Opmetrix Team User Manual

Version 5 onwards

November 2016

Disclaimer: Please note that the screenshots featured in the Opmetrix Team User Manual have been taken using an Apple smart phone device. The functionality of Opmetrix Team is the same for Android smart phones. Updates and notifications may display differently.

Starting the Opmetrix Team app

Smartphone Home Screen

The home screen on your smartphone displays application icons. You can swipe your finger left and right to rotate through the home screens and view icons.
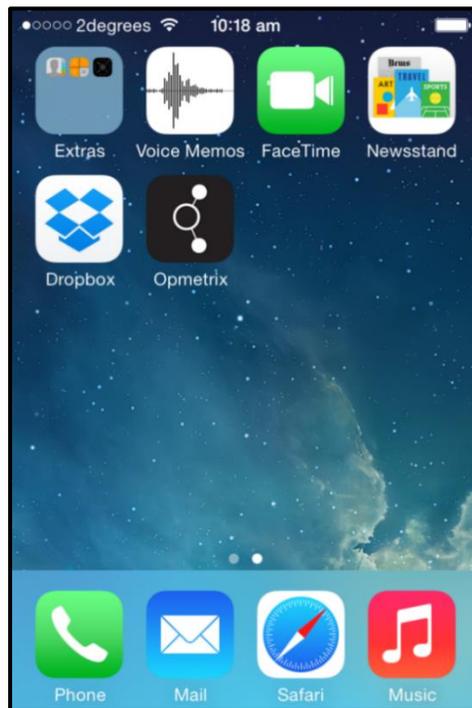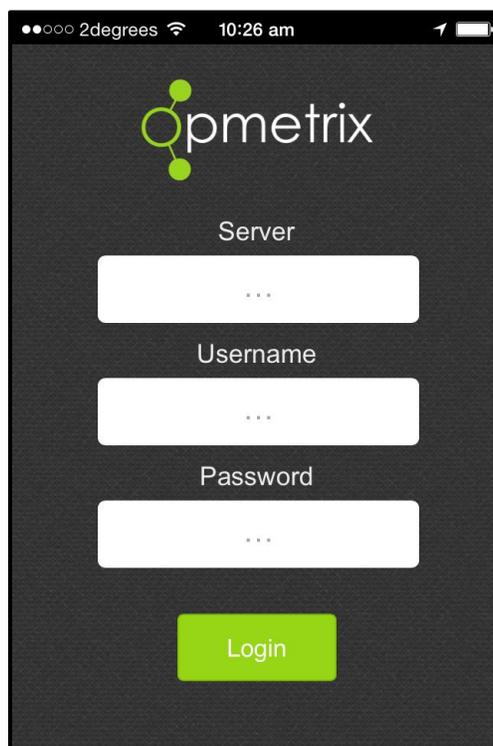

| **Starting Opmetrix Team** | Press the Home button (on your smartphone) to switch your device on. |

Locate the home screen with the Opmetrix Team icon and tap it to start.

Login

Every user has their own username and password. This determines the functions available and filters to display an individual customer/store list.

NOTE: *Passwords are case sensitive, however usersnames are not.*

Login

Tap the **server** field then enter the server address provided to you by head office. Tap on **username** and **password** fields to enter in respective information. When complete, tap **Login.**
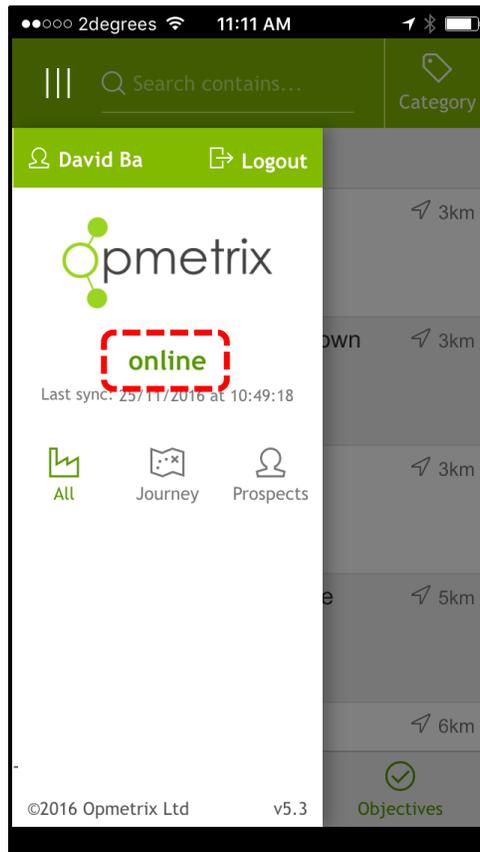
Important:

Initially, a pop-up message will appear in regards to using your current location. Always tap OK to confirm these types of messages. After two confirmations they will not re-appear.

