

| an OSF Product

OSF
BTRACKING

Integrator for Salesforce

OSF INTEGRATOR for BTRACKING and SALESFORCE

User Guide

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1 Description

The OSF Integrator for BTRACKING and Salesforce integrates the GPS functionality provided by Btracking with the customer relationship management of Salesforce, helping your company increase productivity, enhance customer satisfaction, and boost overall efficiency. Some of the main features are:

- Track the visits made by field agents on each location of the account directly in Salesforce;
- The possibility of having multiple locations for each account;
- Automatically geocode account locations using the addresses inputted and displaying the locations on a map;
- The possibility of displaying the visits route for each of your agents;
- View reports by account directly in Salesforce.

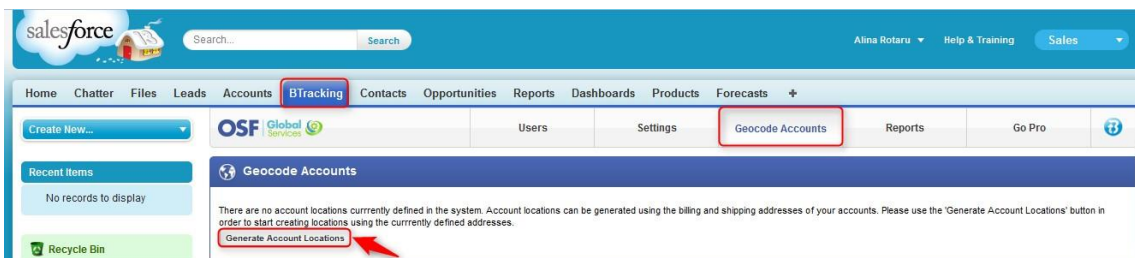
2 Getting Started

To install the OSF Integrator for BTRACKING and Salesforce, follow the instructions provided in the "OSF Integrator for BTRACKING and Salesforce Installation Guide".

3 OSF Integrator for BTRACKING and Salesforce

3.1 Add the billing and shipping locations for all your existing accounts

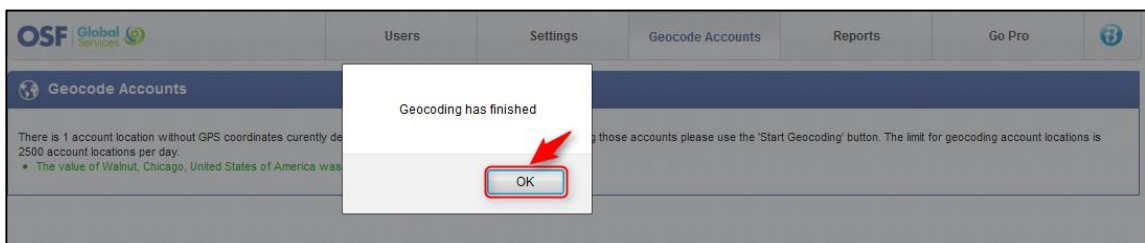
1. To add the billing and shipping locations for all your accounts, after you have the settings set up, go to the Geocode Accounts sub-tab and click the **Geocode Accounts** button.



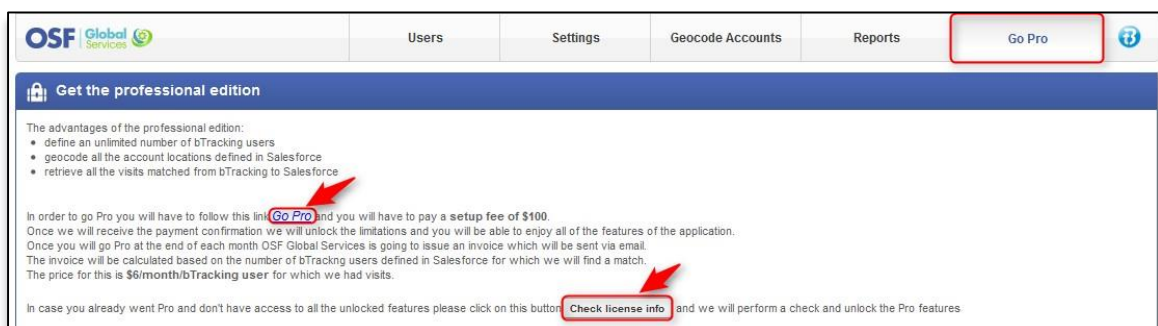
2. The billing and shipping locations will be created and you can find them on each account that has a billing or shipping address in the BT Account Locations section.
3. If one or more of your accounts has the same billing and shipping address, only one new location will be added.

