Field sales

Version 7.17

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Install the “Field Sales for Creatio” app

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The Field Sales for Creatio extension allows automating sales rep tasks. Sales reps use Creatio mobile app in the field to check visit “to-do” list, record the meeting time frame, conduct presentations, monitor SKUs, and place orders.

Product features include:

- Planning of field staff meetings (“visits”)
- Building optimal routes between the meeting locations on the map
- Maintain the visit agenda and guidelines
- Keep a record of the employee’s activities during the visit
- Create custom visit agenda and guidelines.

You need to install the app from the marketplace to access the field functionality. To do so:

1. Open the System Designer, e.g., by clicking .
2. Click [*Installed applications*]. The app management page opens.
3. Click [*Add application*] > [*Choose from Marketplace*].
4. Install the “Field Sales for Creatio” app.

If your Creatio application is deployed on-site, make sure that the application is not restricted from accessing the Internet, before you attempt to install “Field Module for Creatio.” To do so:

1. Grant access to the web site http://package-store.creatio.com/.
2. Install the “Field Module for Creatio” app using the following link: https://marketplace.creatio.com/app/field-sales-creatio.

   For more on adding Creatio apps, see the “Install applications from the Marketplace” article.

> **ATTENTION.** To access the functionality, all sales rep users must be licensed separately.

Set up rules and actions of a visit

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One of the primary components of a visit rule is the sale rep “to-do” list – the activities that sales reps are required to complete during a visit. Field sales for Creatio functionality enables sales reps with mobile apps to perform the following basic actions:

Check-in	Creatio receives GPS coordinates of the sales rep's location and the visit status is changed to “In progress“.
Presentation	Opens a PowerPoint or PDF presentation on the sales rep's mobile device (the presentation must be added to the [*Attachments and notes*] detail of the visit record in the [*Activities*] section). If several presentations have been added to the detail, the sales rep will have to select the needed one.
Order placement	Creates a new order for the sales outlet account and opens the product selection page on the sales rep's mobile device.
SKU Monitoring	Opens the SKU monitoring window for the sales rep to enter changes in SKU (stock-keeping units), specify whether the products are on display in the sales outlet. The sales rep’s mobile device will display the SKU monitoring window.
Check-out	Creatio receives the GPS coordinates of the sales rep's location and the visit status is changed to “Completed“.

You can supplement the list of sales rep visit actions by adding new records to the [*Visit actions type*] lookup. Employees mark visit actions as “complete” by toggling a switch in the mobile device. The connection between visit actions and system sections (e.g., creating a new contract based on a visit action) is carried out only through development.

Set up rules of a visit

1. Click  to open the System Designer.
2. Go to the [*System setup*] block → click [*Lookups*].
3. Click the [*Field sales rules*] lookup.
4. On the lookup content page, click the [*New rule*] button.
5. Populate the required fields:
    a. Populate the [*Name*] field, for example, “2nd quarter of 2020 (Downtown)“ or “1st quarter (Uptown)“.
    b. In the [*Start*] and [*Due*] fields, specify the time limit of rule validity.
    c. Specify visit duration (including travel time) in the corresponding field.
    d. In the [*Number of visits*] field, enter the approximate number of visits of this type that a sales rep can perform during one day.
6. Click [*Save*].
7. Similarly, specify the other rules. Normally, different visit rules apply to different periods and sales outlet locations.

    As a result, these rules will be taken into account when building a schedule for the sales reps.

    In the [*Visit scheduling*] view of the [*Activities*] section, drag a sales outlet from the list to the left and drop it into the calendar. The duration of the visit will be set automatically, according to the [*Visit duration*] value from the corresponding visit rule.

If several rules can be applied to a sales outlet, Creatio will let you choose which rule to use.

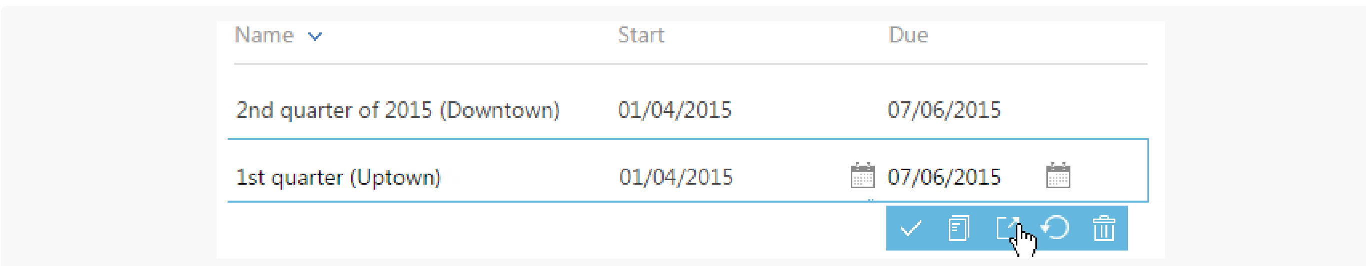
Manage sales rep visit actions

Use the [*Field visit rules*] lookup to set up the list of activities that must be completed during a visit.

To add an action:

1. Click to open the System Designer.
2. Go to the [*System setup*] block → click [*Lookups*].
3. Click the [*Field sales rules*] lookup.
4. Select a rule and click (Fig. 1).

Fig. 1 Opening a rule for editing



5. On the rule page, expand the [*Actions during visit*] detail and click [+].
6. Populate the columns of the new record:
    a. Select the visit action type: “Check-in“, “Check-out” “Presentation,“ etc.
    b. Use the [*Actions priority order*] column, to set up a sequence of sales rep activities. For example, if the action is the first in the “to-do” list, enter “1“.
    c. Select the [*Required*] checkbox for the actions that should not be skipped during a visit.
    The sales rep will not be able to complete the visit until all the required actions are performed.
7. Click to save the visit action.
8. Similarly, add the rest of the visit actions.

    As a result, when you drag a sales outlet and drop it into the calendar in the [*Visit scheduling*] view of the [*Activities*] section, the [*Visit actions*] detail of the visit will be populated automatically. The list of actions on the detail will correspond to the list of actions set up in the lookup for the corresponding visit rule.

Add a presentation to a visit

The “Presentation“ visit action requires additional setup, so that the sales reps have full access to the presentation materials during the visit.

