

## **CONCLO Visit Planner**

Application Guide

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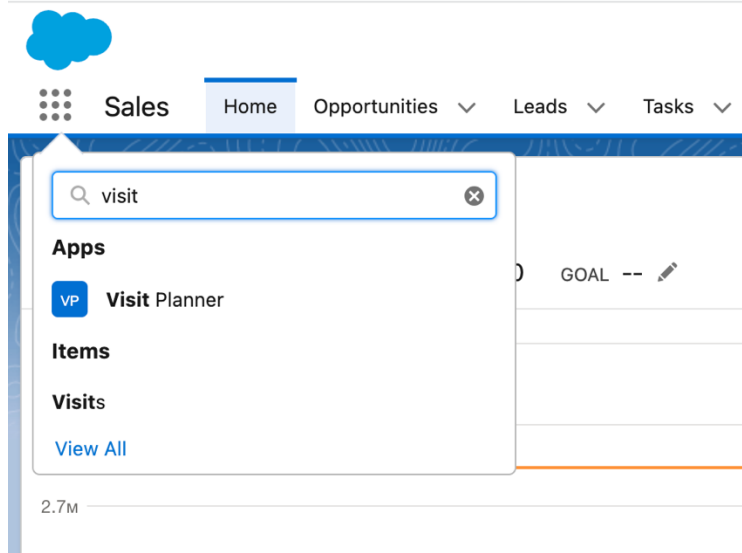
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## About CONCLO Visit Planner

CONCLO Visit planner is a free Salesforce app that can be installed in a customer's salesforce org for planning and managing the visits. This application provides the ability to create Visit Activities templates and reuse the templates to schedule visits for the customer's field service teams.

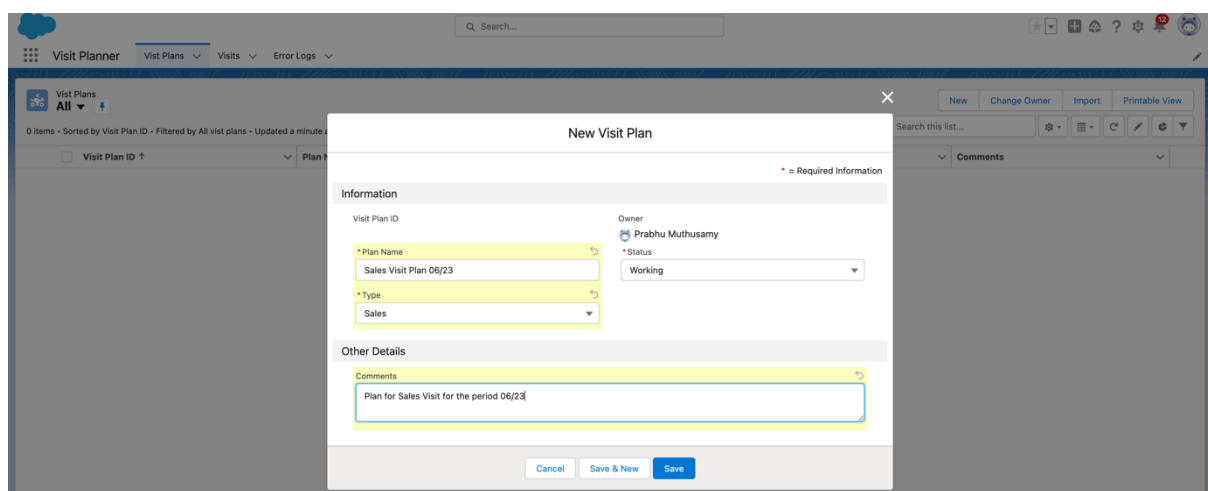
Once the package is installed in the customers org, navigate to visit planner app.



Visit plans are placeholders for the managers to plan various visit activities. This saves time in recreating the same activities again and again. Instead, manager can reuse sample template and add only additional activities specific to the visit.

## Visit Plan

Navigate to Visit Plans Tab to create new visit plan (with activities)



## Activity Template for Plan

Once the visit plan details are captured, users can define activity template for the plan. Live Example: Let's say we are planning to create a sales visit plan and add activities whenever the field service team visits the customer.

The screenshot shows the 'Sales Visit Plan 06/23' interface. The top navigation bar includes 'Visit Planner', 'Visit Plans', 'Visits', and 'Error Logs'. The main content area is divided into two sections: 'Details' and 'Activity'.

