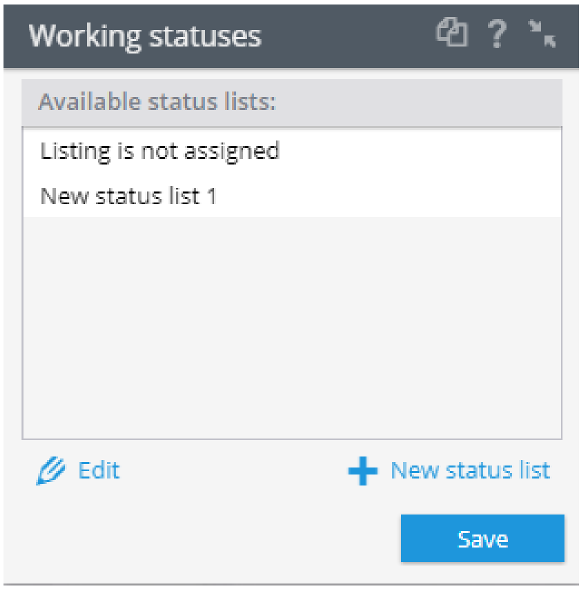
Change status lists with the Edit button.

To create a new list click on + New status list button.

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## Status lists create/edit

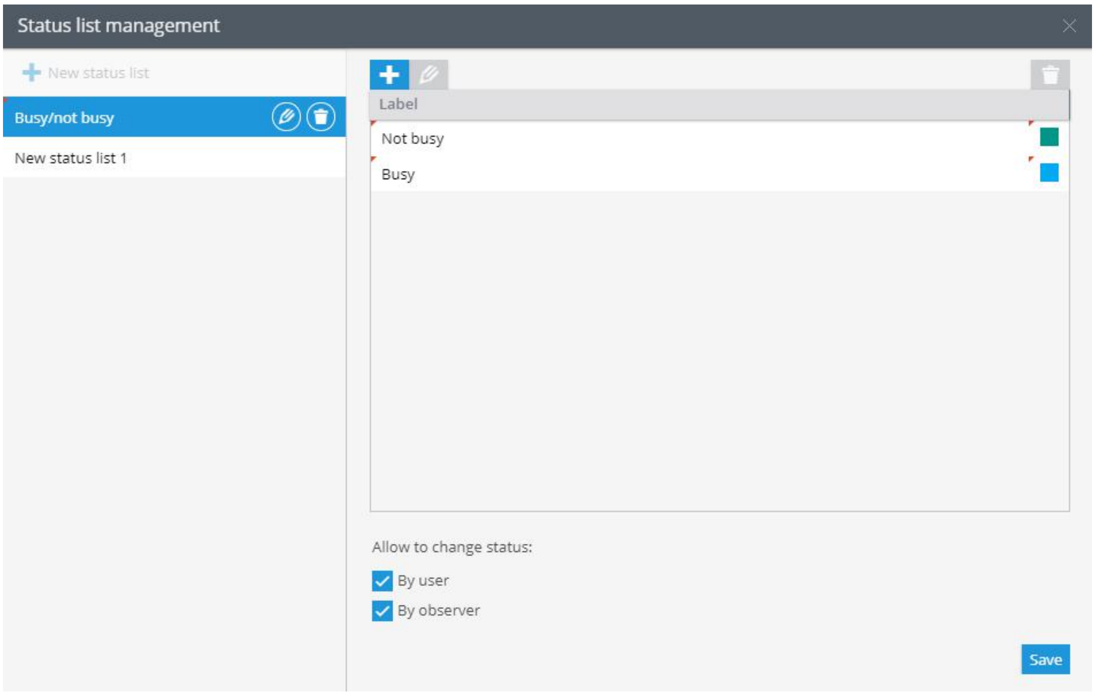
When you click + New status list button the status list management window opens with a new list to create. Specify its name and click Add to create.

Use + to add a new status to the list. There you can specify its name and choose a color.

Allow to change status:

**By user** - if the status can be changed by the employee on his phone using the X-GPS tracker app.

**By observer** - if the status can be changed by the operator in the monitoring app.




# Field service

Field service app lets users manage their mobile workforce according to *tasks* assigned to them.

Each task is a directive to visit some place at particular date and time, and perform some actions over there or simply make a delivery. Tasks can be assigned to employees. The system checks what tasks have been completed, failed or completed with delay, how much time an employee spent completing a particular task, etc.

Managers and dispatchers can efficiently schedule tasks, reassign them to another employees/vehicles in case of unexpected situations, retrieve reports to see how the job was done, measure staff productivity, calculate costs and many more.

Assigned tasks can be viewed in multiple ways:

- Interactively listed in table
- Located on map
- Scheduled on timeline
- Sorted by team members
- Overviewed in productivity chart

User can select the date and time range to view the tasks which were completed, planned for the future or currently in progress. Tasks can be also sorted by status, employee, place or any custom tag.

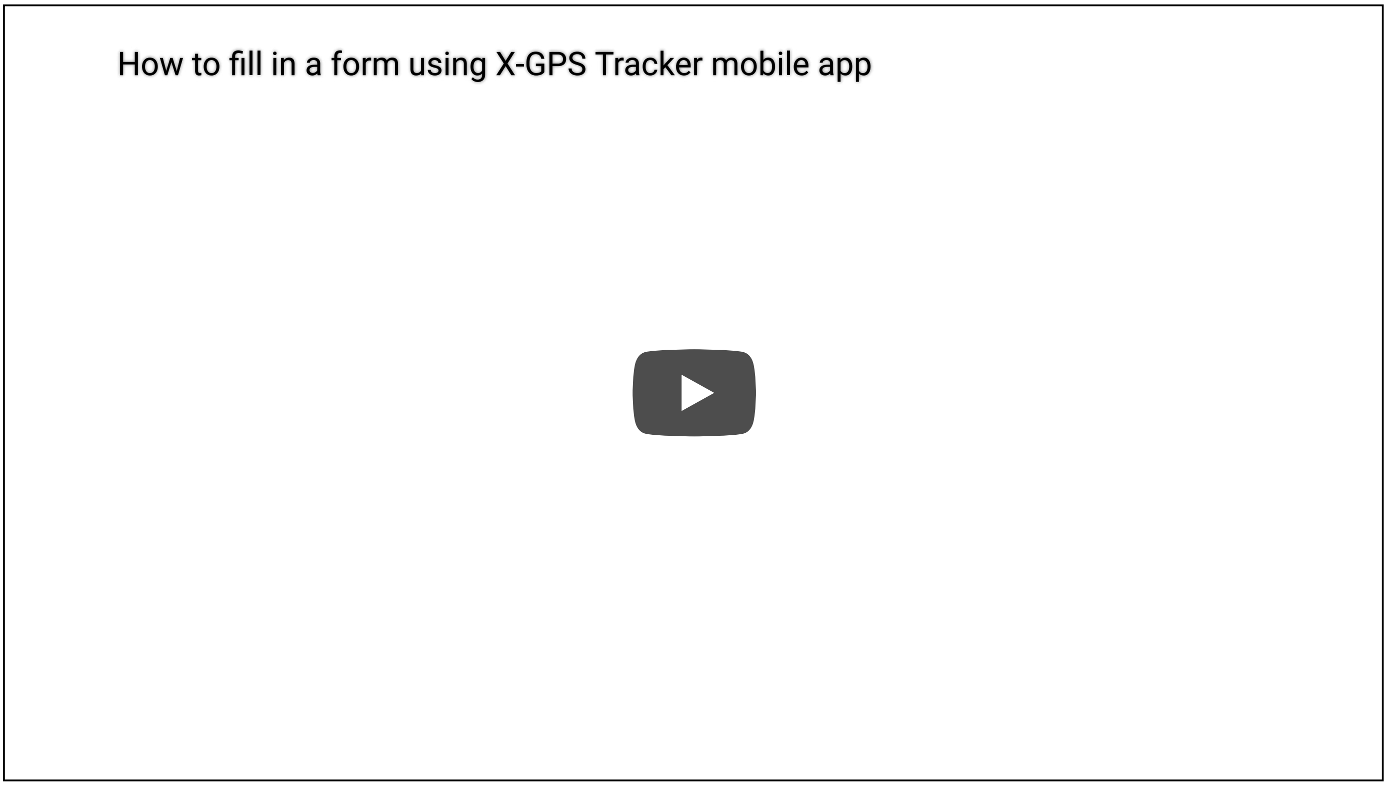
Creating a single or repeated task is really easy, you just need to double click on map or timeline.

As a business oriented app, Tasks can be flexibly configured for different workflows in many industries.

# Field service Forms

A form is an electronic document which is attached to a task. Employees fill out forms during or after having completed a task using the X-GPS Tracker mobile app. This way, an employee can easily and quickly send info on the task results to an office: client orders received, remote objects inspection report.

A form is created by a supervisor and contains adjustable text fields of the required content (text, data etc.) as well as separate fields for media files (photos, videos etc.)

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## How to start

To start using forms:

1. Create a form containing the needed components.
2. Schedule a task and attach a form to it.

There are 3 ways you can view the data from the completed forms:

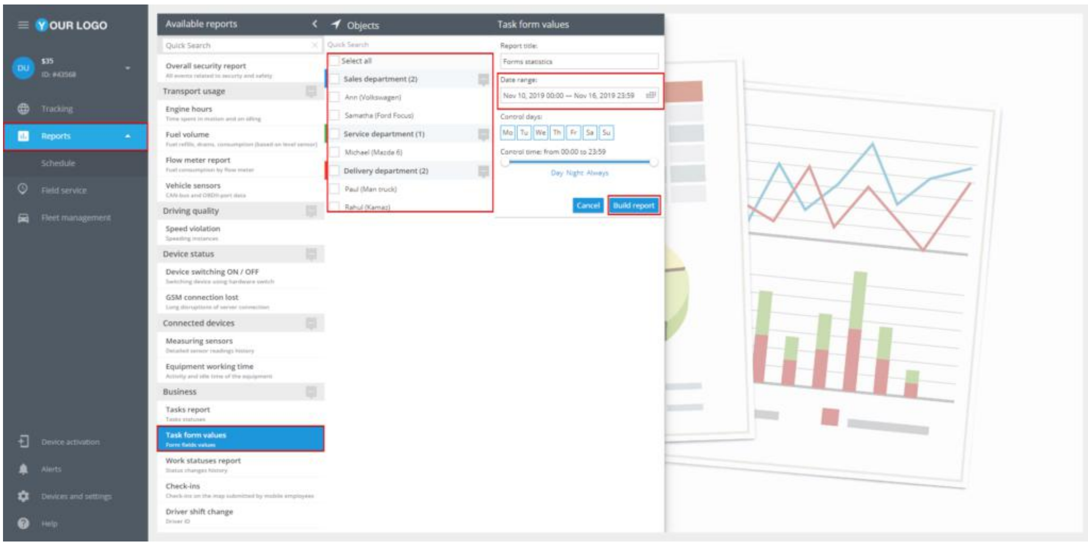
1. **In the list of submitted forms** you can view all the completed forms and look through its contents. More details.
2. **Via the instant notifications.** You can receive instant notifications of forms being completed by mobile employees. For example, for operators sitting in an office it'll be much easier to process the orders from sales representatives. Notifications are received via sms or email and contain a download link to a PDF file. More details.
3. **In the statistics report.** You'll get the statistics on the completed data in a table format. The table contains summary statistics on the selected components. More details.

# Field service Forms “Task form values” report

You can view and compare each employee performance results in the “Task form values” report. In order to create a report:

1. Open the “Reports” app.
2. Press “Create report”.
3. Select the “Task form values” point in the list.
4. Tick the objects you want to create a report.
5. Choose a date range.
6. Click on the “Build report” button.

In the forms statistics you’ll see how many times and what types of components have been selected for each form. For ex., it’s possible to get the number of the chosen repair types: warranty and paid.

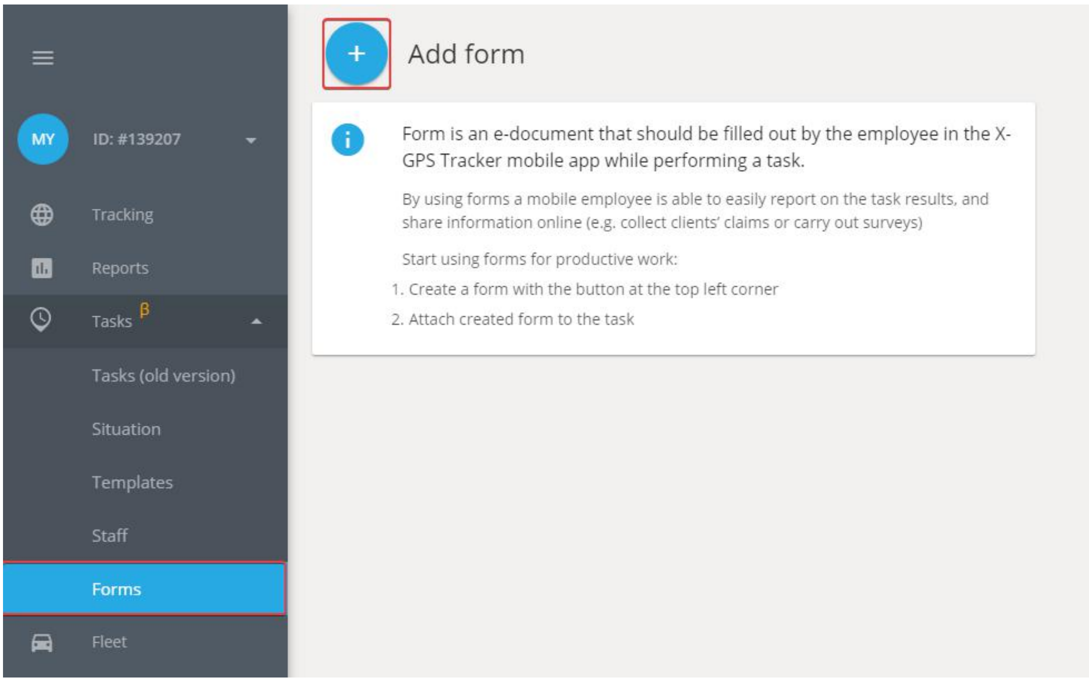


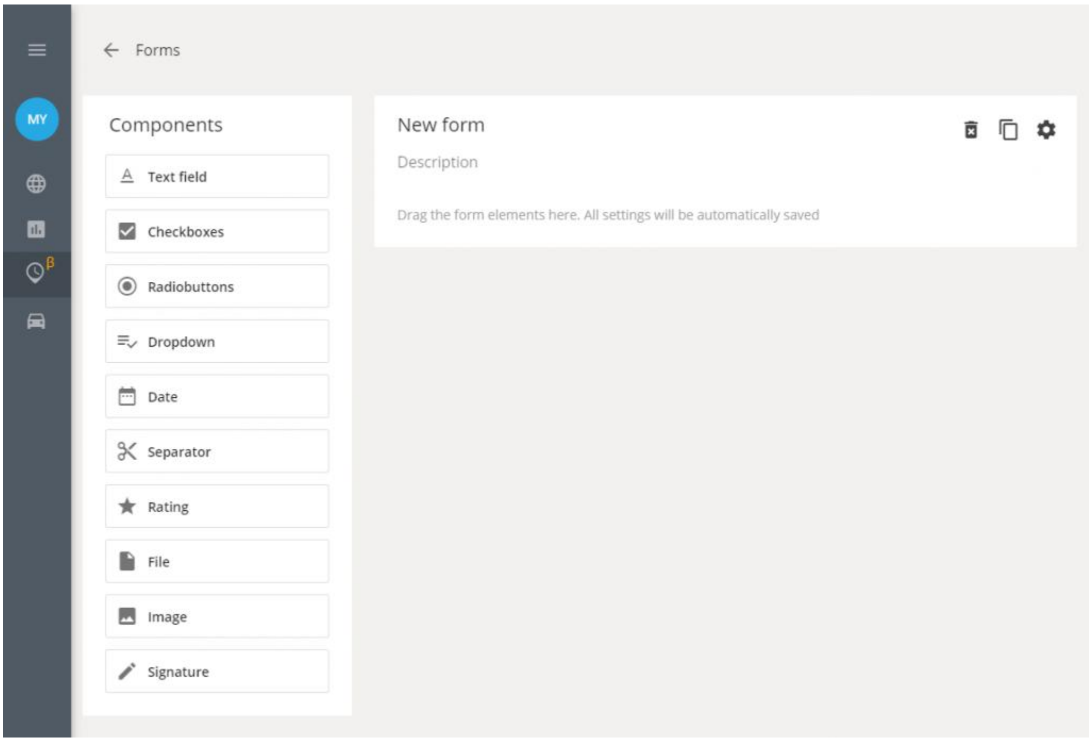

# Field service Forms Create a form

Create forms according to your company’s workflow. It’s possible to make any number of forms and adjust them to the corresponding tasks performed by an employee.

To create a form:

1. Run the “Tasks” app.
2. Open the “Forms” module.
3. Click the Add button.
4. Choose the needed components on the left side of the screen.

