

ACTIVITY GEOLOCATION TO ODOO V14

This module tracks the user's geolocation when an Activity is **marked as done** with customer distance restriction.

a. Configure the maximum distance in meters accepted to mark as done activities between the Salesvendor and the Customer Location.

The screenshot displays the Odoo CRM Settings interface. The top navigation bar includes 'CRM', 'Sales', 'Reporting', and 'Configuration'. The left sidebar lists various settings categories: General Settings, CRM (highlighted with a red box), Sales, Inventory, Invoicing, Agreements, and Employees. The main content area is titled 'Settings' (also highlighted with a red box) and includes a search bar and 'SAVE'/'DISCARD' buttons. The 'CRM' section is expanded, showing options for 'Lead Mining' (checked) and 'Outlook CRM Extension' (unchecked). Below these, the 'BANT' section is visible, featuring 'Warning Percentage' set to 40.00 and 'Warning Users'. The 'Activities Geo Location' section is highlighted with a light blue background and contains a red-bordered box around the 'Maximum distance in meters' field, which is set to 100. A descriptive text below this field states: 'Maximum distance in meters accepted to make check in activities between the Salesvendor and the Customer Location.'

CRM Sales Reporting Configuration

Settings Search...

SAVE DISCARD

General Settings

CRM

Sales

Inventory

Invoicing

Agreements

Employees

Enrich leads on demand only

Enrich all leads automatically

Buy credits

Lead Mining ?

Generate new leads based on their country, industry, size, etc.

Buy credits

Outlook CRM Extension ?

Turn emails received in your Outlook mailbox into leads and log their content as internal notes.

BANT

Warning Percentage 40.00

Oportunidades con una Puntuación BANT menor a este valor será enviada una actividad para ser analizadas.

Warning Users

Usuarios a enviar las actividades de las Oportunidades con una Puntuación BANT baja, además del jefe inmediato.

Activities Geo Location

Maximum distance in meters 100

Maximum distance in meters accepted to make check in activities between the Salesvendor and the Customer Location.

b. Configure the Activity Types that use geolocation.

CRM

SalesReportingConfiguration

6

16

Mitchell Admin (ucon)

Activity Types

Search...

CREATE

Filters

Group By

Favorites

1-11 / 11

<input type="checkbox"/>	Name	Default Summary	Planned in	Type	Model	Icon	Use Geolocation	
<input type="checkbox"/>	+ Email		0 days	after previous activity deadline		fa-envelope	<input type="checkbox"/>	
<input type="checkbox"/>	+ Call		2 days	after previous activity deadline		fa-phone	<input type="checkbox"/>	
<input type="checkbox"/>	+ Visit		2 days	after previous activity deadline		fa-phone	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	+ Meeting		0 days	after previous activity deadline		fa-users	<input type="checkbox"/>	
<input type="checkbox"/>	+ Follow-up Quote		30 days	after previous activity deadline	Lead/Opportunity	fa-file-text-o	<input type="checkbox"/>	
<input type="checkbox"/>	+ Make Quote		15 days	after previous activity deadline	Lead/Opportunity	fa-file-text-o	<input type="checkbox"/>	
<input type="checkbox"/>	+ Call for Demo		10 days	after previous activity deadline	Lead/Opportunity	fa-phone	<input type="checkbox"/>	
<input type="checkbox"/>	+ Email: Welcome Demo		0 days	after previous activity deadline	Lead/Opportunity	fa-envelope	<input type="checkbox"/>	
<input type="checkbox"/>	+ Order Upsell		0 days	after previous activity deadline	Sales Order	fa-line-chart	<input type="checkbox"/>	
<input type="checkbox"/>	+ To Do		5 days	after previous activity deadline		fa-tasks	<input type="checkbox"/>	
<input type="checkbox"/>	+ Upload Document		5 days	after previous activity deadline		fa-upload	<input type="checkbox"/>	

c. Configure the geoposition of your customers.

