



NearBy and Conveyance Management Features for Mobile Application

“Maximize sales using our intuitive features”

(Version 1.0)

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Executive Summary

About BUSINESSNEXT

BUSINESSNEXT has proven credentials in empowering the BFSI segment with its cutting-edge offerings to boost customer experience and drive employee engagement. It has to its credit among the largest Banking CRM implementations in the world with 35+ countries. It's a single platform to drive digital transformations with a variety of product lines including CRMNEXT, CUSTOMERNEXT, ORIGINATIONNEXT, BOTNEXT, DATANEXT, BRANCHNEXT, and RISKNEXT. With more than a million financial service associates and a billion customers supported by the platform globally, we effectively recalibrate banks' potential to grow engagement, drive profitability and deliver innovation.

Established in 2006, the company is PCI-DSS certified and named as a Challenger in Gartner's 2020 Magic Quadrant for Sales Force Automation. This is our fifth consecutive year of being assessed by Gartner and a commendable shift from the Visionaries quadrant to the Challengers quadrant in 2020 "based on its scopes of advanced capabilities, such as bot technology, white-space analytics, and machine learning. Gartner calls out high usability, easy navigation and customization possibilities as our strengths along with our ability to improve customer experience.



Introduction

When your team is in the field, it is important for them to have a complete detail of the leads they need to visit along with their location. Our CRMNEXT mobile application not only offers the visibility to manage leads from a single dashboard, but also offers a **NearBy** feature that displays the list of leads/ customers near to your current location.

Along with this, we offer end to end employee **Conveyance Management** solution that provides your everyday travel information. All you need to do is to mark your daily attendance using the check-in and check-out option and your location (longitude and latitude) is captured your using GPS tracking. This eliminates the need of recalling events or struggling to search for bills, and so on.

This documents explains the functioning of the [Nearby](#) and [Conveyance management](#) features.

Prerequisites

Ensure the following prerequisites are met to enable the NearBy and Conveyance Management features:

- Active internet connection
- Use the latest build version of the CRMNEXT application
- Mobile GPS must be ON