3.2 Geocode the previously created account locations

- After adding the account locations, go to the "Geocode Accounts" sub-tab and click the "Start Geocoding" button to add coordinates to the account locations that were previously created. The account locations are geocoded one by one at a rate of one location per second; please wait until you receive a message that announces you that the geocoding is complete;

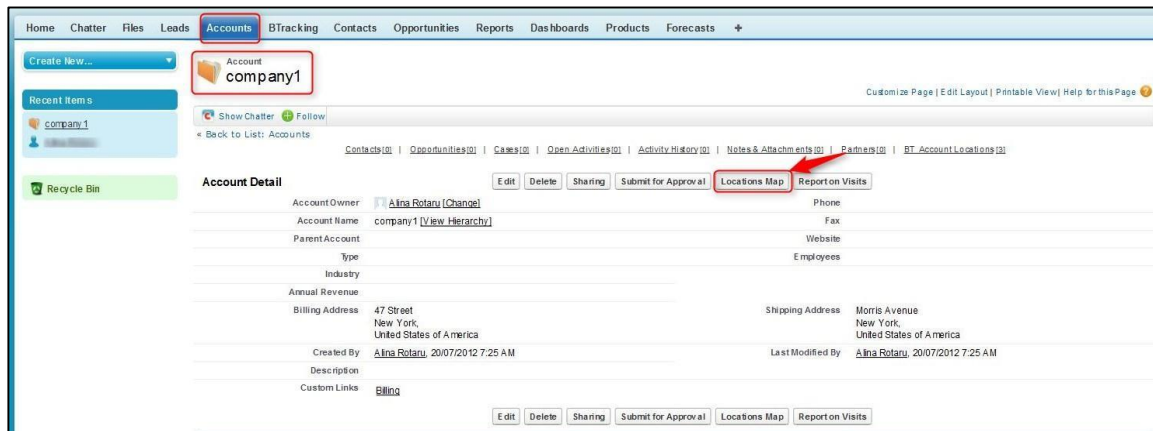


- If you are using the Free Version of the application, only 100 account locations will be geocoded.
- If you want more account locations geocoded, you can start using the Standard Version of the application by clicking the "Go Pro" sub-tab and following the required steps.
- In case you already have the Standard Version and don't have access to all the unlocked features, please click the "Check License Info" button and we will perform a check and unlock the Standard features.

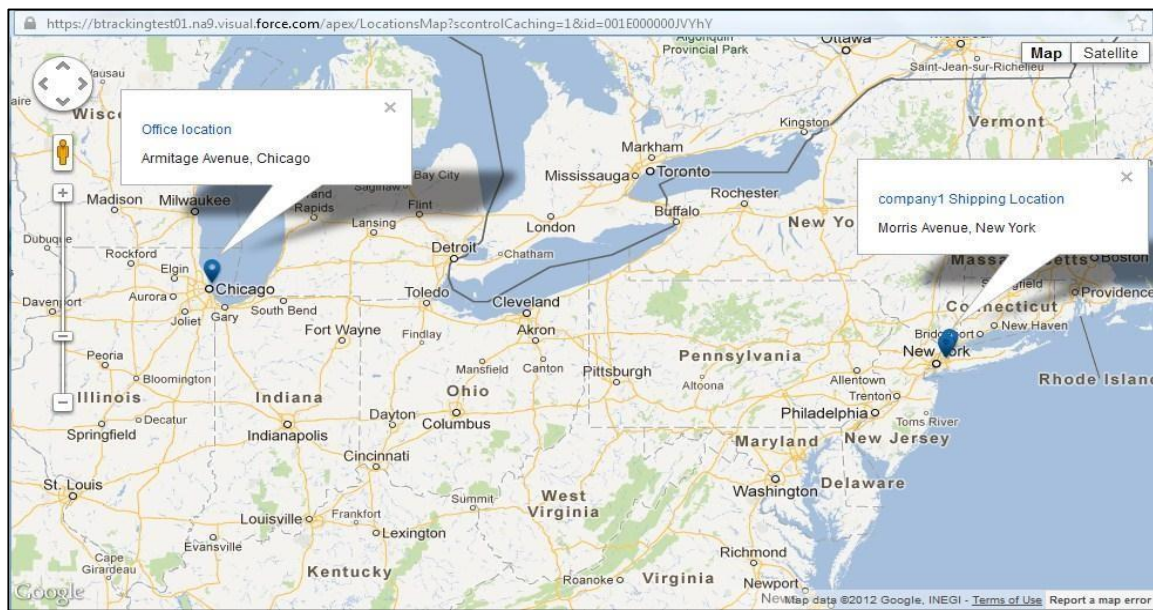


3.3 Display the locations on the Map

- To view the locations of each account go to the "Accounts" tab, click on the account for which you want to view the locations and click the "Locations Map" button from the top of the page.



- To see the details of a certain location, click the pin from the map and an info bubble with details will appear.



3.4 Add a new Btracking user

- To add a new Btracking user, go to the "Btracking" tab and then the "Users" sub-tab and click the "New Btracking User" button.

- Fill in all the required fields and click "Save" or "Save & New" if you want to add another Btracking user.