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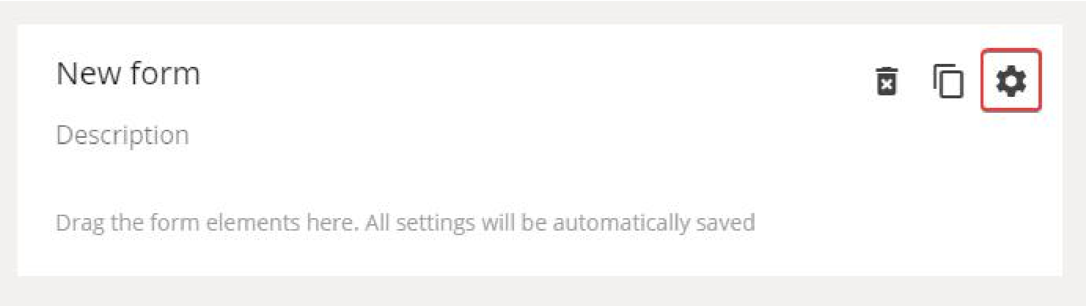
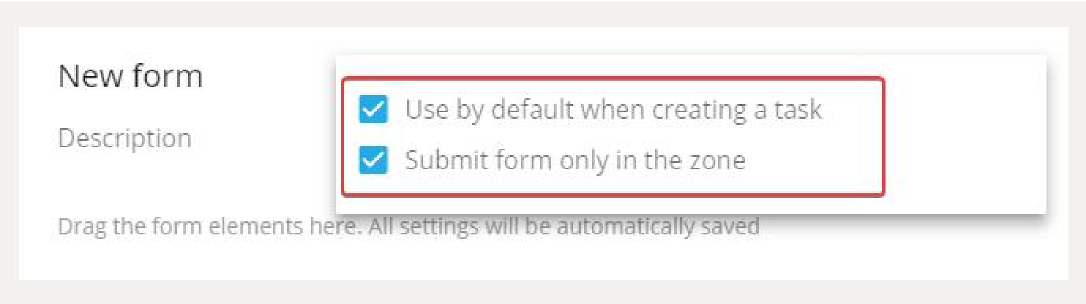
There are additional settings available for each form:

1. **Use as default:** we recommend to set this option when there's one and the same form used many times.Turn on the option and the selected form will be automatically set for each created task.
2. **Submit forms only in the zone:** with this option turned on, an employee will not be allowed to complete and send a form outside the task zone. This way, you can set the place where the form

is only allowed to be submitted, for ex. during a client meeting. This'll improve data reliability and ensure its timely receipt.

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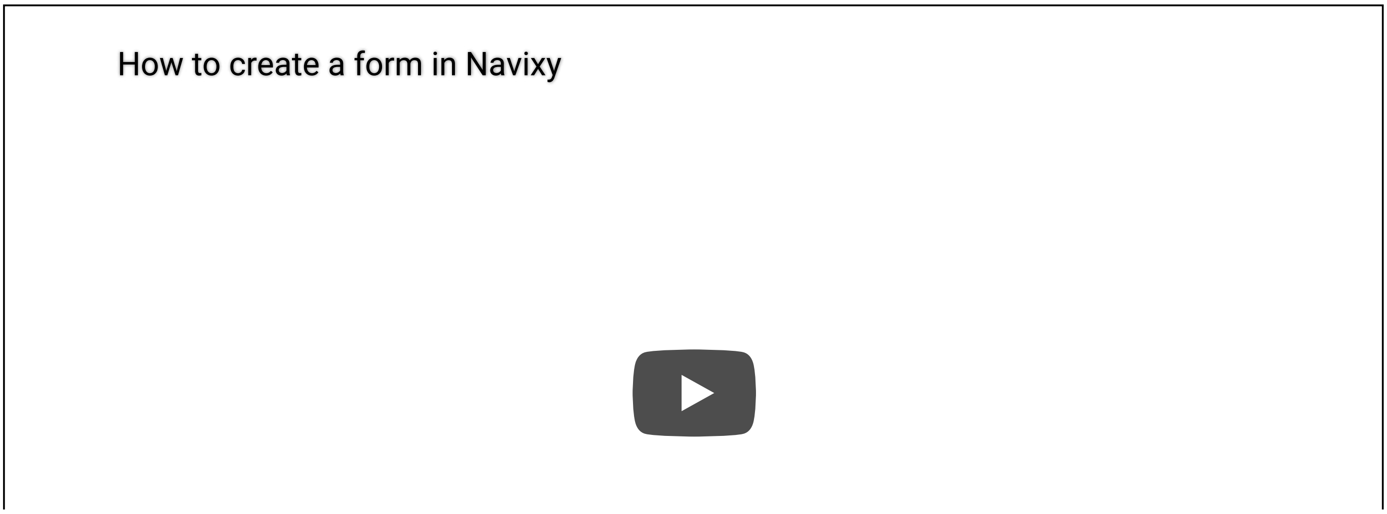
When working with a form components you can:

1. **Make a component mandatory to be filled in** — you can set the most important components to be obligatory as well as allow an employee to choose other components containing additional information. This way, an employee will be able to send a form from the X-GPS Tracker mobile app to a server only after having filled out all the components required.
2. **You can drag elements** to a new location using the mouse.
3. **Copy, edit or delete** components.

You can find the detailed description of the components in a list below:



A list of components

**Text field**

Insert information of any kind, for ex., put a service name and its description.

**Checkboxes**

The user may select one or several options from a list. It's also possible to set the min and max number of checked positions allowed.

**Radio buttons**

The component allows the user to select one option from a set.

**Dropdown**

This component has the same functionality as “Radio buttons”, the difference is that here the variants are hidden in a dropdown list.

**Date**

An employee can enter a date: YYYY/MM/DD

**Separator**

All the components beyond the page break will be taken to the next page.

**Rating**

Ratings allow mobile employees to put a mark. For instance, to evaluate the product shelf placement. The users can also change stars number in settings.

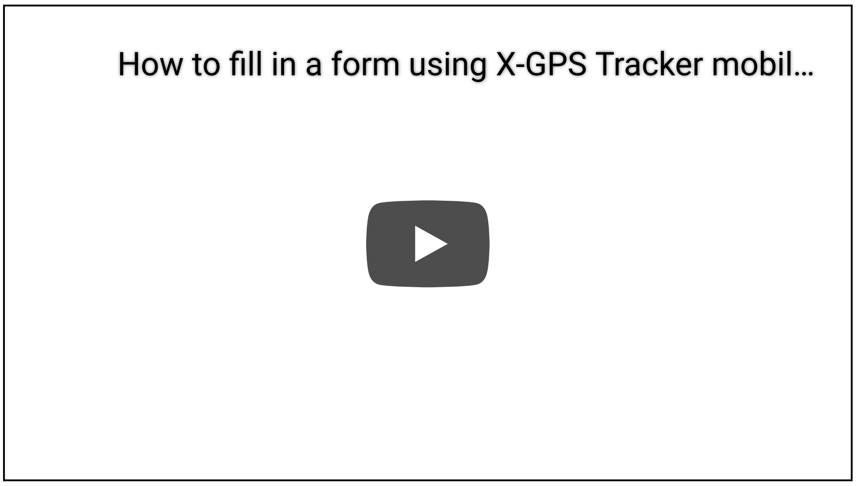
# Field service Forms Fill out a form

An employee fills out a form while performing a task or after its completion. A worker inserts information about the tasks results and actions. In order to start completing a form:

1. Run the X-GPS Tracker mobile app.
2. Switch to the “Tasks” section.
3. Open the needed task.

4. Choose a form in the task description.

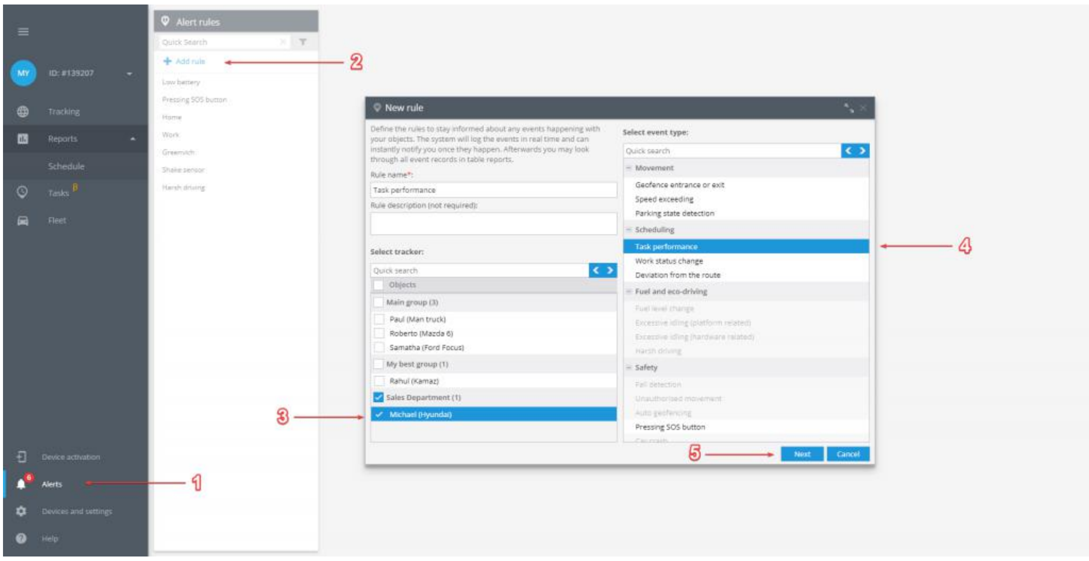
Once all the mandatory fields have been filled, a form will be sent to a monitoring service. Form submission is one of the essential conditions for a successful task completion.

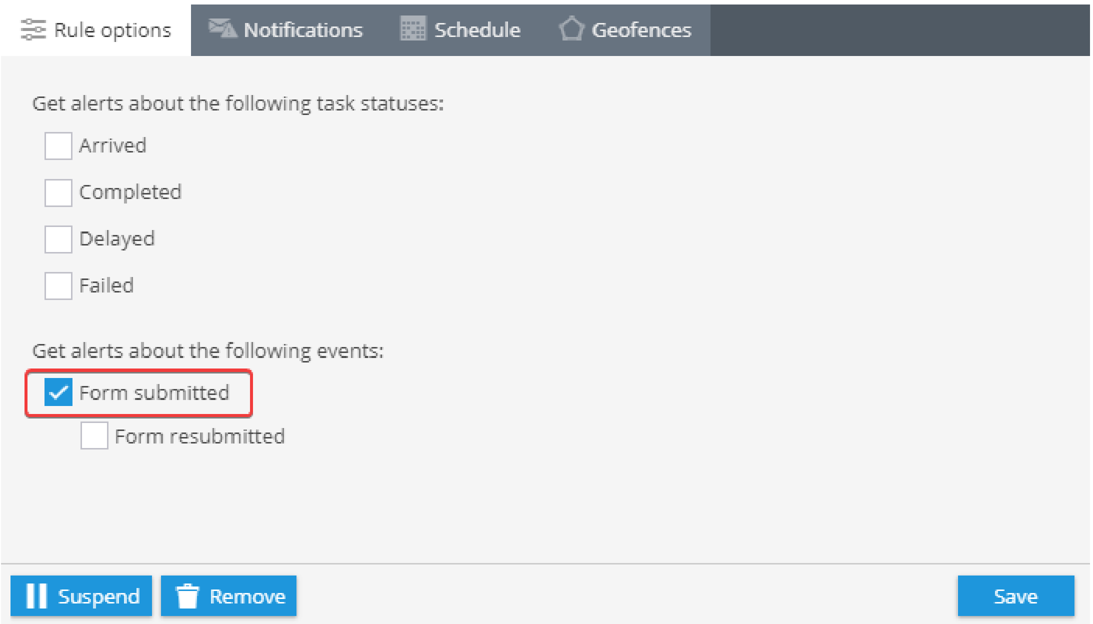


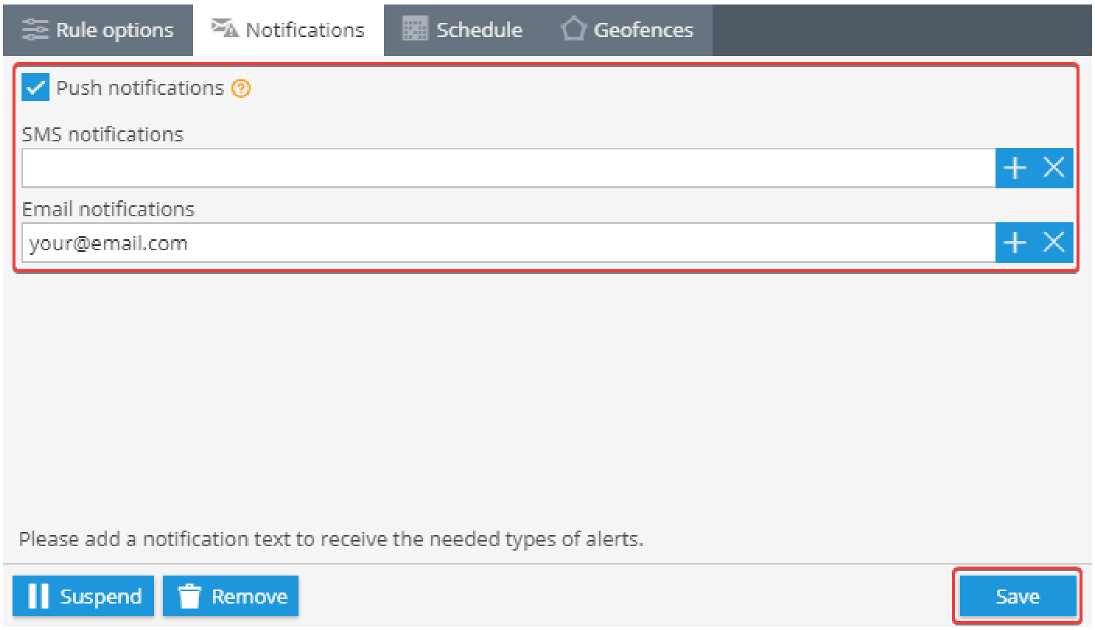

# Field service Forms Form submission notifications

Notifications allow to learn about the form arrival to a monitoring service in time. Follow these steps to configure notifications:

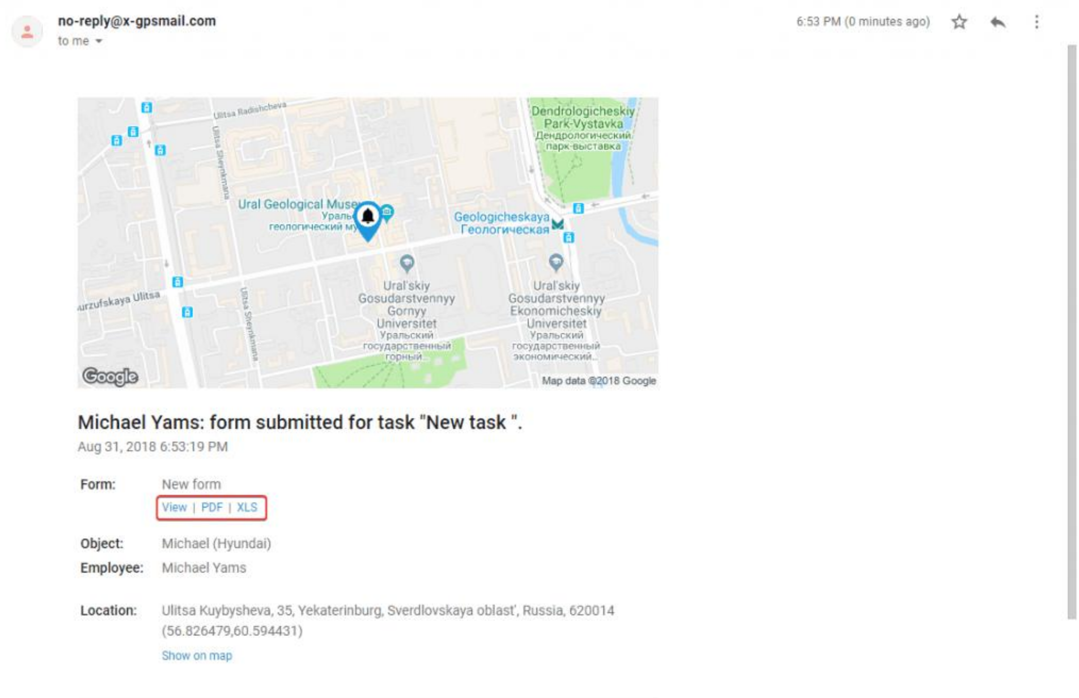
1. Open the “Alert rules” app.
2. Click on the “Add rule” button.
3. Choose the objects on which the rule will be applied.
4. Select the “Task performance” in the list of events and press next.
5. Open the “Rule options” section and tick “Form submitted”.
6. Switch to the notifications tab and choose the notification type.


Alert rules
Add rule
2
New rule
Select event type:
Task performance
4
Select tracker:
3
Alerts
1
5
Next
Cancel


Rule options
Notifications
Schedule
Geofences
Get alerts about the following task statuses:
Arrived
Completed
Delayed
Failed
Get alerts about the following events:
Form submitted
Form resubmitted
Suspend
Remove
Save




You can save the completed form on your computer or smartphone by clicking on a link attached in a message.



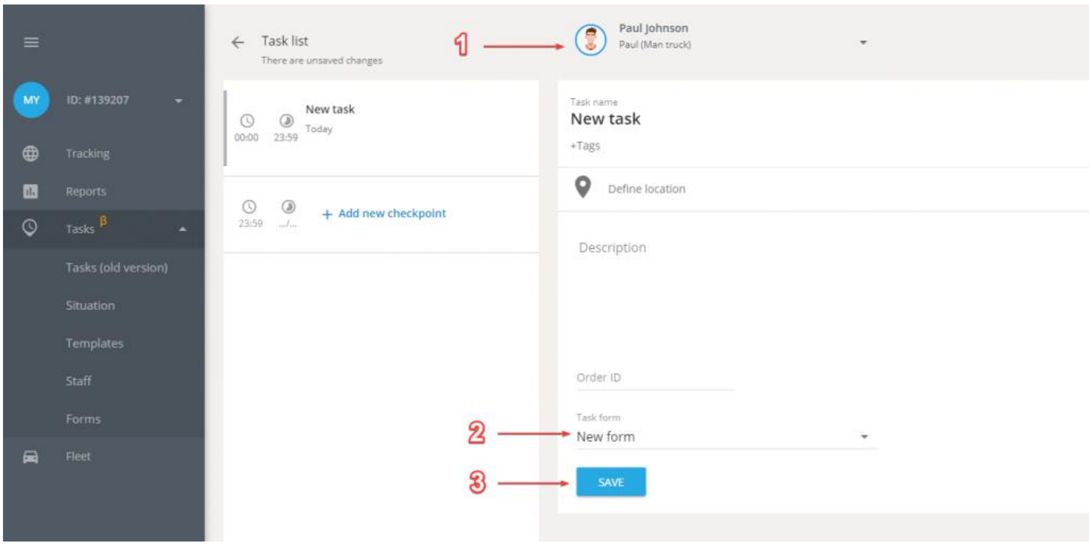

# Field service Forms Send a form to an employee

Attach a form to the corresponding tasks performed by an employee. Follow these steps to quickly attach a form to the needed task:

1. Open the window of creating a new task.

2. Choose an employee to perform the task.
3. Select a form from the list under the "Add task form" field.
4. Save the task.