To add a presentation, create a new record in the [*Knowledge base*] section and add a PowerPoint presentation (*.pptx) or PDF file on its [*Attachments*] detail. Then, link the article to the “Presentation” visit action. As a result, your sales reps will be able to show the attached presentation from their mobile device during visits.

Note. In addition to PowerPoint presentations, you can add other types of documents to the knowledge base article. In this case, when performing the “Presentation“ action, this document will be opened using the default applications for that file type on the mobile device.

To add a presentation:

1. Click to open the System Designer.
2. Go to the [*System setup*] block → click [*Lookups*].
3. Click the [*Field sales rules*] lookup.
4. Open the needed rule and go to the [*Actions during visit*] detail.
5. Select the “Presentation” record and click .
6. On the displayed page, expand the [*Presentation*] detail and click + .
7. In the displayed string, click in the field.
8. In the displayed lookup, select a knowledge base article with an attached presentation.
9. If necessary, add other knowledge base articles with attachments.

   As a result, when a sales rep performs the [*Presentation*] visit action, the PowerPoint presentation (or any other document) attached to the knowledge base article will open on their mobile device. If several presentations and materials have been attached, they will be available on the [*Attachments and notes*] detail of the visit.

   Also, all visits planned in the calendar (the [*Visit scheduling*] view of the [*Activities*] section), will have links to the knowledge base articles specified on the [*Attachments and notes*] detail.

Set up a list of promoted products

When monitoring SKUs, a sales rep should be able to view only SKUs promoted for the current customer. This is done by setting up individual lists of promoted SKUs for each customer account. You can do this in one of the following ways:

- Add all accounts where a product must be promoted on the [*Accounts*] detail of the product page. The information about SKUs will be automatically added to the [*Products*] detail of the account page after you save the product page.
- Add the promoted products to the [*Products*] detail of the account page of the account where the products must be promoted. The information about accounts will be added to the [*Accounts*] detail of the product page.

As a result, the connection between promoted products and accounts will be set. When performing the [*SKU monitoring*] action, a sales rep will see only the SKUs promoted via this account.

The full product catalog is still available when the sales rep places an order during a visit. Thus, if a customer shows interest in products that are not promoted, they can still be added to the order.

Plan visits

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Create **sales rep visits** in the [*Visit scheduling*] view of the [*Activities*] section.

The [*Visit scheduling*] view has the following functional areas:

1. **List of accounts.** The area displays the list of locations (e.g., sales outlets) with scheduled visits. The list includes only the accounts that have the same owner specified as the one that is selected in the calendar. You can filter the records in the accounts list by selecting the [*Apply filter*] option from the ⋮ button menu.
2. **Sales rep's calendar.** The calendar in the [*Visit scheduling*] view is similar to the standard user calendar. The titles of days in the calendar contain additional buttons that allow the user to build the sales rep's daily route.
3. **Route map.** The map that displays the sales reps' daily route.

Plan visits automatically

The Field Sales for Creatio app utilizes cyclic task features to implement automatic visit scheduling. A cyclic task is an activity that includes several visits to sales outlets during a specified time frame. Use the [*Cyclic tasks*] section to create such activities. One cyclic task may schedule multiple visits over a certain period.

Note. The [*Cyclic tasks*] section becomes available after installing the "Field Sales for Creatio".

I. Create a cyclic task:

1. Go to the [*Cyclic tasks*] section.
2. Click the [*New task*] button.
3. On the displayed page, populate the required fields: specify the name of the cyclic task, the start and the end dates, and the owner. The owner must be a contact for which the system user is created.
4. On the [*General information*] tab:
   a. Click + in the [*Visit categories*] detail to add a new visit category record.
   b. Specify the name of the category in the [*Name*] field.
   c. In the [*Quantity*] field, specify the total number of visits you want to schedule for the selected time frame. The [*Days between visits*] and the [*Visits frequency per month*] field values are populated automatically. If you change the values in either one of the [*Quantity*], [*Days between visits*] and the [*Visits frequency per month*] fields, the values in the other two fields will be automatically recalculated based on the total task execution period.
   d. Select the lookup value in the [*Visit rule*] field to specify the rule according to which the visit will be performed. Visit rules determine the actions that the sales rep is expected to perform during the visit. Use the [*Field visit rules*] lookup to set up custom visit rules, if needed.
   e. Add the accounts of the "Sales outlet" and "Retail chain" types to the [*Accounts*] detail. Creatio will be scheduling visits to these accounts.
5. Save the cyclic task.

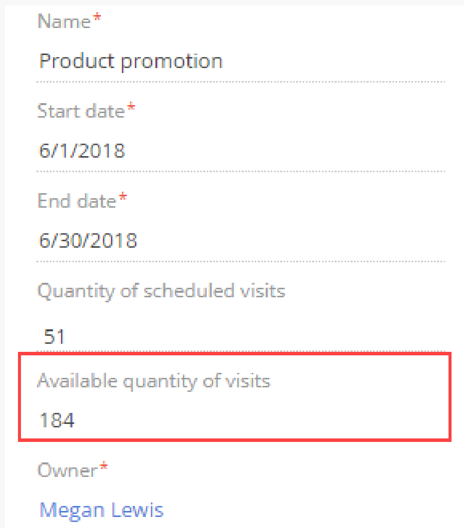
Note. We recommend planning your visits quarterly to analyze product promotion results correctly.

II. Create visits from a cyclic task

After adding a cyclic task, proceed to schedule visits. To do this:

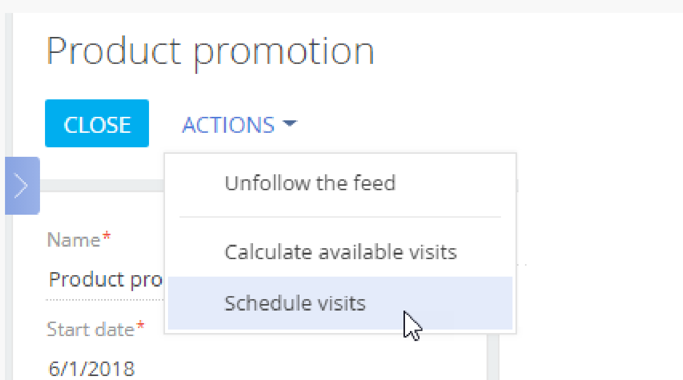
1. Open the cyclic task created on the previous step and use the [*Calculate available visits*] command of the [*Actions*] menu on the cyclic task page to calculate available visit slots. As a result, Creatio will populate the [*Available quantity of visits*] field of the cyclic task page (Fig. 1).