Online / Offline Status

The Store Select screen advises if you are currently **online** or **offline**.

You can continue to use Opmetrix Team when you are offline, however you cannot complete a synchronisation (sync) to send and update data to head office.

Note: You cannot logout of the system unless the system is online.

Tasks to Send

Sync Fails

Data is not lost if a sync times out or fails. Continue to the next call and simply try again later.

When tasks are completed but not yet sent to head office, the sync icon turns orange. Tasks could be made up of: Calling Cards, Emails, Photos, Surveys, Objectives, New Outlets, Prospects, Leave Days and Contacts.

Once a sync is completed the icon returns to green.

Note: The sync icon will appear grey when the device does not have an Internet connection.
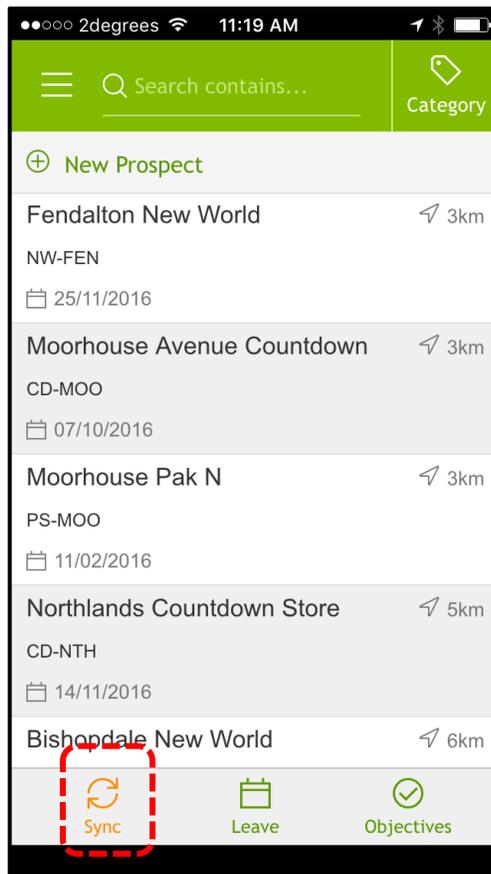
Sync

We recommend that after every outlet/customer call, you complete a data sync. This is subject to mobile coverage and being online with Opmetrix Team.

If you are **offline** all features are still available and it is important to sync when next in coverage.
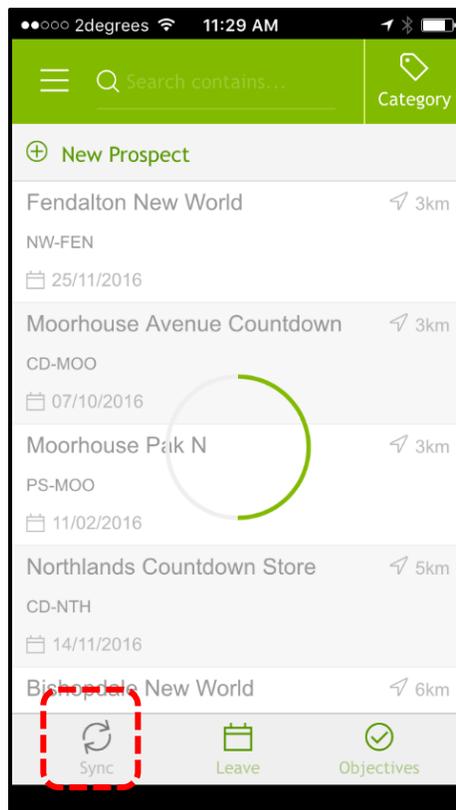

Sync	Tap **Sync** to initiate a data transfer. This both sends new data to head office and updates your system

with the latest customer and product information. A sync should take between 15 and 60 seconds, depending on coverage.