**Details Section:**

- Visit Plan ID:** VP-202306-0
- Type:** Sales
- Status:** Working
- Owner:** Prabhu Muthusamy
- Plan Name:** Sales Visit Plan 06/23
- Type:** Sales
- Other Details:**
  - Comments:** Plan for Sales Visit for the period 06/23
  - Created By:** Prabhu Muthusamy, 26/06/2023, 8:24 am
  - Last Modified By:** Prabhu Muthusamy, 26/06/2023, 8:24 am

**Activity Section:**

- Filters:** All time · All activities · All types
- Upcoming & Overdue:** No activities to show. Get started by sending an email, scheduling a task, and more.
- Past activity:** Past meetings and tasks marked as done show up here.

At the bottom, there is a 'Plan Activities (0)' section with a 'New' button.

## Create new activity for plan

In the same screen of the visit plan, click the new button on "Plan Activities" to create activity templates for the related plan

The screenshot shows the 'New Plan Activity' modal form. The form is titled 'New Plan Activity' and has a close button (X) in the top right corner. It is divided into two sections: 'Information' and 'Other Details'.

**Information Section:**

- Visit Plan:** VP-202306-0 (Required Information)
- Plan Activities ID:** (Empty field)
- Description:** Check if the POS materials are available

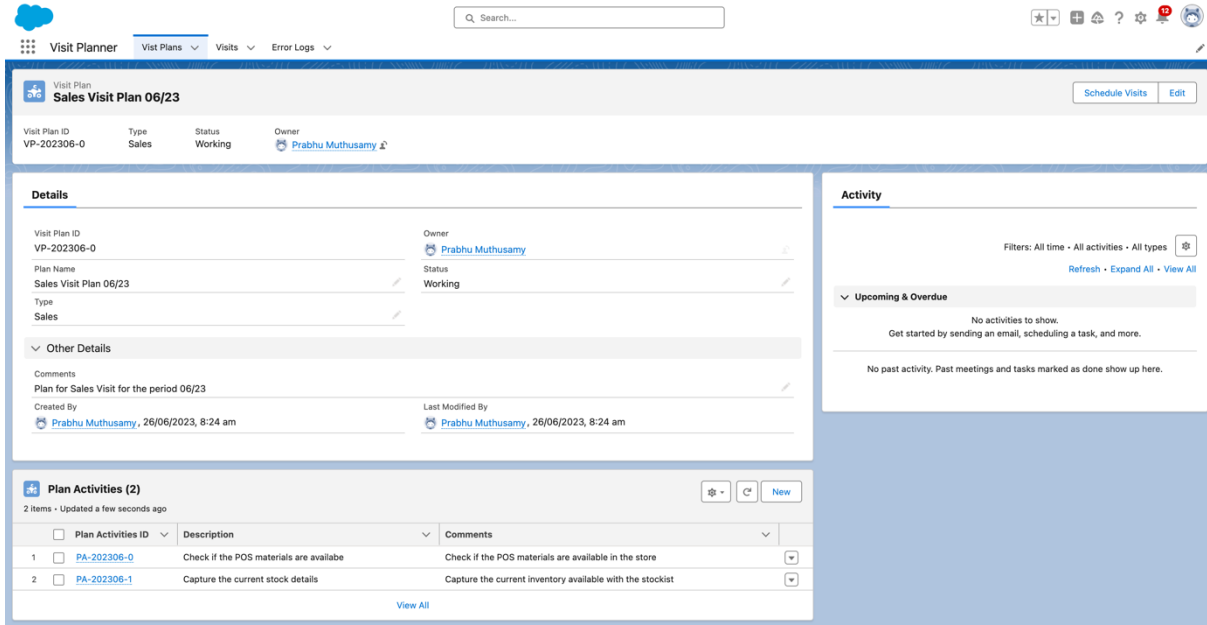
**Other Details Section:**

- Comments:** Check if the POS materials are available in the store

At the bottom of the modal, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

## View activities for plan

View the various standard activities that must be completed by the field service team. Based on your requirement, plan for all the activities

