Creatio Academy

Field Module

Version 7.17

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Install Field Module for Creatio

The Field Module for Creatio add-on can automate field staff tasks.

This lets you:

- Plan field staff meetings (“visits”).
- Build 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.

Field staff uses Creatio mobile app in the field to record the meeting time frame and conduct presentations during a visit. Field Module for Creatio is fully compatible with all Creatio products. Use it as a framework for custom field apps. For example, field banking or field service.

Install the app from the marketplace to access the field functionality. To do so:

1. Click in the main Creatio application.
2. Click [*Installed applications*]. This will open the application management page.
3. Click [*Add application*] → [*Choose from Marketplace*].
4. Install the Field module 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 install Field module for Creatio. To do so:

1. Grant access to the website http://marketplace.creatio.com/.
2. Install the Field module for Creatio app: http://marketplace.creatio.com/app/field-module-creatio.

   Learn more in a separate article: Install applications from the Marketplace.

Attention. To access the field sales functionality, all field staff members must be licensed separately.

Set up visit rules and actions for sales reps

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. This functionality lets field staff perform the following basic actions on their mobile devices:

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.
Check-out	When the action is performed, the system receives the GPS coordinates of the sales rep's location and the visit is assigned the “Completed“ status.

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 a med rep visit rule

1. Click in the main Creatio application.
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 field staff member can perform during one day.
6. Click [*Save*].
7. Similarly, specify the other rules. For example, the rules may vary by the due date or depending on the location a sales rep is operating in.

   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.

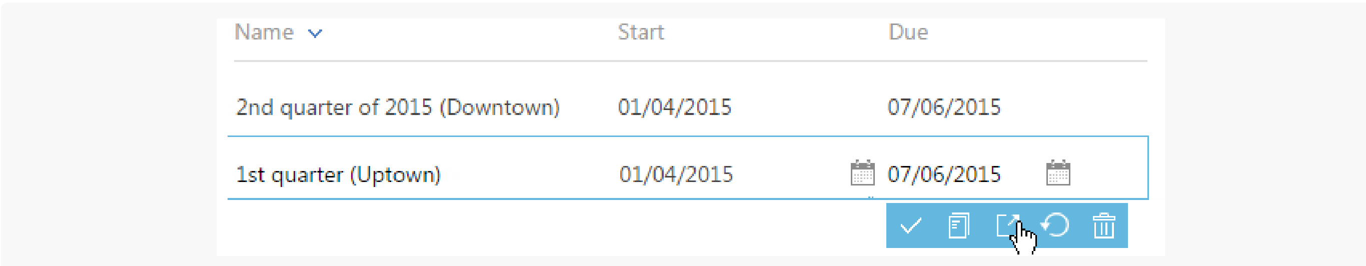
Manage med rep visit actions

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 in the main Creatio application.
2. Go to the [*System setup*] block –> click [*Lookups*].
3. Click the [*Field sales rules*] lookup.
4. Select a rule to form an action and click (Fig. 1).

Fig. 1 Open a rule for editing



5. On the rule page, expand the [*Actions during visit*] detail and click the [*Add*] button.
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 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.

Add a presentation to a visit

The “Presentation“ visit action requires additional setup so that the field staff members have full access to the presentation materials.

In the system, create a knowledge base article 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. You can add not just PowerPoint presentations but also any other 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 in the main Creatio application.

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 field staff member performs the [*Presentation*] visit action, the PowerPoint presentation (or any other document) attached to the knowledge base article will open on their mobile device. All presentations and materials 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.

Schedule sales rep visits

Schedule visits of your sales reps to the sales outlets and build routes on the map using the [*Activities*] section.

Use the [*Visit scheduling*] view, the [*Calendar*] view, and the section list to schedule a visit. You can build optimal routes in the [*Visit scheduling*] view.

Use the [*Visit scheduling*] view of the [*Activities*] section to plan field meetings.

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

1. **Account list.** 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. A sales rep’s **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 daily route of a sales rep.

