

VisitBasis Features

Mobile/Office	Category	Short Description	Long Description
Mobile App	Customer List	Active/None-active	none-active customers shown in grey color.
Mobile App	Customer Summary	Asset	Customer assets info with photos.
Mobile App	Customer Summary	Contacts	Customer contacts
Mobile App	Customer Summary	Details	All address details.
Mobile App	Customer Summary	Map	You can see customer on a map.
Mobile App	Customer Summary	Properties	All customer properties and Attached documents.
Mobile App	Customer Summary	Timeline	You can see old and the next visits to that customer.
Mobile App	Dashboard	Email	Send user stats by email
Mobile App	Dashboard	List of reports	Shows all daily and weekly statistics reports
Mobile App	General	Auto truncation	Old data is automatically trimmed so that the phone is never has to be manually cleanup.
Mobile App	General	Communication Bar	Communication Bar tells you the status of data exchange on all screens.
Mobile App	General	Cross platform	Runs on Adobe Air technology and supports 1000s of devices both iOS and Android.
Mobile App	General	Fast list search	All list are searchable by typing text in the box.
Mobile App	General	Free	Users are free to download and run the app from Apple AppStore, Google Play or direct link to Android .apk file.
Mobile App	General	GPS tracking	All user activity is GPS and time stamped.
Mobile App	General	Intuitive UI	Intuitive User Interface is used on both iOS and Android platforms. Reducing need to training.
Mobile App	General	iOS 7 Look and Feel	Support for clean, easy to use UI like in iOS7.
Mobile App	General	Multi-language	Support for any languages automatically.
Mobile App	General	Offline mode	Collect all field data then sync with one click
Mobile App	General	One user many phones	One user can use unlimited number of devices and switch between often to perform his/her work.
Mobile App	General	One user many platforms	One user can use both iOS and Android platform the same time.
Mobile App	General	Planned vs. Unplanned	You cannot delete planned visits or tasks only add new visit or task.
Mobile App	General	Snapshot and Deltas	Initial load of data happens with a compressed snapshot after that with deltas - only the changed fields are synchronized.
Mobile App	General	Workflow control	You cannot modify visit or tasks in the past of future. Only for today.
Mobile App	GPS	GPS tracking	Activating the app triggers GPS reading to be sent to office app.
Mobile App	Main Menu	Logout	Click on the bottom right corner of the Communication Bar and the email at the bottom to log out.
Mobile App	Main Menu	Quick jump	Navigate main screen from the sliding menu. To hide it swipe the screen from left to right.
Mobile App	Order/Returns	Details	Due date, price list and discount.
Mobile App	Order/Returns	Email Integration	Send email with Order/Return details.
Mobile App	Order/Returns	Item Entry	Recommended quality is shown, total weight, USD amount and price.
Mobile App	Order/Returns	Order Items	Sort by All, Basket, MSL or New.
Mobile App	Product Catalogue	Details	Full product info including photos.
Mobile App	Settings	Console	For support and developer diagnostics
Mobile App	Settings	Help	Online help
Mobile App	Settings	Version	See the latest version of the App.
Mobile App	Settings	Zoom	3 zooming settings. This is so mobile users can adjust screen resolution
Mobile App	Sliding Menu	App Lock	This is a security feature the app is PIN protected
Mobile App	Task Execution	Action/Items list	You can group your form list by either Action to Item.
Mobile App	Task Execution	Action/Items preview	Preview of the form values.
Mobile App	Task Execution	Attachments	See the attachments at the bottom of the Task summary.
Mobile App	Task Execution	Complete Flag	Checkbox ":on" means the task in completed.
Mobile App	Task Execution	Order/Returns	This is built it task and always available.
Mobile App	Task Execution	Photo	There are two cameras - one built it and another phone standard. The built-in is used to devices with lower spec.
Mobile App	Task Execution	Task Editor	If there is a product linked to the editor user can jump to that product by clicking on (i) button.
Mobile App	Task Execution	Task Log	Each task has task log associated with it, where you can write text and photos in the list.
Mobile App	Task Execution	Timing	You can see start/end times and time taken to do the task.
Mobile App	Task Execution	Unplanned Tasks	Add a task to a list of task for the visit at any time for today and future visits.
Mobile App	Task List	Barcode Search	Find products fast using our barcode scanner
Mobile App	Task List	Fast Search	Search by action or item fast