Customers and Journey Plans

The Store Select screen displays a list of outlets/customers. Typically this list does not display all customers, but only the customers assigned to the login used.
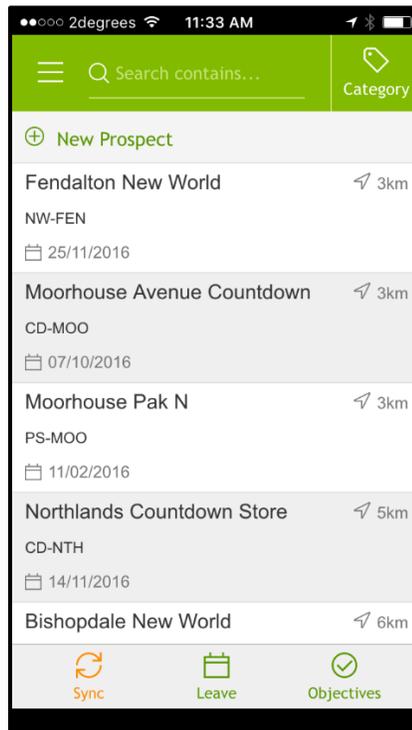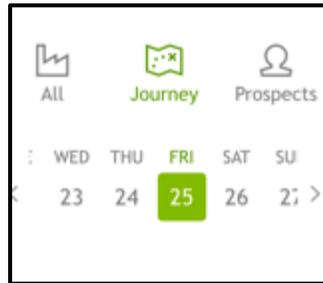
Choose between viewing All customers, or your Journey plan for the day.

Tip: Customers are sorted by distance so the closest stores will always be at the top of the list.
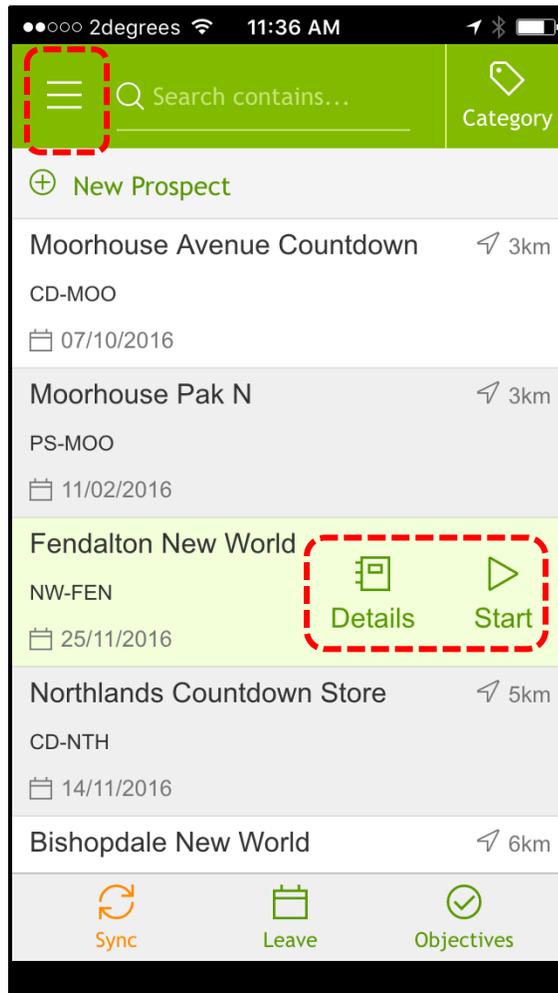
Select an Outlet   Scroll up and down the customer list, tap to select. The selected customer is then highlighted and a Details box appears with a Start icon.

