

# Field sales

## Plan visits

Version 7.17



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# Plan visits

PRODUCTS: SALES ENTERPRISE

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.

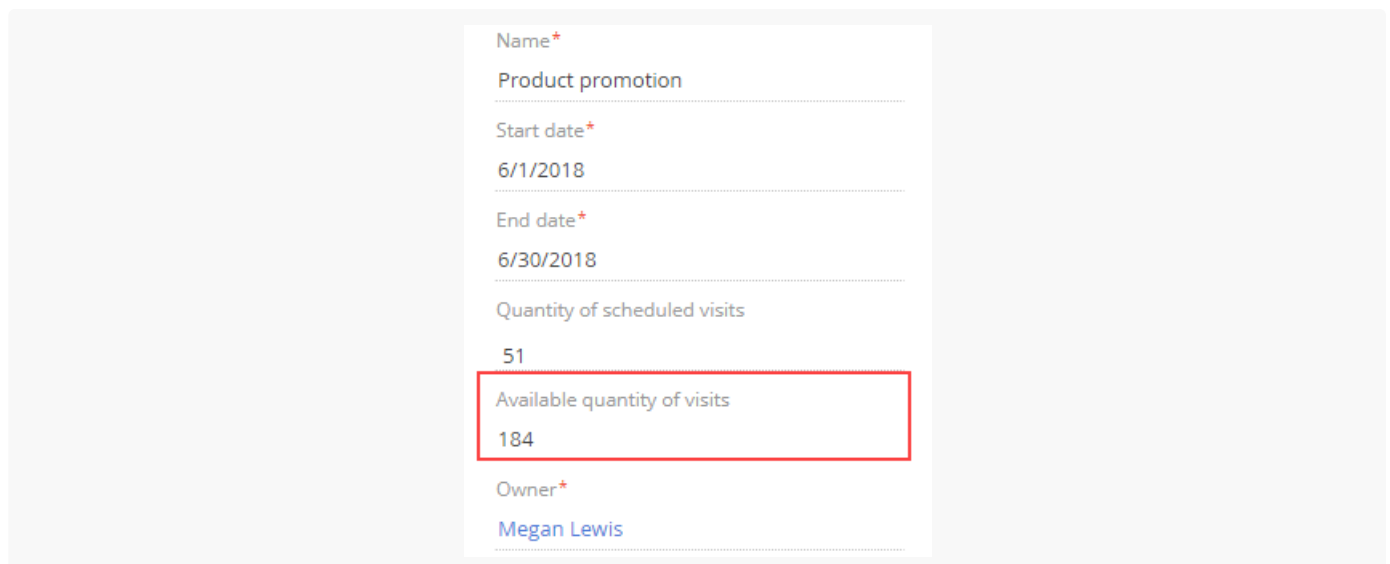
**Note.** We recommend planning your visits quarterly to analyze product promotion results correctly.

## II. Create visits from a cyclic task

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

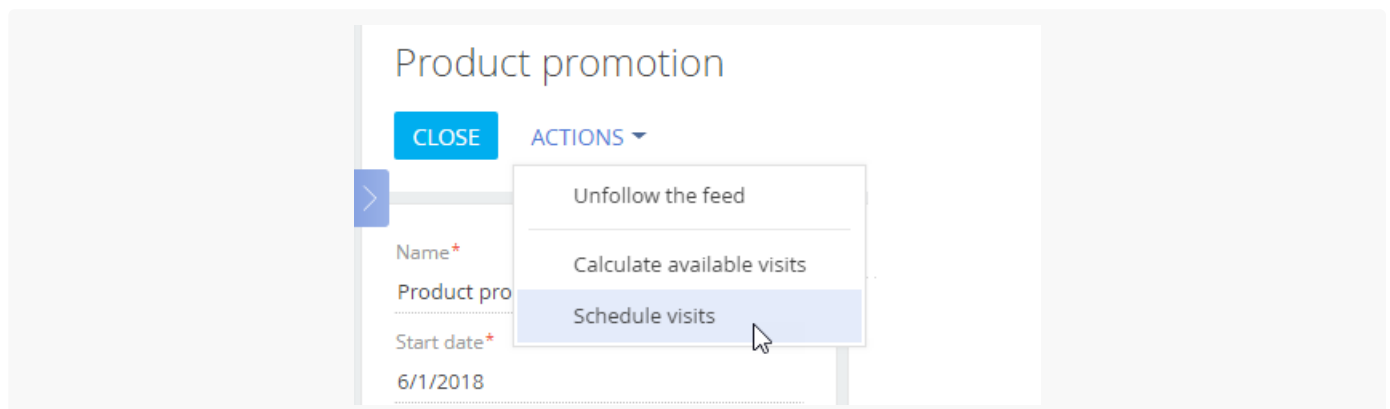
1. Open the cyclic task created on the previous step and use the [ *Calculate available visits* ] command of the [ *Actions* ] menu on the cyclic task page to calculate available visit slots. As a result, Creatio will populate the [ *Available quantity of visits* ] field of the cyclic task page ([Fig.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