Afterwards, an employee will receive a task containing the corresponding form in the X-GPS Tracker mobile app.

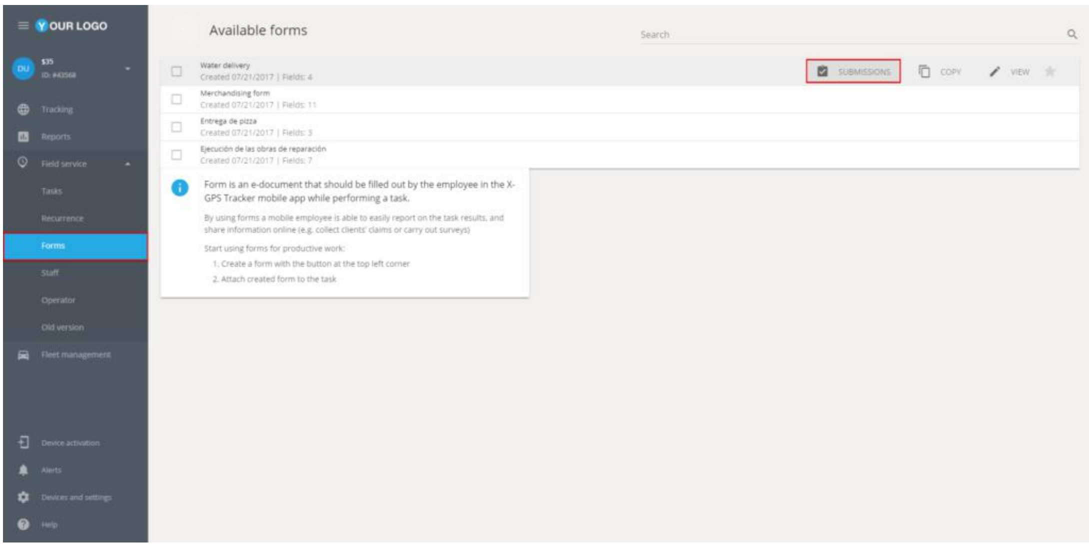


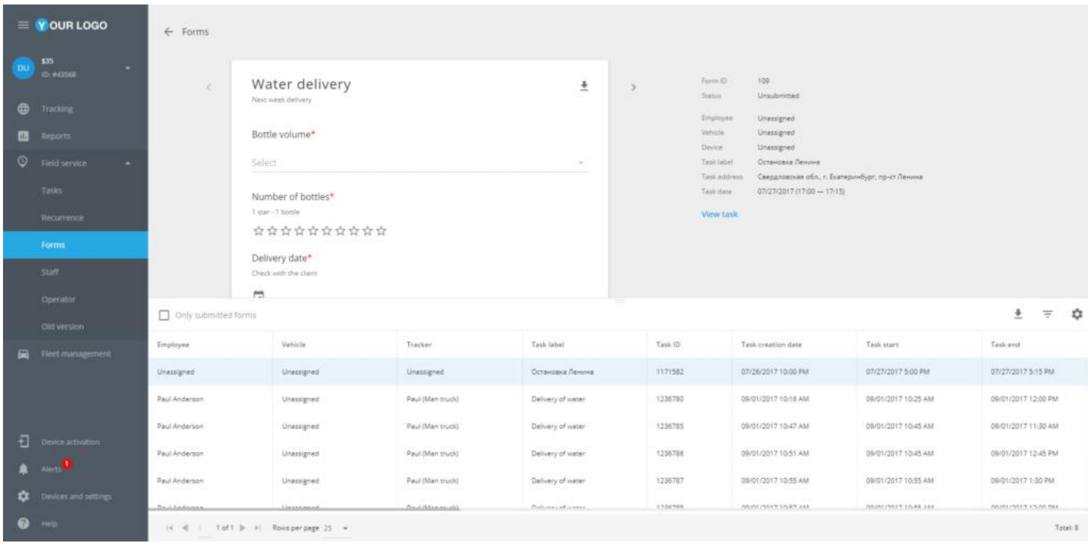

# Field service Forms View completed forms

You can look through the already submitted forms as well as compare them with each other. In order to view a form:

1. Click on the "Tasks" application.
2. Open the "Forms" module.
3. Guide the cursor on the needed form name and press "Submissions" on the right side of the screen.
4. Select the required form from the list at the bottom of the screen.

The list allows to compare an employee's performance with that of other employees.






Submissions contain the following functionality:

- Downloading - download forms in Excel, CSV, and PDF formats.
- Filtering - this function adds an additional line to the table of forms, allowing to add filtering parameters to the table. For example, a certain date of task creation or the name of a certain employee.
- Table customizing - the possibility to add and hide the main information and form fields.

# Field service Places

This section is an advanced tool for working with places, including those created using map tools. Here you can add, edit, delete places, as well as assign them to employees.

## Basic instruments

Having opened the section, you will see a list of available places with all fields, including custom ones. The following functionality is available for you on this page:

**1. Detailed information.** Click on any place in the list so that its location on the map and the contents of all fields are displayed on the right.

**2. Sorting.** You can sort the list by almost any field. To do this, click on the column heading and all elements will be arranged in ascending order. Click again to sort them in descending order.

**3. Group by.** You can group all places according to the assigned responsible employees.

**4. Filter.** Click on the funnel icon at the top of the list and an input box will appear in the header of each column. Enter the data there to filter out only those places in the field which contain the text you entered.

**5. Customize columns.**Click the gear icon at the top of the list and select which fields should be displayed. This can be useful if you have added many custom fields and you do not want them all to appear in the list.

**6. Edit.**Select a place and click on the pencil icon to go to the editing window.

**7. Delete.** Select one or more places and click on the trash can icon to delete them.

**8. Create place.** Click on the "+" icon in the upper left corner to create a new place. You can also import places from an Excel file (except for custom fields). Read more about places import in this article.

---

## Creating places

Click on the "+" button in the upper left corner to open the menu for creating a new place.

Here you can fill in all the fields, both standard and added by you.

Mandatory fields will be marked with an asterisk. The place cannot be saved until they are full.

You can also change the place icon by clicking the corresponding button in the upper right corner. The system will prompt you to choose from the available ones, or upload your own image.

# Field service Recurring tasks

If you or your employees use tasks quite frequently, and these tasks are always the same, you can use recurrences instead of creating new tasks every time. A preset recurrence with the specified parameters will be generated at intervals specified by you.

## How to create a recurring task

1. First of all please enter a "Recurring task" section

2. Click "Add" button

3. Fill the task recurrence as a simple or route task, also specify the task schedule. Tasks will be created according to this timetable

The schedule includes the following fields:

**Basic**

Start - the time at which the task will be started

Duration - number of repetitions, can be specified in days, hours or minutes

**Additional**

Admissible delay - this allows the employee to appear at the place of task execution not at the exact time of task start, but after the specified period of time

Visit duration - the minimum time an employee must spend on task address

Ignore random visits with duration less than - if the employee does not plan to perform the task, but is at the task address, this parameter will allow not to consider the employee's location at the task address for a certain period of time

A recurring task can be assigned to only one employee.

The menu of creating a recurrence also contains a possibility to create a form for a recurring task, to do it you should press the "Create new form" button.

## How to manage a recurring task

Recurring tasks can be grouped by period, employee, address, and filtered by an employee.

To edit a table with recurring tasks, click on the "Manage a task list" button and select the columns you need.

Recurring tasks can be deleted individually or in groups. To delete several recurrences, you should check them and press the "Delete the selected recurring task" button in the upper right corner of the recurrence table.

The already created tasks can be changed by pressing the "Edit" button at the necessary recurring task in the list. After that, the usual menu of creating a recurring task will appear.

# Field service Staff
# Field service Staff Employee tags

## What is “Tag”?

“Tag” is a label attached for the purpose of identification some information.

In our system tags help you to find desired places, employees, tasks or vehicles. You can create tags on your own according to your needs. One object may have several tags.

To find all the objects with one tag you need to type it into a search box and the system will display the information immediately.

## How to add tags

To add a tag you need to enter keywords into a special box during the creating / editing employee personal card. Using tags you can easily find, for example, all the employees with private vehicles.

# Field service Staff Employees import

In corporate use of GPS-monitoring sometimes you have to work with large volumes of data. For example when you have to use directories of employees and directories of departments.

When you need to add a large list of employees you can save yourself some time and import it from an Excel file. The data has to be presented in the form of XLS, XLSX or CSV spreadsheet.

In order to start importing from a file:

1. Go to “Tasks” app.

2. Go to “Employees” inset in “Staff”.

3. Click on Create → import from Excel file.

You are going to see “Employees import” window where you can download “File example” and also set up the geocoder(using directory of addresses) and use headers from file. If you want your import table columns to correctly correlate with data in the monitoring system it’s recommended to specify field headers. However, if this is not done, the system will prompt the user to assign this correspondence during the import process.

In the downloaded file you have to fill the following columns to import the data:

- Name
- Middle name
- Surname and other

After filling up the file you have to save it on your PC

## Download the file to the system

1. Click Select button.

2. Specify the path of the saved file.

3. Click Next.

You are going to see the window where you need to check column headers and proceed to the following step.

---

If some of the fields are going to be incorrect. For example empty, the system will suggest to specify this parameters. If the fields are empty the records will not be imported.

The import will be successfully finished if the data is entered correctly and the new records are going to be displayed in employees list

# Field service Staff List of employees

For fast and convenient work in enterprise applications (mostly – with the "Tasks" application) it is recommended to use directory of employees and directory of departments. For example, once you have defined a contact phone number you can SMS your employee right from the app.

## Directory of employees

Employee's card – it is a record about an employee of the organization, which contains the following fields:

- Last name, first name, middle name
- Photo
- Phone and e-mail
- Location address (in general, may not coincide with the address of employee's office / branch )
- Driver license information
- Employee's department (branch)

# Field service Staff Sort your employees

When you have a lot of mobile employees it is quite problematic to find the one you need. In our system you have a possibility to sort your employees by name or by distance. It helps to find quickly the responsible person for every place or the nearest employee to perform a task. This function is available for all the tasks: single, multiple or samples.The chosen criteria is marked.

How to sort employees:

1. Run the "Tasks" app

2. Press "+" button to create new task

3. Describe a task, point address or simply choose a place on a map

4. Click on the list of employees and choose

## Sort by name

This sorting may help you to see your employees in alphabetic order. From A to Z. It looks like on the following picture.

## Sort by distance

This type of sorting puts the performers in order of increasing distance to the place of the assignment, for this you must specify the address of the task place. If you change the place of the assignment, the list of performers sorted by distance will be automatically updated.

## Statuses

If the employee is available for a change of job status (ie, he can report that he is busy in the system), his current status will be displayed in the list ( "busy", "free", "going to the customer", etc.).

Statuses are displayed only for devices that are online - this will ensure the relevance of the data. In addition to task assignment window, statuses are shown in the list of employees in the "Situation" tab.

These functions will be useful to delivery services, courier services, companies that provide operating personnel, distribution companies, taxi services, shipping companies.

For example, sorting "by distance" will help to find the nearest courier to urgently take the required documents from the specified address; and the working status will show which of the closest employee is free and will be able to come to the customer; sorting by name will help to quickly find the sales representative responsible for working with the sales point and show if his operating status allows him to schedule a visit.

# Field service Tasks

"Tasks" is a very useful feature for the Field Service. With this tool you can plan and monitor the work of field workers who use the X-GPS Tracker app. With just a few clicks, you can create and send a daily work plan to an employee on his mobile phone. The employee will receive all the necessary information for the day, including addresses, task description, contact numbers, etc.

## Tasks list

You can view all created tasks at once using the task list. The list is divided into columns and contains the following information:

**Employee** - shows the name of an employee who is responsible for the task progress and result. When creating a new task, select the employee from the list of employees.

**Status** - displays the current status of the task. There are 7 possible statuses:

## List of task statuses:

**Unassigned** — task has not been assigned to anyone.

**Assigned** — employee has been assigned the task.

**Arrived** — employee has arrived at the task location in due time.

**Completed** — task has been successfully completed in due time.

**Completed with errors** — route task has been completed with changes in the sequence of tasks.

**Delayed** — task has been completed with an admissible delay. Delay time is specified when creating a task.

**Failed** — task has not been completed in due time.

**Label** - shows the name and address of the task. Specified when creating a task.

**Start** - indicates the planned start time for the selected task. Specified when creating a task.

**Finish** - indicates the planned end time for the selected task. Specified when creating a task.

**Arrival** - shows the actual time and date of arrival at the task location.

**Duration** - displays the actual time spent by the employee at the task location.

**Form** - shows the availability, number, title and status (submitted /unsubmitted) of forms attached to the task. A form is attached when creating a task.

**Description** - shows the detailed task description. Specified when creating a task.

**Tags** - displays tags attached to the task. Specified when creating a task.

---

## Tasks list customization

Users are allowed to add and delete columns.

> For example, you can hide the Tags column if you don't need it.

In order to customize the task list view:

1. Click on the cogwheel icon in the right upper corner of the screen.
2. Tick checkboxes with information you need to view in the list.
3. Untick what you want to hide from view.

# Field service Tasks Operations with tasks

# Field service Tasks Operations with tasks

# Assign tasks to X-GPS tracker Apps

This feature makes your work easier. You just assign a plan for a day to your employee remotely. For example, a courier does not need to call a manager to clarify the next place to visit, as well as the employee will learn online about new tasks and any changes in the plan from a notification in the X-GPS Tracer app. The worker knows that the system has recorded his arrival and the work status. Special filter allows the employee to choose more preferable assigned task from the list.

## Push-notifications about new tasks and changing task's status

When a manager assigns a new task or edits an already assigned one, a remote employee receives a push-notification on the smartphone or tablet.

---

The system also notifies the employee's arrival to the task place and the process status, e.g. "accomplished", "failed" or "overdue". The notifications are accompanied by a sound signal or vibration.

# Detailed tasks description and a mark on the map

Employees click on a new task notification and see the detailed information about it:

- Title
- Status (for example, “scheduled”)
- Task address
- Route to the place and a direction based on the current location of the remote worker
- Execution time and the minimum possible delay
- Additional information on the task

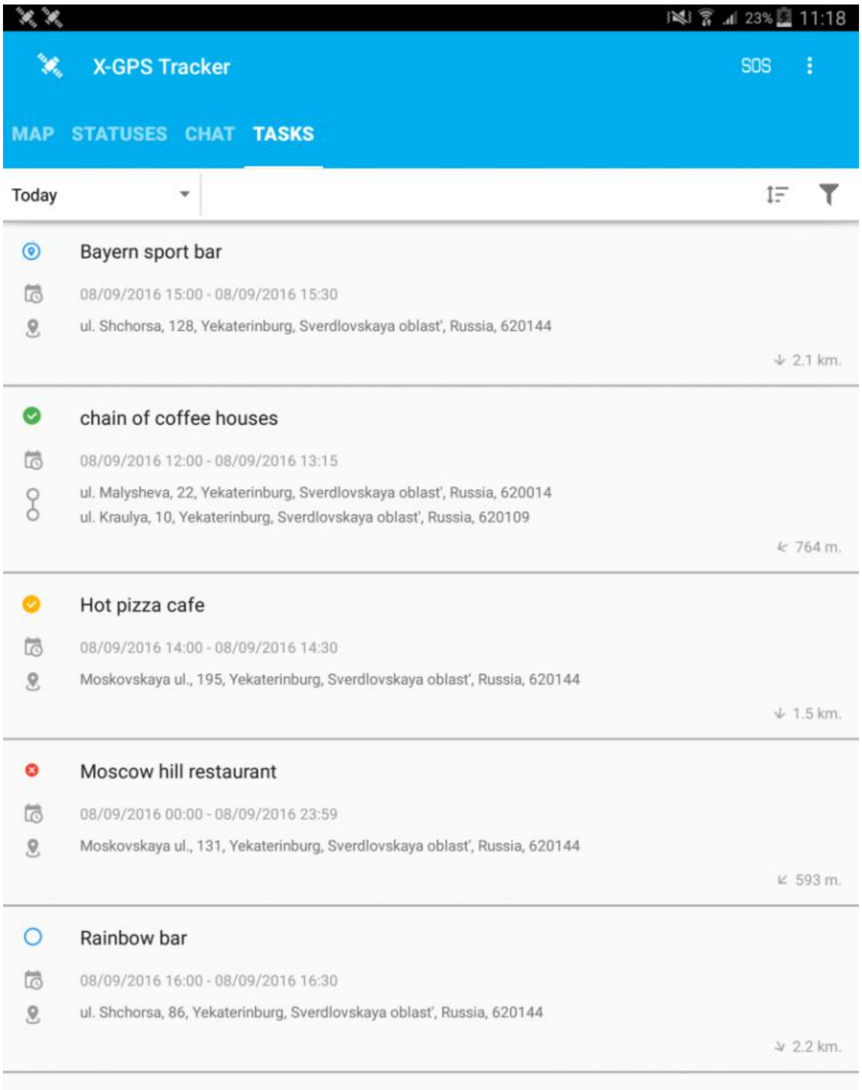
Group tasks also have such function. You can tap on any task from the group and see detailed information about it.

## Get an optimal route to the task place

Tap on an icon next to the task address and the system will get you the direction from the current location to the task point.

## A tasks list on employee’s screen

Choose the Tasks tab in the Tracker app to see the whole To-Do list. Each task has its process status: “assigned”, “overdue”, “completed” etc.