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Mobile App	Task List	Task Template	When choosing a task template click on (i) button will drill down on task description.
Mobile App	Technology	Attachments	All office docs (Excel, pdf, docs) and video and photos supported.
Mobile App	Technology	Auto Sync	There is not sync button, VisitBasis auto synchronizing all data
Mobile App	Technology	Fast Data exchange	VisitBasis App downloads data in packets in many threads and auto retries failed packets.
Mobile App	Technology	Off-line online	VisitBasis app can run online and offline mode.
Mobile App	Technology	Secure	Using latest SSL binary data transfer backed by Google App Engine.
Mobile App	Technology	Zero config	There is nothing to configure with VisitBasis App
Mobile App	Visit Summary	Customer Crosslink	Clicking (i) button will take you to customer info screen.
Mobile App	Visit Summary	Estimated time	Set estimated time is you created this unplanned visit. For planned visited this is read-only info.
Mobile App	Visit Summary	GPS meter	GPS meter shows a distance from user's current location to the target location of the customer. Is the distance is less than 200 meters a checkbox appears .
Mobile App	Visit Summary	GPS Proximity	Tells user if they are close by to the target store (< 200 meters)
Mobile App	Visit Summary	Link to a map	Clicking on "show on map" will take you to the mapping app showing the location of the customer. It makes it easy to navigate to the customer.
Mobile App	Visit Summary	No start/end button	All activities are tracked automatically, no need to start/end button.
Mobile App	Visit Summary	Notes	Add/receive as many visit notes as you like use this list to communicate with the office effectively.
Mobile App	Visit Summary	Task link	See the task counter with the checkbox on of all tasks are completed.
Mobile App	Visit Summary	Timing	For visits that have any completed tasks, start, end and actual time timing in shown.
Mobile App	Visits	Auto Routing	Click a button and get your visits auto routed so that the shorted route is calculated from the current GPS location of the user.
Mobile App	Visits	Calendar	Convenient calendar for visit viewing and planning.
Mobile App	Visits	Completed Visits	Shows a checkbox next to completed visits.
Mobile App	Visits	Manual Routing	Change Visit order manually.
Mobile App	Visits	Planned/Unplanned	Receive planned visits on the date and add unplanned visits.
Office	Account	Admin only	Only users with Master access can see the tab
Office	Account	Company details	Keep your company details updated.
Office	Account	License Info	Account tab will show license count information this is where you can review or change number of required licenses
Office	CRM	Address validation	Invalid addresses or addresses without longitude/latitude are highlighted in red
Office	CRM	Address validation in bulk	You can validate many invalidated address with a click of a button
Office	CRM	Asset tracking	Record all your asset for a particular customer, assign up to 3 photos of the asset
Office	CRM	Clone	Customer can be clone for convenience
Office	CRM	Contacts	You can store as many contact as you need in the customer profile
Office	CRM	Custom properties	You can add as many custom properties as you like
Office	CRM	Customer Code	read-only code that you can use to reconcile VisitBasis customer report with your back office system
Office	CRM	Customer ID	When viewing a customer info you can get a customer Id by clicking
Office	CRM	Customer search	All customer can be searched by name, code, address and custom property
Office	CRM	Document management	Attach as many docs (office docs, planogram, video) to customer as you like
Office	CRM	Export/Import	You can Excel export/import Customers, contacts, assets, pricelists and MSL
Office	CRM	Must Stock List	Manage product MSL for any customer
Office	CRM	Price Lists	Assign many price lists to customer and set one as a default
Office	CRM	Recommended quantity	You can select recommended quantity for any product you supply to a customer
Office	Dashboard	Activity Log	As your field reps perform daily visits you can see all the data as it arrives into your activity log
Office	Dashboard	Easy to navigate	See high level visit information, how many visits planned vs. how many completed
Office	Dashboard	History	All visit data can be accessed for past dates
Office	Dashboard	Routes	See the travel routes field reps took between visits.
Office	Dashboard	Track Mobile Workforce	See your all mobile staff on the map in real-time
Office	Division	Power with Divisions	Divide your customers, price lists, products and user into division and run multiple operations the same time
Office	Division	Default Division	When registering a new account with VisitBasis you will get a default division
Office	Division	Division	Define divisions with you need to separate users/pricelists/products into separate groups
Office	General	Active flag	All data items have active flag, setting active to false made the item inaccessible e.g. one cannot order none-active product
Office	General	Export/Import	All reference data, customer, products, visit etc. can be easily exported/imported into the app using Excel SpreadsheetML (XML) files

