

GPS Integration

Quick Reference Guide

Opmetrix App Version 4.2 onwards

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Introduction



Opmetrix App Mobile can record the GPS coordinates of every store visit completed by a field user.

This data is then compared against the stored coordinates of the store to determine if the field user was in the correct location when they completed the visit and tasks for that store.

The Opmetrix CMS reporting suite includes a location compliance report and store compliance indicators are available in the time in store reports.

GPS integrations use a variety of methods to determine where a mobile device is:

- **GPS** Many tablets have a GPS built in
- **3G/4G** The SIM card in the device can determine location
- Wi-Fi The Wi-Fi network can determine location

Opmetrix uses all of the above to determine a location. Some methods are more accurate that others, however this is factored in when determining location compliance.

Opmetrix GPS Integration works on all supported platforms including iPad, Windows 8 tablets and laptop.

GPS Location Considerations

GPS Integration can be a problematic discussion to have with a field team. While the benefits of business analysis reporting are substantial, some field users may not be comfortable with its use.

We recommend that field users are advised that Opmetrix does have this capability and is active on their system.

Usage and Features

- There is an option is the system setting to turn this functionality off for the entire Opmetrix system
- Field users must select 'Allow Opmetrix to determine your location' when the system is installed. Selecting No will disable this option for that device.
- Field users can also disable this option in the settings and configuration area of the tablet/iPad post install of Opmetrix.
- A store/outlet must have its coordinates (geocode) set in Opmetrix to compare the GPS location in order to report on location compliance
- GPS location on a mobile device is variable therefore a setting in Opmetrix allows for this. The default compliance distance is a radius of 1000 metres from the outlets geocode. It can be set to a maximum of 1 kilometre.

Setup Outlet Location

In order to check location compliance the coordinates of each store visited must be accurately stored. These coordinates are called a geocode.

Automatic geocoding based on the customers address is not always accurate therefore Opmetrix provides a geocoding maintenance module for updating your customer's geocode.

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Budget Compliance	Showing	Showing 184 result(s) between 01/06/2014 and 30/06/2014 (This Month)												
Budget Compliance Graph	No Filte	rs Applied.												iow Pitters
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				_	_	_	_		_					
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Transaction Workflow	1027	Bill	o Killaranev Vi	le .			Dir	-41.17420		169 3904751	0.6 (0.7.0)			•
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Transaction Print and Export	1090	Calter Albany Centre					Dig	-36,7324038		174,7085699	05 (0 / 0)		1	Q
	1091	Cal	tex All Seasons				Die	-36.8630696		174.6485711	0% (0 / 1)		1	- 2
Transaction Detail Lines	1092 Caltex Ashburton							-43.9080544		171.7421933	0% (0 / 0)		1	×
Transaction Photo Gallery	1093	Cal	tex Avalon				Dis	-37.7728919		175.2422424	0% (0 / 0)		1	×
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Transaction Volume Summary	1095	Cal	tex Avonhead				Dig	-43.5113569		172.5559197	0% (0 / 0)		1	×
Product Reports:	1096	Cal	tex Balmoral				Die	-36.884688		174.7385788	0% (0 / 4)		ø	×
	1097	Cal	tex Basin				Dis	-41.3022662		174.7794397	0% (0 / 0)		1	X
Product Group	1098	Cal	tex Bayfair				Die	-37.6743073		176.2278014	0% (0 / 0)		1	×
	1099	Cal	tex Blockhouse	Bay			Dig	-36.9226394		174.7014493	0% (0 / 0)		1	×

GeoMap Customer Maintenance – is available on the **Reports Tab**, then select **Geomap Maintenance**. Only **Opmetrix Administrators** have access to this function.

EditSelects a customer to lookup individual
address on the mapDeleteDeletes an individual geocode for a
customerDelete GeocodesDeletes geocodes for all customersGeocode NowGeocodes all customers without existing
Geocodes

Tip: Use Ctrl-F in your browser to show the find dialogue box, and then enter part of the customer name to quickly locate the outlet you wish to lookup.

Setting / Updating Geocodes

Select edit to select a customer

Switch | Print | X Geocode Maintenance Outlet Details Outlet Name: New World Remuera Address: -36.8819007 10 Clonbern Rd Latitude: Longitude: 174.7972023 Remuera Auckland Find on Map Save Save O Cancel -

If the store has a Geocode the longitude and latitude fields will have numbers displayed and the map will have a green pin on the current store location.