Fig. 1 Available visit quantity



2. When the calculation is finished, the [*Schedule visits*] action will become available on the cyclic task page (Fig. 2).

Fig. 2 The [*Schedule visits*] action



3. Run the [*Schedule visits*] action to start the process of automatic visit scheduling in accordance with the configured parameters and the sales rep’s calendar.

   You will receive a notification when the visits have been scheduled. The [*Quantity of scheduled visits*] field will display the number of scheduled visits. The visit activities will appear on the [*Activity*] detail of the corresponding accounts.

How the automatic visit scheduling works

When scheduling visits, Creatio performs the following actions:

1. Determines the route starting point. The current location of a sales rep responsible for the visit can be a starting point. The location is determined based on the information from the [*Addresses*] detail of the corresponding contact page. If the contact's address is not specified, the system will use the address from the connected account page.
2. Determines the sales outlet closest to the starting point. The optimal car route is determined within the 200 km radius.
3. Checks the working hours of the sales rep and sales outlet.

> **Note.** When checking the working hours, Creatio analyzes the calendar of the sales rep employee. More information about setting up a contact's calendar is available in the "Configure a personal calendar for a contact" article. The calendar specified in the "Base calendar" system setting determines the business hours of the outlets.

4. Creatio creates the first visit.
If the visit time is outside of the working hours, Creatio will look for the next closest location. The procedure repeats until all visits have been scheduled.

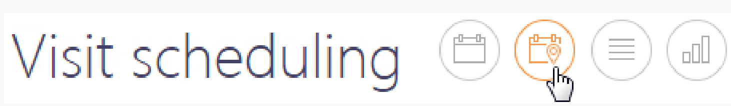
Plan visits manually

Before scheduling visits, make sure that the rule that applies to the visit corresponds to the needed period. If several field rules apply to one visit, Creatio will let you choose which rule to apply to that visit. Learn more in the "Set up rules and actions of a field meeting" article.

To schedule a visit:

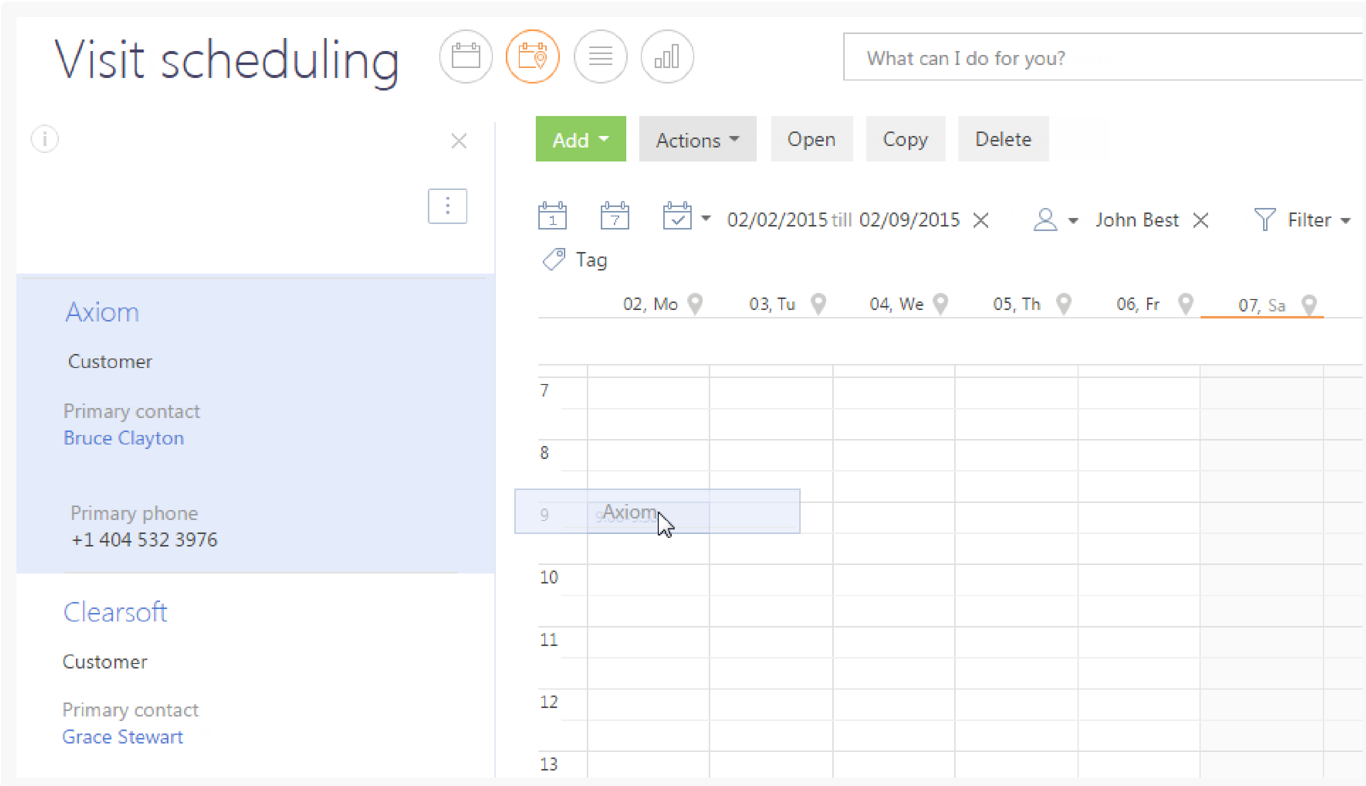
1. In the [*Activities*] section, select the [*Visit scheduling*] view (Fig. 1).