Search   Tap in the Search box and enter in part of the customer code or name.
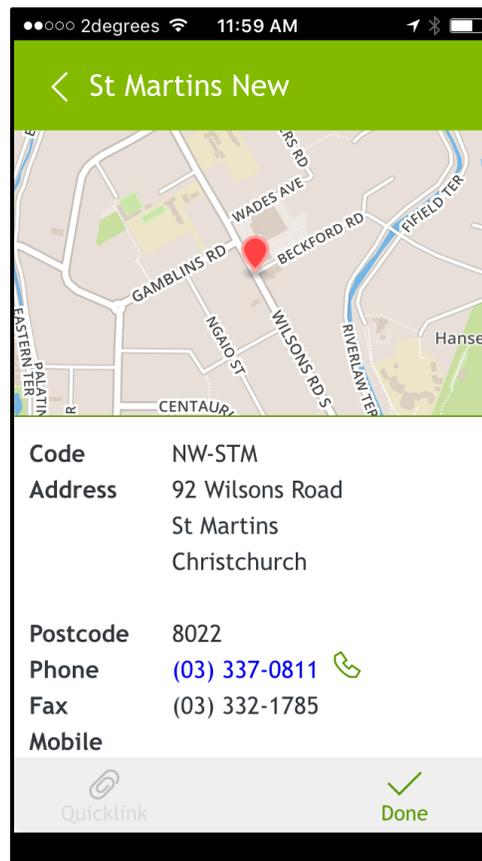
Group Filter   This filter is located on the menu button located on the top left hand corner.

Store Select

Details

Once a store has been selected tap on the **Details** icon to display further information regarding this customer, including store location.

Details	Displays customer details. Select **Done** to close.
	Some information may be visible e.g. customer account balances.
Get Directions	If online and a map is displayed, tap the map to open the smartphone Maps application to get directions from your current location.

Store Select

Journey Plan

Customer visits will be displayed if Journey plan functionality is utilised. You will find Journey Plan when you select the menu icon located at the top left hand corner of the screen.
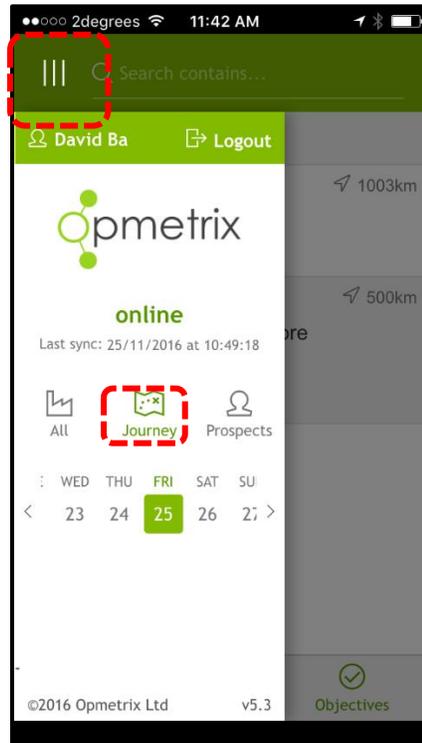
Select **Journey**. Selecting a date shows the customers to visit that day along with the order (or time) which they should be called on.

Journey Plan Maintenance is a head office function and cannot be set on the smartphone.

**Journey Plan** is an optional feature and may or may not be visible.

	Calendar	System defaults to today's date. Select date to view calls.
Tip:	**See All**	Change from Journey to All to see all customers
You can still complete an unscheduled call. From the group filter select All and then select the customer you require.	**Completed**	Once a call has been completed for that customer on that day, the customer line is greyed out, indicating the call is complete.

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Completing a Store Call

Start a Call

Once a store is selected (highlighted) tap the **Start** icon to begin. This should be done when entering the store or in the car park, as it records the start time of the call.
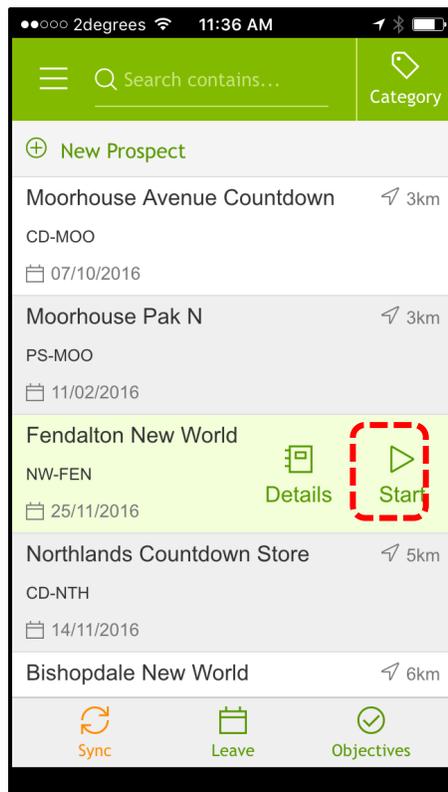
| Select Customer	Use the Journey Plan (if visible), filter or search methods to locate the store. Tap to select and highlight.
Start	Tap the Start icon to begin this call and record the start time.