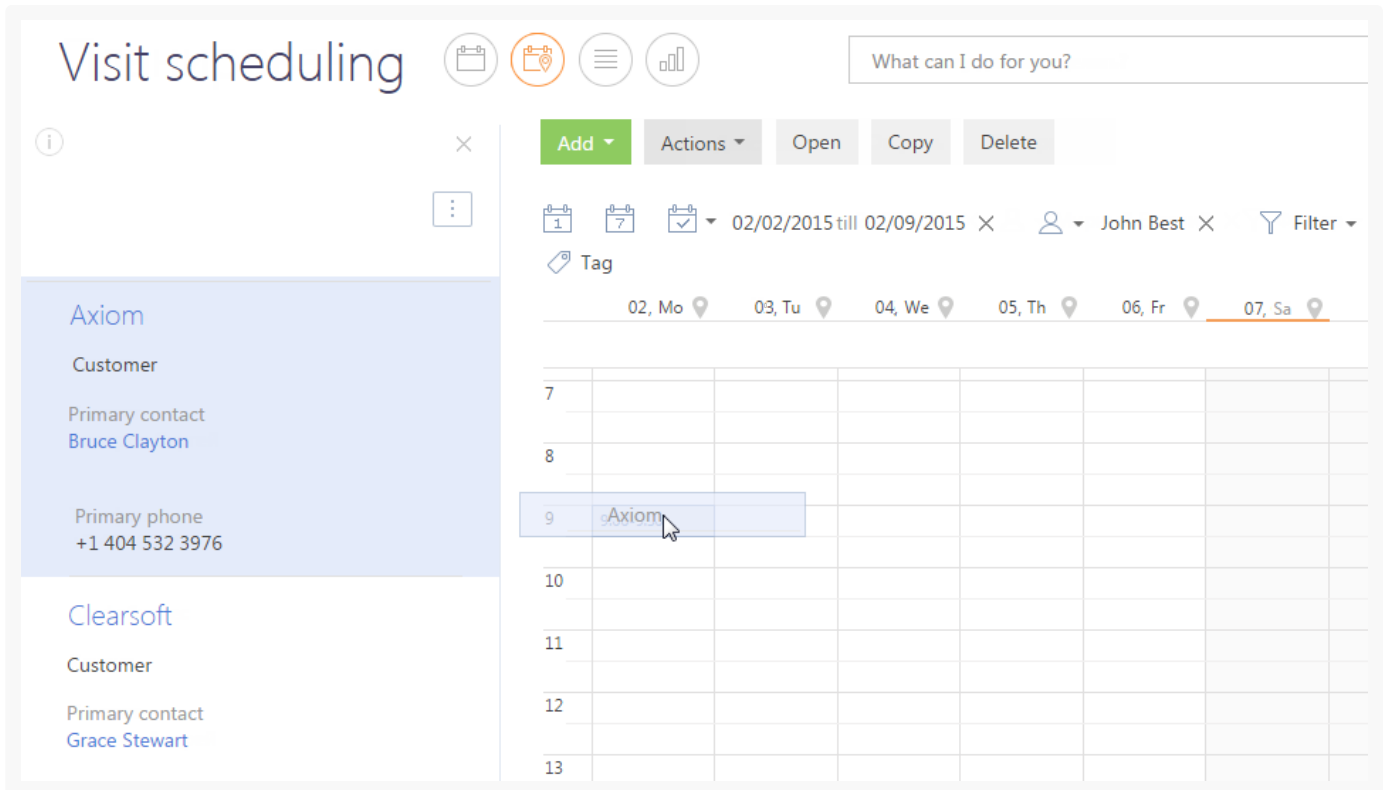
1. In the [ *Activities* ] section, select the [ *Visit scheduling* ] view ([Fig. 1](#)).

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



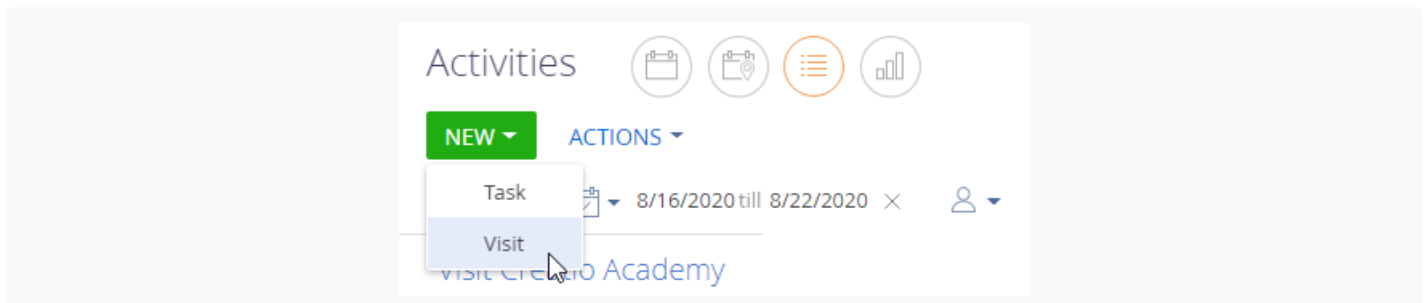
2. Use the filters in the calendar area to select the period and a sales rep employee.
3. Select an outlet to schedule a visit to in the list of accounts to the left, then drag it and drop into the needed time in the calendar ([Fig. 2](#)).

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

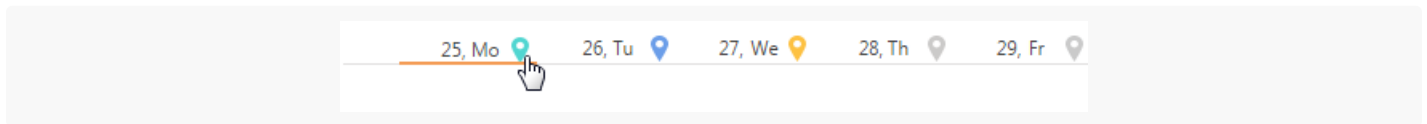
Build sales rep routes on the map for more efficient visit scheduling. Creatio uses the timing of visits and the locations of the sales outlets to automatically chart routes that the sales reps should take.

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.