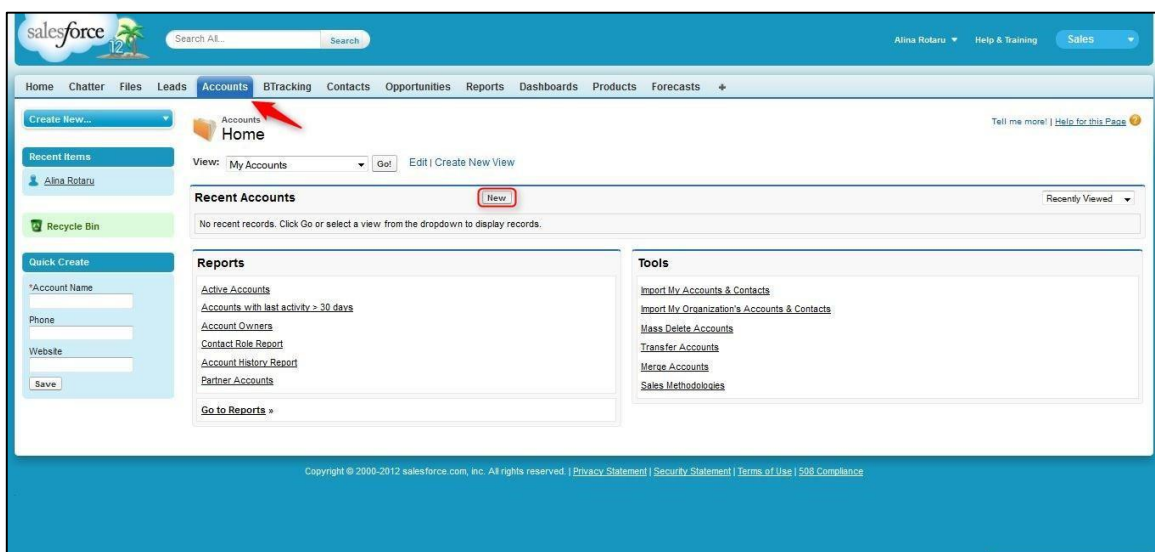
- In the **IMEI** field, enter the same one the user has in Btracking. In Btracking enter the Group the user belongs to and copy its **IMEI**.

- Now you can see the new created user in the "Users" sub-tab. If you want to edit a user, click "Edit".



3.5 Add a new account with billing and shipping addresses

- To add a new account, go to the "Accounts" tab and click the "New" button.

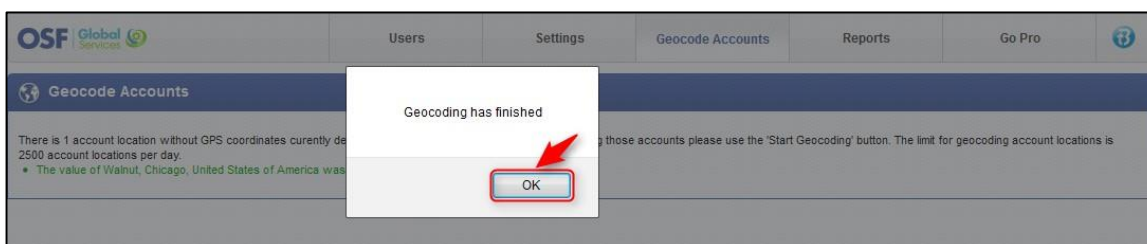


- Fill in all the details of the account, including both complete addresses (Street, City, Country) or only one of the complete addresses (Street, City, Country) and click "Save".

- Refresh the page and you can see that the account location for the address that you inserted is added.

BT Account Locations						
Action	Account Location Name	Latitude	Longitude	Street	City	Country
Edit Del	company1 Billing Location			47 Street	New York	United States of America
Edit Del	company1 Shipping Location			Morris Avenue	New York	United States of America

- To add also coordinates to the location, go to the "Btracking" tab and then to the "Geocode Accounts" sub-tab and click "Start Geocoding". After the success message is displayed, you can go to the account and see the location on the Map.



3.6 Add a new account location of an existing account

- To add a new account location, go to the "Accounts" tab, click the account to which you want to add a new location and click "New Account Location".

BT Account Locations New Account Location BT Account Locations Help ?

Action	Account Location Name	Latitude	Longitude	Street	City	Country
Edit Del	company1 Billing Location			47 Street	New York	United States of America
Edit Del	company1 Shipping Location			Morris Avenue	New York	United States of America

[Back To Top](#) Always show me more records per related list

- Insert the locations details and the complete address (Street, City and Country) or a set of coordinates (Latitude and Longitude);
- It is not necessary to enter both the address and coordinates, because the OSF Integrator will insert the coordinates or the address for you.

Account Location Edit New Account Location

Account Location Edit Save Cancel

Account Location Name
Street

City
State

Zip Code
Country

Latitude
Longitude

Account
Radius

The geocode feature of the application can help you add the fields you need. If you don't have the GPS coordinates or the address for this location please leave either of the field sets blank and the OSF Integrator for BTracking and Salesforce will fill those out for you. When you update the location please remember to clear the fields that do not correspond to the new information so that the location can be recalculated.

Save Cancel

BT Account Locations New Account Location BT Account Locations Help ?