Minor adjustment to a customer location

Sometimes the pin may not be exactly where the store is (eg in a big shopping mall). Click on the location you require and a new blue pin will appear. Once you have the correct location select Save.

Switch | Print | X Geocode Maintenance Outlet Details Outlet Name: New World Remuera 10 Clonbern Rd Address: Latitude: -36.88006162011896 Longitude: 174.8012626170475 Remuera Auckland Find on Map O Cancel ✓ Save ۲



No Location or wrong location

Sometimes there may be no location or a completely wrong location (eg wrong country or hemisphere).

Enter in the address of the outlet in the four line address field. Be as accurate as possible and include a state and country to be sure that the correct address will be found. Now select **Find on Map** to update the map below.



You can refine the location by clicking on the map which updates the red pin. Once you have the correct location select.

Important:

Entering an address does not overwrite the customers address in you accounting system or master data. It is only used temporarily to find the address on the map.

Tips when entering addresses

- Don't use 'corner of' (eg cnr High and Smith)
- Don't include flat or unit numbers (eg Unit 2)
- Don't include level (eg level 2)
- Do use a region, state or country

Tip: Use the zoom and pan controls on the map to assist with accuracy.

Geocoding Resources

Auto geocoding

To Auto geocode customer addresses, select **Geocode Now** in the Geocode Maintenance section.

The results are based on the actual addresses in your accounting or master customer list therefore including a state and country for each customer assists greatly with accuracy. As part of ongoing system maintenance, it will be necessary for you to manually correct or update inaccurate geocodes using the **Geocode Now** tool in Opmetrix CMS.

Checking Geocodes

Opmetrix App users see the distance to each store in their store select screen.

							Outlets	Sales History Objectives					
					tr		Searc	Search contains Contains Store					
Qpmeinx						IX	Code	Name	Address	Last Visit Distance			
	•								🔓 New Outlet				
Logge	ed in	as: D	emo				1112	Liquor King Bush Inn	340 Riccarton Rd	30/01/2014 3km			
Currently online							1113	Liquor King Carlton Mill	17 Papanui Rd	11/11/2013 3km			
Transactions to Send (0) Sync Now						w	1129	New World South City	555 Colombo St	02/03/2014 3km			
Last sync:					107		1171	Scenic Circ Cotswold Hotel	88 Papanui Rd 28/10/2013 3km				
10 March 2014 at 10:07:03 am N2D1					201		1179	Scenic Circ Fino Casementi Hotel -	87 Kilmore St 02/10/2013 3km				
Group						1168	Henrys Liquor - Barbadoes Street	Cnr Barbadoes & St Asaph Sts	24/09/2013 4km				
Su	Мо	Tu	We	Th	Fr	Sa	1072	Warehouse Papanui	Sawyers Arms Rd	08/01/2014 5km			
2	3	4	5	6	7	8	1157	Liquorland - Beckenham, Colombo St	157 Colombo St	05/11/2013 6km			
9	10	11	12	13	14	15	1131	New World Stanmore	300 Stanmore Rd	06/01/2014 7km			
16	17	18	19	20	21	22	1173	Henrys Liquor - Bishopdale	333 Harewood Road 10/05/2012 7km				
23	24	25	26	27	Z8	29	1095	Caltex Avonhead	202 Withells Rd	08/10/2012 7km			

If a distance is incorrect we recommend using the **Calling Card** option in Opmetrix to advise head office to update the location for that customer.

GPS Integration

Each time a field user **starts** or **ends** a store visit, the GPS coordinates are stored. If a field user starts a call on-site, then finishes that call in another location, this can then be reported on. Many Opmetrix customers track and analyse time spent in each store to ensure stores are not over or under serviced.

