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## **BluWave- Geo Location & Travel Claim**



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### 1. Introduction

On BluWave activities can be stamped with the location (latitude and longitude) of where the activity was completed by the sales person. The system uses this both to generate a travel claim report for the user and to confirm that the user was at the customer site.

In order for both these feature to work properly there are a few settings that would need to be set up:

- 1. The device's location needs to be on.
- 2. The browser needs access to the device's location.
- 3. The starting location needs to be set.
- 4. The geo location tracking settings needs to be on in the users' profile.
- 5. The user would need to complete the activities on-site.

These steps are discussed in more detail.

#### 1.1 Switch on the device's location

Make sure that the location for the device is switched on. (Some devices require the device to be restarted to work properly).

Please note these settings might move or change based on updates made by operating software.

#### 1.1.1 For Windows Devices

Settings						-	×
		W	/indows Settings				
		Find a setting	g	Q			
旦	<b>System</b> Display, sound, notifications, power		Devices Bluetooth, printers, mouse		Phone Link your Android, iPhone		
$\oplus$	Network & Internet Wi-Fi, airplane mode, VPN	¥	Personalization Background, lock screen, colors		Apps Uninstall, defaults, optional features		
R	Accounts Your accounts, email, sync, work, family	。 A字	Time & Language Speech, region, date	⊘	<b>Gaming</b> Game bar, DVR, broadcasting, Game Mode		
Ģ	Ease of Access Narrator, magnifier, high contrast	A	Privacy Location, camera	$\mathbb{C}$	Update & Security Windows Update, recovery, backup		
م	Search Language, permissions, history						



#### 1.1.2 For Apple Devices

Follow these steps to enable location services in OS X Mountain Lion or later

- I. Choose System Preferences from the Apple menu.
- II. Click the Security & Privacy icon in the System Preferences window.
- III. Click the Privacy tab.
- IV. If the padlock icon in the lower left is locked (<sup>()</sup>), click it and enter an admin name and password to unlock it (<sup>()</sup>).
- V. Select Location Services.
- VI. Check the "Enable Location Services" checkbox.



#### 1.1.3 For Android Devices

Simply enable your location settings, by dragging down the taskbar and clicking on the Location icon.

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#### 1.2 Allow BluWave access to the device's location

Make sure that you grant Bluwave access to your location. By clicking on the Lock in the URL bar and choosing the **Allow** button next to the Location.

#### 1.2.1 Windows



#### 1.2.2 Activating Location Services in Safari 6 or later

When you visit a geolocation-enabled website in Safari, you are asked if you want to share your location with the site. Websites can provide helpful location-based information, such as showing you the nearest post office or bank ATM. In the sheet that appears, select the option "Remember my decision for one day" if you want to allow or disable authorization for the next 24 hours.



This will be active for 24 hours only. Thereafter you will have to "Allow" it again the next day

To change your Location warning message settings do the following:

- I. In Safari select Safari > Preferences.
- II. Click the Privacy icon in the Preferences window.
- III. Select the "Prompt for each website one time only" option.

Then the location will not keep on appearing once each day. (You can keep the other settings as they are in your system.)

00	Privacy
General Bookmarks Tabs AutoFill Passwords	Security Privacy Notifications Extensions Advanced
Cookies and other website data:	Remove All Website Data
	247 websites stored cookies or other data Details
Block cookies:	<ul> <li>From third parties and advertisers</li> <li>Always</li> </ul>
	O Never
Limit website access to location services:	Prompt for each website once each day
	O Prompt for each website one time only O Deny without prompting
Website tracking:	Ask websites not to track me
Web search:	Prevent search engine from providing suggestions ?

#### 1.3 Set the starting location for the travel claim report

The user must set their default location (work/home address) on their profile- this will calculate from where the users are leaving to go to appointments most often.