Action	Account Location Name	Latitude	Longitude	Street	City	Country
Edit Del	company1 Billing Location			47 Street	New York	United States of America
Edit Del	company1 Shipping Location			Morris Avenue	New York	United States of America
Edit Del	Office location	41.917168	-87.728372	Armitage Avenue	Chicago	United States of America

- If you are using the Free Version and you have reached the limit of 100 account locations geocoded, the missing address or coordinates will not be inserted.
- If you want more account locations geocoded, you can start using the Standard Version of the application by clicking the "Go Pro" sub-tab and following the needed steps.

OSF Global Services Users Settings Geocode Accounts Reports Go Pro ?

Get the professional edition

The advantages of the professional edition:

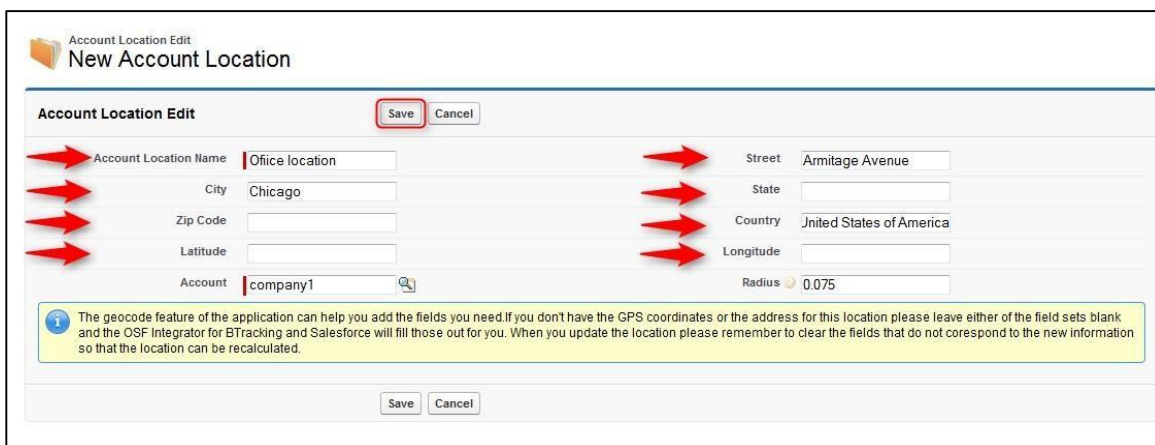
- define an unlimited number of bTracking users
- geocode all the account locations defined in Salesforce
- retrieve all the visits matched from bTracking to Salesforce

In order to go Pro you will have to follow this link [Go Pro](#) and you will have to pay a setup fee of \$100. Once we will receive the payment confirmation we will unlock the limitations and you will be able to enjoy all of the features of the application. Once you will go Pro at the end of each month OSF Global Services is going to issue an invoice which will be sent via email. The invoice will be calculated based on the number of bTracking users defined in Salesforce for which we will find a match. The price for this is \$6/month/bTracking user for which we had visits.

In case you already went Pro and don't have access to all the unlocked features please click on this button [Check license info](#) and we will perform a check and unlock the Pro features

3.7 Update the account location of an existing account.

- To update the account location go to the "Accounts" tab, click the account of which location you want to update and click "Edit".
- Clear all the fields of the location, excepting the "Name" if you don't want it changed, insert the new complete address (street, city and country) or the set of coordinates (latitude and longitude) and click "Save";
- The OSF Integrator will insert the coordinates for the new address or the address for the new coordinates;
- If you are using the Free version and you have reached the limit of 100 account locations geocoded, the missing address or coordinates will not be inserted.



Account Location Edit Save Cancel

Account Location Name: Office location

City: Chicago

Zip Code:

Latitude:

Account: company1

Street: Armitage Avenue

State:

Country: United States of America

Longitude:

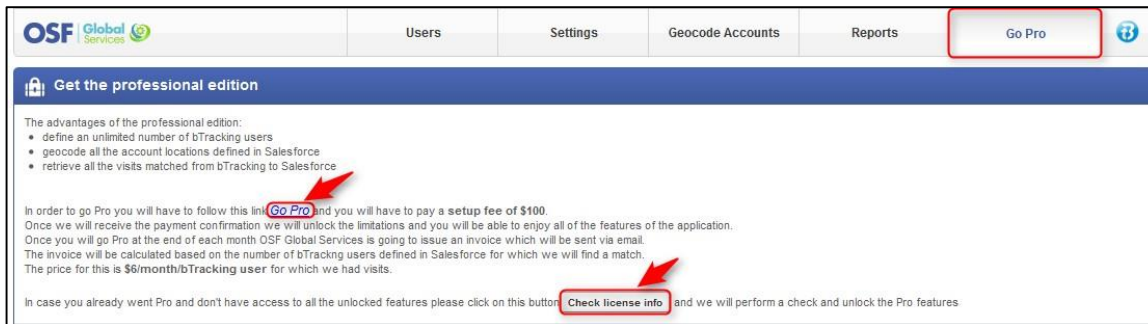
Radius: 0.075

The geocode feature of the application can help you add the fields you need. If you don't have the GPS coordinates or the address for this location please leave either of the field sets blank and the OSF Integrator for BTracking and Salesforce will fill those out for you. When you update the location please remember to clear the fields that do not correspond to the new information so that the location can be recalculated.