							Outlets	Sales History Objective:	5			
e na a hrite							Sear	ch contains o	Contains Store Select			
Opmetrix							Code	Name	Address	Last Visit Distance		
	•								皆 New Outlet			
Logg	ed in	as: D	emo				1112	Liquor King Bush Inn	340 Riccarton Rd	30/01/2014 3km		
Curre	ently	onlin	e				1113	Liquor King Carlton Mill	17 Papanui Rd	11/11/2013 3km		
Transactions to Send (0) Sync Now						w	1129	New World South City	555 Colombo St	02/03/2014 3km		
Last sync:					TOT		1171	Scenic Circ Cotswold Hotel	88 Papanui Rd	28/10/2013 3km		
10 March 2014 at 10:07:03 am N2D1					201		1179	Scenic Circ Fino Casementi Hotel -	87 Kilmore St	02/10/2013 3km		
0100	P		AL	-			1168	Henrys Liquor - Barbadoes Street	Cnr Barbadoes & St Asaph Sts	24/09/2013 4km		
Su	Мо	Tu	We	Th	Fr	Sa	1072	Warehouse Papanui	Sawyers Arms Rd	08/01/2014 5km		
2	3	4	5	6	7	8	1157	Liquorland - Beckenham, Colombo St	157 Colombo St	05/11/2013 6km		
9	10	11	12	13	14	15	1131	New World Stanmore	300 Stanmore Rd	06/01/2014 7km		
16	17	18	19	20	21	22	1173	Henrys Liquor - Bishopdale	333 Harewood Road	10/05/2012 7km		
23	24	25	26	27	28	29	1095	Caltex Avonhead	202 Withells Rd	08/10/2012 7km		

Checking GPS on a mobile device

From the Opmetrix App Store Select Menu select **Action Menu** then **GPS Location Test**. A map will display with current location which confirms the GPS integration is active.



Time in Store Report

The Time in store report is available under the **Activity** tab.

The Time in store report is available to Admin, Supervisors and field users. Data is restricted based on the level of access.

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opinelix	Sales Re	ports	Surveys	Promotions	Objectives	Merch	Merch History	Activity	Custom						
Activity	Time I	n St	ore												Info
Outlet Activity:															
Time In Store															
	Showing 37 No Filters A	result(s) between 01	1/03/2014 and 31	/03/2014 (This A	lonth)				🖂 Email	😰 Save	Export	Print 3	Show Fi	Iters
Store Visit Summary		ppired.													
Location Compliance	Total time: 7	d 05h 13	8m 41s - Avera	nge time: 04h 40r	m 54s - For: 37 m	esults									
Call Coverage By Device	Outlet ID	Out	let Name			Start Tim	0	End Time	De	vice Login	Visit Type	Time Tak	ien Loc	sation	
Call Coverage By Supervisor	1020 E	is Cole	s Broadbeach		D	z 12/03/201	4 11:15	2/03/2014 11:1	17 Cub	eDemo	In Store	0:01:19	♀ Li	ocation	Dia
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Ganing Garus.	1034 0	is Cour	tdown Green	lano	Di	a 12/03/201	4 10:24	2/03/2014 10:4	66 Ren	00	Out of Store	0:22:13	Q Li	ocation	Dia
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	1111 0	ia Pak I	N Save Manger	re	D	£ 04/03/201	4 10:30	1/03/2014 12:1	16 Scot	tt	In Store	169:45:51	♀ Li	ocation	Dia
Calling Card Compliance	1069	is Ware	house Newm	arket	D	£ 11/03/201	4 10:45	1/03/2014 10:4	46 Ren	60	In Store	0:01:33	€ Li	ocation	Ria
Calling Cards Gallery	1034	ia Cour	tdown Green	lane	D	£ 11/03/201	4 10:41	1/03/2014 10:4	45 Ren	60	In Store	0:04:11	€ Li	ocation	Dia
contrast contery	1091	is Calte	x All Seasons		D	£ 11/03/201	4 10:12	1/03/2014 10:2	23 Rod		In Store	0:10:42	♀ Li	ocation	Ria
Calling Cards By Type	1064	ia Ware	house Manuk	au	D	£ 10/03/201	4 15:54	0/03/2014 15:5	55 Ren	60	Out of Store	0:01:23	♀ Li	ocation	Dia
Lunary Direct	1034	ia Cour	tdown Green	lane	D	£ 10/03/201	4 15:29	0/03/2014 15:3	31 Ren	66	In Store	0:01:12	♀ Li	ocation	Dia
Journey Plan:	1035	ia Price	Lock Annand	ale Hotel	D	£ 07/03/201	4 11:57	7/03/2014 11:5	58 Dem	10		0:00:14	♀ Li	ocation	Dig
Journey Plan Compliance	1011	ia Cole	s Albury		D	£ 06/03/201	4 12:41	6/03/2014 12:4	48 Dem	10	In Store	0:07:13	💡 Li	ocation	Dia
	1011	ia Cole	s Albury		D	£ 06/03/201	4 12:18	6/03/2014 12:4	40 Dem	10	In Store	0:22:19	♀ Li	ocation	Dig
Journey Plan Maintenance	1069	is Ware	house Newm	arket	D	£ 04/03/201	4 10:35	4/03/2014 10:3	38 Ren	ee	In Store	0:02:45	💡 Li	ocation	Dig
Outlet Contacts:	1098	is Calte	x Bayfair		D	£ 04/03/201	4 09:12	4/03/2014 09:1	14 Rod		In Store	0:01:52	€ Li	ocation	Dig
	1096	is Calte	x Balmoral		D	£ 03/03/201	4 17:11	13/03/2014 17:1	14 Rod		In Store	0:02:42	€ Li	ocation	Dia
Contacts Maintenance	1036	ia Price	Lock Australia	an Hotel	D	£ 03/03/201	4 17:07	13/03/2014 17:0	18 Rod		In Store	0:01:31	€ Li	ocation	Dig
	1034 0	ia Cour	tdown Green	lane	D	£ 03/03/201	4 16:54	3/03/2014 16:5	56 Ren	ee	In Store	0:01:54	€ Li	ocation	Dia
	1034 0	fit Cour	tdown Green	lane	D	£ 03/03/201	4 16:23	3/03/2014 16:3	30 Ren	ee	In Store	0:06:49	€ Li	ocation	Dig