Fig. 1 Selecting the [*Visit scheduling*] view



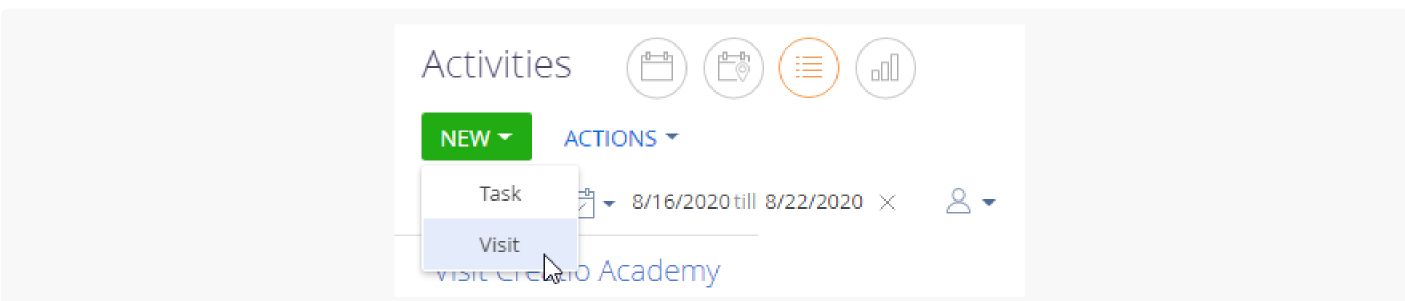
2. Use the filters in the calendar area to select the period and a sales rep employee.
3. Select an outlet to schedule a visit to in the list of accounts to the left, then drag it and drop into the needed time in the calendar (Fig. 2).

Fig. 2 Adding a visit to the calendar



You can also schedule a visit of **sales rep** in the [*Calendar*] view of the [*Activities*] section. Click [*Add action*] → "Visit" on the toolbar to schedule a visit (Fig. 3). This method of scheduling a visit requires populating the [*Contact*] or [*Account*] field on the visit page. If both fields are blank, you will not be able to save the record.

Fig. 3 Adding a visit in the [*Activities*] section list



As a result, Creatio will add a new "Visit" activity. The primary contact of the account will be specified as the contact of the visit. The list of actions will be added to the visit according to the corresponding visit rule. Creatio sets the duration of the visit will according to the corresponding visit rule. If necessary, you can change the visit duration manually.

Note. After adding all visit activities of a sales rep on the calendar, use the map to view the changes in the sales rep's route for each day. Canceled visits are not taken into account when building a route.

A manually created visit will be automatically mapped to a cyclic task if the following parameters match:

- visit time frame

- promoted product
- outlet

If the above parameters of a visit correspond to those of a cyclic task, the [*Cyclic task*] field on the [*General Information*] tab of the visit page will be populated with that cyclic task, and the cyclic task will treat the manually scheduled visit as if it was scheduled automatically (will not schedule duplicate visits, etc.).

Build a route for a sales rep

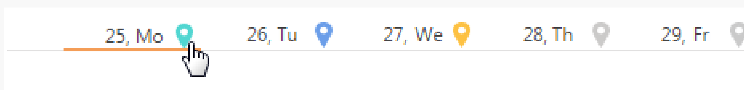
Build sales rep routes on the map for more efficient visit scheduling. Creatio uses the timing of visits and the locations of the sales outlets to automatically chart routes that the sales reps should take.

The sales outlet is displayed on the map based on the GPS coordinates specified on the account page. If an account has several addresses, Creatio will use the address marked as “primary”, regardless of the address type. You can view the address of an outlet on the map and the title of the corresponding visit by clicking the marker of the visit.

When all the visits are added to the map, build a route. To do so:

- Click the corresponding button that is located next to the date in the calendar (Fig. 1).

Fig. 1 Building a route for a sales rep



As a result, the map will display the route between the visit locations for the selected day. The order of visits on the map will correspond to their order in the schedule.

The button in the day title will change its color. The button color will correspond to the color of the route on the map. The route color is different for each day.

You can view routes for several days by clicking for multiple dates.

> **Note.** On the map, the point that the route starts from is your current location (your browser will need permission to share your current location). If your browser privacy settings do not permit sharing location, the first point of the route is the value specified in the “Default city for employees“ system setting.

Sales rep's actions during a visit

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Field Sales for Creatio manages a sales rep’s “to-do” list during the visits and records results of each activity. For that, the sales rep uses a mobile device with Creatio mobile app. We recommend that sales reps use tablets for the best experience when working in the field. Visit pages are most informative when viewed in the horizontal layout.

Attention. Only the users included to the “Sales representatives“ role can use the field features in the mobile app.

The list of actions that must be performed during a visit is stored on the [*Visit actions*] detail of the visit page. For example, according to the rule of the visit, the visit agenda of a sales rep is as follows: check in, do a presentation, place an order for the next batch of products and check out.

To complete an item on a visit agenda:

1. Open the visit page.
2. On the [*Visit action*] detail, toggle the switcher next to the corresponding action to the “Completed“ position. The switcher of a completed action is highlighted in blue.

   As a result, the visit action will be considered completed. You can finish the visit once all required actions are completed (you can skip optional visit actions). A field employee cannot complete a required action unless all preceding required actions on the agenda have been completed. Once the last required action is completed, the visit is considered finished. The action that is not required can be skipped.

   All visit actions are available in the offline mode of the mobile app. When working offline, you do not need to maintain a constant Internet connection. It is required to periodically synchronize the mobile application with the main application to save the changes made when using the mobile device on the Creatio server.

To synchronize the mobile app with the primary Creatio application:

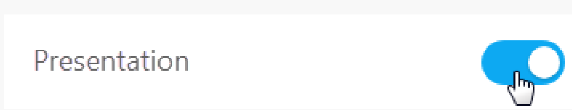
1. Make sure that the mobile device has established an Internet connection.
2. Open the [*Settings*] section of the mobile application.
3. Click the [*Synchronization*] button.

   As a result, the data from the primary application will be displayed in the mobile app and the primary application will display the records that were created using the mobile app.

Do a presentation

If the visit agenda requires conducting a presentation, the “Presentation“ action (Fig. 1) becomes available to the employee. As a result, a Microsoft PowerPoint file will open in your mobile app, so you can use it during the presentation.