Schedule visits automatically

Use the cyclic tasks functionality to automatically plan field staff visits to sales outlets in Fieldd Module for Creatio. A cyclic task is an activity that includes multiple visits planned for a certain period of time. You can create cyclic tasks in the [*Cyclic tasks*] section. One cyclic task may schedule multiple visits over a certain period.

> **Note.** After installing the “Field Module for Creatio” app, make sure you add the [*Cyclic tasks*] section to the needed workplaces.

1. Add 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.

    > **Note.** 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.

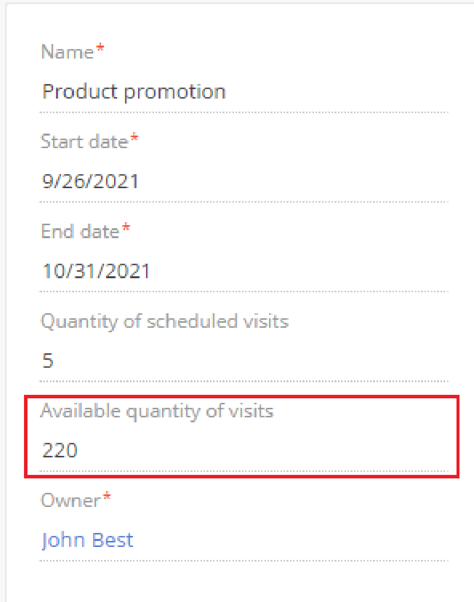
> **Note.** We recommend planning your visits quarterly to analyze product promotion results correctly.

2. Schedule med rep visits using cyclic tasks

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

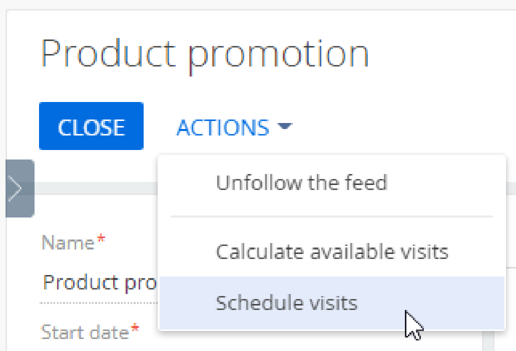
1. Open the cyclic task created on the previous step. Use the [*Calculate available visits*] command of the [*Actions*] menu on the cyclic task page to calculate available visit slots. As a result, Creatio will populate the [*Available quantity of visits*] field of the cyclic task page (Fig. 1).

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. Creatio will notify you when the import process is complete. 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.

Automatic scheduling of visits

The algorithm for automatic visit planning is as follows:

1. Creatio 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. Creatio determines the closest sales outlet to the starting point. The optimal car route is determined within the 200 km radius.
3. Creatio checks the working hours of the sales rep and retail outlet.

Note. When checking the working hours, Creatio analyzes the calendar of the sales rep employee. Sales outlet work hours are determined in the “Base calendar” system setting (“BaseCalendar“ code).

4. Creatio creates the first visit.
5. 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.

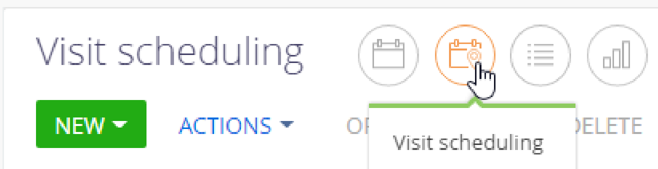
Schedule visits manually

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

To schedule a visit:

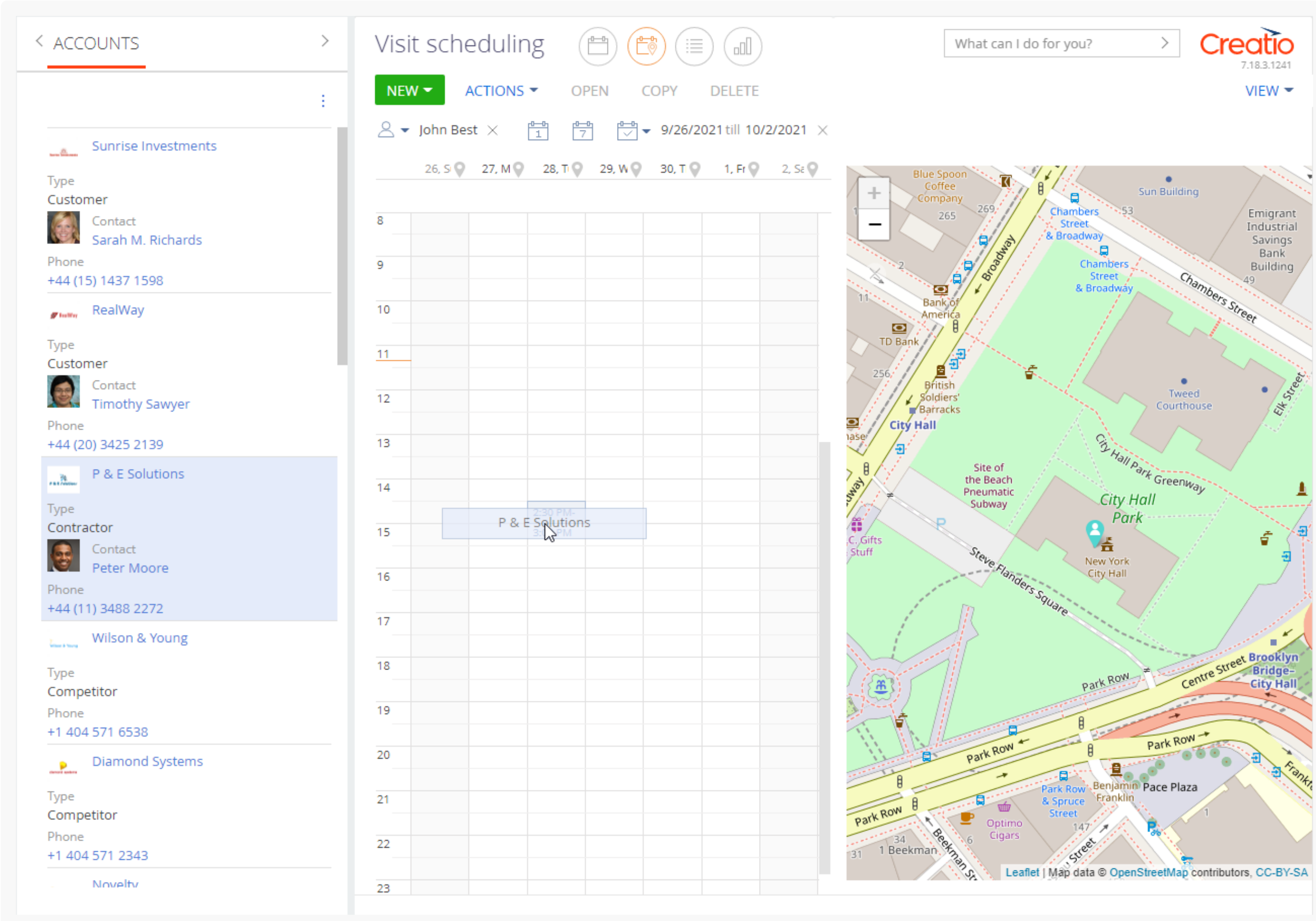
1. In the [*Activities*] section, select the [*Visit scheduling*] view (Fig. 3).

Fig. 3 Selecting the [*Visit scheduling*] view



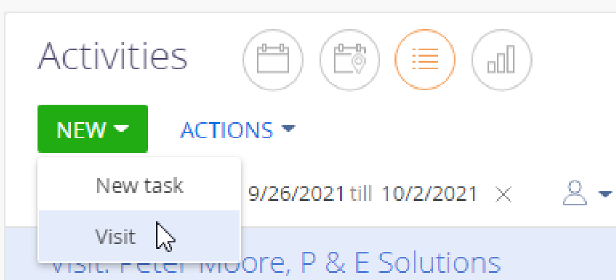
2. Use the filters in the calendar area to select the time period and a sales rep employee.
3. Select an outlet to schedule a visit to in the list of accounts to the left, then drag it and drop into the needed time in the calendar (Fig. 4).