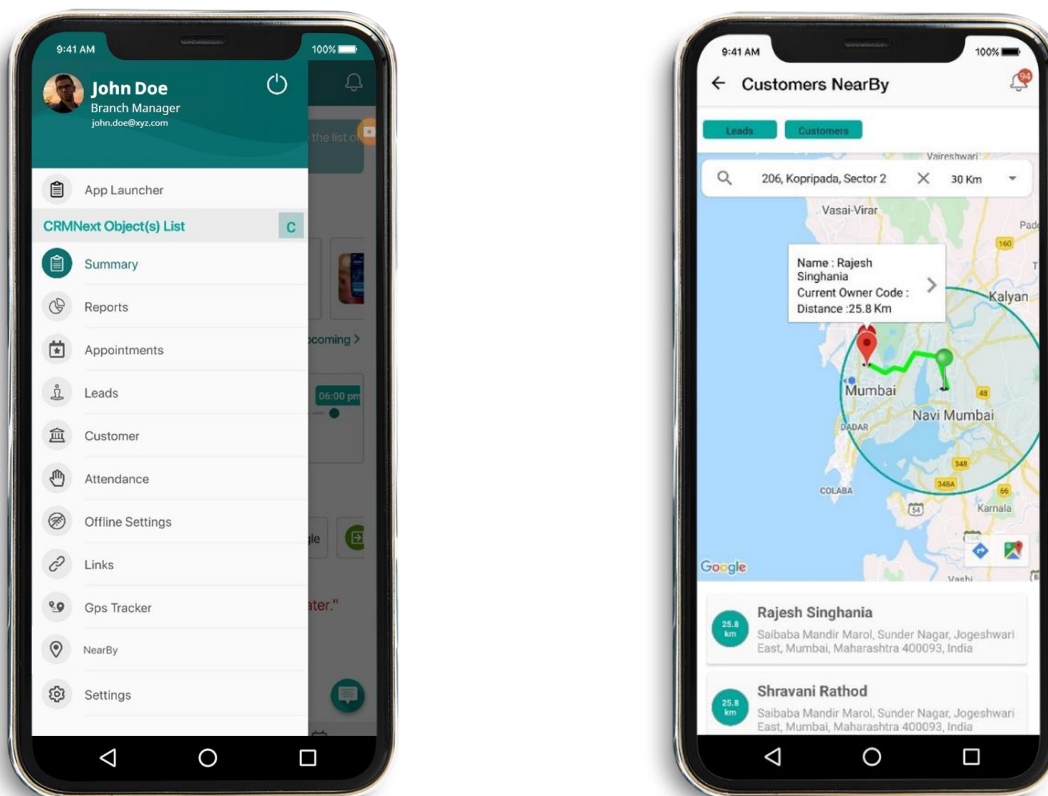
NearBy

For client meetings that wrap up early and you are left with enough time to spare, the nearby feature comes in handy. Your mobile application helps you make the best use of that spare time by displaying the leads or accounts available in your vicinity to schedule more meetings and increase sales.

The Nearby feature utilizes your location services to find your current spot and identifies the available leads, opportunities or accounts in its surroundings. With this, you can extract the most use of your time while you are out in the field.



Where Can I Access? – The **NearBy** option is available on the hamburger menu. Click it, the Customers Nearby screen displays the filter-based geographical representation of available leads, accounts, or both in your vicinity with a pictorial view to compare distances.



The NearBy screen above displays:

- Object tabs for which it is configured – Leads and Customers
- Provision to select the radius within which you want to display leads
- List of leads available under the select location radius
- When hover the leads location, the information about leads display



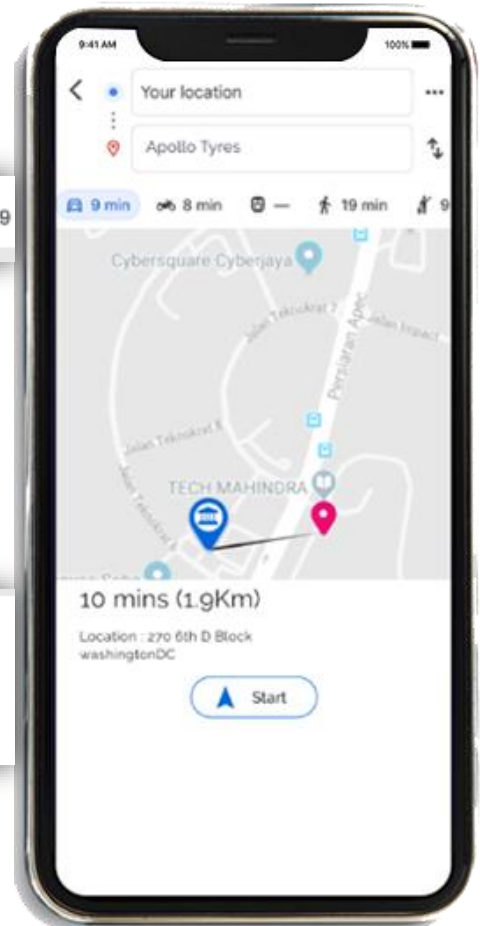
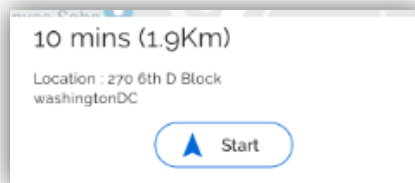


As of now, the NearBy feature can be configured only for Leads and account object. An administrator can configure these object through **Mobility Management** settings available under Administrative settings.

You can click a Lead/Account to display its single view geographical location with the exact distance from your place using the map of your choice.



So now, you can select the most efficient navigation route based on the ETAs, click Start and get moving to make that sale.



Conveyance Management using Attendance Object

CRMNEXT offers an easy way to submit your daily conveyance simply by marking your daily attendance while working remotely from different locations using the check-in and check-out options on the Attendance object. This calculates the total distance travelled between the Check-in and check-out point.

A manager views its subordinate's daily conveyance through a custom report generated using a report designer.



For more details about Report Designer, refer to our complete document available on SharePoint and CRMNEXT Content Library.

