



BluWave- Geo Location & Travel Claim



For support please contact: 011 462 6871 or support@bluwave.co.za.

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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.

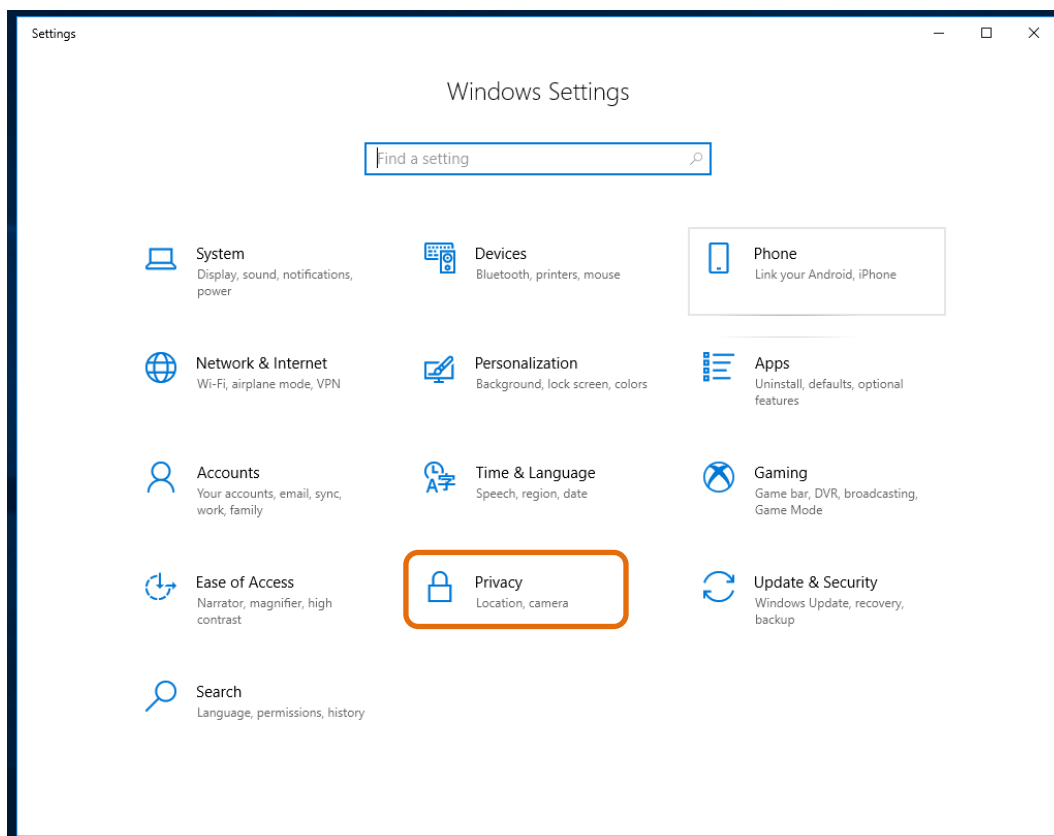
These steps are discussed in more detail.