Store Visit Type

Once a store is selected options for users are displayed e.g. a sales rep may tap on Out of Store if they want to review previous call notes and previous sales prior to calling on the outlet.
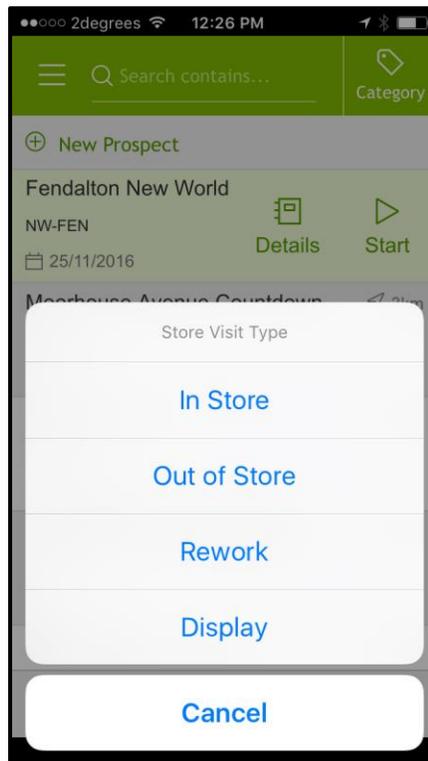
Store Menu Overview

Once a call has been started, Opmetrix Team will display the Task List. There are two key areas – Tasks to be completed for the vsit, and Contacts for the store. Edit or add new contacts at the bottom of the screen.
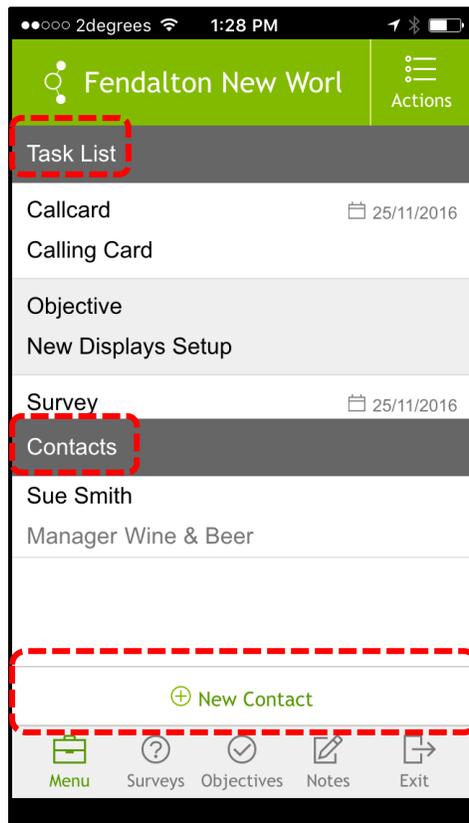
Menu	☰	To display the Task and Contact lists.
Surveys	⊘	To display all active surveys.
Objectives	⊘	To display a list of current objectives.
Call Notes	✎	To display previously entered call notes.
Exit Store	→	To exit this store and finish the store visit.