Attendance

To make your experience more professional, we offer a provision of capturing your location (longitude and latitude) using GPS tracking. The aim of introducing this feature is to mark your daily attendance.

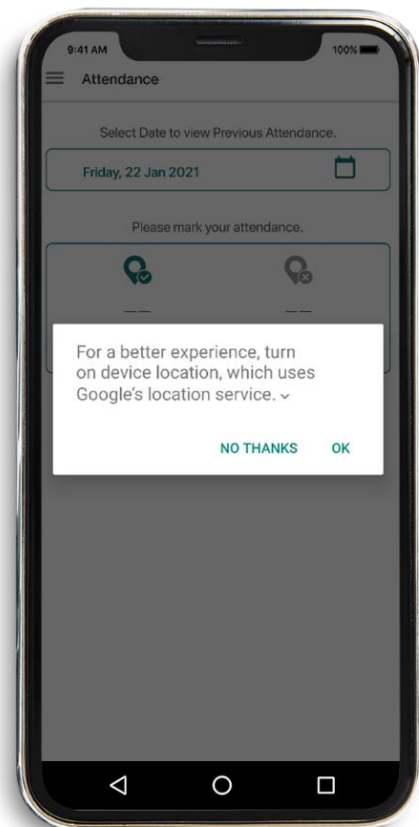
For this, it is mandatory to enable the following:

- Mobile device GPS
- Allow location access permission for CRMNEXT application, under settings

Once enabled, the GPS tracker starts working in the background. If the GPS is not enabled then the application displays a warning message to enable GPS, as displayed:

With this your current location's longitude and latitude are captured along with the check-in and check-out time, using GPS tracking.

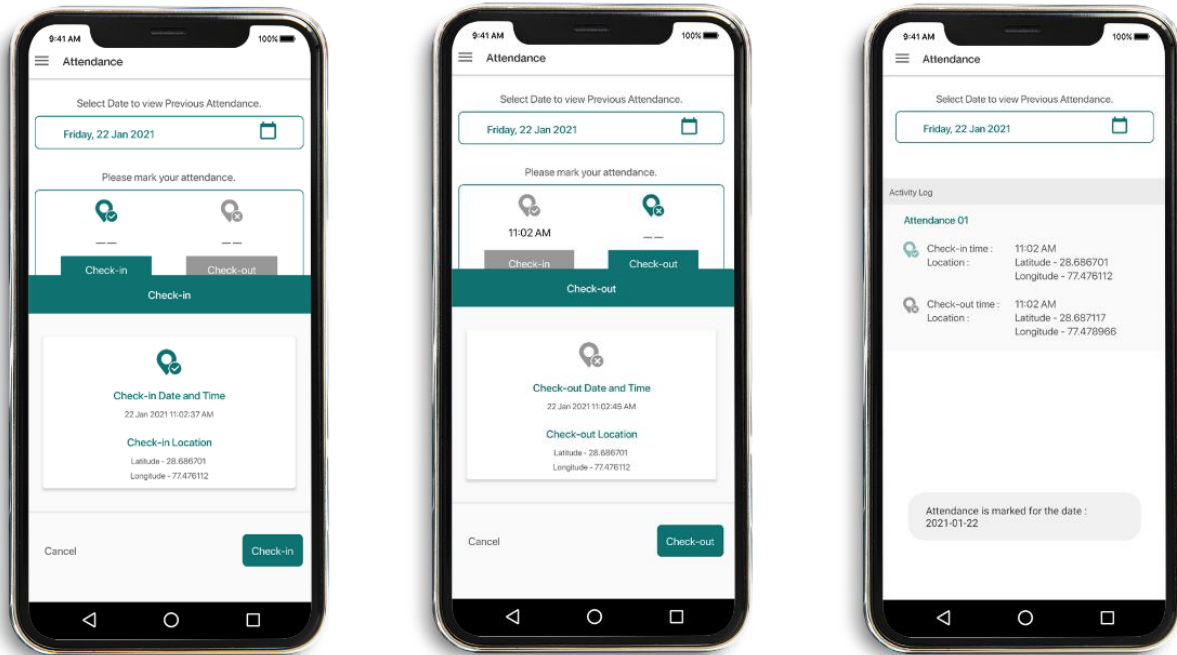
Where Can I Mark Attendance? – Navigate to the hamburger menu on the main screen, select the attendance object. The Attendance page displays.