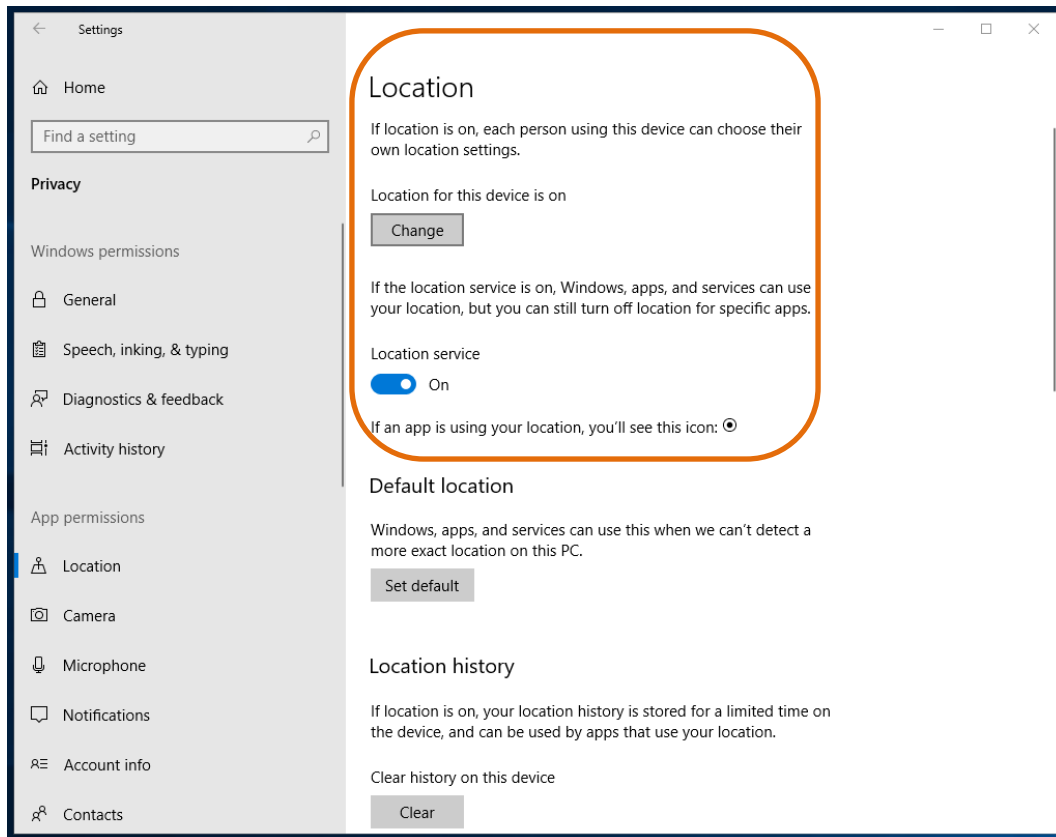
1.1 Switch on the device's location

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





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 (🔒), click it and enter an admin name and password to unlock it (🔓).
- V. Select Location Services.
- VI. Check the "Enable Location Services" checkbox.



