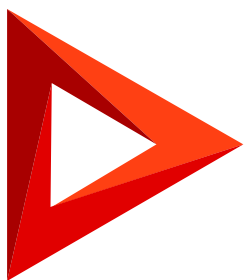


Field sales

Check-in verification

Version 7.17



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Check-in verification

PRODUCTS: SALES ENTERPRISE

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.

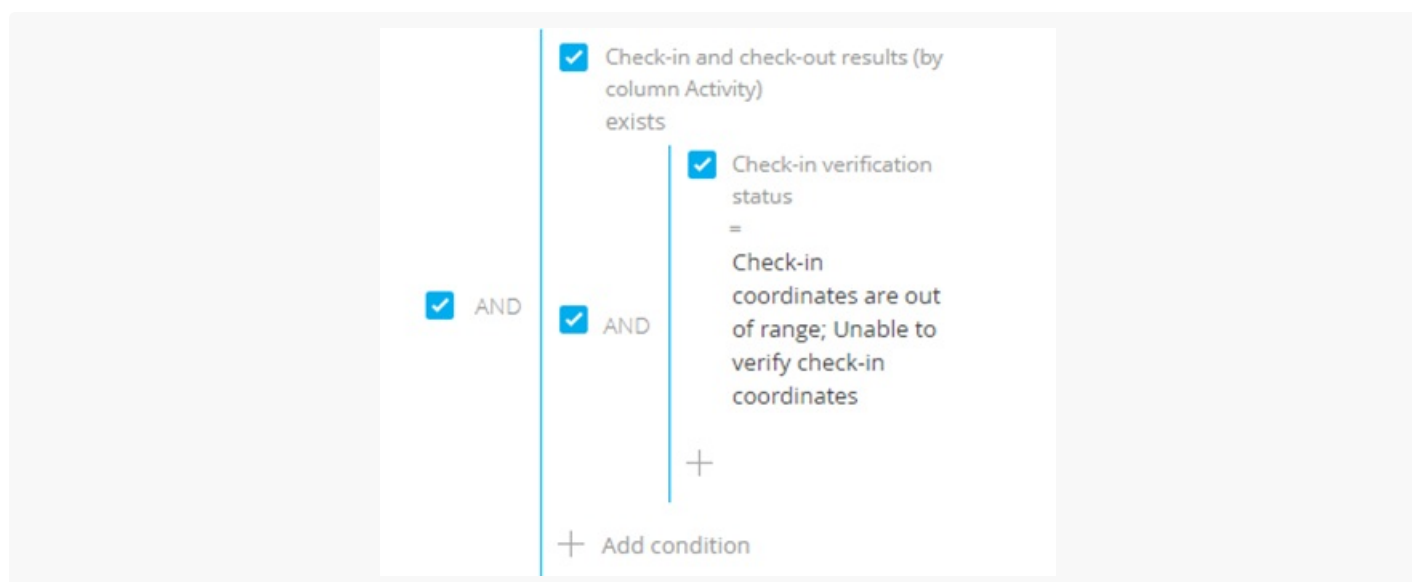
Attention. If the range value is not specified, check-in verification will not be performed.