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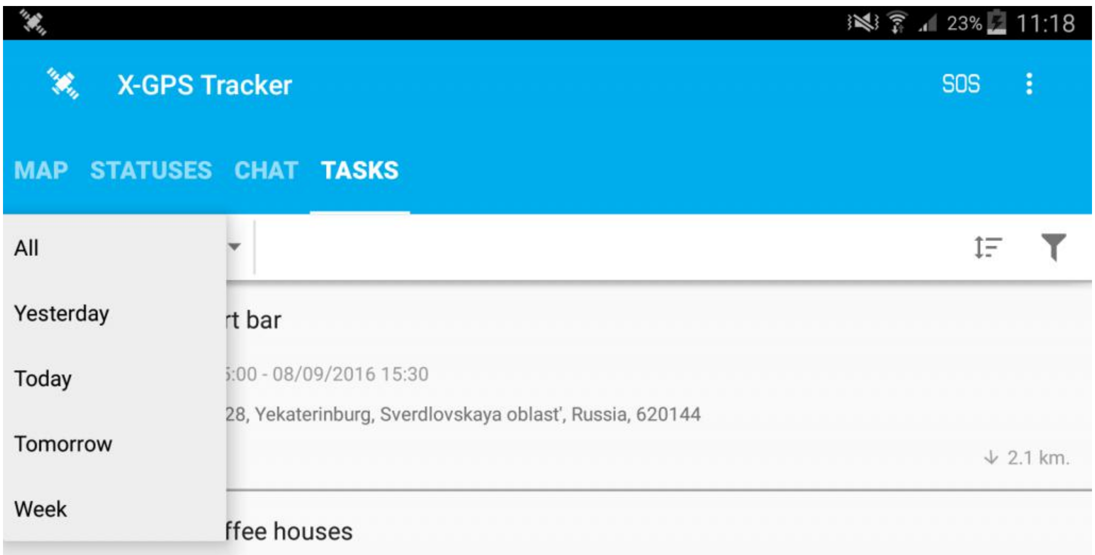
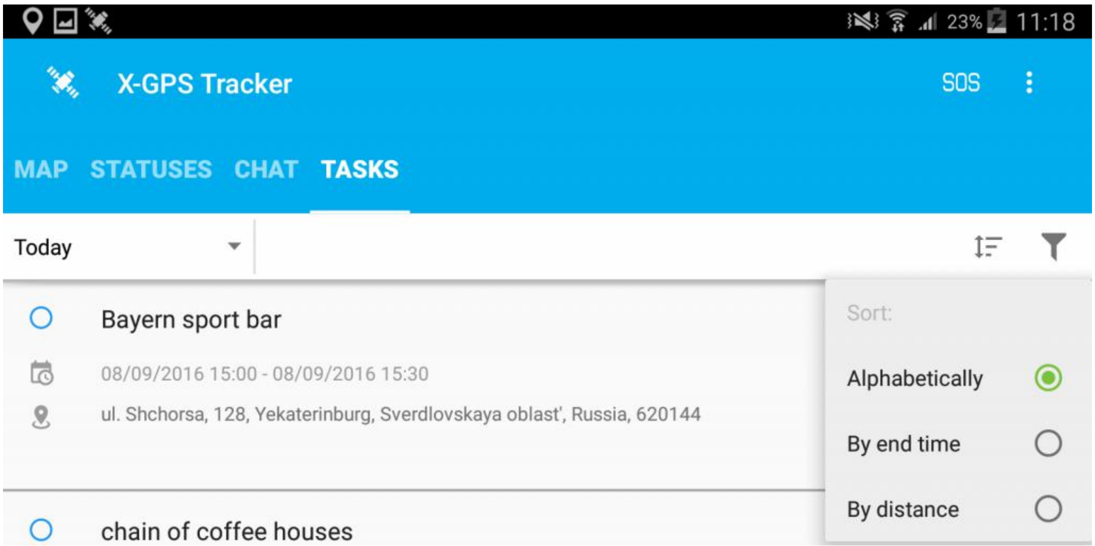
An employee can see completed tasks, current and planned ones. Just select the desired day or time interval.



## Sorting by distance, time and status

It is also possible to sort the list of tasks alphabetically, by time or by distance from a performer. You should just choose the desired feature in the settings.

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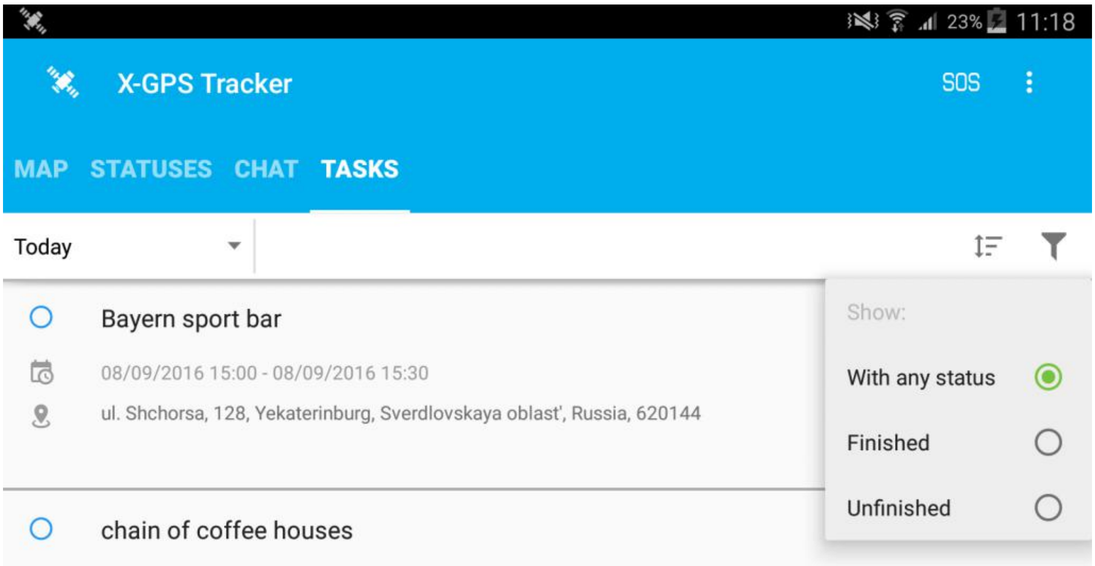
You may sort tasks by statuses: finished, unfinished or with any status.




The new update is really helpful to companies working with sales representatives, carriers, service engineers, drivers, field auditors, etc.

# Field service Tasks Operations with tasks Editing and deleting tasks

# Editing tasks

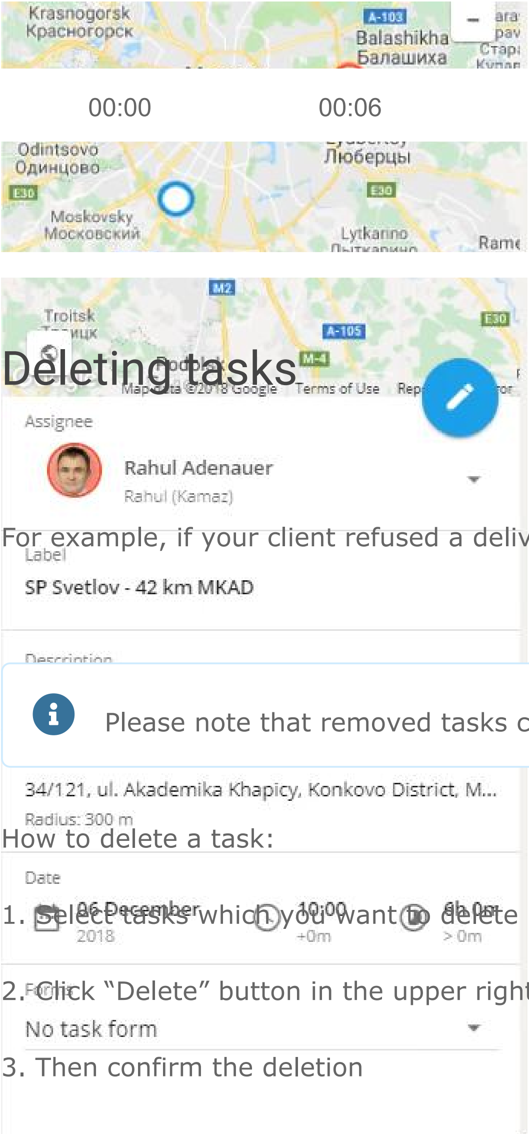
You can edit tasks in the “Task Info” section on the right side of the screen. Editing is available only for tasks with the “Unassigned”, “Assigned”, “Arrived” statuses. For example, the date/time of the courier’s visit was changed, you can change task’s date and time too.

How to edit a task:

1. **Select a task, which you want to edit in the tasks list.** Task’s route/destination and employee, which was assigned to this task, will appear in the right part of the screen

2. **Make needed changes in the bottom right in the screen**. Following parameters are available for changes:

- Assignee
- Taks’s label
- Description
- Address
- Date and time
- Task’s form




# Deleting tasks

For example, if your client refused a delivery, you can remove unnecessary task.

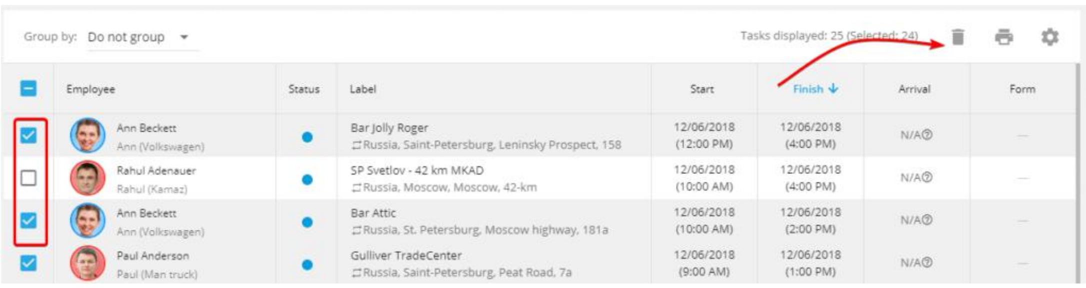
Please note that removed tasks cannot be restored.

How to delete a task:

1. Select tasks which you want to delete

2. Click "Delete" button in the upper right corner

3. Then confirm the deletion




# Field service Tasks Operations with tasks Print tasks

Print a list of tasks for your employees. For example, you can print a list of tasks for the next week and give it to a courier.

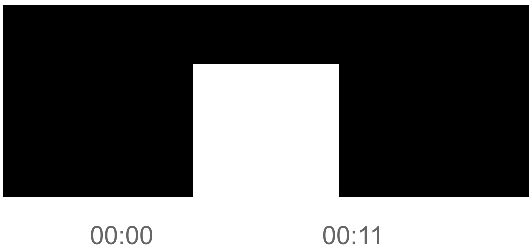
To print tasks:

1. Select the required tasks.

2. Click the "Print" button in the upper right corner.

3. In the upper right corner, click on the appeared "Report ready" button.

4. Print or save the opened report to PDF.




# Field service Tasks Operations with tasks Search and filter tasks

## Search tasks

You can find and sort tasks based on their name or assigned tags. For example, you could easily display only Urgent tasks or all tasks for deliveries.

To search tasks:

1. Click on the search bar on top of the page

2. Select a tag from a drop-down menu or input your own request

> You can use several parameters in your search if you separate them by pressing enter. For example, you can find all urgent furniture deliveries to downtown Austin.

# Filter tasks

Our Tasks menu has a filter option that will allow you to display only the tasks that satisfy specified criteria.

Tasks can be filtered by:

- Date of completion
- Assigned employee
- Current status

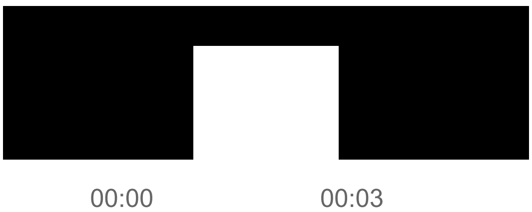
# Filter by date

Filter by date will allow you to display tasks scheduled for a certain period.

To filter tasks by date you should:

1. Click the date field above the list of Tasks
2. Select date range

After that, the list will only contain tasks scheduled for the selected time period.



# Filter by Employee

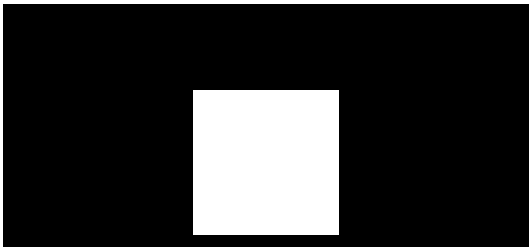
Tasks can be sorted by assigned employee. This will allow you to view only the tasks assigned to certain personnel or group.

To filter tasks by the employee you should:

1. Click on the Employee field above the list of tasks

2. Select employees or a group.

After that, the list will display tasks assigned to selected personnel.



00:00 00:04

# Filter by status

Filter by status will allow you to view tasks in a certain status - unassigned, assigned, arrived, completed, completed with errors, delayed or failed.

To filter tasks by status you should:

1. Click on Status field above the task list

2. Select required statuses

After that, only the tasks with specified statuses will be displayed.

00:00 00:03

# [redacted]s Operations with tasks
# Tasks sorting and grouping

## Tasks grouping in the list

Initially, all tasks are shown in a common list. For convenience, you can group tasks — divide the General list into groups. Use one of the following criteria to group the list:

- By employee.
- By status.
- By the address.
- By label.

---

For example, you can group the list by employee and print a list of jobs for each employee.

## Tasks sorting in the list

You can sort tasks for easy display in the list.

To sort the list of tasks, click the name of the column you want to sort by.

The list can be sorted by the following columns:

- Employee
- Status

Label

Start time

Finish time

---

For example, you can sort tasks by the Start column to see the soonest tasks.

# Field service Tasks Route tasks

Besides simple tasks you can create route tasks. It is very convenient in case an employee should visit several places on the same route. This function helps to assess the convenience of the route and fix it.

To create a route task you need too:

1. Run the “Tasks” app
2. Click "+"

In the next window, you should define the first location and then click "add new checkpoint" button. After that, your task will be transformed into route task.

In this window, you can also give a title to your task, describe it, add tags, assign it to employee and add more checkpoints.

Checkpoints will be automatically connected to the route and the task must be performed according to the given sequence.

# Field service Tasks Route tasks Optimize route

Imagine that a courier needs to deliver packages to several addresses in different areas of the city. Moreover, each address has its own delivery time. How to quickly find the most optimal and convenient sequence for visiting each client? For such cases, there is a **route optimization** feature. The system can automatically determine the order for each point of the route task, taking into account the address, time and the start point of the task.

This feature will allow you to reduce fuel costs, increase the speed of completing tasks and improve productivity.

## To optimize the route:

1. Create a route task, specify time and address of each point

2. Click "Optimize Route"

3. Set the starting point

4. Click "Optimize"

5. Now the points are set in the most convenient order. The courier can visit all addresses as quickly as possible.

Platform can optimize up to 25 points in one route task.

The system also takes into account the task start time. For example, if one of the points has a later interval than others, this point will always be the last in the queue.

# Field service Tasks Single task

Use single tasks if the order in which they are completed is not important. For example, if a courier has to deliver documents during the day to several addresses at any time.

## How to create a task

To create a single task:

1. Click the Add button in the upper left corner.

2. Fill in the fields:

   **Task name** – it can be the name of the customer or a description of the task (Installation of equipment, Inspection of communications, etc.)

**Location** – enter the address, place name, geographic coordinates or select a point on the map.

**Task time** – set the date and time range (from… to…) when employee should visit the task site. If necessary, specify additional time values.

## Additional time values

**Admissible delay** — the maximum time that an employee may be delayed. If completed within the delay time, the task will receive the status "completed late".

**Minimum duration** – the time that the employee must spend on the task site to complete the task successfully. The time of several visits is summarized.

**Ignore visits lasting less than** — when calculating the minimum duration, visits shorter than those will be ignored.

**Employee** – select an employee to perform the task. To make it easier, you can use additional tools.

## Additional tools

**Search in the list of employees** – start typing the employee's name to search.

**Sort by distance** – select the Distance tab to sort the list of employees by distance from the task location. The nearest employees will be shown at the top of the list.

**Work statuses** – consider the status of employees when assigning tasks to them.

You can assign a task performer later by using a task list.

For the task to be completed successfully, the employee must visit it within the specified time frame.

3. Click Save to complete the task creation.

## Additional parameters

Additionally, when creating tasks, you can specify:

**Task description** – specify the information that might be useful. For example, the name of the contact person. Note, that every phone number which are specified in the task description, will be clickable and you or an employee will be able quickly dial these numbers.

**Form** – select which form the employee should fill in when performing the task. The form can only be filled in the X-GPS Tracker app

**Tags** – specify keywords or set tags to quickly find the necessary tasks later.

**Order ID** – assign an ID to the task and tell it to the client. The client will be able to track the order status using the "Courier on the map".

# Field service Tasks Single task Tasks import from Excel

When you have a lot of employees or tasks, it is more convenient to import task lists rather then creating and assigning them manually one by one. Usually in this case tasks are loaded from external systems like 1C or other CRMs.

Besides usage of programming interface (API) for developers, there's an easy way of import – from Excel file. Data has to be presented in the form of XLS, XLSX or CSV spreadsheet.

To start importing from an excel file, hover your mouse over "+" button and the press "XLS"

You are going to see the "Tasks import" window where you can download "File example" and also set task parameters.

Fields marked as "Required" must be filled in, otherwise the import will fail.

You can specify an address instead of coordinates. The system will automatically find the location.

## Import settings

In addition to private settings that are individual for each task, you can specify:

Default radius – defines the permissible deviation from a specified location. Even if employee(vehicle) will not arrive to defined place but will arrive to specified area the task will be counted as completed.

If you want that the imported tasks were automatically assigned to employees, use “Auto-assign tasks” feature. That way you can specify to which employees (from the list) and how the task will be assigned.

Ignore address – task will assigned to all employees evenly.

Use employee address – tasks will be assigned according to the distance to the employee's home address.

Use department address – task will be assigned according to the distance to the employee's department.

The addresses of departments and employees can be specified on their cards.

# Field service Tasks Single task Tasks import from TXT

When you have a lot of employees and / or you have a lot of tasks for them to do, it is more convinient to import task lists rather than creating and assigning them manually. Usually, in this case tasks are loaded from external systems like 1C or other CRMs.

Besides usage of programming interface (API) for developers there’s an easy way of import – copy from a spreadsheet, for example, Excel, OpenOffice Calc, LibreOffice Calc, Google Spreadsheet and others.

To start importing from a spreadsheet, hover your mouse over “+” button and press “TXT”:

You will see the “Tasks import” window that will contain a big field where you can simply paste via clipboard (copy-paste) tasks from an external table.