You mark attendance for the previous or current date only. The example below displays the attendance marked for previous days.



Check-in and Check-out options on the Attendance object page



Conveyance Management

Based on the longitude and latitude captured during the checked-in time to checked-out time, the application can automatically calculate the distance travelled. This helps to manage your daily expenses without any paperwork and missed reimbursements.

A supervisor can view its employees' [distance calculation](#) details on a web application by generating a custom report using a report object.

| Conveyance Management Report | | | | | |
|---|----------------|------------------|--------|-------------------|------------------|
| <div> Export Add to Quick Links Clone Email </div> | | | | | |
| <div> Filter By <div>ConveyanceDa</div> <div>Hide Details</div> <div>Execute</div> <div>Filter</div> </div> | | | | | |
| ConveyanceDate | Assign To Name | Created On | Name | Total Distance KM | Total Distance M |
| 06/01/2021 00:00 | John Doe | 06/01/2021 19:15 | 100277 | 45.5 | 45500 |
| | Samantha | 06/01/2021 17:43 | 100212 | 23 | 23000 |
| | John Doe | 06/01/2021 13:15 | 100150 | 09 | 9000 |
| | Billy B | 06/01/2021 11:55 | 100089 | 32 | 32000 |
| Total Count For 06/01/2021 = 4 | | | | | |
| 07/01/2021 00:00 | John Doe | 07/01/2021 18:41 | 100379 | 15 | 15000 |
| | Samantha | 07/01/2021 18:41 | 100368 | 27.13 | 27130 |
| | Billy B | 07/01/2021 18:41 | 100364 | 35.4 | 35400 |
| | John Doe | 06/01/2021 19:15 | 100312 | 23 | 23000 |
| | Samantha | 06/01/2021 19:15 | 100301 | 47 | 47000 |
| Total Count For 07/01/2021 = 5 | | | | | |



The application captures your current location (longitude and latitude) at a selected [time interval](#). The location is updated on the server, every time you travel a distance of a minimum of 50 meters.

When using mobile data, the longitude and latitude captured gets synced on the server and is deleted from the phone memory. The syncing process starts when there is a minimum of ten location records in the phone memory.



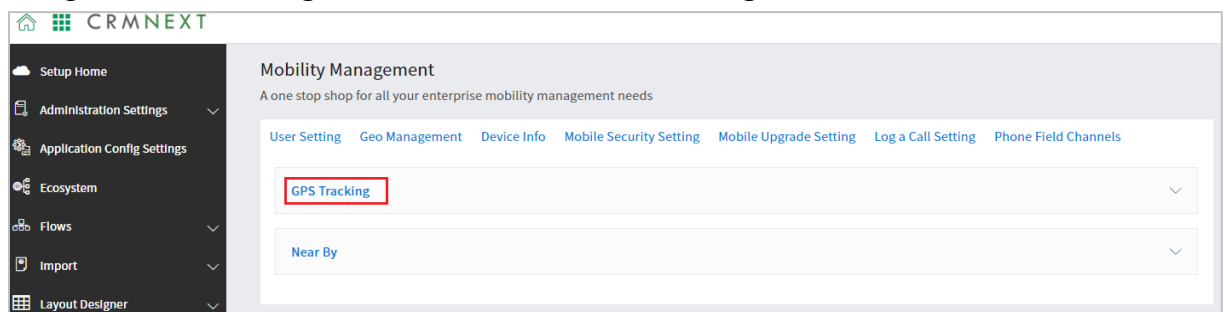
Check-in and check-out are mandatory for syncing and displaying data in the database.