Save Cancel

- If you want more account locations geocoded you can start using the Standard Version of the application by clicking the "Go Pro" sub-tab and following the needed steps.
- In case you already have the Standard Version and don't have access to all the unlocked features please click the "Check Licence Info" button and we will perform a check and unlock the Standard features.

BT Account Locations New Account Location BT Account Locations Help						
Action	Account Location Name	Latitude	Longitude	Street	City	Country
Edit Del	company1 Billing Location			47 Street	New York	United States of America
Edit Del	company1 Shipping Location			Morris Avenue	New York	United States of America
Edit Del	Office location	41.917168	-87.728372	Armitage Avenue	Chicago	United States of America



Get the professional edition

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- define an unlimited number of bTracking users
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In order to go Pro you will have to follow this [link](#) **Go Pro** and you will have to pay a **setup fee** of \$100. Once we will receive the payment confirmation we will unlock the limitations and you will be able to enjoy all of the features of the application. Once you will go Pro at the end of each month OSF Global Services is going to issue an invoice which will be sent via email. The invoice will be calculated based on the number of bTracking users defined in Salesforce for which we will find a match. The price for this is \$6/month/bTracking user for which we had visits.

In case you already went Pro and don't have access to all the unlocked features please click on this button **Check license info** and we will perform a check and unlock the Pro features

3.8 View the visits of a Btracking user and his route.

- To view the visits made by one of your Btracking users, go to the "Btracking" tab, then to the "Users" sub-tab, click the name of the user for whom you want to see the visits and the route;



Home Chatter Files Leads Accounts **BTracking** Contacts Opportunities Reports Dashboards Products Forecasts +

Create New... Recent Items Customer A-US Recycle Bin

Users

View: All bTracking Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New BTracking User

Action	BT User Name	First Name	Last Name	IMEI
Edit Del	Jonathan S	Jonathan	Smith	011-444-11111111

- At the bottom of the page now you can see all the visits made by the Btracking user. To see all the list click "Go to list".



Visits Visits Help ?

Action	Visit: Visit Name	Duration	Last Reading	Account Location Name	Account	Start Time	End Time
Edit Del	V-02453	0 days 0 hours 0 min	17/05/2012 10:49 AM	[REDACTED]	[REDACTED]	17/05/2012 10:49 AM	17/05/2012 10:49 AM
Edit Del	V-02442	0 days 0 hours 3 min	14/05/2012 9:40 AM	[REDACTED]	[REDACTED]	14/05/2012 9:36 AM	14/05/2012 9:40 AM
Edit Del	V-02443	0 days 1 hours 4 min	14/05/2012 10:47 AM	[REDACTED]	[REDACTED]	14/05/2012 9:43 AM	14/05/2012 10:47 AM
Edit Del	V-02444	0 days 0 hours 0 min	15/05/2012 12:33 AM	[REDACTED]	[REDACTED]	15/05/2012 12:33 AM	15/05/2012 12:33 AM
Edit Del	V-02445	0 days 10 hours 11 min	15/05/2012 10:59 AM	[REDACTED]	[REDACTED]	15/05/2012 12:48 AM	15/05/2012 10:59 AM

Show 5 more » **Go to list (50+)**

- To see the visits on the map and also the route between them click the "Visits Map" button;

BT User
JaneDoe

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Custom Apps

BT User Detail

Owner: [Avatar] [Change] Visits [0] **Visits Map**

BT User Name: JaneDoe Contact Method: [Field]

First Name: Jane Phone: [Field]

Last Name: Doe Fax: [Field]

IMEI: 9874583210 Cell Phone: [Field]

Title: [Field] Pager: [Field]

Email Address: [Field]

Website: [Field]

Time Zone: [Field]

Created By: Alexandru Boghean, 20/07/2012 9:51 AM Last Modified By: BTracking package, 20/07/2012 10:01 AM