Fig. 4 Adding a visit to the calendar



You can also schedule a visit of field staff in the [*Calendar*] view of the [*Activities*] section. Click [*Add action*] → "Visit" on the toolbar to schedule a visit (Fig. 5). 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. 5 Adding a visit in the [*Activities*] section list



As a result, Creatio will add a new "Visit" activity with the "Visit" type. 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.

To automatically connect a manually created visit to a cyclic task, the following parameters must coincide:

- visit time frame
- account.

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.).

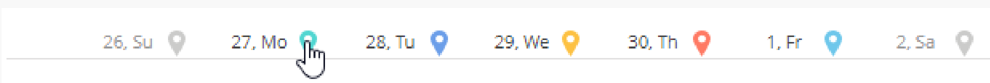
Build a route for a field staff member

Build field staff 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. Click the corresponding button that is located next to the date in the calendar (Fig. 6).

Fig. 6 Building a sales rep route for a day



As a result, the map will display all visits 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 if your browser allows sharing this information. 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 (“EmployeeCityDef” code).

Sales rep visit actions

Field Module for Creatio manages sales rep’s “to-do” list during the visits and records results of each activity For that, the field staff member 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 horizontal layout.

Attention. Only the users with the “Field employees“ 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 sales rep has to perform the following actions: check-in, presentation, order placement and check-out. Use the [*Field visit rules*] lookup to customize the list of visit actions.

To perform an action during a visit:

1. Open the visit page.
2. On the [*Visit actions*] detail, set the switcher next to the needed 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 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 application with the main application:

1. Make sure that the mobile device has established an Internet connection.
2. Open the [*Settings*] section of the mobile application.
3. On the opened page, 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.

Check-in verification for sales reps

You can control sales rep’s wok 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 (“CheckInRadius” code).

The last added 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 settings (“CheckInRadius” code) 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 performance result*] 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” (“UseMobileLastKnownLocation” code). This system setting enables a mobile device 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 signal may be unavailable.

Note. Functions of working with cached coordinates are available for Android OS devices.

- “Check-in verification range” (“CheckInRadius” code). This system setting enables you to control the check-in performance by a sales rep. 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.

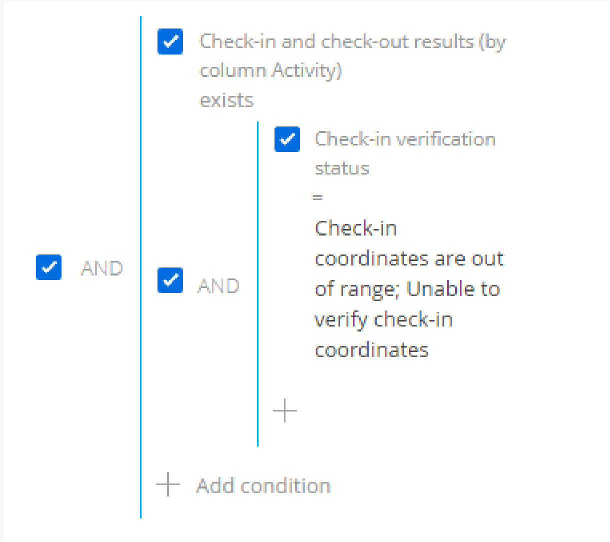
Attention. If the range value is not specified, check-in verification will not be performed.

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 check-in verification results

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 filtering conditions for all visits with unverified check-in (Fig. 1).

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



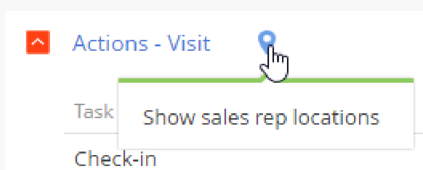
Note. More information about work with folders and dashboards is available in the separate articles: [Folders](#) and “[Dashboard tiles](#).”

View coordinates on the map.