	Click on the Use current location button or the Select from m	<b>1ap</b> button in the users p	rofile.
--	---	----------------------------------	---------

Edit User D	etails and Roles		
Full Name	Michelle Bester	User Name	michelle@demo.co.za
Branch	Bloemfontein 🗸	Date Captured	03/09/2018 00:00:00
Sub-Branch/Division:	Management 🗸	Rep Code	517143
Designation	Manager	Find my Sage	One Repcode HTML Signature
Telephone	011 462 6871	4	
Cell	074 586 3506	र 🌉	
Email	mibpsnyders@gmail.com	Ū	
Active	Change Password	Browse	
Monthly Targets	No of Quotes 10	Priority %	Start and End GIS Location
Target Quoted Value	500000	10 %	Use Current Location Select From Map
Target Sales Value	100000	10 %	Rate Per Km 2.5
GP Value	50000		Rate Per Hour: 100

To check what and if a location has been set- click on the **Select From Map** button in the users' profile to see what address has been chosen.

The starting location can also be set from this page. Simply click anywhere on the map and click on the **Save This Location** button.



#### 1.4 Enable the correct settings on the users' profile

Make sure the user has the following enabled and set on the users' profile:

- The **Rate per Km** is typed in. (Not mandatory, unless it will be used to calculate the travel expenses of the user at the end of each month)
- That the checkbox next to Track Geo Location of Activities? is checked.

Fuil Name	Michelle Snyders	User Name	michelle@bluwave.co.za		
Branch	Bryanston 🔻	Date Captured	11/09/2018 00:00:00		
Designation	Implementation Consultant	Change Password	HTML Signature		
Telephone	011 462 6871	To Change your Passwo	rd, first click on the Change Password button		
Cell	074 586 3506/				
Email	michelle@bluwave.co.za				
<u>Monthly Targets</u>	No of Quotes 0	Start and End GIS Locat	Start and End GIS Location		
Target Quoted Value	0	Use Current Location	Sciect From Map		
Target Sales Value	0	Rate Per Km	2.5		
GP Value	0	Active	4		
GP Value No of Units	0	Active	() ()		
GP Value No of Units No of Face-to-Face Visits	0 0 0	Active	Find my Sage One Repcode		
GP Value No of Units No of Face-to-Face Visits Approval Manager	0 0 0 	Active Rep Code	Find my Sage One Repcode		
GP Value No of Units No of Face-to-Face Visits Approval Manager Do you want to copy your a	0 0 0 xctive opportunities to the current mo	Rep Code	Find my Sage One Repcode MS88		

#### NOTE:

Enabling the **Default New Activity Company to the nearest company based on Geo Location** checkbox in your profile, helps you as the user to quick create a call report for the company you are physically at. (This is not a part of the tracking of activities- just an extra setting to assist the user)

This is especially useful for the sales person whom calls on customers without an upfront appointment. When booking an activity (from quick create and activities tab; not from the Company Page), the nearest Company based on your <u>current location</u> will be identified and the system will pre-populate the company details (if enabled on your profile page).

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#### 1.5 Completing the activities on-site

Users must complete activities on-site (the meeting location). Make sure that the activity is ticked next to **Complete Activity?** and that the GPS Coordinates appears.

In order for the activities to be geo-located the activity type also needs to be Face to Face- this can be set in Setup.

📔 Edit	Activity		Update	Jpdate & New Cancel
Sales Staff	Michelle Bester	Invitees	Email	Names
Company*	Unitas Hospital		No add	ditional invitees
Contact*	Lily Hello + D Invite?	Note		
	lily@unitas.com 010 023 0020 074 574 1254			
Activity*	Demonstration ~			
	Appointment 📅 Task 🖾			
Start	Booking as Appointment 06/05/2024 08:00			
End	06/05/2024 🕥 08:30 🗇			
Location	Clifton Avenue Centurion	Created	By Michelle Bester	On 2024/05/06 19:07
Quote/ Opp No	~	orcateu	by michelic bester	011 2024/00/00 13:07
Quote/ Opp Status	~			
Coordinates Linked Documents	<ul> <li>✓ Not yet complete, Complete Now?</li> <li>Activity is Scheduled in the Past, Defaulting to Completed</li> <li>-25.811672 28.156016</li> <li>✓ ●</li> </ul>			
	Update Update & N	ew Cano	el	

#### 1.5.1 Confirming the Activity types

In order to check what activities are face-to-face you can check it in the system setup tab. Click on the System Setup tab and in the dropdown select the Activities option.