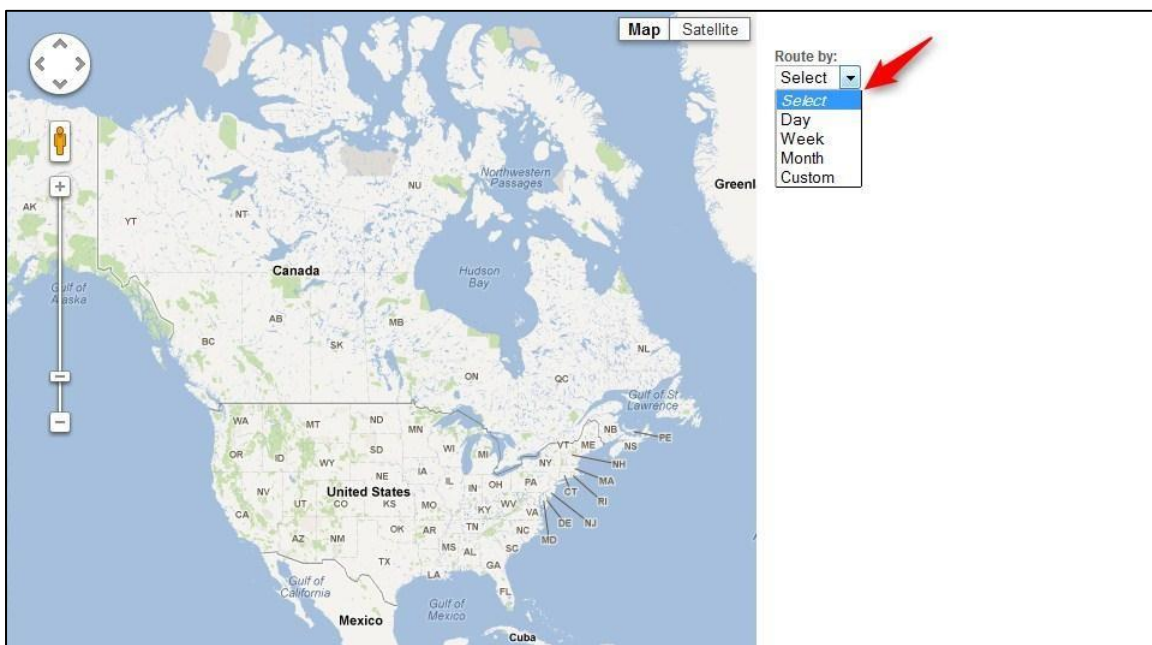
[Edit] [Delete] [Clone] [Visits Map]

Visits Visits Help

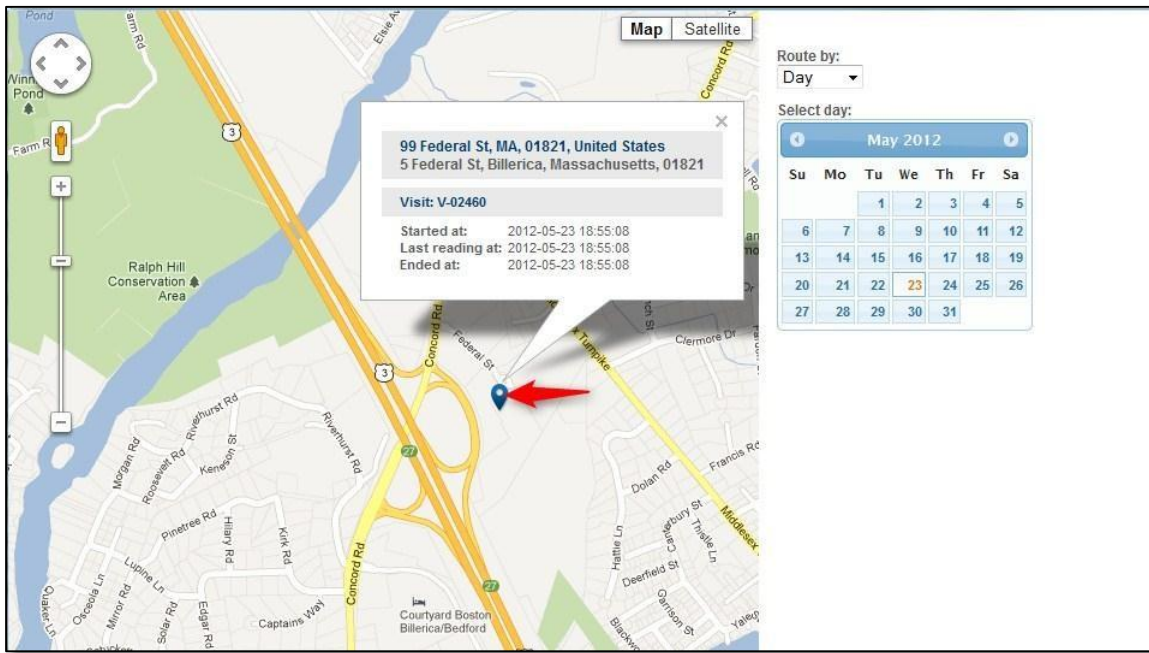
No records to display

^ Back To Top Always show me more records per related list

- Select the day, week, month or custom date for which you want to see the visits and route.