Fig. 1 Performing the ”Presentation” action

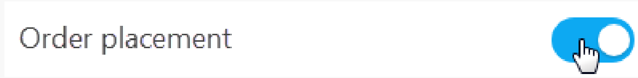


Note. More information about the ”Presentation” visit action is available in the “Set up rules and actions of a field meeting” article.

Place an order

To place an order, on the [*Visit actions*] detail of the mobile app, perform the "Order placement" action (Fig. 1).

Fig. 1 Placing the order

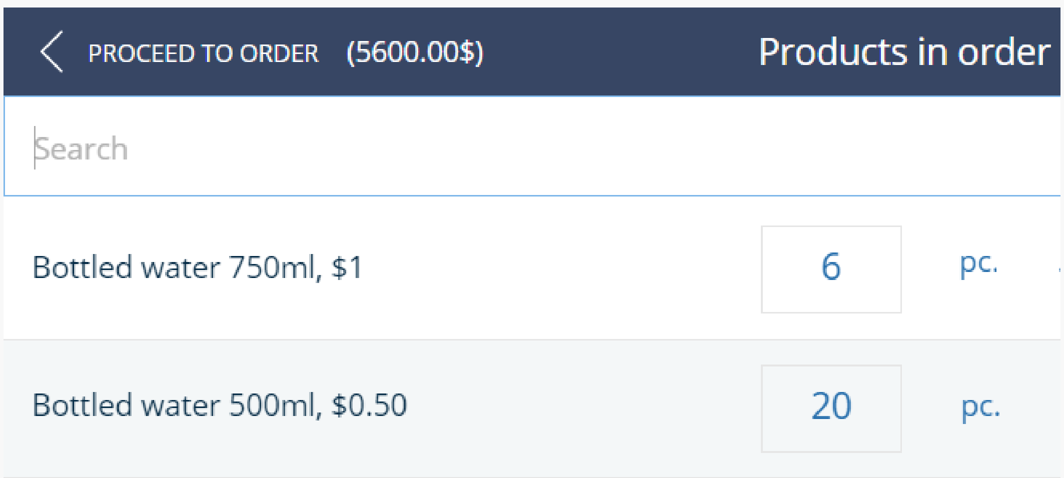


When the action is completed, a new order will be automatically added. It will be connected to the current visit and the account specified in the visit.

To add products to the order:

1. A page with a list of products specified in the last order of the current account will open after running the [*Order placement*] action (Fig. 2). Filter the required products from the catalog using quick filters. You can learn more about product selection in the "Find products in the catalog" article.

   Fig. 2 The order product page

2. Click the + button next to the needed product.
3. In the displayed window, enter the number of ordered products and tap [*Enter*]. If necessary, repeat the action to add more products.
   To remove a product from the order, specify "0" as its quantity.
4. Tap the [*Proceed to order*] link on the [*Products in order*] page that is located at the top left corner of the application window.

   As a result, a new order with specified products will be added to the system.

Find products in the catalog

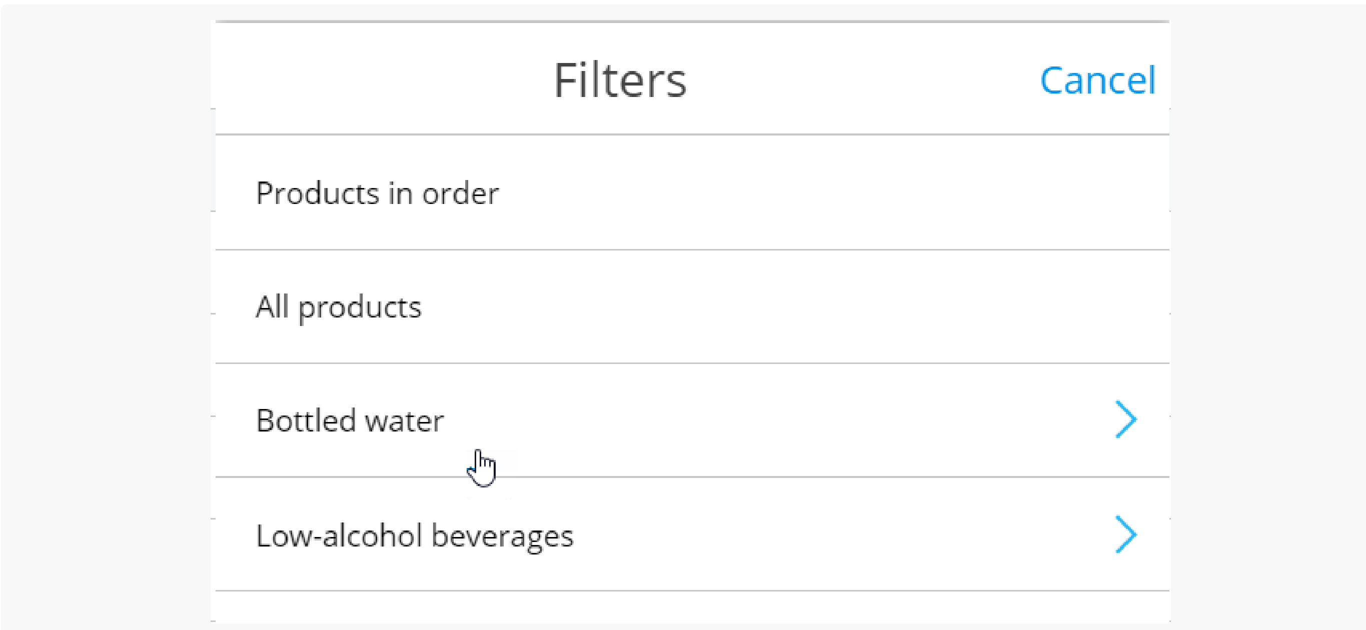
In the mobile app, you can search for products using the product catalog. The product folders that are used to search for products in the mobile app correspond to the product catalog that is configured in the [*Products*] section of the main application.

> **Note.** The product folders in the mobile app can be set up based on all base lookup fields of the [*Products*] section. In the mobile app, you cannot see the folders created based on the custom fields.