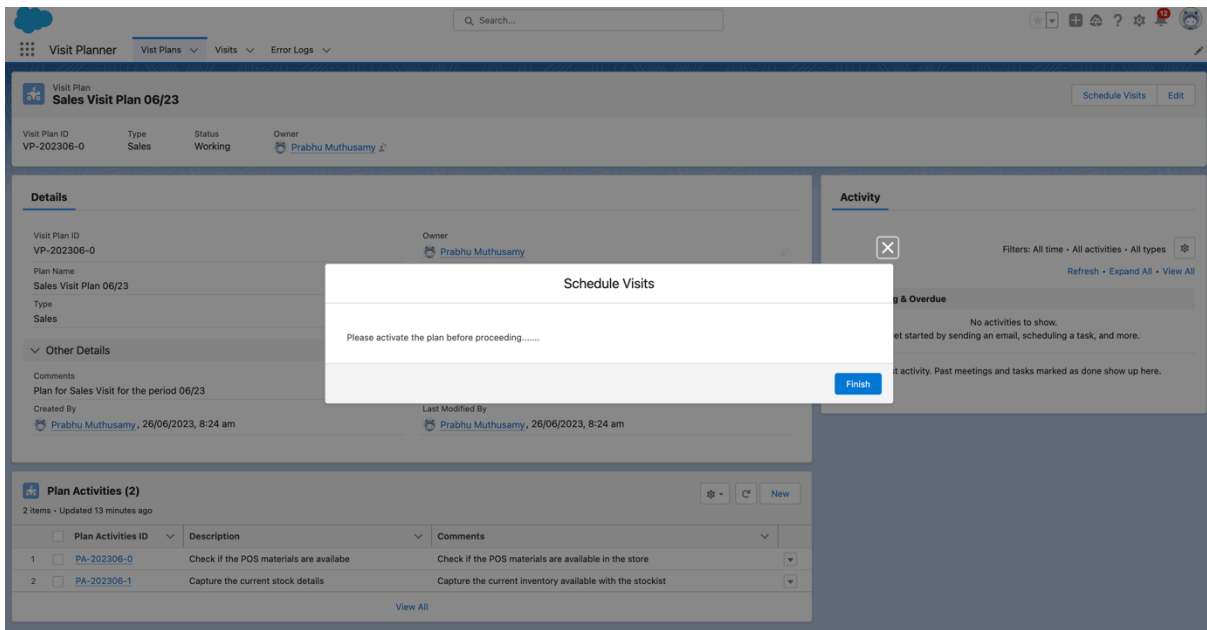


The screenshot shows the 'Visit Planner' interface. At the top, there's a search bar and navigation tabs: 'Visit Planner', 'Visit Plans', 'Visits', and 'Error Logs'. The main section displays a 'Sales Visit Plan 06/23' with details like Visit Plan ID (VP-202306-0), Type (Sales), Status (Working), and Owner (Prabhu Muthusamy). Below this, the 'Details' section shows the plan name, type, and other details. The 'Plan Activities (2)' section lists two activities: 'Check if the POS materials are available' and 'Capture the current stock details'. The 'Activity' section on the right shows filters and a message: 'No activities to show. Get started by sending an email, scheduling a task, and more.'

## Scheduling of visits using Plan:

Once the plan is available, use "Schedule Visits" button to use current plan template to create and assign activities to the field service team.

**NOTE:** Plan must be active in order to schedule.



This screenshot shows the same 'Visit Planner' interface as before, but with a 'Schedule Visits' dialog box open in the center. The dialog box contains the text: 'Please activate the plan before proceeding.....' and a 'Finish' button. The background interface is dimmed, showing the same plan details and activities.



Visit Planner

Vist Plans

Visits

Error Logs

Search...



Visit Plan  
**Sales Visit Plan 06/23**

Visit Plan ID  
VP-202306-0

Type  
Sales

Status  
Working

Owner  
Prabhu Muthusamy

### Details

\* = Required Information

Visit Plan ID

VP-202306-0

\* Plan Name

Sales Visit Plan 06/23

\* Type

Sales

#### Other Details

Comments

Plan for Sales Visit for the period 06/23

Created By

Prabhu Muthusamy, 26/06/2023, 8:24 am

Owner

Prabhu Muthusamy

\* Status

Working

--None--

Working

Active

In Active

Cancel

Save

## Schedule Planned activities

After activating the plan, clicking "Schedule Visits" button will open the visit scheduler.

Visit Planner Vist Plans Visits Error Logs

Search...

