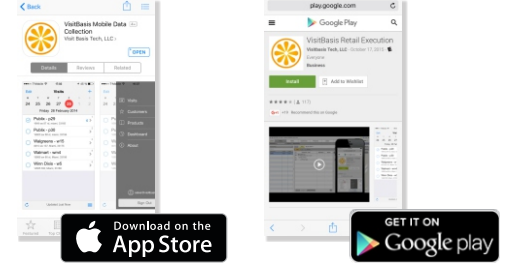


VISITBASIS MOBILE APP OVERVIEW

Congratulations! Your company has chosen the most user-friendly mobile data collection solution on the market. Now we will help you master the app and start working in just a few minutes!

Downloading and Installing

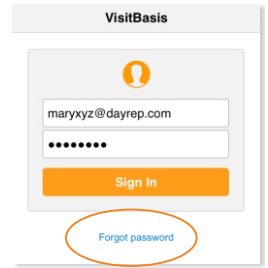
- VisitBasis is available **free of charge** for both iOS and Android users.
- To download it, access **Apple Store** or **GooglePlay**, search for "VisitBasis".
- Proceed with loading the app onto your device.
- Run the app and login with the VisitBasis credentials sent to your email.



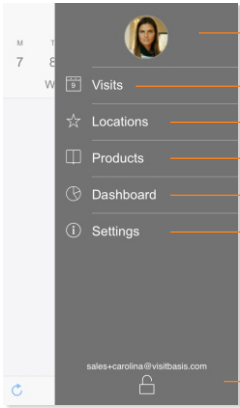
Password Reset

- Forgot your password?
On the VisitBasis app login window, **enter your email first**, then click on **"Forgot password"**.

A new password will be emailed to you.

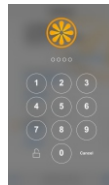


VisitBasis App Menu

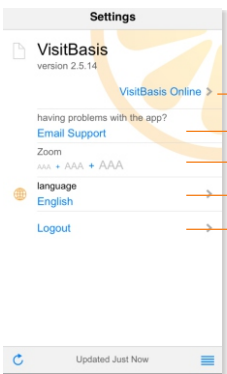


- Your Gravatar. Learn more at www.gravatar.com.
- Access your calendar and the visits scheduled for you.
- Click here to view the customers on your territory and respective details.
- View product lists by division and detailed information.
- View and email statistical information on your visits.
- See below

Choose a pin to lock the app. Useful for shared devices.



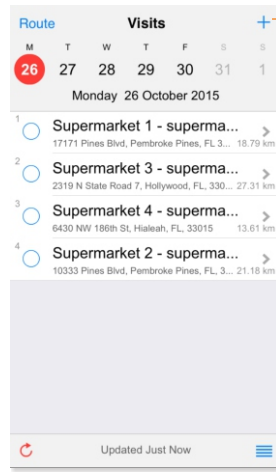
Settings



- Access your Visit History (see next page for more details).
- Any questions or other issues? Email us!
- Customize your viewing options - increase/decrease font size.
- Change app language.
- Log out of the app. Any information that was not synchronized will be lost. Next time you open the app you will have to type your credentials again to log in.

Calendar

- The visit calendar is your **standard welcome screen** on VisitBasis. It shows you your **visits scheduled for the day**.
- You can view the visits scheduled for you on the past or future by clicking on the appropriate day.
- Change the week by swiping back or forth on the date bar.
- You cannot make any changes to visits on past or future dates, or on visits that have been closed.**



Add visit

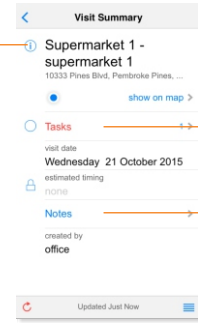
Swipe to see past or future weeks

Go to visit summary



Location/customer details

View, add, and complete visit tasks

Visit notes sent and received



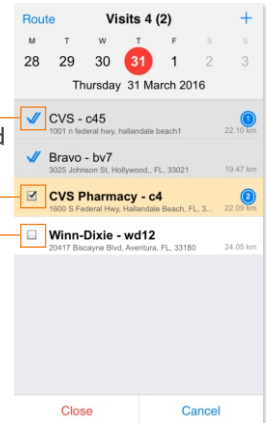
Synchronizing and Closing Visits

- Upon completing your tasks/visits, you **must sync VisitBasis to send the information you collected and close the visit**.
- To **sync**, click on the round arrow  on the bottom-left corner of the app.
- “Click to Synchronize”** on the bottom bar means you have **pending changes and need to sync** .
- “Updated just now”** means the new information has been uploaded and synchronizing is complete.
- To **close a visit**, click on the selection box next to the location, then on **“Close”** to confirm. You might be prompted to sync before closing a visit.
- Important:** If you don't synchronize and you log off or “kill” the app, all the session data will be lost and your office will not receive any of the information.

Double check means closed and synchronized

Now closing this visit

Visit not yet performed

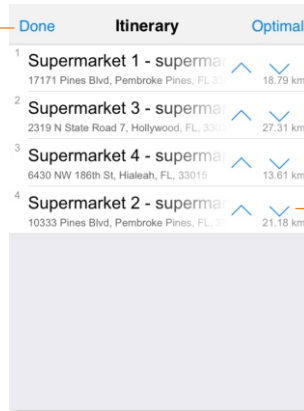


Route Optimization

- VisitBasis can automatically calculate the shortest route for your itinerary, or you can change the order of your visits manually.
- To access routing options: Select **Route** on the visit calendar screen.
- Click on the **up/down arrows** to change visit order manually.
- Click on **Optimal** to automatically calculate the shortest route.

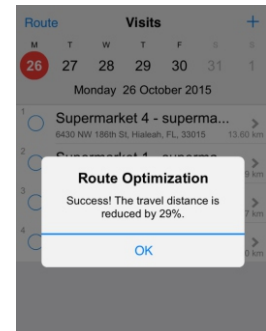
Route

Select when finished



Let VisitBasis calculate the shortest route for your day

Move visit up or down the order



Visit History

- You can view and search your Visit History by accessing **VisitBasis Online** from the VisitBasis app **Settings** menu.
- A browser window will open VisitBasis Online.
- Select **Search Visit/Task History**.
- Login** with your VisitBasis credentials.
- Use the fields to search by date, location (name, code or street name), division, or mobile user.