For example, the catalog is set up based on product categories and types. Display the products with the “Bottled water“ category and the “Soda“ type:

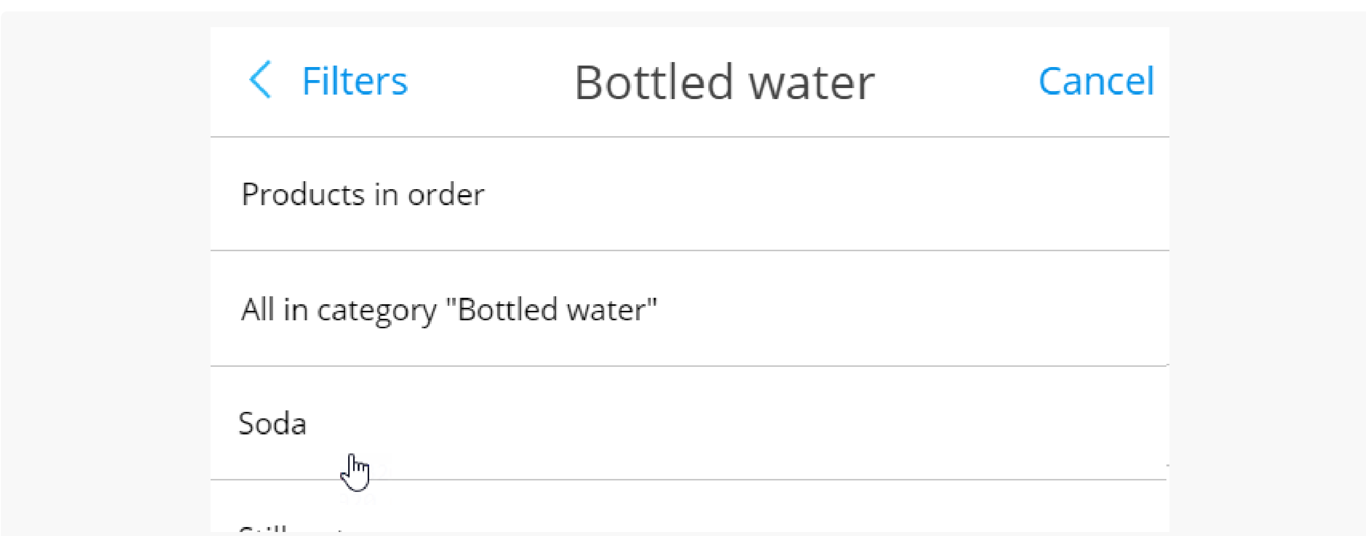
1. Go to the [*Products*] detail in the mobile app.
2. Click the [*Products in order*] link that is located in the title of the product list.
3. In the displayed window, select the needed product category, for example, “Bottled water“ (Fig. 1).

Fig. 1 Selecting the product category



4. From the list of tags that are connected to the selected category, select the needed product type, for example, “Soda“ (Fig. 2).

Fig. 2 Selecting the product type

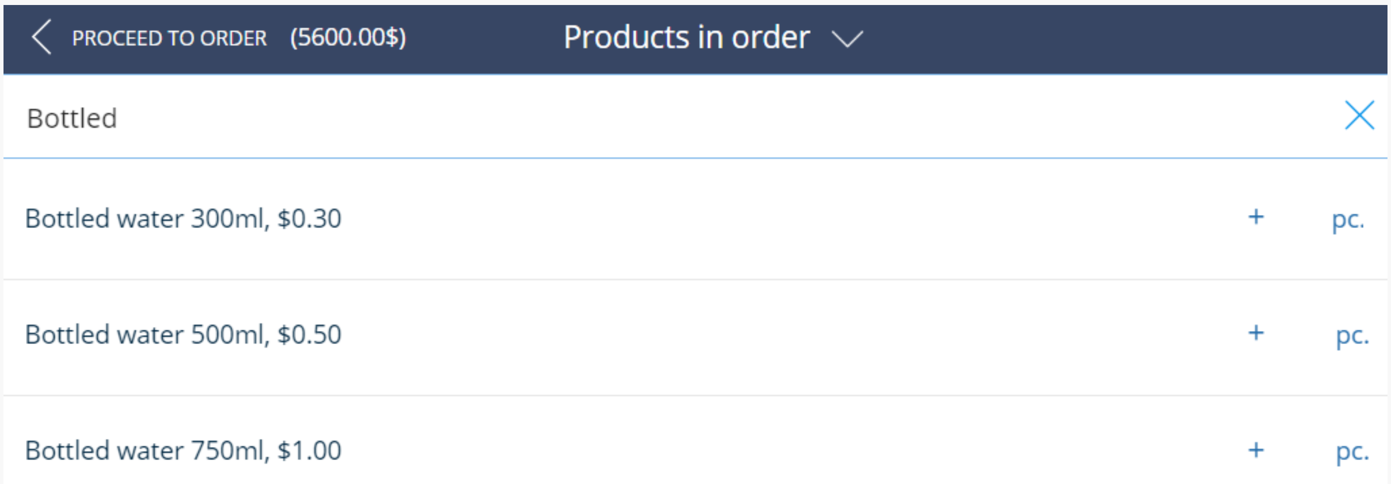


As a result, the detail will display all products of the selected type that are available in Creatio.

Note. To view the products that have been added to the order, select the [*Products in order*] folder. You can also display all products that are stored in Creatio. To do this, select the [*All products*] folder. To display all products of a certain category, select the [*All in category...*] folder from the menu of the corresponding category:

To perform a search by name, use the search string that is located at the top of the product list on the [*Products*] detail. Enter the needed value in the string. As a result, the detail will display all products whose name matches the search criteria (Fig. 3).