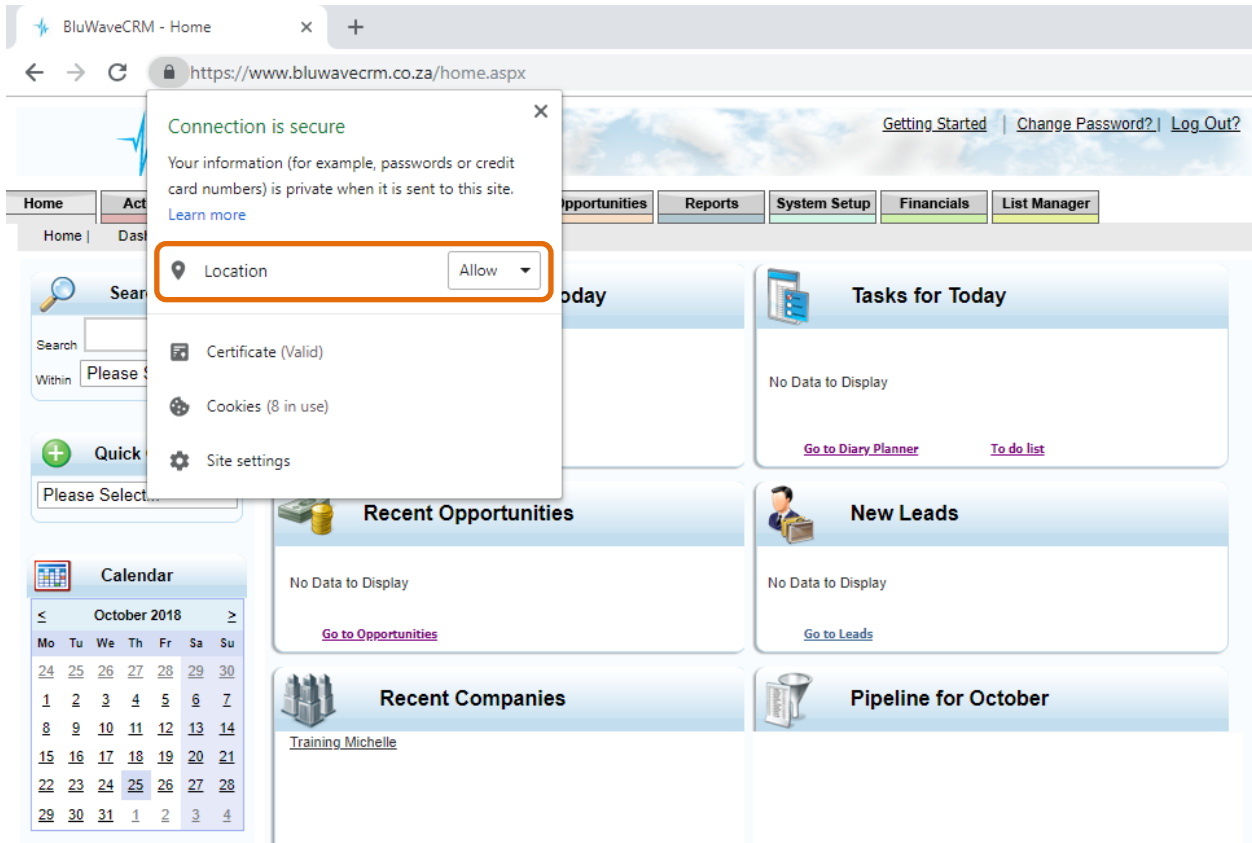
1.1.3 For Android Devices

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

1.2 Allow BluWave access to the device's location

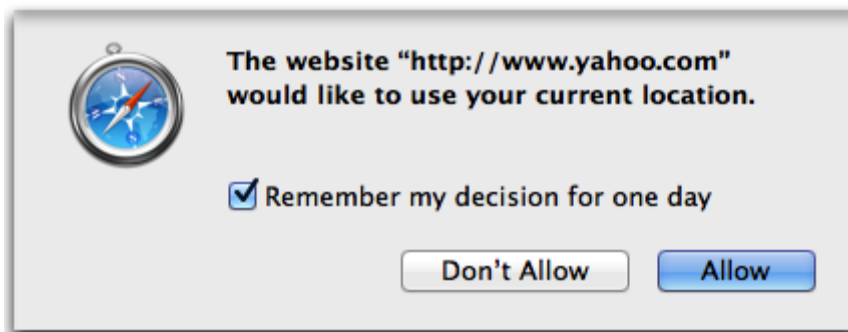
Make sure that you grant Bluwave access to your location. By clicking on the Lock in the URL bar and choosing the **Allow** button next to the Location.

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.