Actions Menu   To access the Actions Menu, tap on the top right of the screen. View Outlet Details, New Objectives and Exit Store.
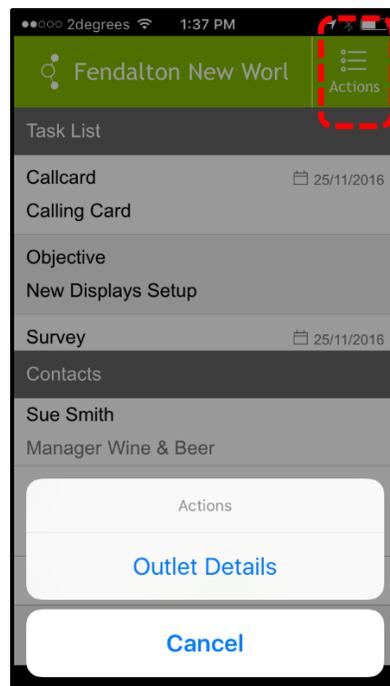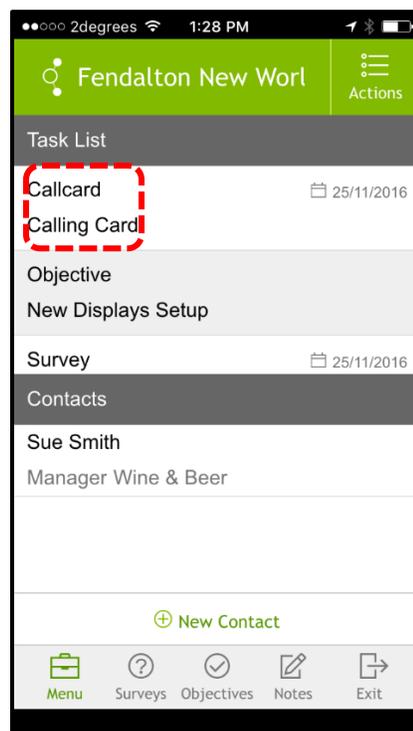
Store Call

Store Menu Lists Overview

Task Lists

The Task List displays a list of actions that should be completed for this store. They can include tasks such as surveys, objectives and calling cards. The list is filtered to actions that are appropriate for the store selected.

Each store's task list has an action in it called Calling Card. Calling Cards should be completed at least once per store visit and can also be used to record and escalate issues or notes regarding this store.
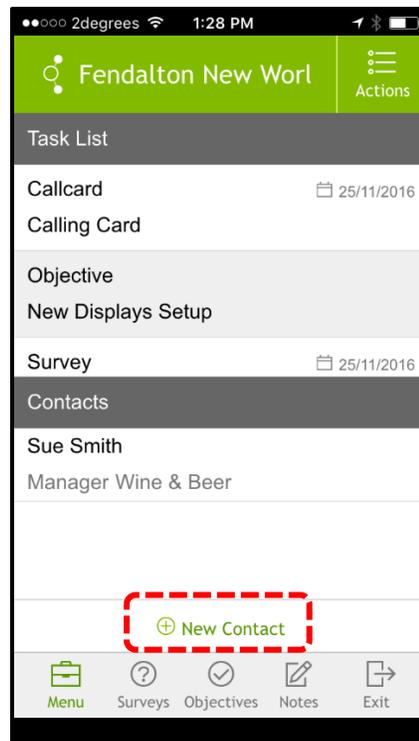
Contacts

Contacts List

Multiple contacts within a store can be added and maintained. Primary contacts can be tagged with a star within the contact list.

If a contact's email is included, a copy of a Calling Card can be emailed directly to that person.

All contacts are synchronised to the central Opmetrix CMS system.

|	
Add Contact	Tap **New Contact**, enter data then **Save.**
Edit Contact	Tap the contact to **Edit** then **Save** when done.
Delete Contact	Tap the contact then tap **Remove.**

Calling Card

Calling Card Overview

Calling Cards are used to record details on the store visit. They are often used to:

- Record what happened on each visit.
- Escalate issues, problems or competitor information.
- Record detail changes e.g. address, phone numbers.
- Photo-capture that relates to the Calling Card.

All Calling Cards become part of the call history for that client and can be accessed via the **Notes** button.
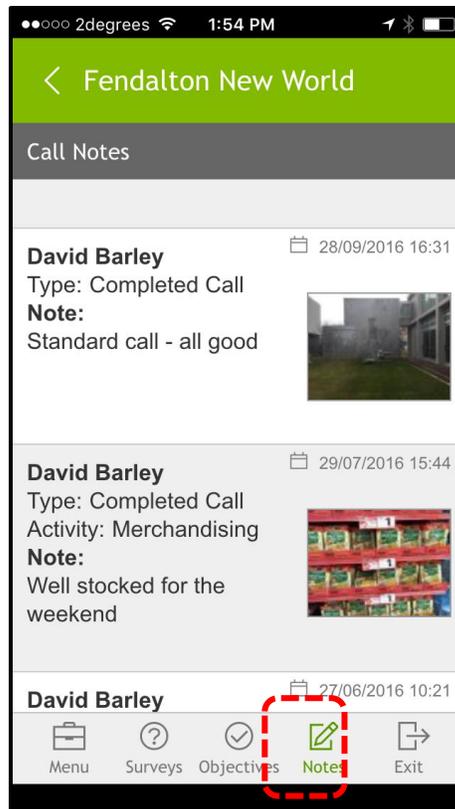
Calling Card Entry

To add a new Calling Card select **Calling Card** from the Task List. The Calling Card detail screen will display. Record all relevant information then tap **Save** or to exit without saving, tap the **Back** button in the top left hand corner.