Fig. 3 Searching for a product by name



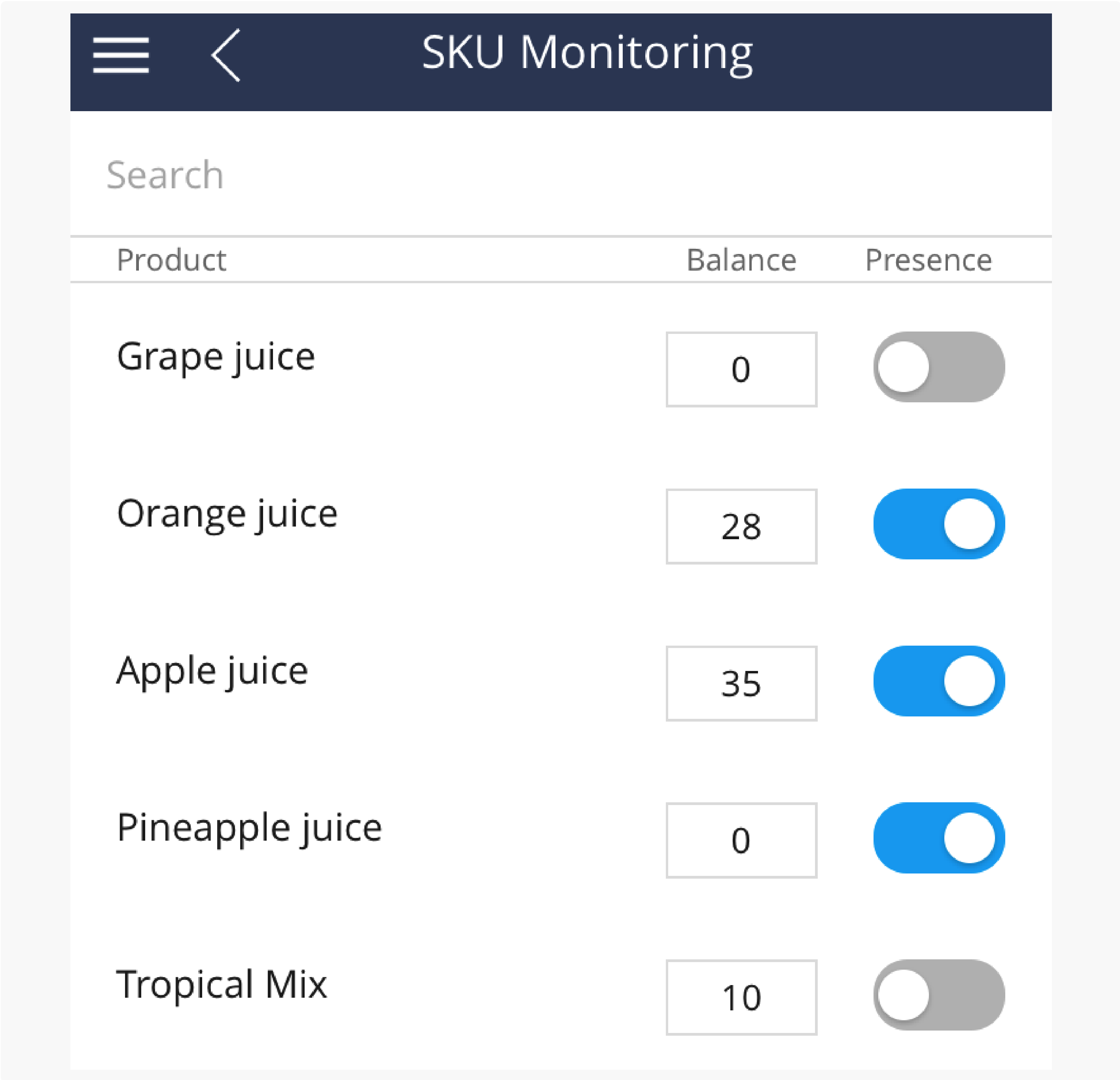
Copy products

Alternatively, filter products using the list of products from the last order from the current sales outlet. When scheduling a visit, the [*Products*] detail is automatically filled in with the list of products specified during the previous visit to this sales outlet.

Monitor SKU

During a visit, tap the [*SKU Monitoring*] action. A page will open, where you can enter the availability of products in stock and identify whether the products are on display (Fig. 1).

Fig. 1 SKU monitoring page



You can also use the smartphone or tablet camera to take a picture of products on display and attach it to the visit. To do so:

1. On the section page, click [*Edit*].
2. Select the [*Attachments*] detail.
3. Click .
4. Select the photo you made earlier and attach it to the activity. You can also use the [*Take picture*] action. The mobile device will switch to its camera mode. The picture taken will be automatically added to the [*Attachments*] detail.

Check-in verification

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You can keep track of sales rep's progress by setting up the check-in performance and verification parameters during visits. Use custom details, dynamic folders, or dashboards to display check-in results.

Creatio stores detailed check-in information including the source of received coordinates and the time of receiving the coordinates from GPS. Current time is indicated for the coordinates received in real-time while the time of caching is used for the cached coordinates.

Check-in verification procedure

Whenever a sales rep performs the check-in action, Creatio captures the current or cached coordinates of the latest sales rep's location and compares them to the account's address coordinates. The allowable discrepancy between these coordinates is specified in meters in the "Check-in verification range" system setting.

The address marked as [*Primary*] is used for verification. The check-in is not verified if it was not possible to obtain the coordinates and if the value of the [*Check-in verification range*] system setting is not specified.

- If the GPS coordinates of the sales rep and the visited account **are in the verification range**, the check-in will be verified and the status of the visit will be changed to "In progress". The "Check-in coordinates are within range" status will be displayed on the [*Check-in and check-out results*] detail.
- If the discrepancy between the GPS coordinates of the sales rep and the visited account **exceed the verification range**, the sales rep will receive the following message: "Check-in coordinates are out of range. Would you like to save check-in results?" If this result is saved, the check-in will have the "Check-in coordinates are out of range" status.
- If the check-in verification is not possible (the address of an account is not specified or a sales rep had no Internet connection during the verification process), the sales rep will receive the following message: "Unable to verify check-in coordinates. Would you like to save check-in results?" If the check-in results are saved, the check-in will have the "Unable to verify check-in coordinates" status.

Set up check-in verification

Use the following system settings to set up check-in verification:

- **"Use last known location of user" –** This system setting enables mobile devices to use the latest cached sales rep's location and save it as the check-in location if the actual check-in coordinates are unknown. This usually occurs when sales reps perform check-in inside buildings, where GPS may be unavailable.

Note. Working with cached coordinates is available for devices on Android OS.

- **"Check-in verification range" –** This system setting enables you to monitor the sales rep check-in performance. It helps identify the acceptable discrepancy (in meters) between the sales rep's coordinates at the time of check-in and the coordinates of the corresponding sales outlet. Specified distance will be used for check-in verification.