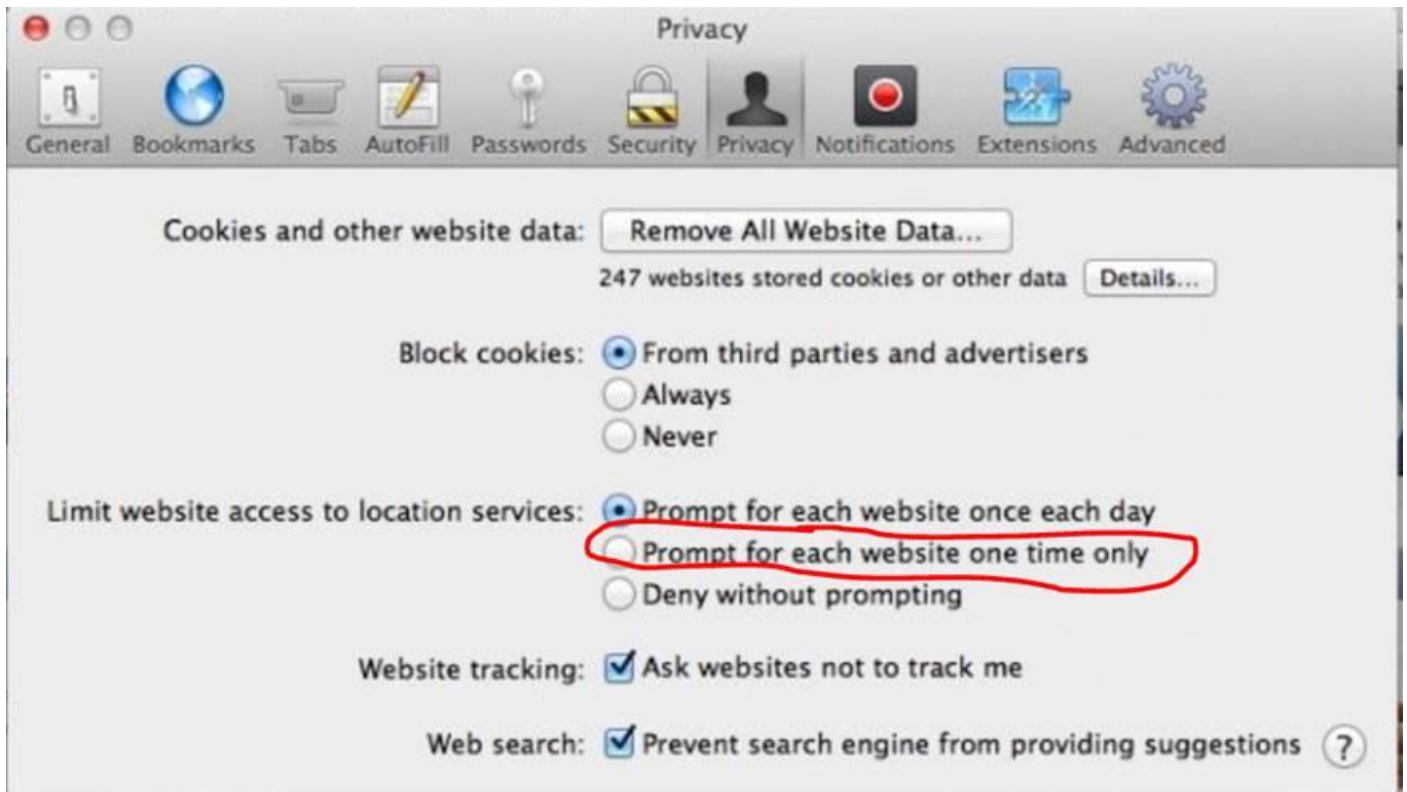


This will be active for 24 hours only. Thereafter you will have to "Allow" it again the next day

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.)





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 map** button in the users profile.

Edit User Details and Roles


Full Name	<input type="text" value="Michelle Bester"/>	User Name	<input type="text" value="michelle@demo.co.za"/>
Branch	<input type="text" value="Bloemfontein"/>	Date Captured	<input type="text" value="03/09/2018 00:00:00"/>
Sub-Branch/Division:	<input type="text" value="Management"/>	Rep Code	<input type="text" value="517143"/>
Designation	<input type="text" value="Manager"/>	<input type="button" value="Find my Sage One Repcode"/> <input type="button" value="HTML Signature"/>	
Telephone	<input type="text" value="011 462 6871"/>		
Cell	<input type="text" value="074 586 3506"/>		
Email	<input type="text" value="mibpsnyders@gmail.com"/>	<input type="button" value="Browse..."/>	
Active	<input checked="" type="checkbox"/>	<input type="button" value="Change Password"/>	

Monthly Targets	No of Quotes	<input type="text" value="10"/>	Priority %	Start and End GIS Location	
Target Quoted Value	<input type="text" value="500000"/>	<input type="text" value="10"/>	%	<input type="button" value="Use Current Location"/>	<input type="button" value="Select From Map"/>
Target Sales Value	<input type="text" value="100000"/>	<input type="text" value="10"/>	%	Rate Per Km	<input type="text" value="2.5"/>
GP Value	<input type="text" value="50000"/>			Rate Per Hour:	<input type="text" value="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.

Michelle Snyders
Select location from map below
Latitude Longitude



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.

Edit User Details and Roles

Full 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 Password, first click on the Change Password button.
 Cell: 074 586 3506/ |
 Email: michelle@bluwave.co.za

Monthly Targets	No of Quotes	0	Start and End GIS Location
Target Quoted Value	0		Use Current Location Select From Map
Target Sales Value	0		Rate Per Km: 2.5
GP Value	0		Active: <input checked="" type="checkbox"/>
No of Units	0		Find my Sage One Repcode
No of Face-to-Face Visits	0		Rep Code: MS88

Approval Manager: | Do you want to copy your active opportunities to the current month?
 Do all Quotes from this user Require Approval?
 Track Geo Location of Activities?
 Default New Activity Company to the nearest Company based on Geo location?

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 current location will be identified and the system will pre-populate the company details (if enabled on your profile page).

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
Update & New
Cancel

Sales Staff

Company*

Contact* + ✎ Invite? Note

lily@unitas.com 010 023 0020 074 574 1254

Activity*

Appointment
Task

Booking as Appointment

Start

End

Location

Quote/ Opp No

Quote/ Opp Status

Not yet complete, Complete Now?

Activity is Scheduled in the Past,
Defaulting to Completed

Coordinates

Linked Documents 🔗 ▼ 0

Email
Names

No additional invitees

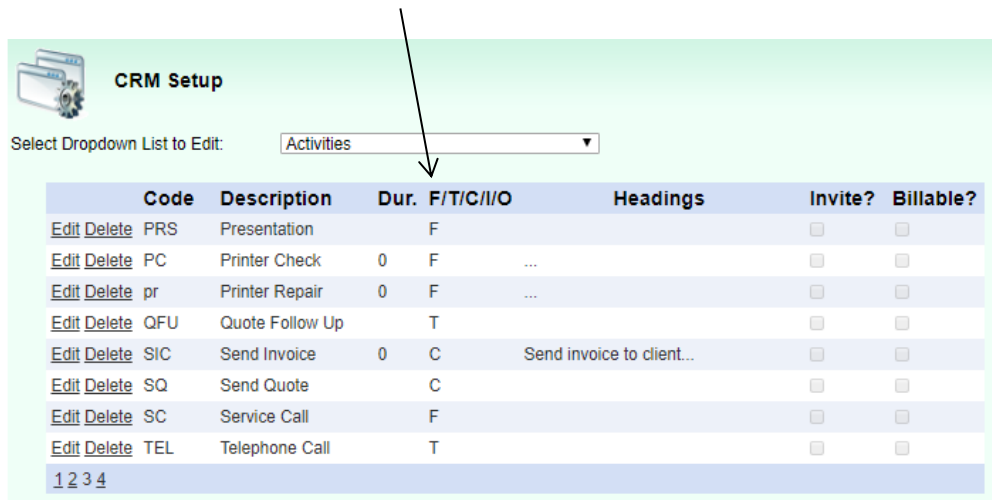
Created By Michelle Bester On 2024/05/06 19:07

