Creatio Academy

Visit actions

Sales rep visit actions

Version 7.17

Table of Contents

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.