The right hand column indicates if the GPS location matches the stored geocode for that visit.

Tip: Use the report filters to show only in-store visits and no other types of custom visit types like phone calls or Admin	Green Indicator	The Start and End coordinates matched the outlets geocode				
visits.	Orange Indicator	Either the Start or End coordinates matched the outlets geocode, but the other did not.				
	Red Indicator	No coordinates matched the outlets geocode				
	Grey Indicator	The outlet does not have a geocode, the GPS was not active on the device or the coordinates could not register at the time.				

Time in Store Location Detail

Select **Dig** on a store compliance to show map detail.

The green dot indicates the store while the green arrows show the start and end visit locations.



Select the **Outlet, Start** or **Finish** from the title bar to move the map to that location.



Location Compliance

The Location Compliance report is available under the Activity tab.

The Location Compliance report is available only to **Administrator** and **Executive** logins.

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Č.	Sales Reports	Surveys Promotions Object	tives Merch Merch History	Activity Custom		
Activity	Location Co	mpliance				2 10/0
Outlet Activity:	Location of	Inpliance				
Time In Store	Showing 5 result(s) he	tween 01/03/2014 and 31/03/2014 (This Month)			
Store Visit Summary	No Filters Applied.				mail 😰 Save 🗋 Export	A Print Show Filters
Location Compliance	Destandante	T-14 0-14-1 15-14-	Door Not Avefand	Nat ComePart	Constitute	Formalian
Call Coverage By Device	CubeDemo	fota outlet visits	Die 4	Dig 2	Dig 0	Dig 1%
Call Courses By Superviser	Demo	4	Die 0	<u>Dig</u> 4	Dig 0	<u>E18</u> 0%
Call Coverage by Supervisor	Renee	20	Dig 0	Dia 12	Diz 8	Die 40.0%
Calling Cards:	Rod	5	Diz 0	Dia 5	Diz 0	Dia 0%
Calling Cards Log	Scott	2	Dix 0	Dig 2	Diz 0	Ris 0%
Calling Card Compliance	All	37	Dia 4	Dia 25	Dia 8	11e 24.2%
Calling Cards Gallery	Device Login	Total Outlet Visits	Lines Not Audited	Not Compliant	Compliant	Compliance
Calling Cards By Type						
Journey Plan:						
Journey Plan Compliance						
Journey Plan Maintenance						
Outlet Contacts:						
Contacts Maintenance						
					Onmetrix CMS	Version 4.0 © 2014 Oppretrix Ltd

This report shows each device Login (field user), the total number of visits completed and totals of compliant and noncompliant visits. The compliance percentage is graphed in the right hand column.