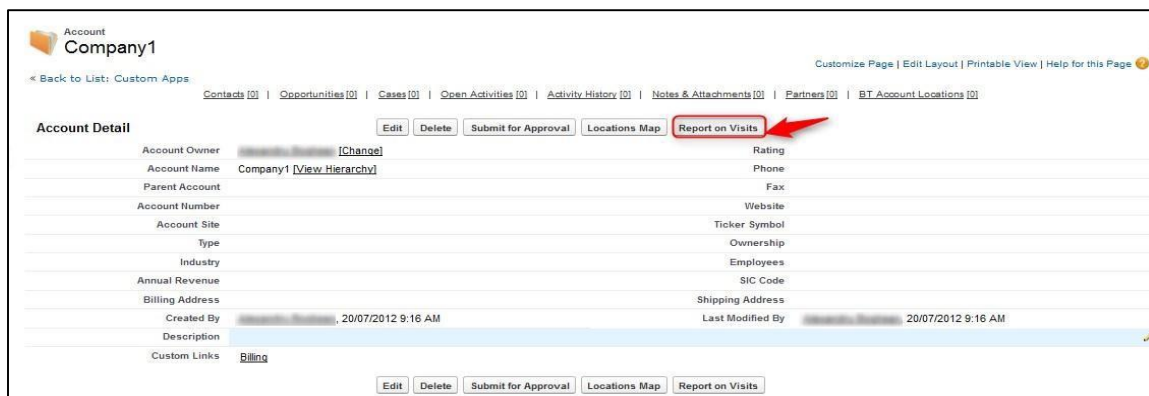


- To see the details of a certain visit click the pin from the map and an info bubble containing all the details will be displayed.

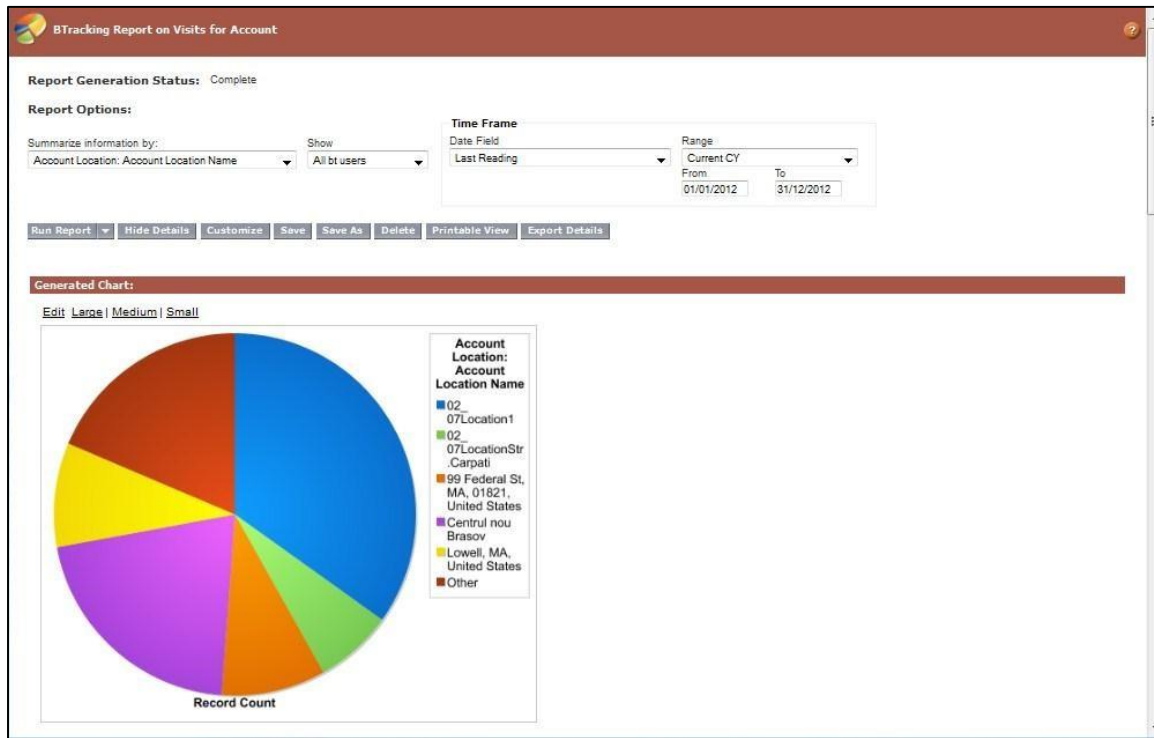


3.9 View the reports on visits for each account.

- To view the visits report of a certain account, click the "Accounts" tab, click the account for which you want to see the report and click the "Reports on Visits" button;

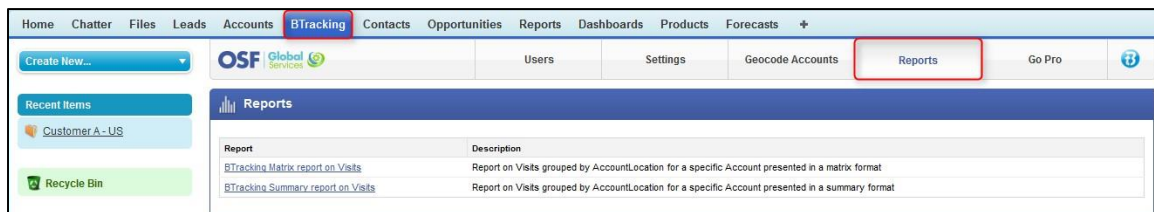


- A new page like the one below will be opened, showing the report on visits.