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Call Type   Status of the call e.g. completed, cancelled etc.

Met With   The person(s) met with during this store visit. This list comes from the store contact list.

Activity   The actions completed on this call.

Call Notes   Enter information and notes regarding this call.

Take Photo   One photo can be attached per calling card. However multiple calling cards per store visit can be created.

Calling Card – Email Notify

You can notify other staff or customer contacts by email regarding this calling card. Tap **Email To** and select the staff or contacts required, then tap **Done**.

Once a synch is complete, a copy of the calling card will be emailed. This is useful to escalate an issue or non compliance. If a photo has been taken with this calling card, the photo is sent by email as an attachment.
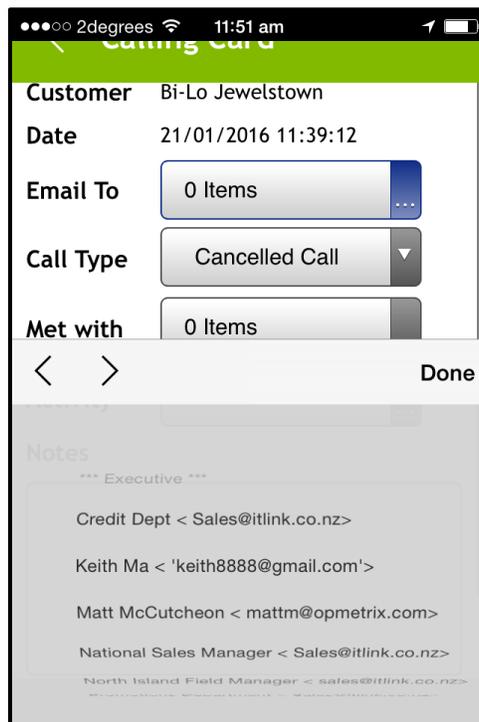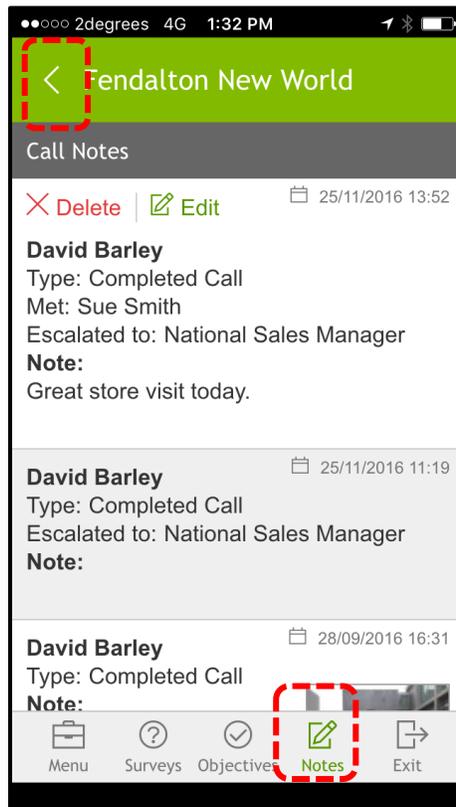
Calling Card History

Review historic Call Notes by selecting **Notes** from the in-store menu bar at the bottom of the screen.