Time Interval Configuration

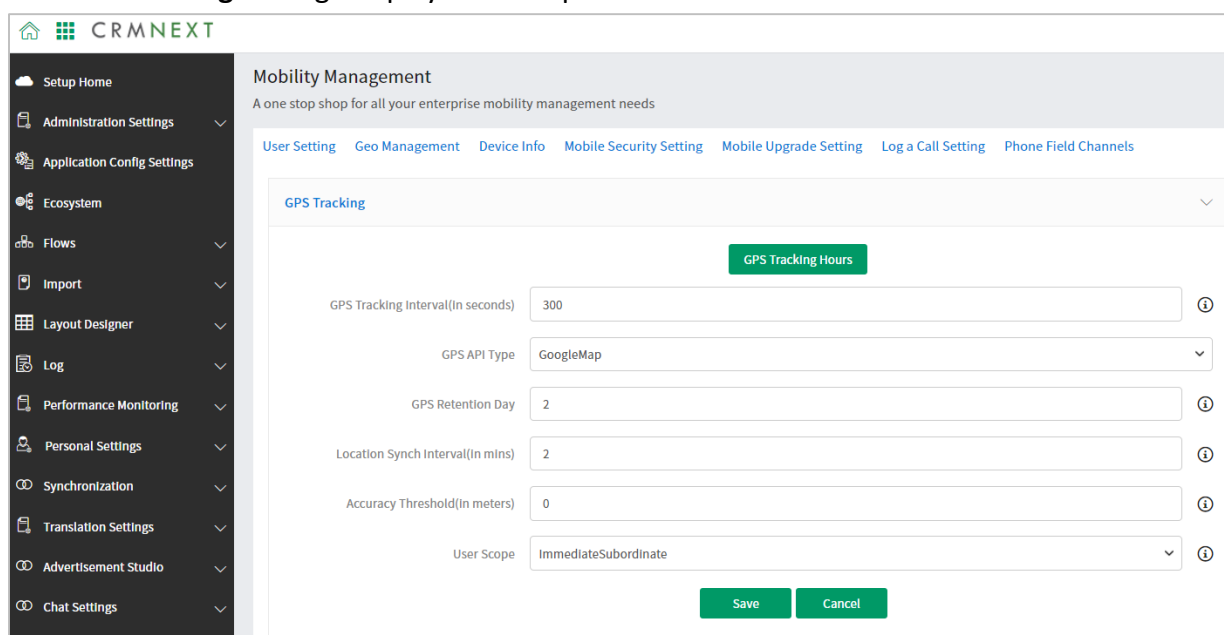
You can configure the time interval after which your location is automatically updated, whether you move or not. This helps in keeping the track of your updated location.

Perform the following steps to enable objects:

1. Navigate to **Setup > Administrative Settings > Administration Settings > Mobile Settings**. The **Mobility Management** page displays
2. Navigate to **Geo Management** tab. Click the **GPS Tracking** from the list



3. The **GPS Tracking** settings displays as a drop-down



4. Set **GPS Tracking Interval** minimum to 5 minutes (300 seconds). The other fields are set as required
5. Click **Save**

Distance Calculation Process

Every time you travels a distance of a minimum of 50 meters, the location gets updated within the system. This distance is calculated by the **Calculate User Distance** job available under Synchronization Jobs Listing.



This job is created through backend is available under the Synchronization Manager.

Perform the following steps to view **Calculate User Distance** job

1. Navigate to **Setup > Administrative Settings > Synchronization > Synchronization Manager**. The **Synchronization Jobs Listing** page displays
2. Select **System Jobs** in search panel. The System Jobs list displays
3. Observe that **Calculate User Distance job** is available

| CRMNEXT | | | | | | |
|--|------------------|-------------|----------------|-----------------------|----------------------|--|
| Synchronization Jobs Listing | | | | | | |
| Search | | | | | | |
| System Jobs | | | | | | |
| Name | Last Run On | Last Run By | Current Status | Last Execution Result | Last Stopped By | |
| Send Report Scheduler Notification | 18/01/2021 13:25 | Scheduler | Active | Success | | |
| Rebuild Product Hierarchy | 21/12/2020 00:00 | Scheduler | Active | Success | | |
| Process Push Notification | 21/10/2020 15:49 | Scheduler | Active | Success | Mobile Administrator | |
| FlowResume | 20/12/2020 14:41 | Scheduler | Active | Success | | |
| Calculate User Distance | 11/01/2021 18:51 | Scheduler | Active | Success | Mobile Administrator | |

Showing 1-5 Records

This job is created using CRMNEXT **Autonoma Designer** where a flow is created using the following:

- **Start Point** = Check-in point (longitude and latitude)
- **End Point** = Check-out point (longitude and latitude)

The longitude and latitude of places visited (say A, B, C, and D) is captured at the backend at a specific interval of time.