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Office	General	Export/Import modes	When importing data there two modes you can do it. First Append/Update and Replace mode. Replace is more dangerous but allows to keep your back office system in sync with VisitBasis very easily
Office	General	Fast search	All list information (Customers, Products, Users..) is searchable very quickly
Office	General	Item ID easily accessible	When doing export/import via Excel it is sometimes required to have raw item ID. You can get it by clicking on top right corner when viewing, say, Customer record.
Office	General	Language	You can switch between languages at run time
Office	General	RIA Look and Feel	Rich Internet Application, user-friendly desktop-like features on the web.
Office	General	Security	There are four security roles, Master, Product Supervisor, Office User and Mobile User. Mobile users cannot access the office app. Office users cannot add or update product information.
Office	General	Support for multi-user environment	In multi-user environment is it important to prevent data corruption when two or more users work on the same data row. VisitBasis does this with Optimistic Locking strategy.
Office	General	Time zone	Company time zone for rolling pricelists and visit logic control and it can be auto detected upon account registration
Office	Getting started	When logging in for the first time user can follow 5 minute tutorial	
Office	Price List	Active flag	By setting active flag to false you can stop your field reps from ordering products for the prices from the list.
Office	Price List	Export/Import	Export/Import pricing and price list in Excel
Office	Price List	Price List	You can define many price lists for products. You can schedule a new prices from a date in the future. It will roll automatically at 12:00 at night based on your company's time zone.
Office	Product	Export/Import	You can keep your product database in sync with VisitBasis using product Export/Import feature in Replace mode.
Office	Products	Clone	You can clone a product
Office	Products	Custom properties	Product can have as many custom properties as you like. They can be exported and imported also.
Office	Products	Photos	You can have up to 3 product photos attached to a product.
Office	Products	Product Tree	Define a product tree so that it is easier to manage them. You can move product from one product folder to another.
Office	Registration	Free registration	One can start using VisitBasis with in 5 minutes
Office	Registration	Fry before you buy	Full access to system for 14 days
Office	Reports	BigQuery Reports	Use Google API and BigQuery access to your data to get ultimate custom reports and dashboards in seconds
Office	Reports	Standard Reports	Get all your data immediately, filter by reg expressions
Office	Tasks	Complex forms	By combining actions with items you can have table like form easily created
Office	Tasks	Form Items	Form items can be either product based or simple text.
Office	Tasks	Simple Tasks	There are 5 task answer types: Number, Text, Multiple choice, Photo and Signature. We are working on adding more types.
Office	Tasks	Task Attachments	Attach and relevant documents to a task and it will be available on mobile device.
Office	Tasks	Task Builder	Use our task builder to create a simple task or very complex
Office	Tasks	Task Tagging	By tagging a task you can group many tasks you have created for a particular promotion. It would be easy to search and report.
Office	Territory Management	Add a new Customer	It is easy to discover and add a new customer to a particular user.
Office	Territory Management	Assign Users to Customers	Click on the map and assign users for the customers
Office	Territory Management	Discovery	Use our interactive search capabilities to navigate all your customer and see them on the map. Search Customers by custom properties.
Office	Territory Management	Export/Import	Export/Import customer/user mapping. You can make the user assignment very efficient using this simple method.
Office	Territory Management	Optimize	We made it easy for your to compare two or more users territories and eliminate and overlapping customers.
Office	Territory Management	User Territory	See each see territory in unique colors.
Office	Users	Easily Add/Remove users	Add/remove users , move them from one division to another
Office	Users	Export/Import	Export/Import all your company's users via Excel xml file
Office	Users	Password Reset	If user has Office User access you can reset their password with a click.
Office	Visit	Export/Import	Use excel visit export/import feature to update visit and task and plan future visits and tasks.
Office	Visit Execution	Calendar	You can see all your visits on daily, weekly and monthly views. It is easy to navigate.
Office	Visit Execution	Estimated time	You can edit estimated time for Visits and Tasks.
Office	Visit Execution	Preview of Tasks	See the task execution results, all task answers including photos and signatures as the data becomes available during the day.
Office	Visit Execution	Task Attachments	Access the documents that were attached to the task.
Office	Visit Execution	Task Log	Review task log for last minute comments/photos related to performing the task.
Office	Visit Execution	Visit Notes	Review visit notes that field rep might send to the office. You can reply to the note and it pushed to the reps mobile device.
Office	Visit Execution	Visit Ordering	You can reorder visits
Office	Visit Execution	Visit Planning	You can add visits for today and for future dates only.

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Office	Visit Execution	Visit Verification	Visit can be verified live, you can see visits on the map, GPS distance to the visit location
Office	Visit Execution	Visit Wizard	Use our advanced visit wizard create future planned visits. You can easily repeat previous visits, move visits around and create new visits.
Office	Visit Execution	Work Time tracking	Start of visit, end of visit time. Duration taken to perform tasks and travel time.
System wide	General	Language	English, Spanish, Portuguese, Russian, French, German, Italian
System wide	Technology	Field based deltas	We use highly optimized data exchange that only sends deltas field by field. This makes it super fast and users do not have to wait for data exchange.
System wide	Technology	Google Cloud	VisitBasis is running on Google Cloud platform, it does not use SQL like databases allowing to have the best performance and scalability compare to traditional web-based systems.
System wide	Technology	High performance globally	As Google Cloud implementations you can count on best service availability even if your company is multinational and runs in different countries and time zones.
System wide	Technology	Progressive data uploads/downloads	VisitBasis is designed to work under all communication conditions. The data is broken into multi-packets and send in separate threads simultaneously. If connection breaks the system needs to resend only the lost packets. Result you do not need to wait data to be resent to you.
System wide	Technology	Retry and recovery	Smart retry and recover strategies used to allow the data exchange after the connect drop. So you never have to retry the syncing as system will do all the hard work for you.
System wide	Technology	Top performance	VisitBasis uses highly compressed binary AMF3 protocol over SSL for fast and secure communication with Cloud based service.