Tip:

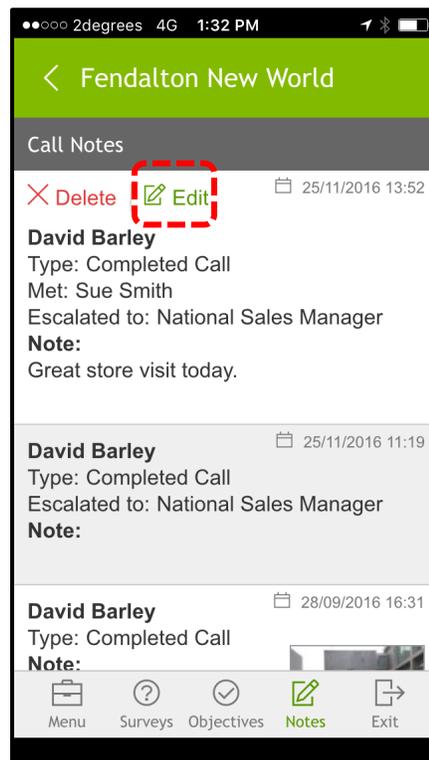To return to the In-Store view, tap on back button

Edit Calling Card

Edit or delete a calling card only when still in-store.

An option is available to edit or delete a calling card prior to selecting **Exit Store.**

Tap on **pencil** to edit or **X** to delete.

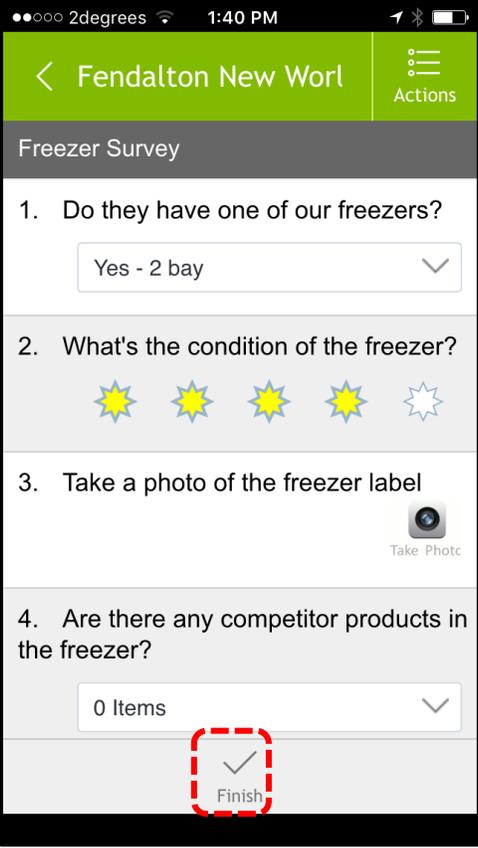Note: Calling cards cannot be edited once the user has selected **Exit Store.**

Objectives

Refer to separate guide for details.

Surveys

Survey questions can include:

- Two choice answers
- Input text
- Input number
- Single choice
- Multiple choice
- Rating 1-5
- Instruction
- Photo

Once all compulsory answers have been completed, tap **Finish**.

Store Call

Exit

Exit the store on completion of your visit. Exiting will record the end time of this Store visit.
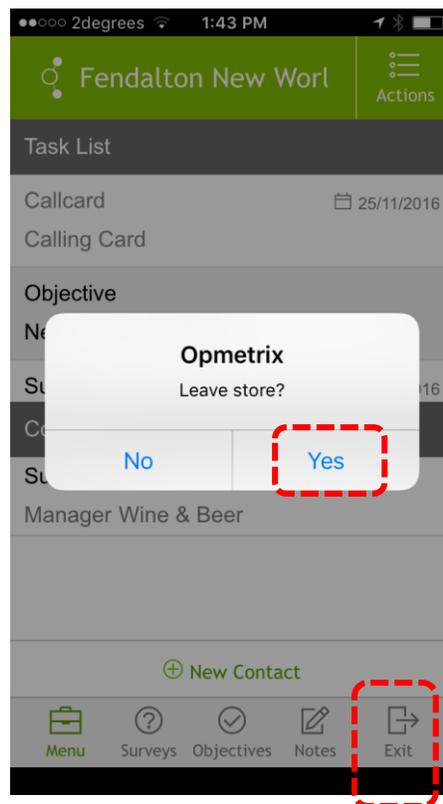
To Exit	Tap **Exit.**
Confirm	Tap **Yes** to confirm exit prompt.
Sync	Complete the sync process if you are online.

Opmetrix Contact Details

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Hours of Operation*   8.30am – 6.00pm Monday – Friday

*NZ Time and excludes New Zealand Public Holidays