# Field service Tasks Task tags

A "tag" is a label attached to identify some information.

In our system tags help you to find places, employees, tasks or vehicles. You can create tags on your own according to your needs. One object may have several tags.

To find all the objects with one tag you need to enter it into a search box and the  system will display the information immediately.

## How to add tags?

During the adding / editing a task, you can add a tag to it. For this you are to open a task card, and enter your tags comma separated in the box “Advanced”. After saving a task, tags are available in the general list that can be viewed during the next attaching.

# Fleet management

## Fleet management

All the information about vehicles of your organization is in the app **«Fleet management»**.

It makes your work easier and much more convenient. For example, you enter data on fuel consumption per 100 km (or miles), and monitoring system will calculate fuel consumption based on this indicator to compare it with the actual readings.

# Vehicles

The **«Vehicles»** tab displays information about the user's vehicles as a table and an additional visualized menu on the right side of the screen.

In this tab it is possible to add and edit vehicles, attach them to the depots and link them to trackers activated on the platform.

# Adding a new vehicle

Press button to add a new vehicle.

Button allows adding an image of the vehicle.

The **«Main»** tab contains all main information about the vehicle and additional information, such as tags or text notes.

The tab **«Specification»** is required to fill in additional information about the vehicle, such as vehicle dimensions, size and number of wheels in the wheelbase, as well as the permitted speed, availability of a trailer and its year of manufacture.

The **«Fuel»** tab is used to fill in information about the type of fuel, tank capacity and consumption rate per 100 km, which is necessary for further calculations in fuel reports.

The tab **«Insurance»** allows entering the number of insurance with the date of expiration.

## Depots

Information on fleet owners is available on the **«Depots»** tab.

# Adding a new depot

Press button to add a new depot.

The depot profile contains its name, address, name of the mechanic and name of the dispatcher. This data can be used for more convenient and efficient task management.

# Fleet management Driver Identification

Driver Identification will be extremely useful for companies and enterprises where several drivers share the same vehicle. This function will make you aware of who is driving the vehicle at any given moment.

## How to Use

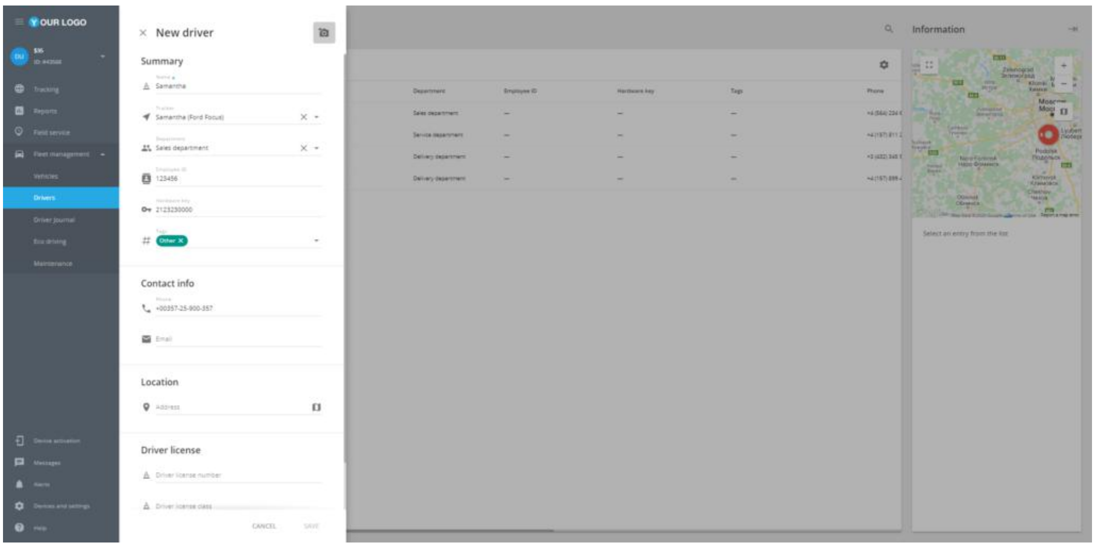
To start using this functionality, first of all you have to create a driver profile:

1. Proceed to the Fleet application.
2. Choose Employees tab.
3. Click on "Create".

In the new window, please specify the following information:

- Photo
- Name
- Choose the tracker
- Choose the department
- Contact information (phone number and email)
- Hardware key (if available)
- Tags
- Driver license details
- Location

After you filled in all the info, please click on "Create" button.

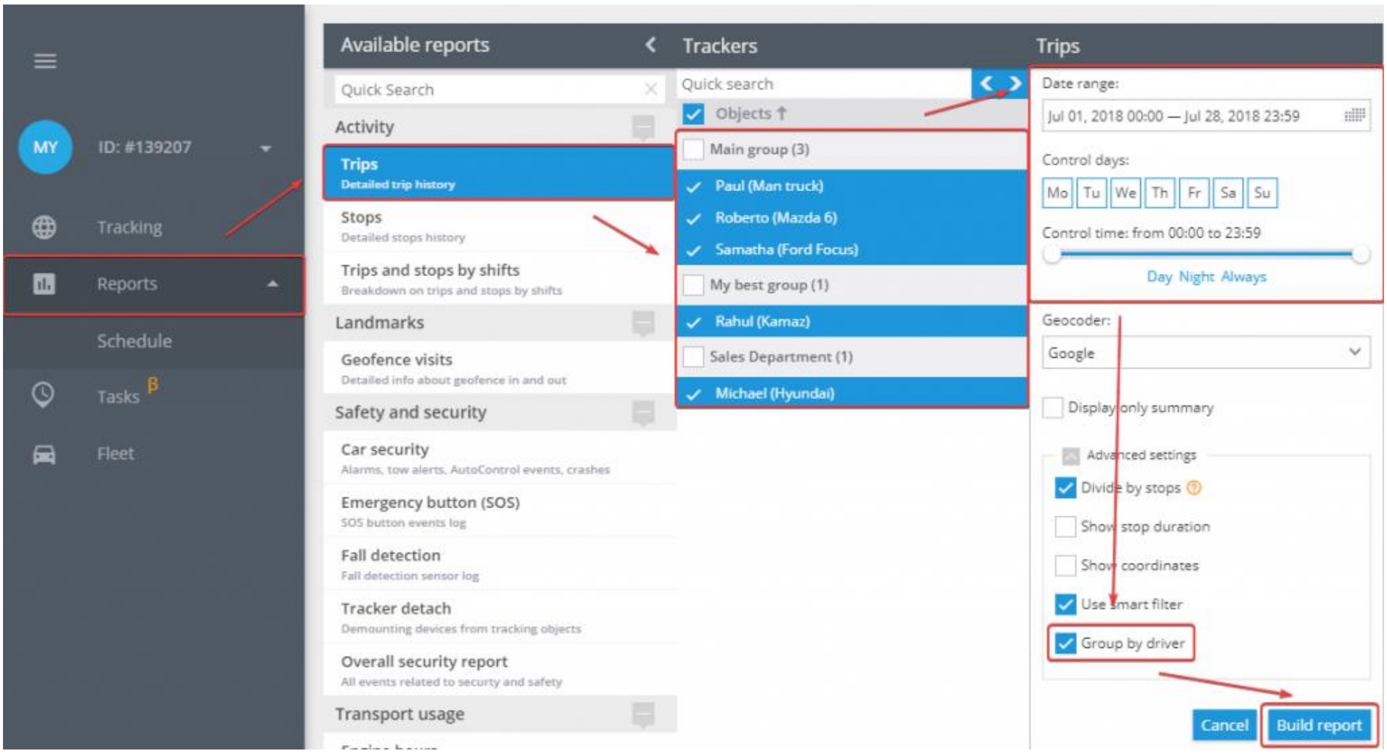



# Fleet management Driver Identification Reports on Drivers

In many companies several drivers work on the same vehicle. In order to make it easier to view the information about the trips and working hours of each of these employees, our service has the ability to generate travel reports grouped by driver, as well as driver shift change reports.

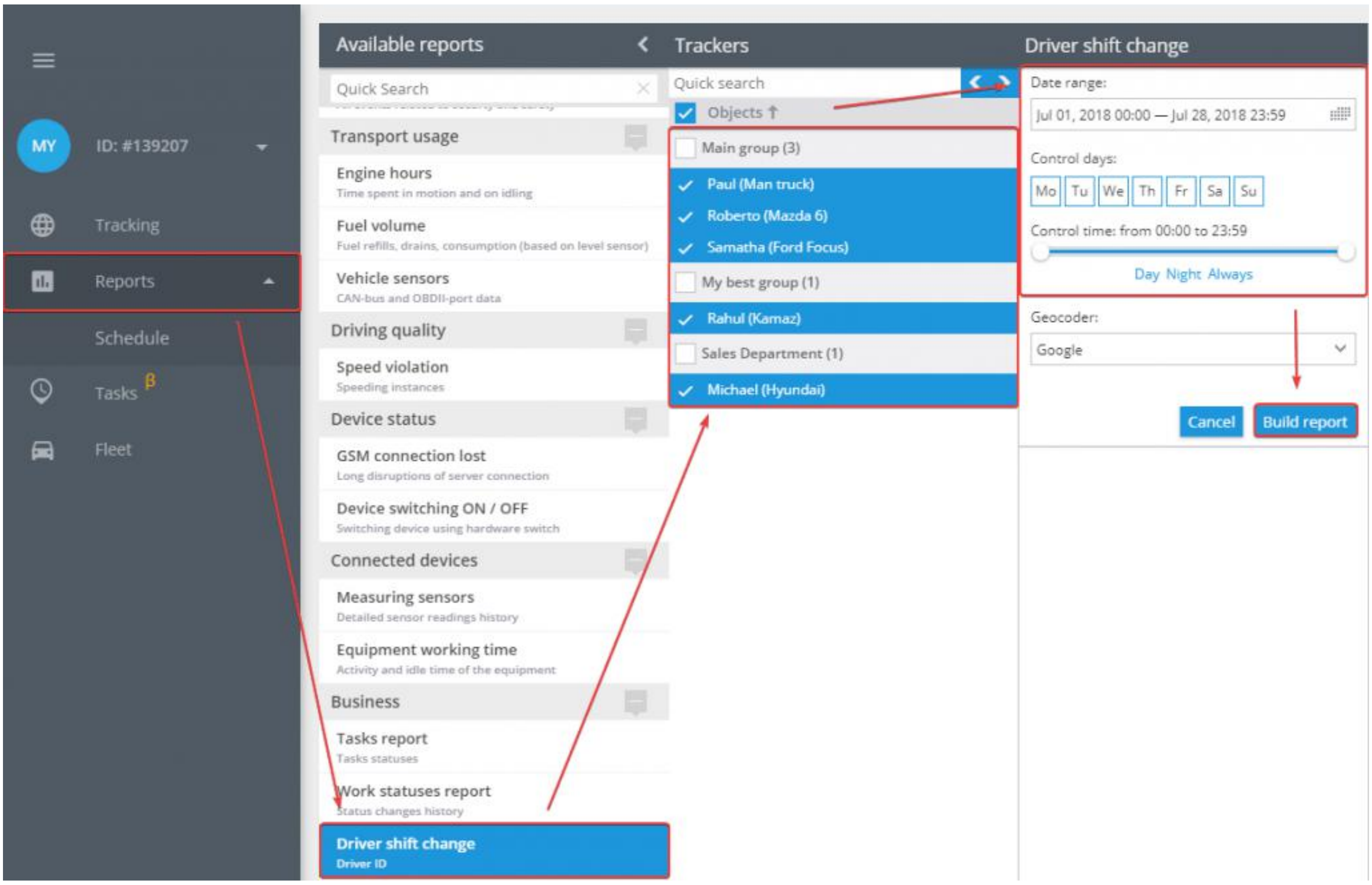
## Trips report sorted by driver.

1. Open the application "Reports" ;
2. Select "Trips";
3. Mark the devices;
4. Specify the date range;
5. Mark "Sort by driver";
6. Build report.




## Driver shift change report

1. Open the report app;
2. Choose Driver shift change report;
3. Mark the devices;
4. Specify the date range;
5. Build report.



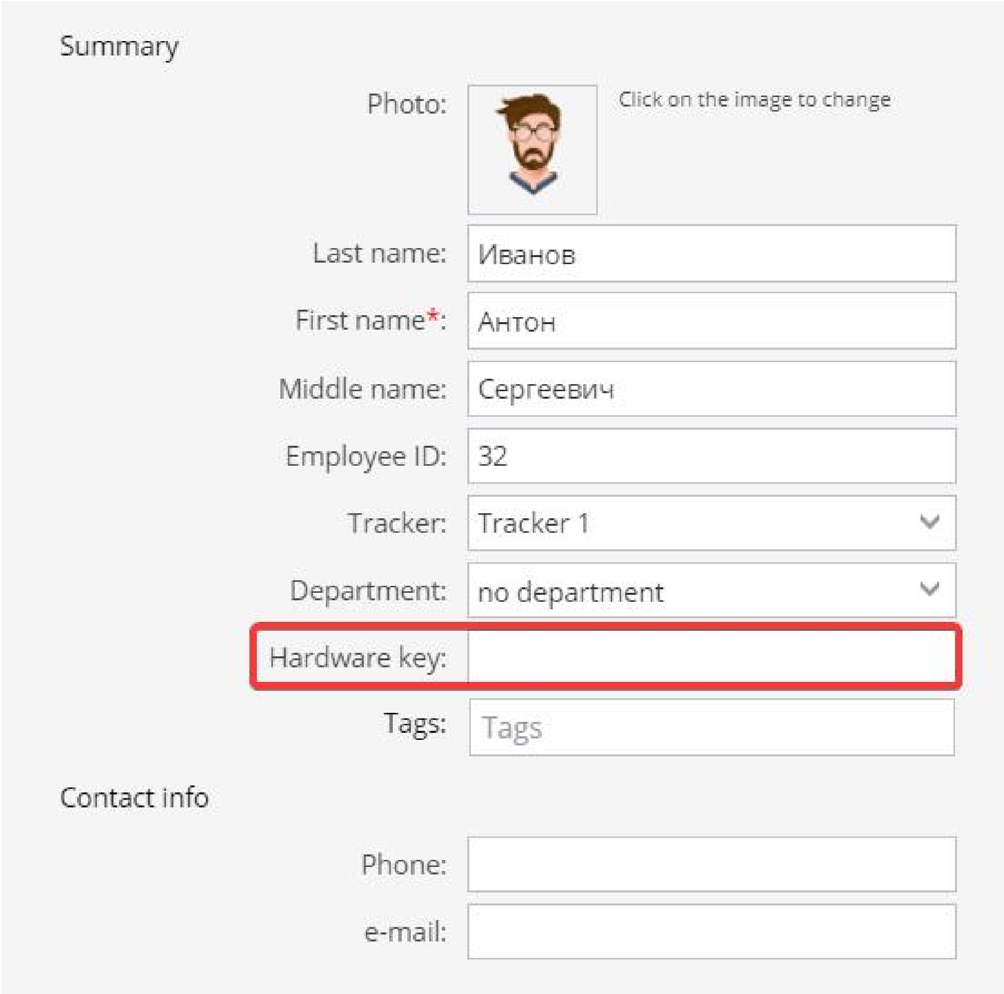

# Fleet management Driver Identification Ways of Identification

## Automatic Identification

Electronic keys such as i-Button or RFID will help you to assign drivers to vehicles automatically. This functionality is supported only by those devices which have the ability to connect an electronic key via the 1-Wire interface.

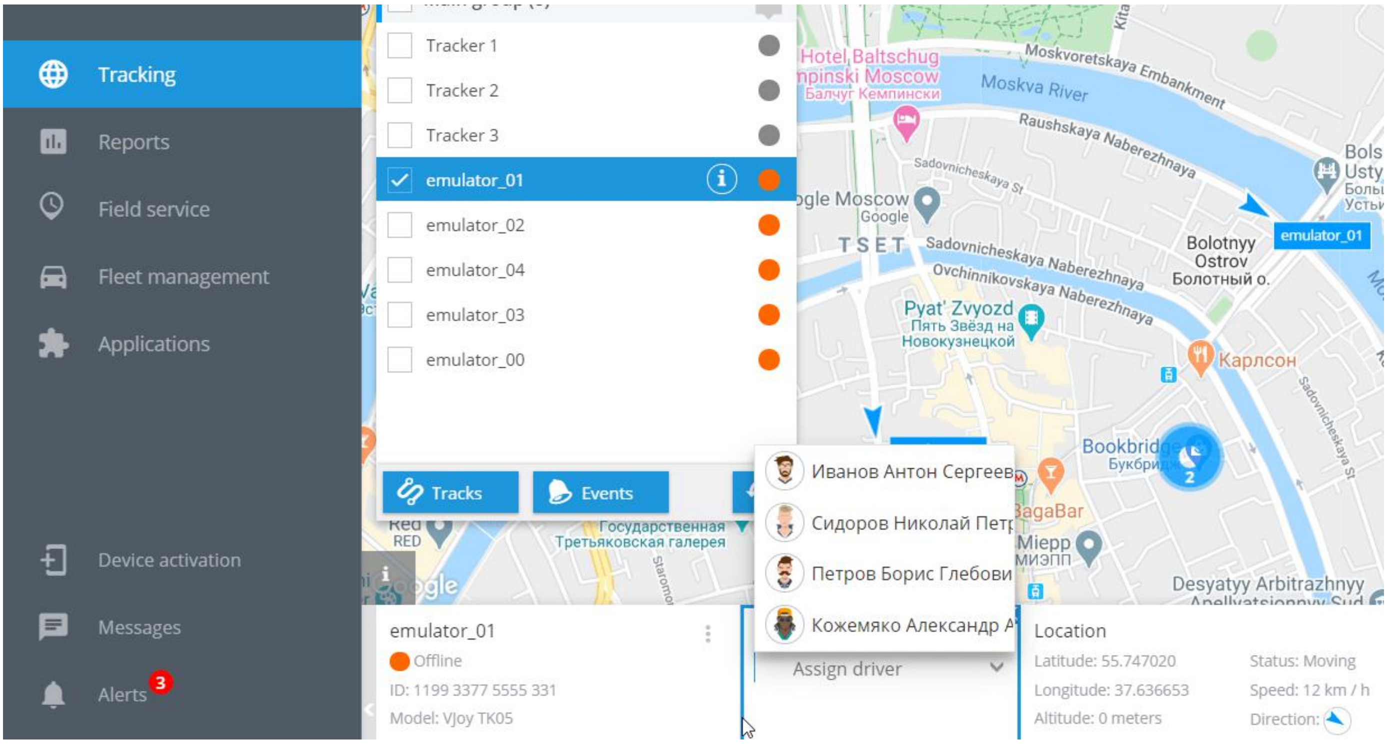
In order to bind an i-Button key to a driver, you should manually enter the Hardware key to the required field in the employee card (the code is on the key itself).