Total Distance Covered = Distance covered from Start point to point A + Distance covered from point A to point B + Distance covered from point B to point C + Distance covered from point C to point D + Distance covered from point D to End point.



If the longitude and latitude of a location are the same for more than the defined time interval, then the location is not updated at the backend.



Device Specifications

CRMNEXT mobile application is cross-platform and is supported by the latest version for both iOS and Android operating systems. We do not provide support for Windows phone.

Refer to the table below for detailed information about compatible devices for both Android and iOS:

| | OS VERSION | RAM | INTERNAL STORAGE | MOBILE/ IPAD DISPLAY SIZE | TESTED DEVICE |
|---------|---------------------|------|------------------|--|---|
| ANDROID | 5.0, 6.0 up to 10.0 | 2GB | 8 GB | 7 inches (1600*2560 pixels) 6.28 inches (1080*2280 pixels) 5.5 inches (1080*1920 pixels) | Samsung Tablet Lenovo Tablet Moto G4 Plus |
| | 10.0 or above | 3 GB | 16GB | 5 inches (1080*1920 pixels) 5 inches (720 * 1280 pixels) | Moto G5 Huawei Honor 7x One Plus 6 Mi A2 Lenovo Z2 Plus Samsung J7 Prime Samsung S9 Oppo A37Fw |
| iOS | 10.0 or above | | 16GB | 6.1 inches (1125*2436 pixels) 5.8 inches (1125*2436 pixels) 5.5inches (1125*2436 pixels) 4.7 inches (750*1334 pixels) | iPhone 6s iPhone 7 iPhone X iPhone Xs iPhone Xr iPhone 11PRO iPhone 8 |

Installation Options

Install our mobile application for your Android or iOS devices that meet the minimum device requirements as listed above.

Listed here are two ways to access the CRMNEXT mobile application:

- [Use the application link provided by us](#)
- Download and Install the application from the [Google play store](#) or [App Store](#)

Once installed, launch it from your device screen and login to your account. Create an MPIN when prompted for and get ready to experience our Mobile CRM application.

Your user license type, the set assigned user profile and permission determines the data that is available to you.



Links to Download CRMNEXT Mobile Application

You can download and install CRMNEXT mobile application using the following links:

- Android App on Play Store

https://play.google.com/store/apps/details?id=com.crmnextmobile.crmnextofflineplay&hl=en_IN

- iOS App on App Store

<https://apps.apple.com/in/app/crmnext-saas/id1539856646>



Let's Sum It Up



Improved the effectiveness of your business with our NearBy and Conveyance Management features that helps you offer a consistent and efficient service experience to your customers/ prospects.

With our sleek, super-light, and concise application you can transform your services and provide a proactive and personalized experience. This lets you accelerate business processes and maintain proper real-time records of your travel.



Appendix – A

Google SDK Functions

Some of the Google SDK functions that we use for the NearBy and Conveyance Management features are:

| Google Map SDK Functions | Detail |
|---|--|
| Get address from latitude, longitude | <code>getFromLocation(double latitude, double longitude, int maxResults)</code> https://developer.android.com/reference/android/location/Geocoder |
| Display route and markers | <code>com.google.android.gms.maps.SupportMapFragment</code> |
| Draw route using polyline | <code>PolylineOptions lineOptions = new PolylineOptions();</code> <code>mMap.addPolyline(lineOptions);</code> |
| Get current location and location on intervals | <code>FusedLocationProviderClient</code> <code>fusedLocationProviderClient.requestLocationUpdates(locationRequest, locationCallback, Looper.myLooper())</code> |