The activity would have an "F"	value in the F/T/C/I/O column.
--------------------------------	--------------------------------

	CF	M Setu	p						
Sele	ct Dropdown	LIST TO EO	t. Activities	``	$\checkmark$	•			
		Code	Description	Dur.	F/T/C/I/O		Headings	Invite?	Billable?
	Edit Delete	PRS	Presentation		F				
	Edit Delete	PC	Printer Check	0	F				
	Edit Delete	pr	Printer Repair	0	F				
	Edit Delete	QFU	Quote Follow Up		т				
	Edit Delete	SIC	Send Invoice	0	С	Send invoi	ce to client		
	Edit Delete	SQ	Send Quote		С				
	Edit Delete	SC	Service Call		F				
	Edit Delete	TEL	Telephone Call		т				
	<u>1234</u>								

#### 2. Reports

The following reports can be produced by the system if the above is done correctly.

#### 2.1 Completed Activities Location Tracking

This report can be pulled per day per user. The report shows where the user started the day (green pin), the route and locations where the activities were complete (blue pins) and where the user's day ended (red pin).



#### 2.2 Completed Activities Location Exceptions

This report shows which activities have been completed more than 1km away from where the company is geo-located (the location shown on the map on the edit company screen).

# Activity Location Exceptions (For Activities more than 1 Km away from their Company)

Branch Descript	ion : Johannesburg	
Salesperson :	Michelle Snyders	
Activity Description :	Presentation	
Activty Date 24/10/2019 15:00 meeting to discuss r	Company Name Training Michelle new products- he wants it in bulk and pink	Contact Peter Gelden
28/10/2019 13:00 Agenda:Topics of di is happy and will ser	Training Michelle iscussionDiscussed complaints and resolved nd me an order next week	Michelle Snyders (Left) I some of the misconceptions. Need to do a follow-up phone call in a week.Client
Total For Activity	Type : Presentation	2
Total For Salesp	person : Michelle Snyders	2

#### 2.3 Travel Claim Report

The travel claim report can be produced per rep for one month at a time.

15	Travel Claim Report By Rep and Date
	For Period : 01/10/2019 to 31/10/2019
	Indicates a difference of more than 1 km between the completed activity and the company

		- marcates a amer		and on the completed dourny t	ind are company
Activity Date	Company Name	Contact	Activity	Distance(Km)	Cost
Branch Descri	ption : Johannesb	urg			
Sales Staff :	Michelle Sr	nyders		Rate per Km	: 2.50
2019-10-24 15:0	0 Training Michelle	Peter Gelden	Presentation	1.1 *	2.75
2019-10-24 23:5	9 Office		Office	1.1	2.75
Total For Date	e: 1			2.2	5.50
2019-10-28 13:0	0 Training Michelle	Michelle Snyders (Le	ft) Presentation	1.1 *	2.75
2019-10-28 23:5	9 Office		Office	1.1	2.75
Total For Date	e: 1			2.2	5.50
Total For Rep	: 2	Avg.Dist.:	2.24	4.5	11.00
<b>Total For Bran</b>	nch: 2	Avg.Dist.:	2.24	4.5	11.00

## 3. Revision History

Version	Date	Updates
SM0010	19/02/2019	Creation
SM0010.2	06/05/2024	<ul> <li>Updated the screenshots for the new release</li> </ul>