Visit Plan Sales Visit Plan 06/23

Schedule Visits Edit

Visit Plan ID VP-202306-0 Type Sales Status Active Owner Prabhu Muthusamy

### Details

Visit Plan ID VP-202306-0

Plan Name Sales Visit Plan 06/23

Type Sales

#### Other Details

Comments Plan for Sales Visit for the period 06/23

Created By Prabhu Muthusamy, 26/06/2023, 8:24 am

### Schedule Visits

Plan Name: Sales Visit Plan 06/23

\* Account Search Accounts...

\* Assigned To Search People...

\* Appointment Start Date/Time

\* Appointment Duration (Minutes) 30

☐ Do you want to create multiple daily visits?

Schedule

### Plan Activities (2)

2 items - Updated 15 minutes ago

| Plan Activities ID | Description                              | Comments                                                  |
|--------------------|------------------------------------------|-----------------------------------------------------------|
| 1 PA-202306-0      | Check if the POS materials are available | Check if the POS materials are available in the store     |
| 2 PA-202306-1      | Capture the current stock details        | Capture the current inventory available with the stockist |

View All

Account/customer must exist in order to schedule. Below are the functionalities associated with the scheduler

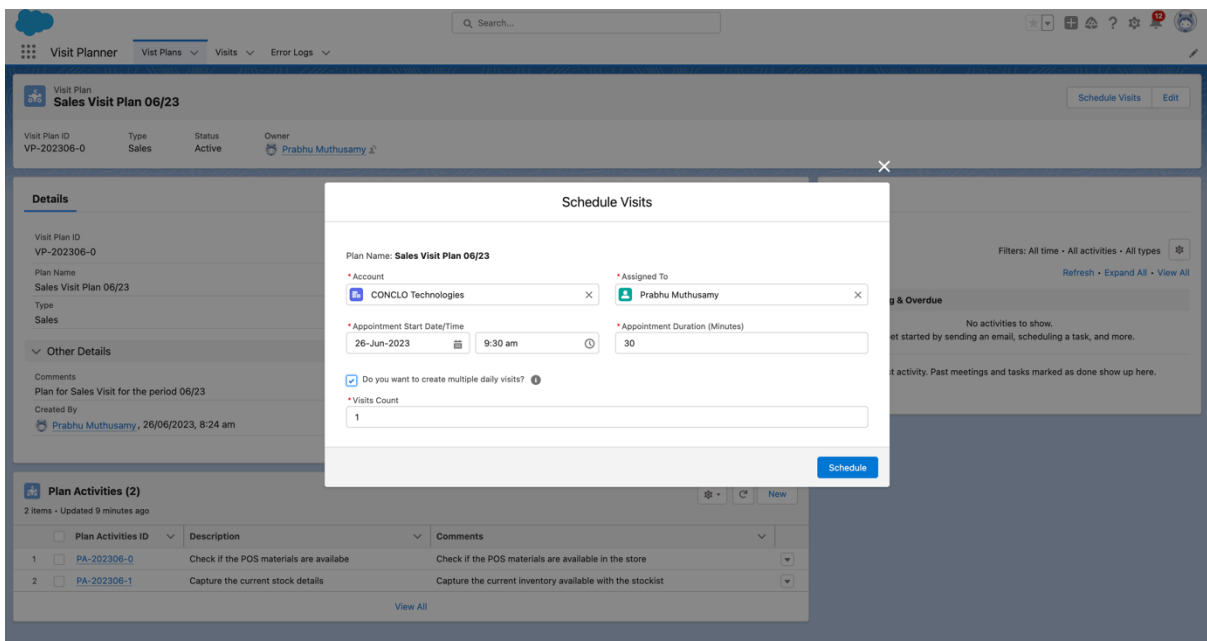
**Account:** Customer to whom the visits need to be scheduled

**Assigned To:** The field service team member whom the activities will be assigned.

**Appointment Start Date/Time:** This is used to provide the date and time the appointment is planned.

**Appointment Duration:** This is the duration of the meeting. The default is set to 30 Minutes.

**Do you want to create multiple daily visits?** If you need to create multiple visits then select this check box. If only one visit needs to be created based on this plan, this can be unchecked.