CRM													
Sales		Reporting		Configuration		6 15							
Customers / Azure Interior													
SAVE DISCARD													
1 / 38													
Contacts & Addresses		Sales & Purchase		Invoicing		Internal Notes							
Sales				Purchase									
Salesperson		Delivery Method		Payment Terms		Payment Method							
Normal Delivery Charges		End of Following Month											
Sales Team		Payment Terms											
End of Following Month													
Fiscal Information				Misc									
Fiscal Position		Reference		Industry									
Inventory				Geolocation									
Customer Location		Partner Locations/Customers		Geo Latitude									
Vendor Location		Partner Locations/Vendors		Geo Longitude									

d. Schedule an activity that use geolocation and mark as done the activity, if the distance between the user and the client assigned to the opportunity is greater than the setting, the user will see an error and the activity will not be marked as done.

Note: If is the first time that use geolocation, the navigator will ask you if you want to share your location to this site, please allow this and remember this decision.

The screenshot displays a web browser window with a CRM application. The address bar shows a URL starting with `https://localhost/web#id=22&action=178&model=crm.lead&view_type=form&cids=1&`. The browser's address bar and the CRM interface are annotated with red circles and numbers 1 through 6.

CRM Interface Elements:

- Top Navigation:** Includes a CRM logo (1), a Sales menu (2), and a Pipeline / 5 VP Chairs link (3).
- Lead Record:** Shows details for Mitchell Admin, Sales Team, and America. It includes tabs for Internal Notes, Extra Information, and BANT.
- Activity List:** Displays a list of activities, including a "Due in 2 days: Vi" activity (4) with a "Mark Done" button (5).
- Planned activities:** A section for planning future activities.

Location Permission Dialog:

A dialog box titled "¿Permitir a localhost acceder a tu ubicación?" (Allow localhost to access your location?) is displayed. It contains a "Saber más" (Learn more) link, a checked "Recordar esta decisión" (Remember this decision) checkbox (6), and two buttons: "Bloquear" (Block) and "Permitir" (Allow).

e. Another way to mark as done an activity.

CRM Sales Reporting Configuration

My Pipeline Search...

CREATE GENERATE LEADS GENERATE LEADS

Filters Group By Favorites

Quote for 150 carpets
\$ 40,000.00

Puntuación Bant

0

Product
Type:
★☆☆☆

Quote for 12 Tables
\$ 40,000.00

Puntuación Bant

0

Product
Type:
★☆☆☆

Global Solutions: Furnitures
\$ 3,800.00

Puntuación Bant

0

Deco Addict1
Design
Type:
★★★☆☆

Quote for 600 Chairs
\$ 22,500.00

Puntuación Bant

0

Product
Type:
★☆☆☆

Info about services
\$ 25,000.00

Modern Open Space
\$ 4,500.00

Puntuación Bant

0

Information
Type:
★★★★☆

Office Design
\$ 9,000.00

Consulting
Type:
★★★★☆

5 VP Chairs
\$ 5,600.00

Distributor Contract
\$ 19,800.00

Puntuación Bant

0

Information Other
Type:
★★★★☆

Planned

Visit Due in 2 days

Feedback test

DONE & SCHEDULE NEXT DONE Discard

+ SCHEDULE AN ACTIVITY

f. To view the geolocation position of activities marked as done, go to Messages.

Settings General Settings Users & Companies Translations Technical

Messages / 5 VP Chairs

EDIT CREATE Action 1 / 78

Subject

Date 09/19/2022 18:55:49

From "Mitchell Admin" <admin@yourcompany.example.com>

Author YourCompany, Mitchell Admin

Type System notification

Subtype Activities

Employee Only ☐

Related Document crm.lead

Model

Related Document ID 22

Message Record 5 VP Chairs

Name

Parent Message 5 VP Chairs

Moderation Status

Moderated By

Body Gateway Recipients Tracking Geolocation

Check-in Date 09/19/2022 18:55:49

Check-in Latitude

Check-in Longitude