Update
Update & New
Cancel

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.

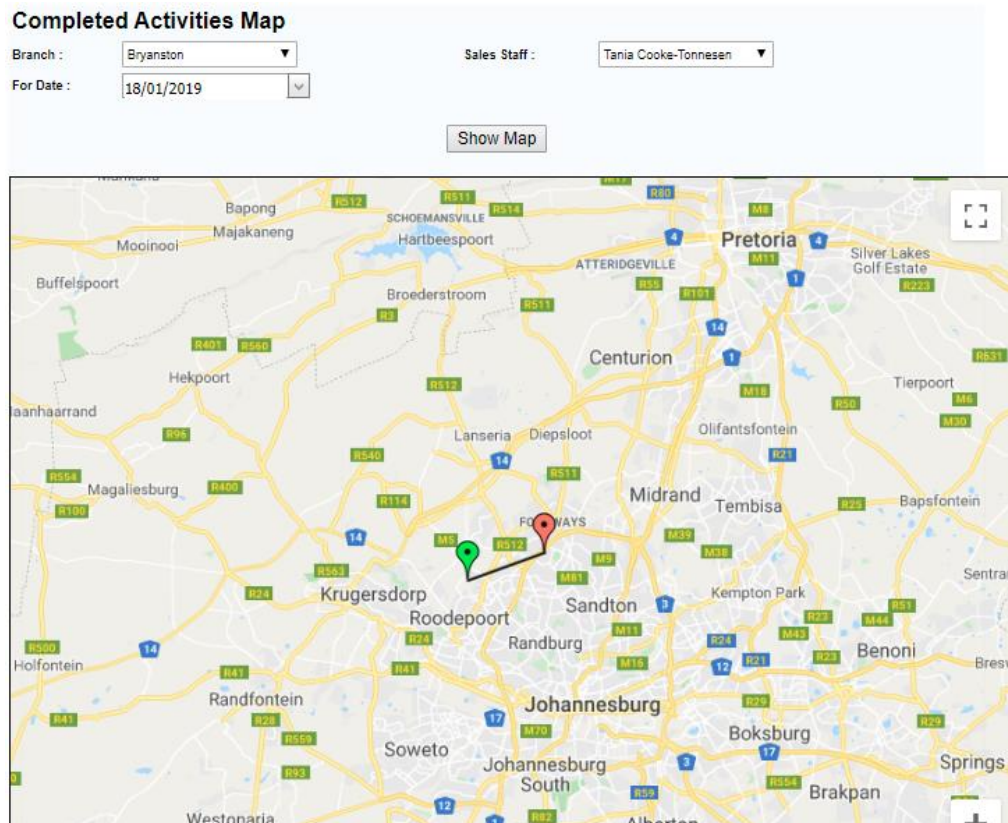


2. Reports

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

2.3 Travel Claim Report

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



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.

Activity Date	Company Name	Contact	Activity	Distance(Km)	Cost
Branch Description :		Johannesburg			
Sales Staff :		Michelle Snyders		Rate per Km: 2.50	
2019-10-24 15:00	Training Michelle	Peter Gelden	Presentation	1.1 *	2.75
2019-10-24 23:59	Office		Office	1.1	2.75
Total For Date :		1		2.2	5.50
2019-10-28 13:00	Training Michelle	Michelle Snyders (Left)	Presentation	1.1 *	2.75
2019-10-28 23:59	Office		Office	1.1	2.75
Total For Date :		1		2.2	5.50
Total For Rep :		2	Avg.Dist.: 2.24	4.5	11.00
Total For Branch :		2	Avg.Dist.: 2.24	4.5	11.00

3. Revision History

Version	Date	Updates
SM0010	19/02/2019	<ul style="list-style-type: none">• Creation
SM0010.2	06/05/2024	<ul style="list-style-type: none">• Updated the screenshots for the new release