The screenshot displays the 'Visit Planner' interface with a 'Schedule Visits' modal open. The modal contains the following fields:

- Plan Name:** Sales Visit Plan 06/23
- Account:** CONCLO Technologies
- Assigned To:** Prabhu Muthusamy
- Appointment Start Date/Time:** 26-Jun-2023, 9:30 am
- Appointment Duration (Minutes):** 30
- Do you want to create multiple daily visits?:** ☒ (checked)
- Visits Count:** 1

A 'Schedule' button is located at the bottom right of the modal. The background interface shows details for 'Sales Visit Plan 06/23' and a table of 'Plan Activities (2)'.

| Plan Activities ID | Description | Comments                                 |
|--------------------|-------------|------------------------------------------|
| 1                  | PA-202306-0 | Check if the POS materials are available |
| 2                  | PA-202306-1 | Capture the current stock details        |

**Visit Count:** Enter the number of visits that needs to be created from the appointment start date.

Currently the application has the ability to schedule daily visits based on visit count.

In the above example, if the visit count is 10 then the visits will be scheduled for the next 10 days for the same time from appointment start date/time.

The screenshot shows the 'Visit Planner' interface with a 'Sales Visit Plan 06/23' selected. A modal titled 'Schedule Visits' is open, allowing the user to configure visit details. The modal includes fields for Plan Name, Account, Assigned To, Appointment Start Date/Time, Appointment Duration, and Visits Count. A checkbox for 'Do you want to create multiple daily visits?' is also present. A 'Schedule' button is at the bottom right of the modal.

**Visit Planner** | Visit Plans | Visits | Error Logs

Visit Plan ID: VP-202306-0 | Type: Sales | Status: Active | Owner: Prabhu Muthusamy

**Details**

Visit Plan ID: VP-202306-0  
Plan Name: Sales Visit Plan 06/23  
Type: Sales

**Other Details**

Comments: Plan for Sales Visit for the period 06/23  
Created By: Prabhu Muthusamy, 26/06/2023, 8:24 am

**Plan Activities (2)**

| Plan Activities ID | Description | Comments                                 |
|--------------------|-------------|------------------------------------------|
| 1                  | PA-202306-0 | Check if the POS materials are available |
| 2                  | PA-202306-1 | Capture the current stock details        |

**Schedule Visits Modal:**

Plan Name: Sales Visit Plan 06/23

Account: CONCLO Technologies | Assigned To: Prabhu Muthusamy

Appointment Start Date/Time: 26-Jun-2023 9:30 am | Appointment Duration (Minutes): 30

☒ Do you want to create multiple daily visits?

Visits Count: 10

**Schedule**

The screenshot shows the 'Visit Planner' interface with the 'Sales Visit Plan 06/23' selected. The 'Schedule Visits' modal is now displaying a success message: 'Visits were successfully created'. A 'Finish' button is visible at the bottom right of the modal.

**Visit Planner** | Visit Plans | Visits | Error Logs

Visit Plan ID: VP-202306-0 | Type: Sales | Status: Active | Owner: Prabhu Muthusamy

**Details**

Visit Plan ID: VP-202306-0  
Plan Name: Sales Visit Plan 06/23  
Type: Sales

**Other Details**

Comments: Plan for Sales Visit for the period 06/23  
Created By: Prabhu Muthusamy, 26/06/2023, 8:24 am  
Last Modified By: Prabhu Muthusamy, 26/06/2023, 8:57 am

**Plan Activities (2)**

| Plan Activities ID | Description | Comments                                 |
|--------------------|-------------|------------------------------------------|
| 1                  | PA-202306-0 | Check if the POS materials are available |
| 2                  | PA-202306-1 | Capture the current stock details        |