After the electronic key is specified in the card and attached to the I-Button reader, the driver will be automatically identified by the system and assigned to the appropriate vehicle.




## Manual identification

After the employee cards are created, it will be possible to assign drivers to cars. In the Monitoring app choose one object and assign a driver to the object in the widget bar below the screen as it is shown in the screenshot.




# Fleet management Driver Journal

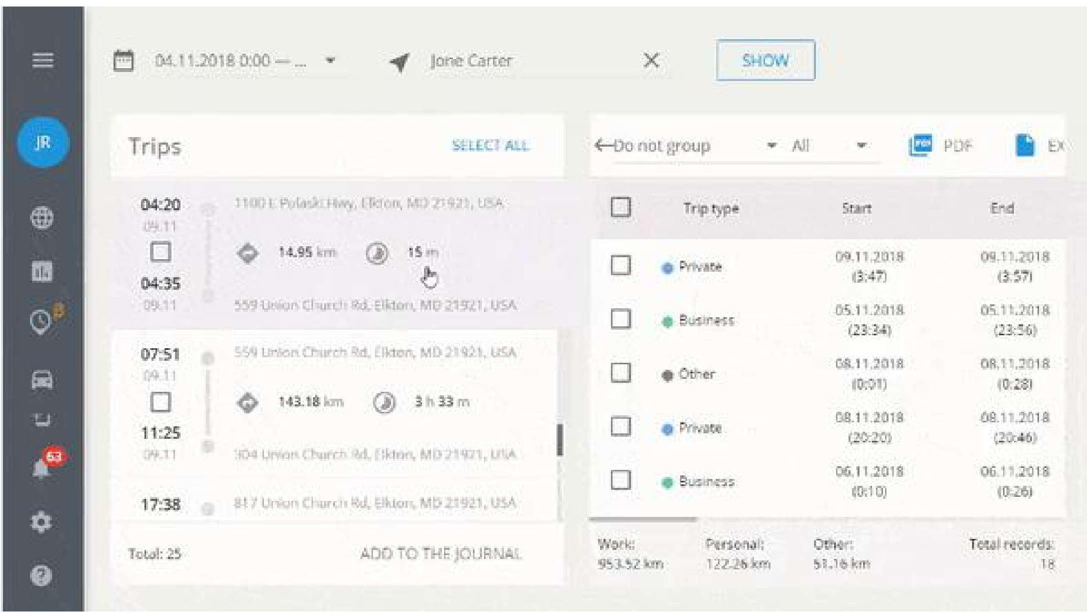
Using the driver journal, you can monitor trips and categorize them by status to see the full picture of transport usage.

Trips can be divided by:

Business - allows calculating fuel consumption and amortization of vehicles

Private - allows controlling how employees use the company's vehicle fleet

Other - trips that do not belong to the other two categories. You can add a description of trips in Notes

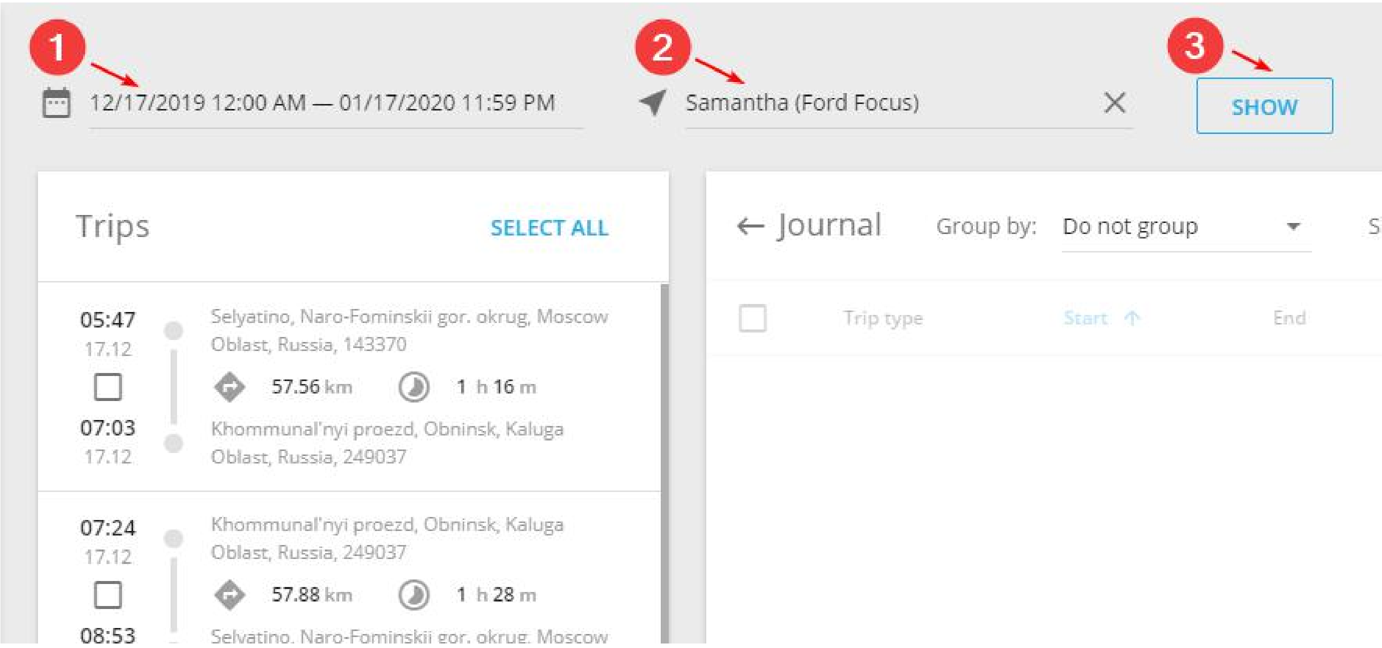


# Select trip status

To assign a status to trips, follow these steps:

1. Select a trip time interval
2. Select a vehicle
3. Display the trips by clicking on the "Show" button.

You can assign a status to a single trip by dragging it to the right corner of the screen, or mark several trips at once and select their status by clicking "Add to the journal".




# Journal interface

The driver journal contains the following fields (they also can be hidden):

Trip type

Start

End

Travel time

Initial location

Start odometer

Final location

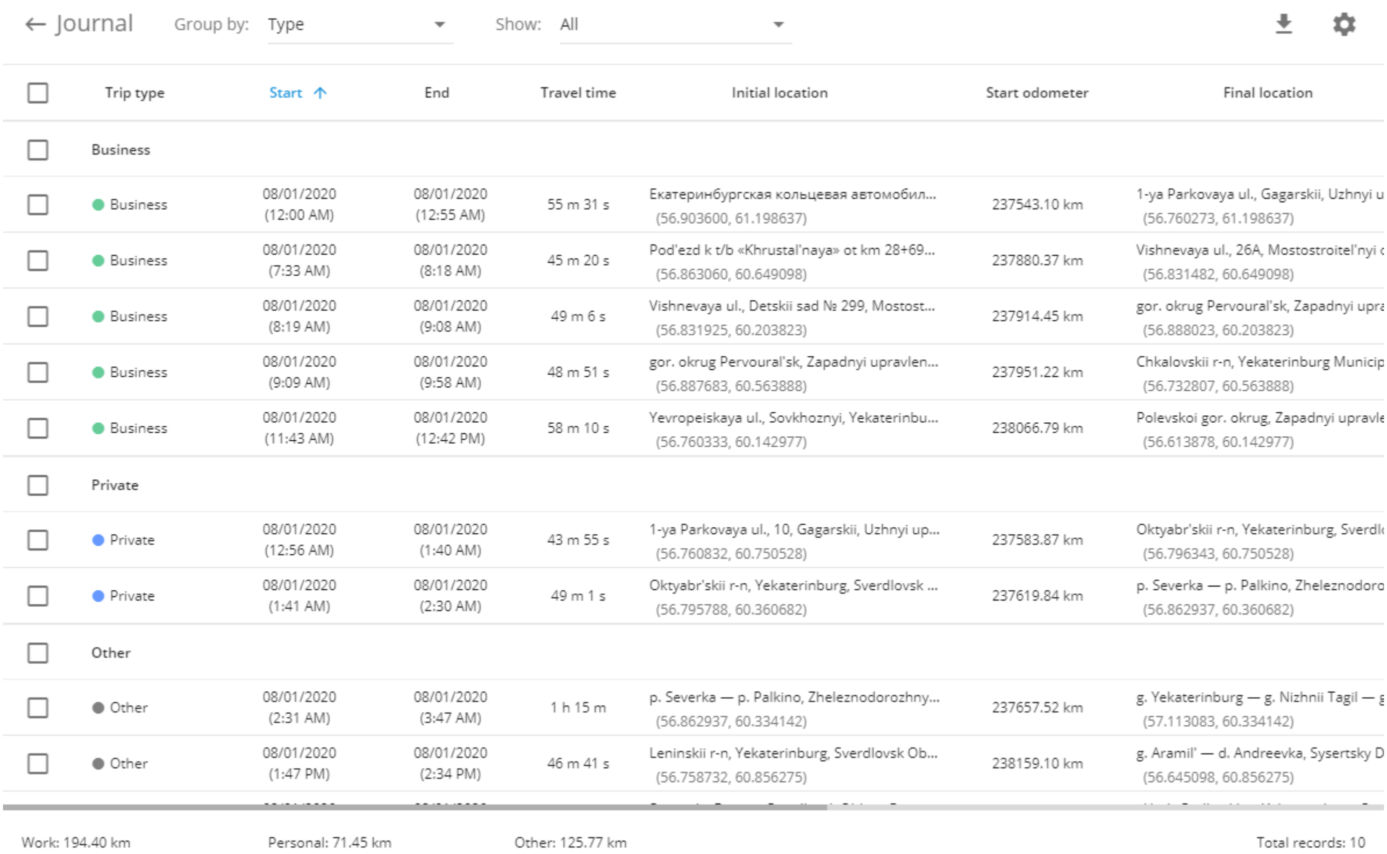
End odometer

Mileage

Driver

Note

Notes shall be edited directly in the Journal by clicking on the Note field and entering text. The driver journal can be downloaded as PDF or XLSX report.



← Journal    Group by: Type    Show: All

| Trip type | Start ↑ | End | Travel time | Initial location | Start odometer | Final location |
|---|---|---|---|---|---|---|
| Business | | | | | | |
| Business | 08/01/2020 (12:00 AM) | 08/01/2020 (12:55 AM) | 55 m 31 s | Екатеринбургская кольцевая автомобил... (56.903600, 61.198637) | 237543.10 km | 1-ya Parkovaya ul., Gagarskii, Uzhnyi u (56.760273, 61.198637) |
| Business | 08/01/2020 (7:33 AM) | 08/01/2020 (8:18 AM) | 45 m 20 s | Pod'ezd k t/b «Khrustal'naya» ot km 28+69... (56.863060, 60.649098) | 237880.37 km | Vishnevaya ul., 26A, Mostostroitel'nyi (56.831482, 60.649098) |
| Business | 08/01/2020 (8:19 AM) | 08/01/2020 (9:08 AM) | 49 m 6 s | Vishnevaya ul., Detskii sad № 299, Mostost... (56.831925, 60.203823) | 237914.45 km | gor. okrug Pervoural'sk, Zapadnyi upra (56.888023, 60.203823) |
| Business | 08/01/2020 (9:09 AM) | 08/01/2020 (9:58 AM) | 48 m 51 s | gor. okrug Pervoural'sk, Zapadnyi upravlen... (56.887683, 60.563888) | 237951.22 km | Chkalovskii r-n, Yekaterinburg Municip (56.732807, 60.563888) |
| Business | 08/01/2020 (11:43 AM) | 08/01/2020 (12:42 PM) | 58 m 10 s | Yevropeiskaya ul., Sovkhoznyi, Yekaterinbu... (56.760333, 60.142977) | 238066.79 km | Polevskoi gor. okrug, Zapadnyi upravle (56.613878, 60.142977) |
| Private | | | | | | |
| Private | 08/01/2020 (12:56 AM) | 08/01/2020 (1:40 AM) | 43 m 55 s | 1-ya Parkovaya ul., 10, Gagarskii, Uzhnyi up... (56.760832, 60.750528) | 237583.87 km | Oktyabr'skii r-n, Yekaterinburg, Sverdl (56.796343, 60.750528) |
| Private | 08/01/2020 (1:41 AM) | 08/01/2020 (2:30 AM) | 49 m 1 s | Oktyabr'skii r-n, Yekaterinburg, Sverdlovsk ... (56.795788, 60.360682) | 237619.84 km | p. Severka — p. Palkino, Zheleznodoro (56.862937, 60.360682) |
| Other | | | | | | |
| Other | 08/01/2020 (2:31 AM) | 08/01/2020 (3:47 AM) | 1 h 15 m | p. Severka — p. Palkino, Zheleznodorozhny... (56.862937, 60.334142) | 237657.52 km | g. Yekaterinburg — g. Nizhnii Tagil — (57.113083, 60.334142) |
| Other | 08/01/2020 (1:47 PM) | 08/01/2020 (2:34 PM) | 46 m 41 s | Leninskii r-n, Yekaterinburg, Sverdlovsk Ob... (56.758732, 60.856275) | 238159.10 km | g. Aramil' — d. Andreevka, Sysertsky D (56.645098, 60.856275) |

Work: 194.40 km    Personal: 71.45 km    Other: 125.77 km    Total records: 10

# Fleet management Eco driving

This section contains information on creating, configuring, editing the Eco driving report.

# Fleet management Eco driving Eco driving report

Check how carefully your drivers use company vehicles using the Eco driving report

## To create an Eco driving report:

**1.** In the **"Fleet management"** application go to the **"Eco driving"** section.

---

**2. Indicate the time interval** for which the report will be generated**.**

---

**3. You can make adjustments to an interval,** for example, exclude any weekdays from the report and determine the exact time range.

**4. Set penalties for various types of violations:**

## Speeding

Choose a method for speeding detection:

- Preset value - the speed of all vehicles will be checked with the specified value.
- From the vehicle data - the speed of all vehicles will be checked with the value indicated in the vehicle card

Indicate the penalty amount for speed limit overrun

Indicate the minimum duration of the violation for which the penalty is charged

## Harsh driving

The Harsh driving section allows you to track dangerous maneuvering, sudden acceleration and braking of the vehicle. Your GPS tracker must support the feature of Harsh driving.

To correctly detect harsh driving events, you need to set up a corresponding rule.

Indicate the penalty size depending on the type of dangerous maneuver.

## Excessive idling

This section allows you to track idling with an engine running.

Indicate the penalty size, and the minimum duration of the violation for which a penalty is charged.

**5. Choose a way to group data:**

**By objects** — data will be grouped by GPS trackers installed on vehicles
**By drivers** — data will be grouped by drivers who drove cars in the reporting period. This method of grouping is convenient, for example, if drivers work by shifts. To correctly group the driver report data:

- Fill in driver cards
- Use the driver identification

After specifying all the necessary parameters, click the **Generate report** button.

**6. In the final report you will see:**

**Drivers/objects raiting** — based on the recorded violations, drivers/objects will receive a final rating. This will allow you to compare them with each other and identify the least accurate. The rating of drivers is indicated in the report on the **Summary** sheet.

**Detailing for each driver/object** - to analyze violations, use the detailed information on the sheet with the driver's/object name.

# Fleet management Eco driving Email scheduled report

For your convenience, an Eco driving report can be received directly by e-mail - with a configured frequency, in Excel or PDF format.

## To create a report schedule:

1. In the **"Fleet management"** application, go to the **"Eco driving"** section, then select the **"Schedule"** tab

**2. Indicate weekdays on which control is required.**

**3. Specify the schedule parameters:**

- What days of the week (or day of the month) to generate a report
- For how many days (weeks, months) to aggregate data
- Email address to deliver (you can specify several) and format - PDF or Excel

You can create several schedules for reports on different objects or time periods.

**4.** After specifying all the necessary parameters, click the **Save schedule** button.

# Fleet management Fuel consumption

You can calculate fuel consumption for every trip at any period of time, even if your GPS device is not equipped with the physical fuel sensor.

To do that, you simply need to specify a “Fuel consumption per 100 km (or miles)” parameter in the vehicle profile.

After you specify this parameter, fuel consumption readings will be available in:

**1. Trip report** – in a column called “Fuel consumption by norm”, next to every trip and also in the summary over a period.

**2. Fuel report** – information about predicted and actual fuel expenditure is shown in the summary and may be compared.

**3. Tracks history** – in the track history details at the bottom of the screen.

# Fleet management Maintenance

## Overview

Fleet Maintenance feature helps to make sure that any scheduled maintenance or urgent repair is carried out in a timely manner.

Maintenance allows to:

- Schedule a service work (by date/ by mileage/ by engine hours)
- Set up auto-repetitive service work.
- Schedule renewal of documents (e.g. insurance)
- Estimate maintenance tasks based on the vehicle usage.
- Ensure that maintenance works are completed on time
- Keep a log of scheduled and urgent service works and their cost
- Display malfunction alerts (Check engine / MIL) and diagnostic trouble codes (DTC).

To schedule a maintenance task add a new service work.

All new service works will be displayed in the maintenance task list.

# Fleet management Maintenance Add Service Work

Create service works to receive timely notifications of the upcoming maintenance.

## To add a service work:

1. Go to Fleet and click Maintenance.
2. Press Add in the top left corner.
3. Select the vehicle that you need to add a service work for.
4. Select one or more conditions for the service interval:

**By date** — fill in the date of the service work in the “schedule on” field.

Use “Remind before” field to enter the number of days prior to the “schedule on” date that you should be notified of the upcoming service work.