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

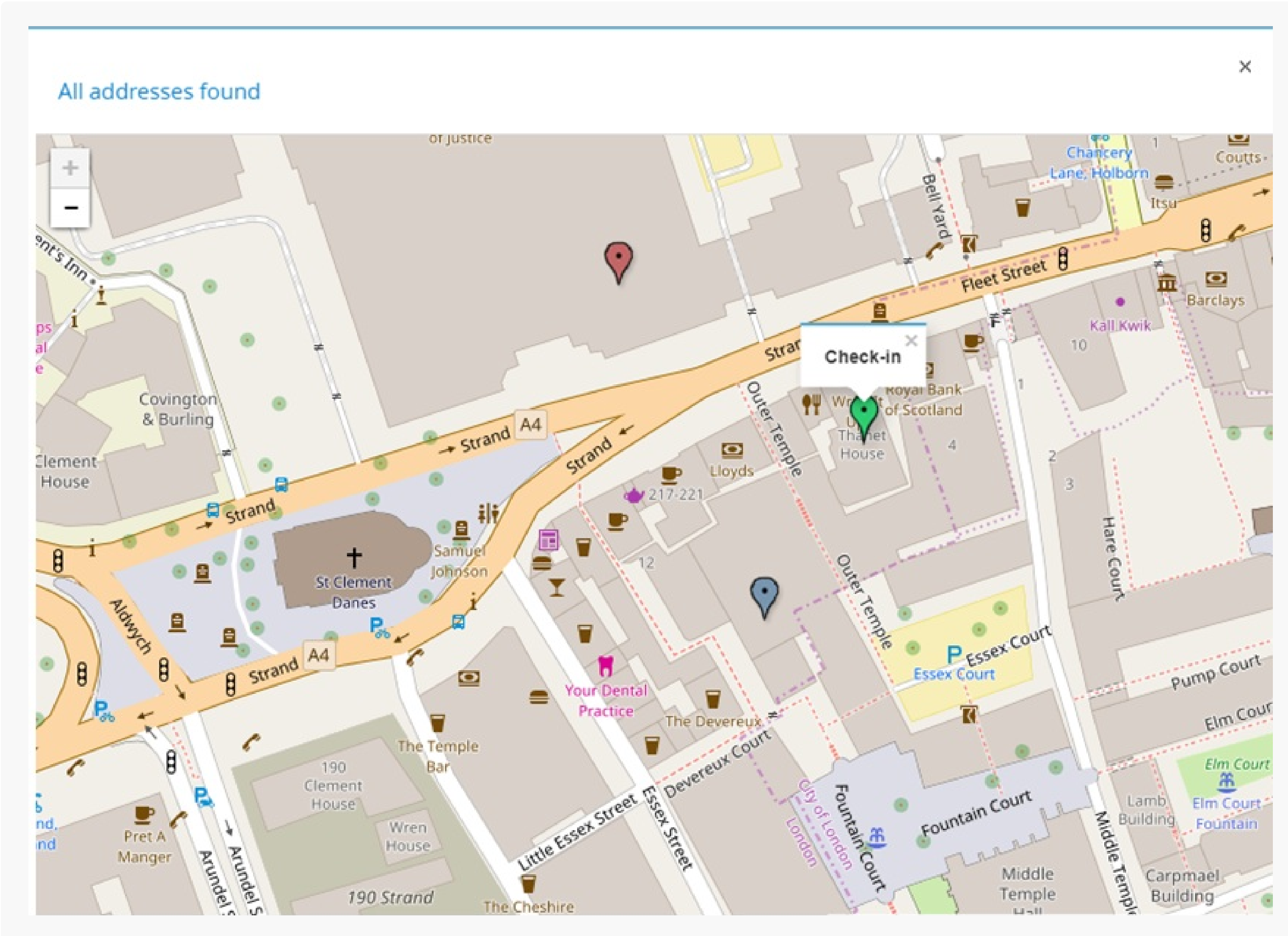
1. Open the visit page.
2. Click the button on the [*Actions - Visit*] detail (Fig. 2).

Fig. 2 Viewing check-in/check-our 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. 3).

Fig. 3 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.