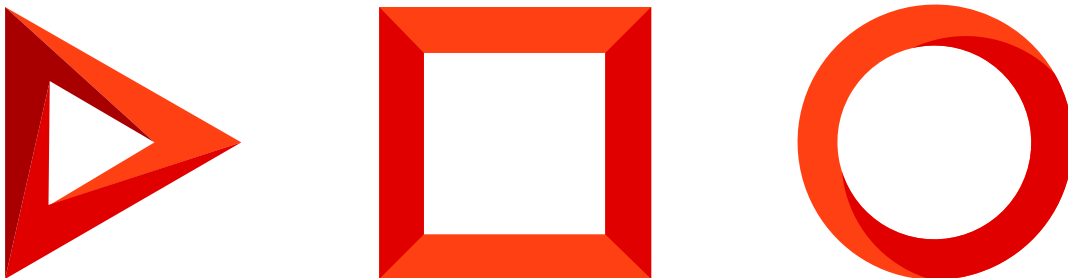


# Check-in verification

Monitor check-in performance

Version 7.17



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# Table of Contents

<b>Monitor check-in performance</b>	<b>4</b>
Check-in verification procedure	4
Set up check-in verification	4
Get check-in verification results	5

# Monitor check-in performance

You can control med rep's work 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

At check-in Creatio captures the current or cached coordinates of the latest med rep's location and compares them to the account's address coordinates in case of a visit to pharmacy or to the contact's address in case of a visit to physician. 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 med rep and the visited account or contact **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.
- In case distance between the med rep GPS coordinates and the factual check-in **are out of the check-in verification range**, the med 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 med rep had no Internet connection during the verification process), the med 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 med reps 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 med rep. It helps to identify the acceptable discrepancy (in meters) between the med rep's

coordinates and the actual coordinates of the check-in.

**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

