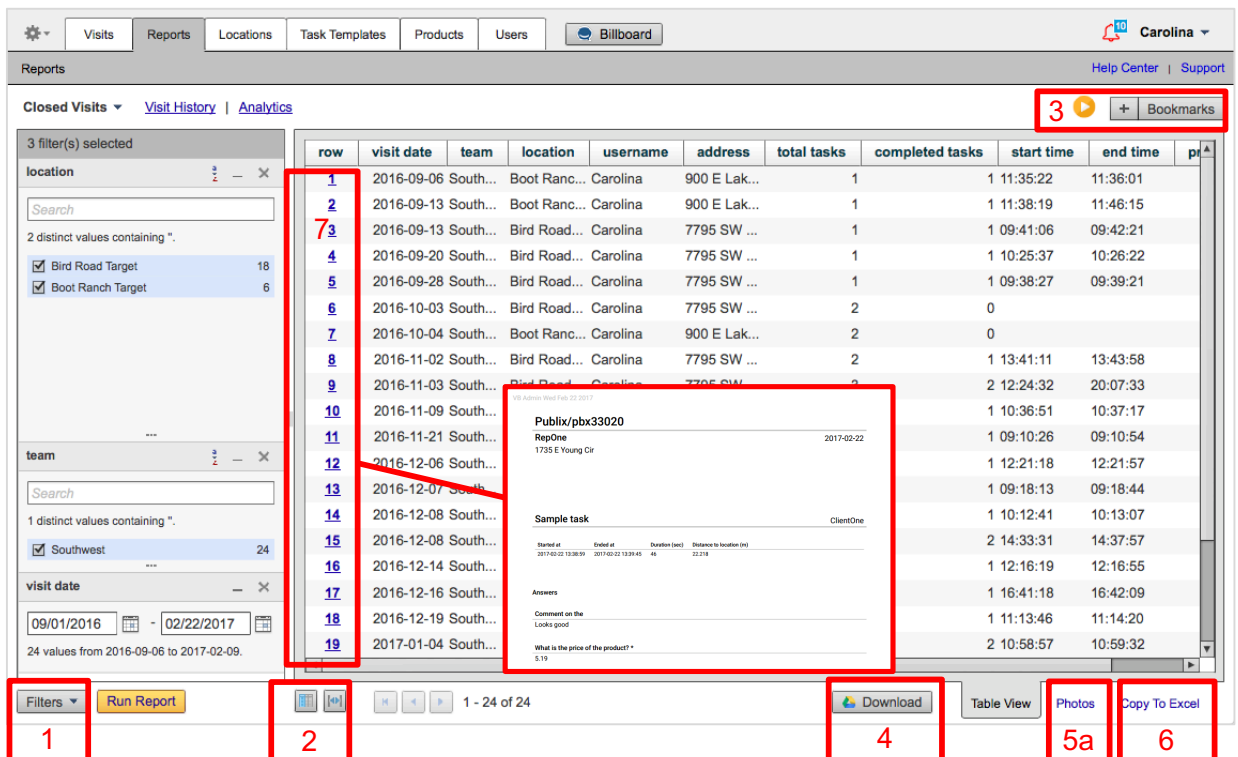
Now you can:
1. Select and apply additional filters.
2. Customize the report columns.
3. Create a bookmark for your favorite views.
4. Download or save data to Google Drive.
5. View only the photos within the report parameters you chose (5a) and then generate an HTML version of them (5b).
6. See and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

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.