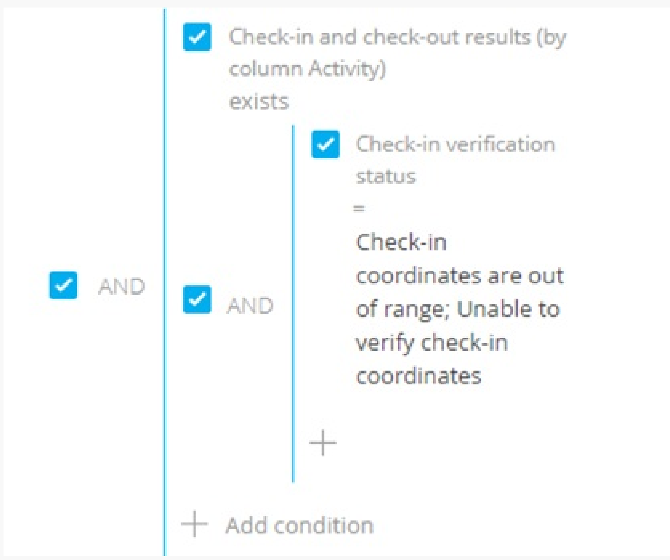
Attention. If the range value is not specified, check-in verification will not be performed.

You can add the [*Check-in and check-out performance result*] detail based on the [*Check-in and check-out performance result*] object to display the check-in results and show the columns in the detail list on Creatio primary application page.

Get the results of the check-in verification.

To track the check-in results, you can configure a dynamic folder in the [*Activities*] section, or a dashboard in the dashboards view of this section. An example of configuring the filtration conditions for all visits with unverified check-in (Fig. 1)

Fig. 1 Filtration conditions of all visits with unverified check-in



View check-in/check-out coordinates on the map

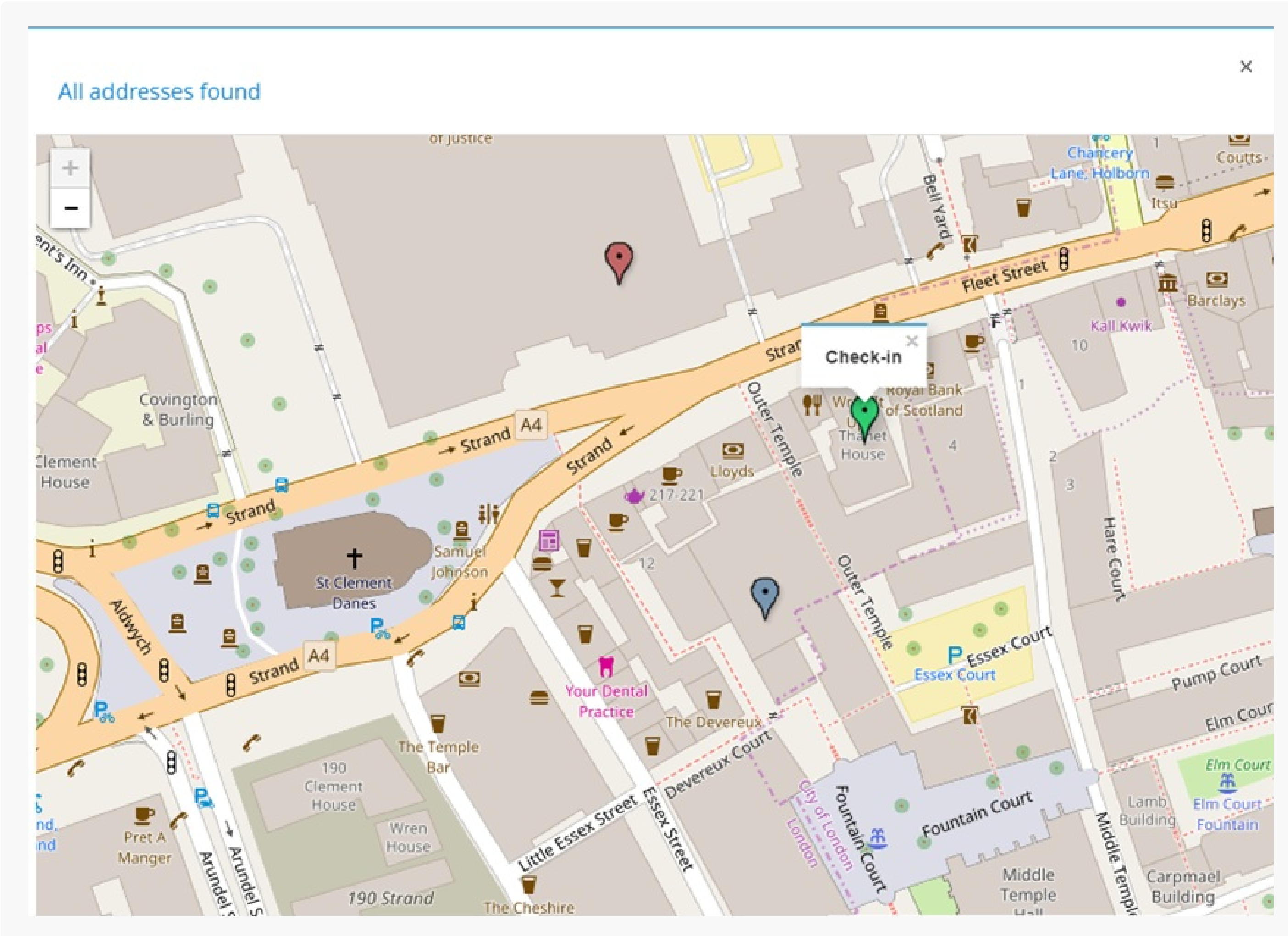
To track the coordinates of the sales rep check-in and check-out:

1. Open the visit page.
2. Click the button on the [*Actions - Visit*] detail (Fig. 1).

Fig. 1 Viewing check-in/check-out coordinates on the map

This will open a window with a map, that contain markers that represent GPS coordinates of an account and sales rep during check-in and check-out (Fig. 2).

Fig. 2 Visit map with account coordinates, check-in, and check-out



Sales rep GPS coordinates will be displayed on the map after check-in and/or check-out in the mobile app and synchronization of mobile app with Creatio primary application.