**Schedule Visits Modal:**

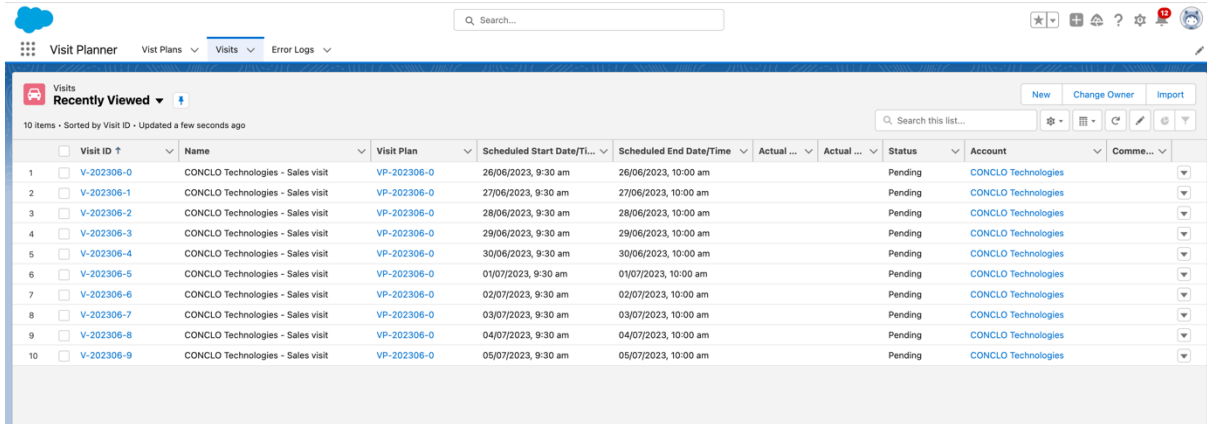
Visits were successfully created

**Finish**



## View Scheduled visits

Visits which got crated based on the schedule.



Search...

Visit Planner Visit Plans Visits Error Logs

Visits Recently Viewed

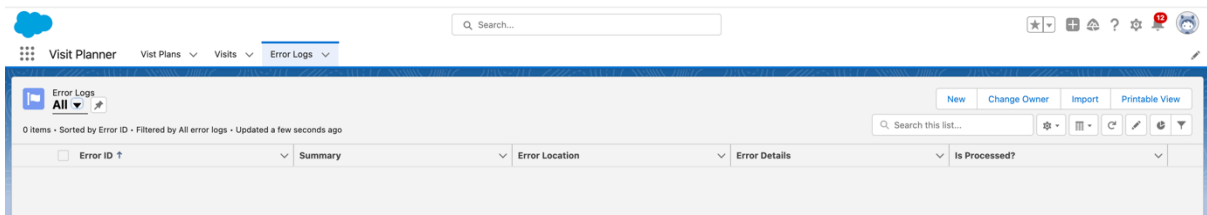
10 items • Sorted by Visit ID • Updated a few seconds ago

Search this list...

| Visit ID      | Name                              | Visit Plan  | Scheduled Start Date/Ti... | Scheduled End Date/Time | Actual ... | Actual ... | Status  | Account             | Comme... |
|---------------|-----------------------------------|-------------|----------------------------|-------------------------|------------|------------|---------|---------------------|----------|
| 1 V-202306-0  | CONCLO Technologies - Sales visit | VP-202306-0 | 26/06/2023, 9:30 am        | 26/06/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 2 V-202306-1  | CONCLO Technologies - Sales visit | VP-202306-0 | 27/06/2023, 9:30 am        | 27/06/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 3 V-202306-2  | CONCLO Technologies - Sales visit | VP-202306-0 | 28/06/2023, 9:30 am        | 28/06/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 4 V-202306-3  | CONCLO Technologies - Sales visit | VP-202306-0 | 29/06/2023, 9:30 am        | 29/06/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 5 V-202306-4  | CONCLO Technologies - Sales visit | VP-202306-0 | 30/06/2023, 9:30 am        | 30/06/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 6 V-202306-5  | CONCLO Technologies - Sales visit | VP-202306-0 | 01/07/2023, 9:30 am        | 01/07/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 7 V-202306-6  | CONCLO Technologies - Sales visit | VP-202306-0 | 02/07/2023, 9:30 am        | 02/07/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 8 V-202306-7  | CONCLO Technologies - Sales visit | VP-202306-0 | 03/07/2023, 9:30 am        | 03/07/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 9 V-202306-8  | CONCLO Technologies - Sales visit | VP-202306-0 | 04/07/2023, 9:30 am        | 04/07/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |
| 10 V-202306-9 | CONCLO Technologies - Sales visit | VP-202306-0 | 05/07/2023, 9:30 am        | 05/07/2023, 10:00 am    |            |            | Pending | CONCLO Technologies |          |

## View Errors while scheduling activities

if any error occurs during creation of visit, please click the error log tab to view the error details and take necessary corrective actions.



Search...

Visit Planner Visit Plans Visits Error Logs

Error Logs All

0 items • Sorted by Error ID • Filtered by All error logs • Updated a few seconds ago

Search this list...

| Error ID | Summary | Error Location | Error Details | Is Processed? |
|----------|---------|----------------|---------------|---------------|
|----------|---------|----------------|---------------|---------------|