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

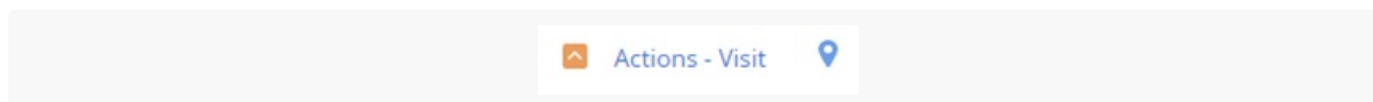


View check-in/check-out coordinates on the map

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

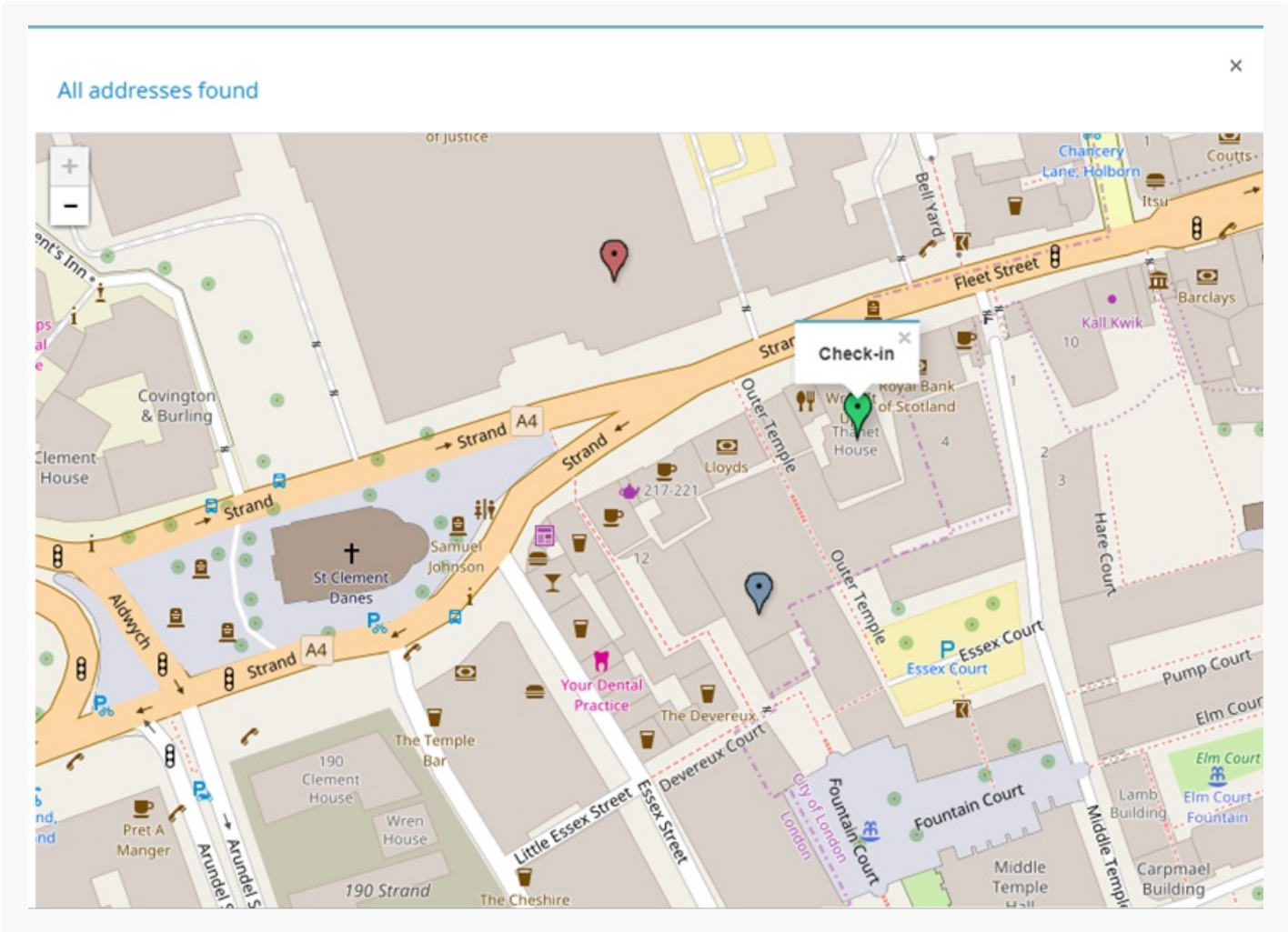
1. Open the visit page.
2. Click the  button on the [*Actions - Visit*] detail ([Fig. 1](#)).

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.