**By mileage** — enter the odometer value that the service works should be completed upon in the "target mileage" field;

Use "Remind before" field to enter the number of miles prior to the "target mileage" that you should be notified of the upcoming service works.

To set the odometer value go to “Devices and Settings”.

**By engine hours** — enter the engine hours value that the service works should be completed upon in the “target value” field.

Use “Remind before” field to enter the number of engine hours prior to the “target value” that you should be notified of the upcoming service work.

When one of the maintenance conditions either of CBM or Scheduled maintenance is coming up, a notification will be sent and the task status will be automatically updated to “soon”. All current statuses are available in the Maintenance task list.

To set the engine hours meter go to “Devices and Settings”.

---

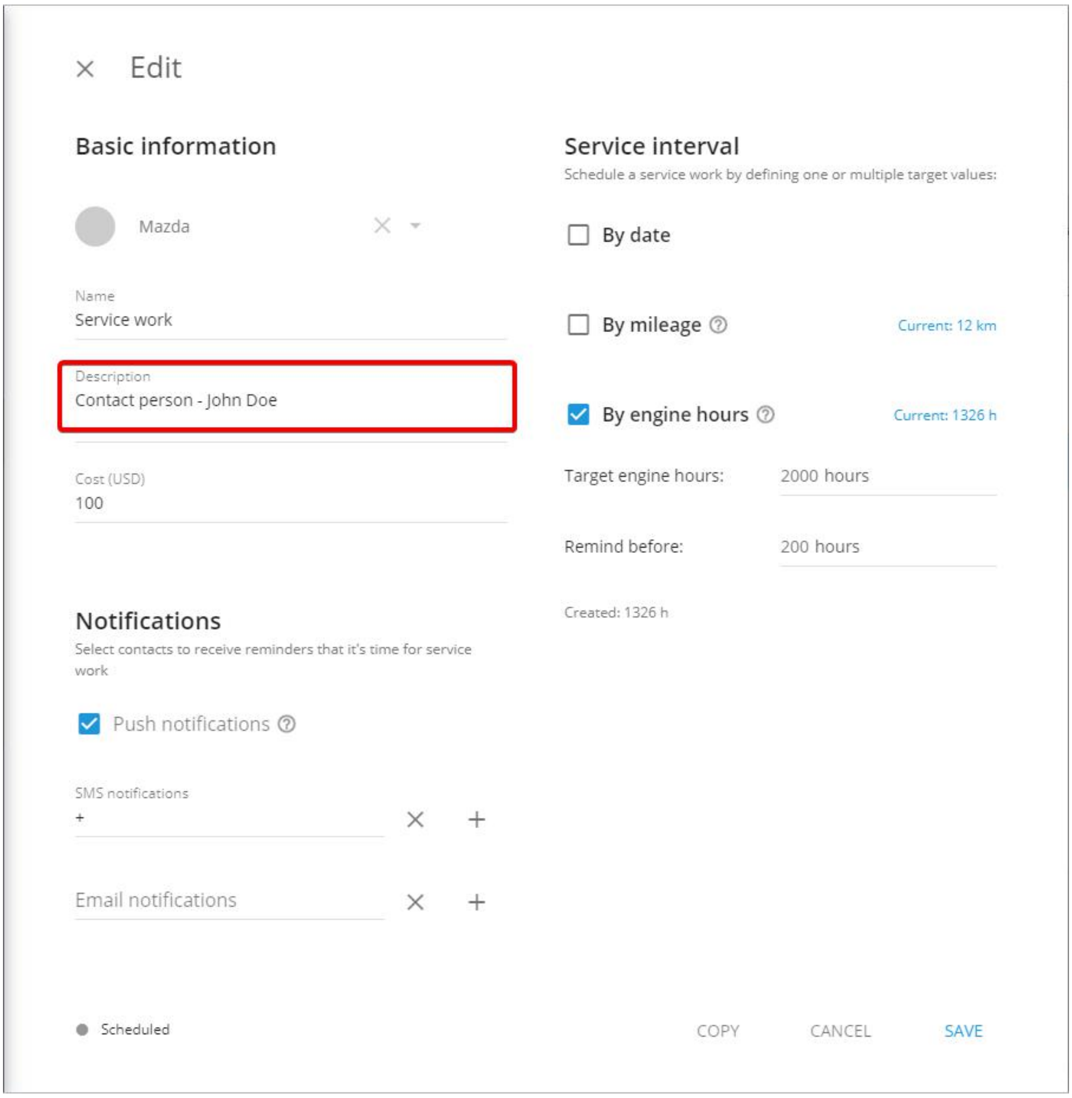
5. Save service work.

Once you hit save, the task will immediately appear in the Maintenance task list.

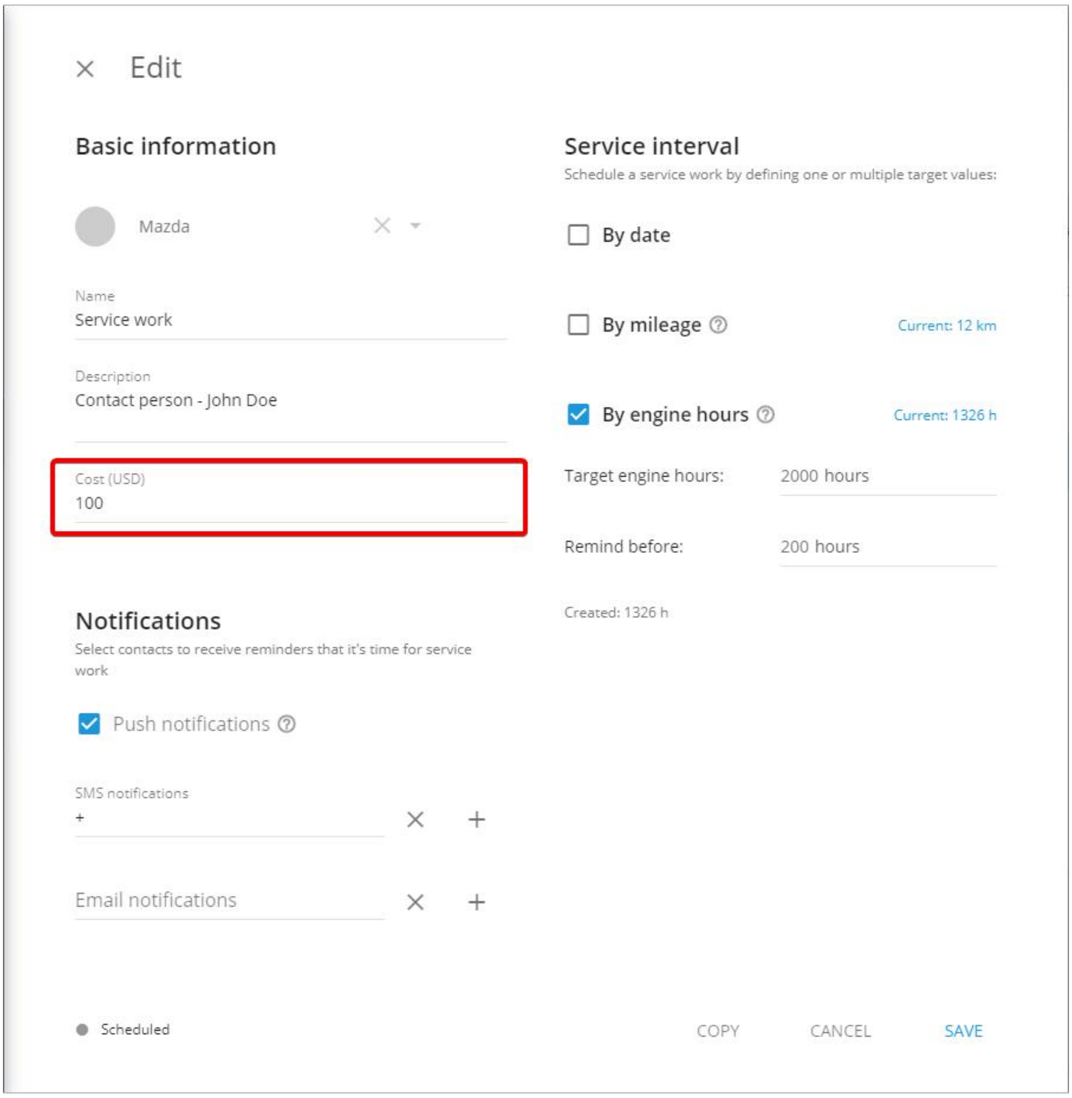
## Additional parameters

Additionally you can add:

**Service work description** — type in details for the new service work, for instance, its name, maintenance organisation or preferred engine oil brand.




**Cost** — add estimated cost of the service work.

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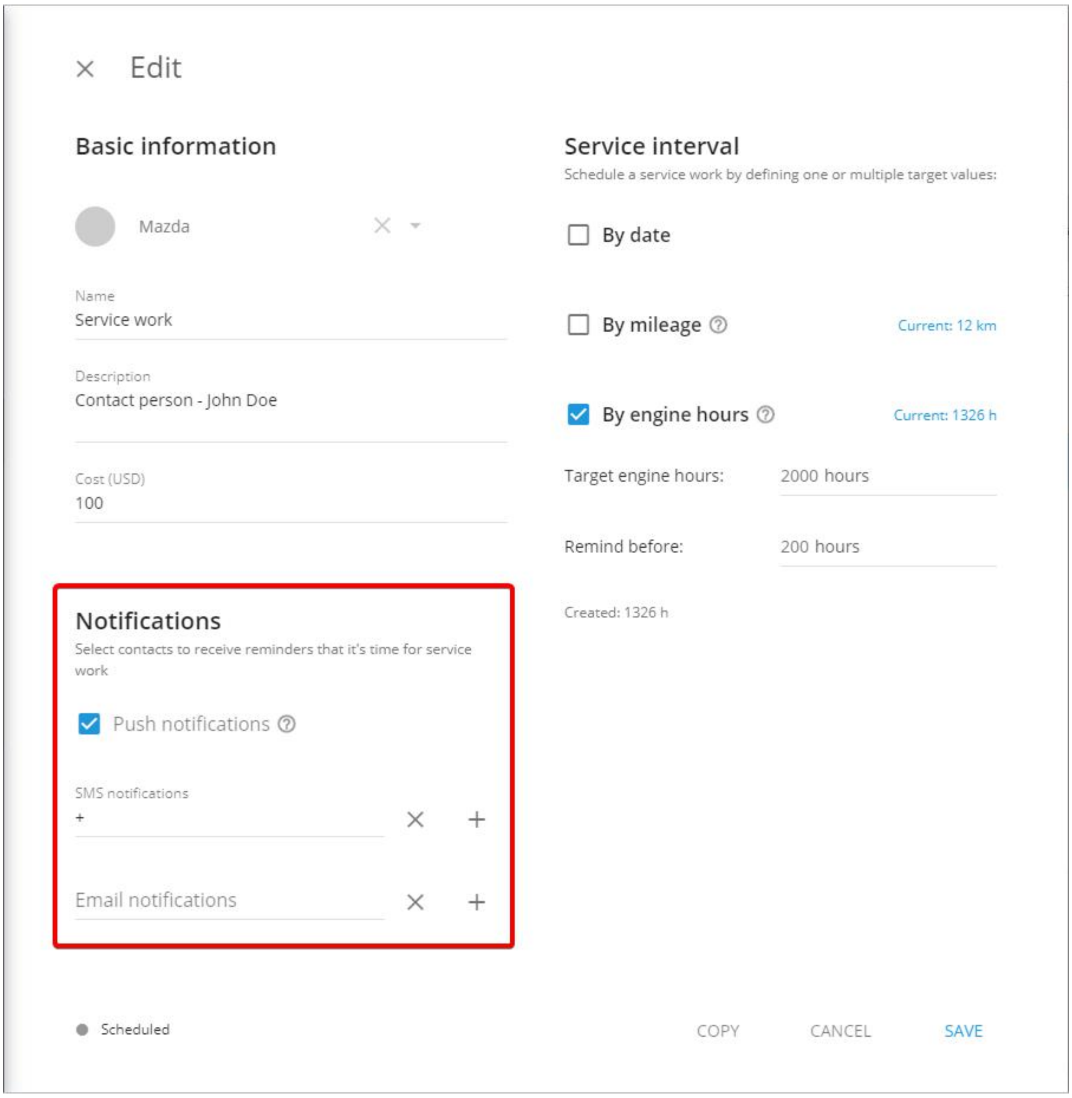
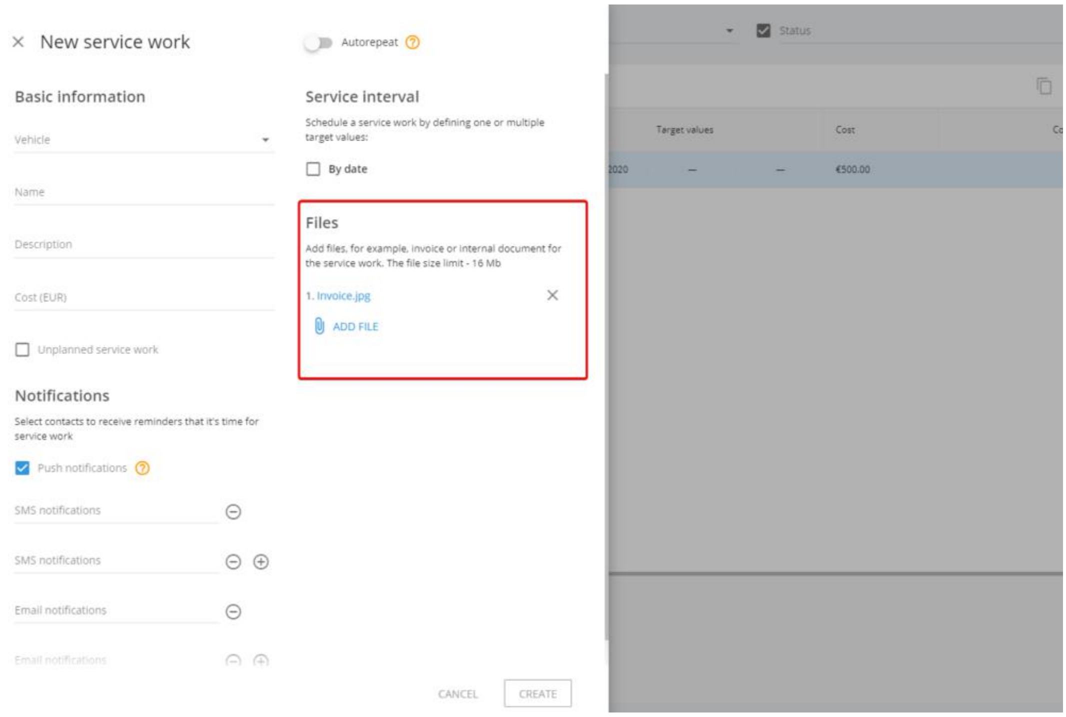
**Contacts** to receive reminders of the service work by any means of your choice:

- **Push-notification** — install X-GPS Monitor app and enable push-notifications to stay alert about the upcoming service works.
- **SMS** — add up to three cell phone numbers to be reminded by text.
- **Email** — add up to three email addresses to be reminded by email.




# Files

Also you can attach files to the task, e.g. invoice or internal document for the service work.

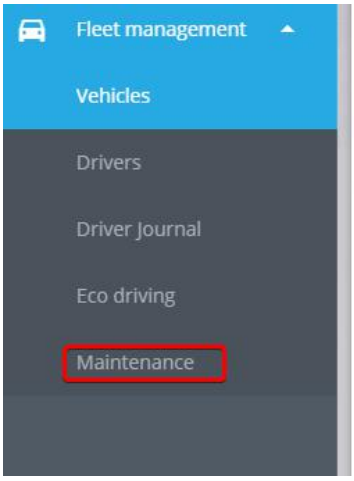



You can upload up to 10 files for each maintenance task.