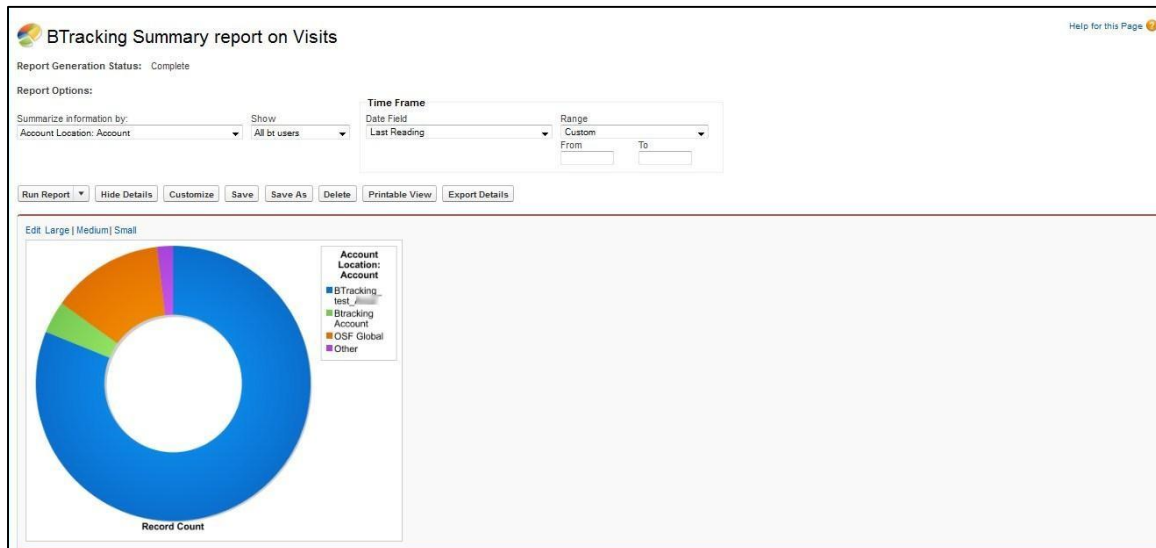


3.10 View the “Btracking Matrix report on Visits” and “Btracking Summary report on Visits”

- To visualize the custom reports of the OSF integrator, go to the “Btracking” tab, then to the “Reports” sub-tab and select the type of report you want to view;



- A new page like the one below will be opened with the report you have selected.



BTracking Matrix report on Visits

Report Generation Status: Complete

Report Options:

Summarize information by: Account Location: Account Location Name

Summarize information by: BT User: BT User Name

Show: All bt users

Time Frame: Date Field: Last Reading

Range: Custom From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details

Account Location: Account Location Name	BT User: BT User Name	Grand Total	Visit: Visit Name	Duration	Start Time	End Time
02_07Location1	Record Count	15				
			V-02595	0 days 0 hours 0 min	09/07/2012 2:42 AM	09/07/2012 2:42 AM
			V-02473	0 days 0 hours 30 min	27/06/2012 1:21 AM	27/06/2012 1:51 AM
			V-02475	0 days 1 hours 10 min	27/06/2012 2:26 AM	27/06/2012 3:36 AM
			V-02448	0 days 9 hours 56 min	16/05/2012 1:10 AM	16/05/2012 11:06 AM
			V-02452	0 days 9 hours 21 min	17/05/2012 1:23 AM	17/05/2012 10:44 AM
			V-02478	0 days 0 hours 30 min	27/06/2012 4:06 AM	27/06/2012 4:36 AM
			V-02483	0 days 7 hours 55 min	02/07/2012 3:09 AM	02/07/2012 11:04 AM
			V-02445	0 days 10 hours 11 min	15/05/2012 12:48 AM	15/05/2012 10:59 AM
			V-02455	0 days 10 hours 11 min	18/05/2012 1:06 AM	18/05/2012 11:17 AM
			V-02485	0 days 10 hours 36 min	02/07/2012 11:24 AM	02/07/2012 9:59 PM
			V-02443	0 days 1 hours 4 min	14/05/2012 9:43 AM	14/05/2012 10:47 AM
			V-02442	0 days 0 hours 3 min	14/05/2012 9:36 AM	14/05/2012 9:40 AM
			V-02638	0 days 0 hours 0 min	16/07/2012 4:23 PM	-
			V-02482	0 days 1 hours 50 min	02/07/2012 1:09 AM	02/07/2012 2:59 AM
			V-02470	0 days 0 hours 0 min	20/06/2012 8:34 AM	20/06/2012 8:34 AM
02_07Location2	Record Count	1				

Should you have any questions, contact us at info@osf-commerce.com. Please note, the Free Version allows you to use up to two Btracking users and 100 account locations geocoded. If you are interested in upgrading to the Standard Version of the product, simply select the "Go Pro" button in the application within Salesforce.