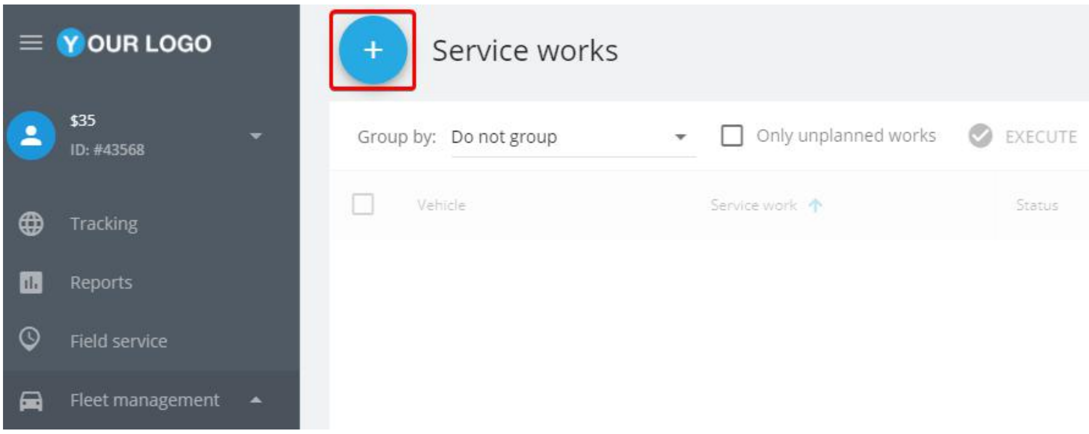
# Fleet management Maintenance Bulk maintenance works

## How to create bulk maintenance tasks

**1. Open Maintenance section.**



**2. Create new maintenance task.**

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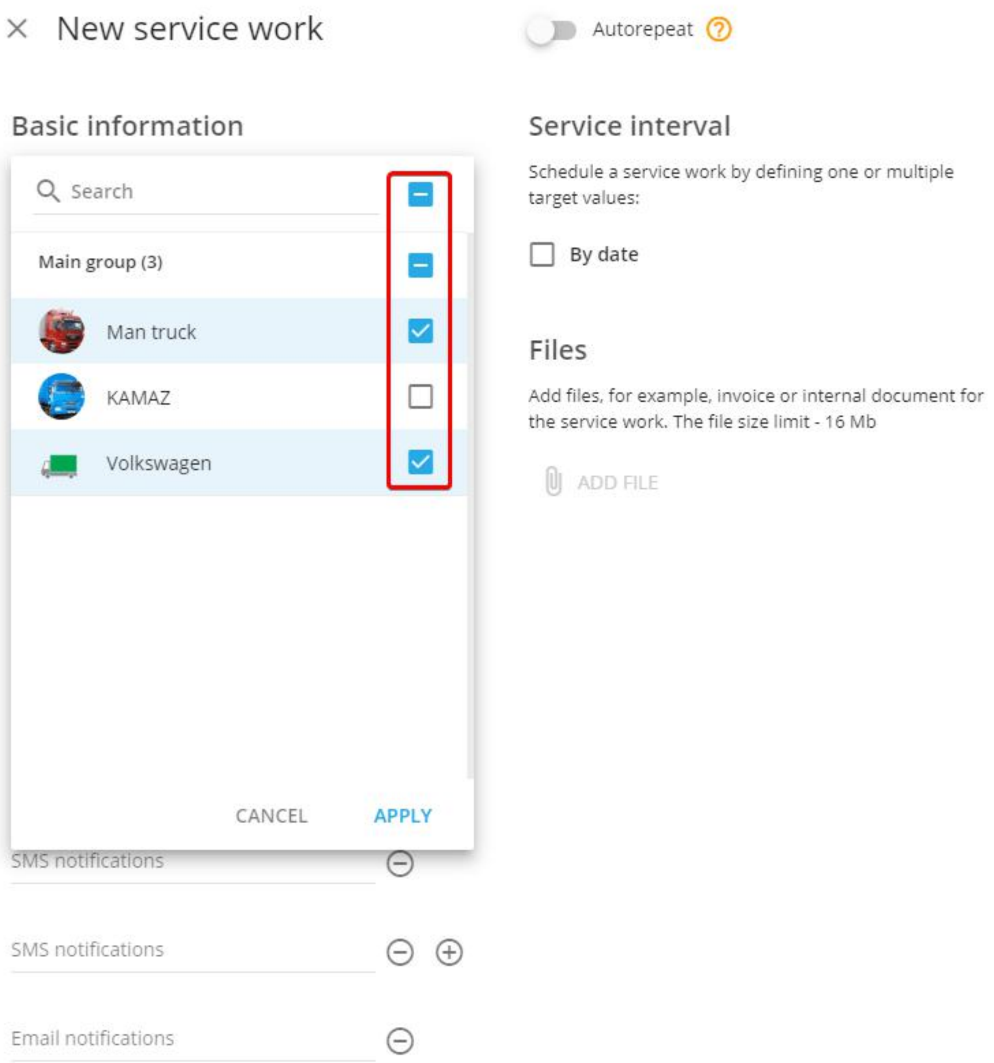
**3. Select vehicles.** Task will be created for them.

**4. Specify other parameters.** Set the parameters as for a simple service work, also you can make this task repeatable or unplanned.

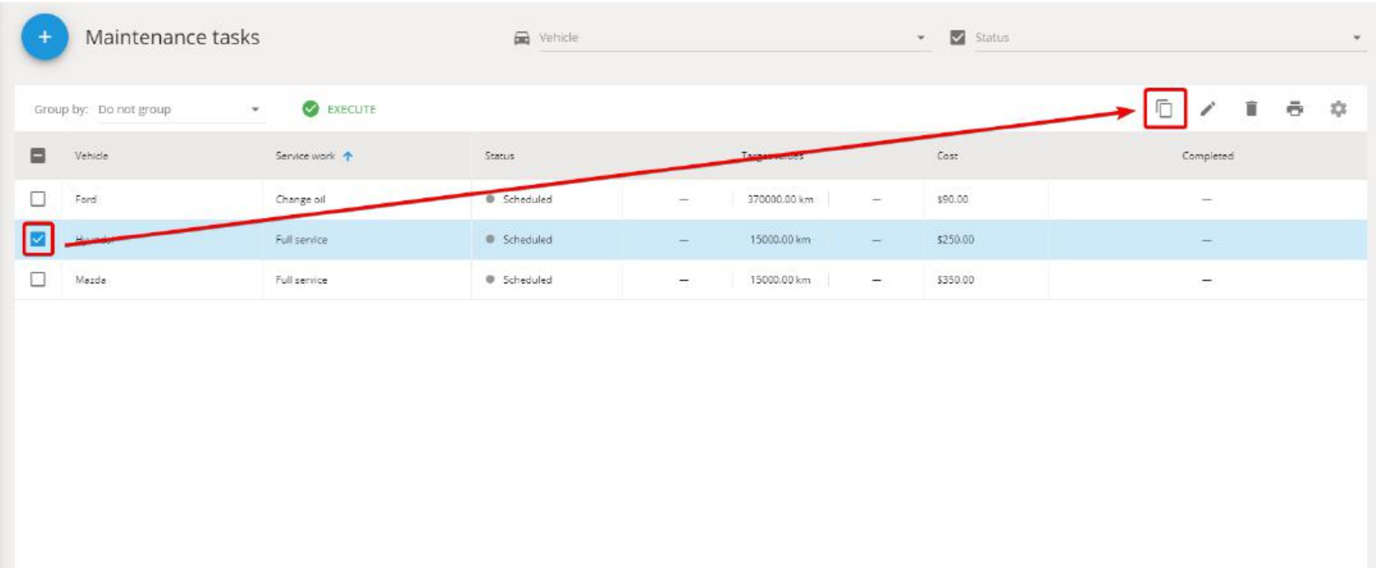


# Fleet management Maintenance Copy Service Work

Copy a service work to assign similar or repeated tasks fast and easy.

**To copy a service work:**

1. Select the required service work in the Maintenance task list.
2. Click Copy in the upper right corner.
3. Add changes, if needed.
4. Click Save.




# Fleet management Maintenance Delete Service Work

Any service work can be deleted if it is no longer valid. For example, if a vehicle is no longer used.

To delete service work:

1. Select one or more service works in the Maintenance task list.
2. Click Delete.
3. Confirm the action.

> Please note that **deleted tasks cannot be recovered!**

# Fleet management Maintenance Edit Service Work

If vehicle operating conditions have changed, you might consider changing its maintenance conditions as well. For instance, if a vehicle is now used in off-road terrain, its suspension system will have to be serviced more often.

## How to edit service work

1. Select the required service work in the Maintenance task list.
2. Click Edit at the top of the list.
3. Add necessary changes.
4. Click Save.

Please note that you can edit the tasks with statuses “Soon” and “Scheduled” only.

While editing you can change the task status to completed.

# Fleet management Maintenance Maintenance Task List

All new service works will be immediately displayed in the maintenance task list. The list is broken down in the following columns:

**Vehicle** — fleet vehicle assigned for maintenance when the service work was created.

**Service Work** — service work name as assigned when the service work was created.

**Status** — a current service work condition available in 4 options:

- **Scheduled** — maintenance conditions by date/by mileage/ by engine hours as assigned when the service work was created are not met and the task hasn’t been marked as completed;
- **Due** — notification about the upcoming maintenance has been sent. The interval can be configured in the “remind before” field;
- **Completed** — the service work has been marked as completed;
- **Expired** — the service work hasn’t been completed, and at least one maintenance condition by date/by mileage/ by engine hours has expired.

**Target values** — target values for date, mileage, and engine hours.

**Cost** — estimated maintenance cost as assigned when the service work was created.

**Completed** — the date when the service work was completed.

**Summary of scheduled and completed maintenance tasks is shown at the bottom of the list:**

**Total** — total number of maintenance tasks in each status.

**Expenses** — total cost of maintenance tasks in each status.

## Service Works Filter

You can filter the list of service tasks by two criteria:

1. Vehicle
2. Status

Simply select the vehicles and statuses you are interested in at the top of the screen:

> Summary at the bottom of the list will be changed accordingly and will feature metrics for the filtered items only.

## Group Service Works

Service Works can also be grouped by vehicle and status. Select the grouping method in the upper left corner of the list:

# Fleet management Maintenance Mark as completed

When the maintenance is done, the service work can be changed to completed.

To mark a task as completed:

1. Select one or more tasks in the Maintenance task list;
2. Click “Execute” at the top of the list.
3. Confirm that the maintenance is completed.

Once you click confirm:

The service work Status in the Maintenance task list will switch to Completed;

The Usage value will be paused.

> You can change the task status to completed while editing.

# Fleet management Maintenance Print Maintenance Task List

Print out Maintenance task list if you wish to save the list as a soft (.pdf) or a hard copy. Take advantage of this feature to:

schedule future service works;

analyze completed tasks

Go to Maintenance and click Print icon in the top right corner.

> The list can be filtered before printing to get only the necessary tasks.

# Fleet management Maintenance Service works export

Use button to download your service list in EXCEL or PDF format.

This function will allow to bring the service work list in the document, allowing to plan the budget for carrying out planned or unplanned service works.

The resulting file will contain a list of all service works, general information about amount of works and total cost.

# Fleet management Tags

## What is “Tag”

“Tag” is a label for convenient and fast search of the desired information.

In our system tags help you find desired places, employees, tasks or vehicles. You can create custom tags according to your needs. One object may have several tags.

To find objects with the same tag you simply need to type it in a search box and the system will show you all the search results.

You may add tags to your vehicles in the “Fleet” app. It will help you quickly and easily find a needed vehicle profile.

To add a tag you should open a vehicle profile (more information in the “Fleet” section) and add your keywords separated by commas in the field “Tags”. Each vehicle can have several tags.

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## How to add tags

You may add tags to your vehicles in the “Fleet” app. It will help you quickly and easily find a needed vehicle profile.

To add a tag you should open a vehicle profile (more information in the “Fleet” section) and add your keywords separated by commas in the field “Tags”. Each vehicle can have several tags.

# Fleet management Vehicle import

If you have a large fleet and would like to create profiles for all your vehicles, it’s more convenient to import all the information with one signle file, rather than creating vehicle profiles one by one. In this case data has to be presented in XLS, XLSX or CSV file formats.

To import vehicle profiles from a file, please run the app “Fleet”, click the button “Add vehicle” and choose the option “Import from Excel file”.

After that you will see the import window, where you can see the Excel file example.

To relate the columns with right data in the tracking system you need to enter header fields. You can do it before the import or during the process.

In the loaded file you need to specify in the following information:

- Label
- Model
- Type
- Fuel type etc.

After filling out the form, you should save it on your computer.

## Uploading file into the system

Click the button “Select ”, find the file, then click “Next”. You will see the window where you should check header fields and press “Next”.

If some of the fields are wrong, the system will ask you to correct them. In case the fields are empty, information won’t be imported.

If all the information is correct, import will be completed successfully, and you will see it in the “Fleet”.

# New Tracking

New tracking is a completely revamped Tracking module that provides better performance.

Main features:

- Real-time tracking of objects
- Detailed data about object's status
- Display of inputs, outputs and sensor values
- Display of events that were generated by the platform
- Object/location search by tags, addresses, geofences and POI

- Review of historical tracking data
- Create and manage Geofences
- Create and manage POI
- Multiple maps and Street view module
- Build routes between any 2 points or addresses on the platfrom

# New Tracking Map tools

We provide wide set of tools to work with maps, addresses, tags, POIs, geofences, directions and many other items which have relation to visualization of assets and geospatial information.

Main map toolbar is located on the top right section of the screen.

**Map search.** Search by coordinates, addresses, names, and places that you added yourself

**POI.** You can create or upload places and enable/disable their display on the map

**Geofences.** Create geofences and show/hide them off the map

**Maps.** Switch between maps and view modes like traffic, transit or bicycling

Additional feature toolbar is located on bottom right and provides access to following features:

**Directions.** Get directions between selected points on the map, see the length of the route

**Reference point.** Set a point anywhere on the map to see its location and address. Enables sorting trackers by distance from set point

**Zoom.** Change zoom levels for selected map

# New Tracking Map tools Geofences

## Intoduction to Geofences

Geofences are used to define virtual perimeters. The system can control whether object crossed geofence border (either "in" or "out"). All these events are logged, so user can obtain geofence reports and receive alerts.

Moreover, you can assign various rules for events to particular geofences. For example, if you need to get speeding alerts only within a certain area (e.g. in city) or route.

Also, by left-clicking the geofence on the map, you can see the number of tracked objects in it.

To access Geofences tool click the Polygon icon on the map toolbar. Here you can create and import new geofences or edit the existing ones. To display desired geofences on map simply mark checkboxes.

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## Geofence types

There are three basic types of geofences available:

1. **Circle** – geographical area with a given center and the shape of a circle with a minimum radius of 20 meters (radius and center of the circle are defined by user).
2. **Polygon** – area bounded by an arbitrary polygon with any number of vertices.
3. **Route** – allows to create a virtual perimeter between two (or more) points. E.g., it is used in order to ensure that a vehicle doesn’t leave a predetermined route, and if it does, an alarm can be set to inform the interested party.

## How to create a geofence

1. Locate the desired area on the map. You can use 'Address search' tool.
2. Choose 'Geofences' tool by clicking on the Square icon in the right upper corner of the map.
3. Point the mouse to the Add geofence button and select type of the geofence.
4. Draw a geofence on the map:

    Circle – move a circle with a mouse, having pressed the center of the circle. To change the size of the circle pull the point on the edge of the circle.

    Polygon – initially has a form of the correct pentagon, which can be easily and randomly changed. To add new vertices you need to pull the mouse over the center of one of the polygon's sides. To delete a vertex just double-click on it.

    Route – you need to choose start and end points, the system will automatically build a route between them. If you want to add more points on the route, drag the route with the mouse. Next, determine the size of the vicinity.
5. Specify the name of the geofence and save it. Geofences you created can be edited or deleted.

## Colour Your Geofences

You have a possibility to colour created geofences for better visualization. It is very helpful in case you have a lot of geofences on the map. So you are able to divide them into groups and distinguish them at a glance. For example, offices may be painted in red, warehouses in blue and parkings in grey.

To change a colour of your geofence:

1. Open a list of geofences
2. Choose a necessary zone
3. Click “Edit”
4. Choose the colour you like and you will see how a geofence has changed the colour on the map.
5. Save results.

# New Tracking Map tools Points Of Interest

Points of Interest (POI) is a very useful feature both for organizations and end users. Any user can create a list of POIs for their own convenience - it can be just a couple of places (like home, work, supermarket, etc.) or include hundreds of POIs (for needs of the logistic manager) and then track device visitation of places.

## What data can I see in POI?

By default, each POI contains the following information:

**Label.** Choose a label that fits your purposes and will help you find your POI easily.

**Address.** You can enter the address of the POI manually or specify it on the map by simply clicking on the icon in the address field.

**Radius**. Specify a radius for each POI.

**Tags**. Tags make search easier and are useful when working with large numbers of POIs. There’s no tag limit, and the same POI can be identified by several tags.

**Description.** This field can contain all additional information about the POI that may be useful to the user

Also, points can contain additional fields that you can add in the Custom field tab.

## How do I create and edit POIs?

There are 2 ways to add or edit POIs:

Use the map tool “POI” in the tools panel on the right upper side of the map.

You can add or edit POIs in the Places tab.

## What do I need POIs for?

**Finding objects on the map** - you don’t have to specify the whole address anymore. Just type the name or tag you assigned to the POI and you’ll have the list with all the matches.

**Creating routes and geofences** - you can easily find place on the map and draw a circle or polygon. You can also create a route between several POIs, let’s say between your office and warehouse.

**Assigning tasks to the employees** - instead of the whole address of their destination you can just use the name of the right POI and our system will create the task.

**Adding places to X-GPS Tracker** - You can add places in X-GPS Tracker to each employee, to which they can build a route if necessary

## How can I add POI to X-GPS Tracker?

In order to add places to a specific employee in the X-GPS Tracker, you need to go to Custom fields and add the Employee field in the Additional information of Places.

In the Employee field, also enable the "Assignee" option so that the place appears in the application.

After that, you can assign an employee to the POI in the POI editing menu.
As soon as the employee is assigned, the place will appear in their application.

# Importing POIs

It’s useful to upload a large amount of POIs from Excel file rather than create them manually one by one. For that purpose you’ll need an XLS, XLSX or CSV file.

In order to start importing from the file:

**1.** Go to the Places tab and click on XLS button that will appear when you point the mouse to the "Add place" button.

**2.** You’ll be able to download the example of the Excel file and specify the geocoder.

**3.** After downloading the file - fill in the following columns:

- Name
- Address
- Latitude
- Longitude
- Radius

**4.** Once all the columns are filled - save this file on your PC.

**5.** Click on “Select” button in the "POI Import" window and find the file on your PC.

**6.** After you’ve pressed "Next" button - the window with the column names will appear.

**7.** Checking that everything is mapped correctly and reassign columns if needed.

**8.** If some data is missing - the system will offer you to specify it. If any blank fields left - the record is not going to be imported.

If all the data is correct - your points of interest will appear on the list.

# New Tracking Object list

All your devices are listed in the object list. It is a small window on the map in the Tracking application. The list is used for a visual representation of your vehicle fleet, searching for devices, viewing their statuses and history.

The Object list can be collapsed and expanded at any time by clicking the arrow button next to the title.

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## Display settings

Click on the gear icon in the upper right corner of the list to show the settings for displaying the list and objects on the map.

**Do not group** - divide devices into groups or show them in a general list.

**By name** - sort trackers alphabetically.

**By status** - sort by status. Active devices will be displayed first.

**By distance** - put a point on the map and all trackers will be sorted by distance from it. The closest ones will be shown in the list above the rest.

**Follow the selected object** - the map will automatically center on and track the selected devices. Thus, all devices will be constantly visible.

**More settings** - click on the three dots on the right to open additional settings:

Clusterize objects markers - combine several trackers on the map into one mark if they are too close to each other. You can click on this mark to view all objects.

Object labels - show/hide tracker names on the map.

Trace - draw a small tail on the map to represent the tracker's trajectory.

Animation - when turned on, the device label will move across the map smoothly, without sudden jumps.

Show only selected objects - only selected objects will be displayed.

Hide offline objects - offline object will not be shown on the map.