
TourSolver mobile app Reference Guide

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Introduction

The TourSolver mobile app is an application designed for mobile terminals (smartphones, tablets...) enabling interaction between a forward planning facility and the terrain. It operates under the main market standard operating systems (Android, IOS, Windows Phone) as well as in webapp form.

Starting TourSolver mobile app



- 💡 The mobile app is a functionality complementing the TourSolver solution. It enables mobile staff (sales personnel, technicians, haulage companies, etc) to maintain continuous contact with scheduling teams. Constant interaction with TourSolver enables managers and scheduling teams to track the progress of mobile staff on their rounds, and handle, for example, visit start and finish times, or abandoning of a visit. Responses to customers or contacts, and resolution of any problems that occur out in the field can all be addressed in real time.

The user in the field will have access to the data they need on their smartphone or tablet, including details of their visits such as the agenda itself, a description of the visits in question and the geographic location of the user plus that of the visits, on a map.

Connection

To connect to the mobile application, the user must first enter a user name (identifier) and associated password, as defined in the TourSolver solution. An option is displayed to **Remember me** and so to avoid having to type the identifier and password again the next time the application is started.

Connection screen

TourSolver Mobile
version

Welcome to TourSolver Mobile

User Id

Password

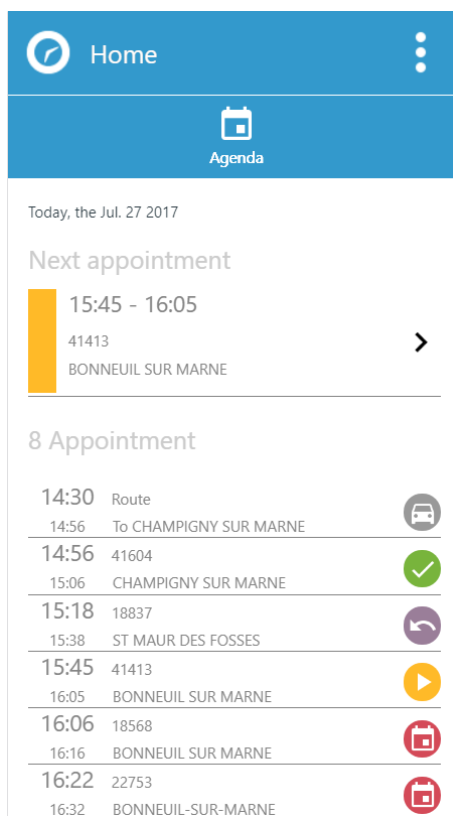
Remember me


Connection

Once the fields have been correctly entered, the **Connection** button provides access to the application.

The home page displays.

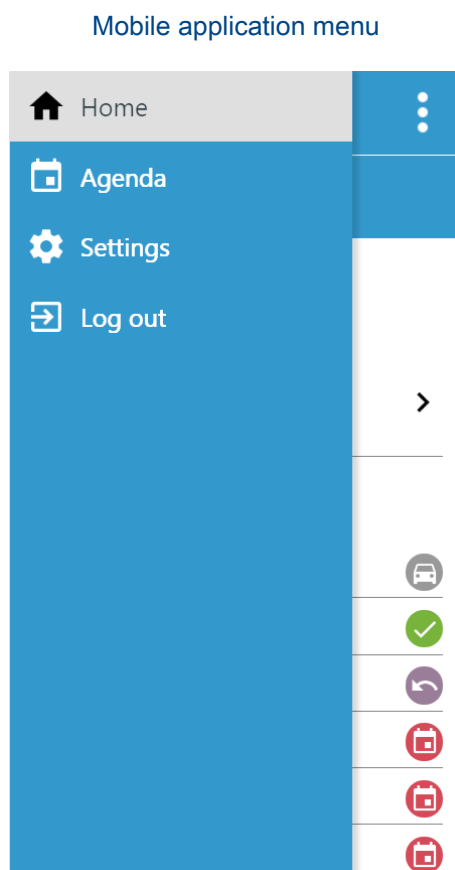
Mobile application home page



 The telephone or WiFi network must be accessible to enable connection to mobile application.

Menu

Tapping once on the  icon opens the application's main menu.



Home

The Home page provides a link to the next visit to be fulfilled for the day, a swift preview of visits and unavailabilities for the day, with their action status as well as a short-cut to the [Agenda](#) module of the application. It is also possible to [Refresh](#) data ([Cf. section on Home](#)).

Agenda

This module provides access to details of visits for the current day, and, if required, for up to 31 days to come. The detailed information about individual visits or an unavailability is accessed by just tapping the item of interest ([section on Agenda](#)).

Settings

This module allows handling of mobile app configuration parameters, such as the geolocation options and Private life mode. It also enables access to information about the application itself (name, version number, publishing company, terms and conditions of use, etc) ([Cf. section on Settings](#)).

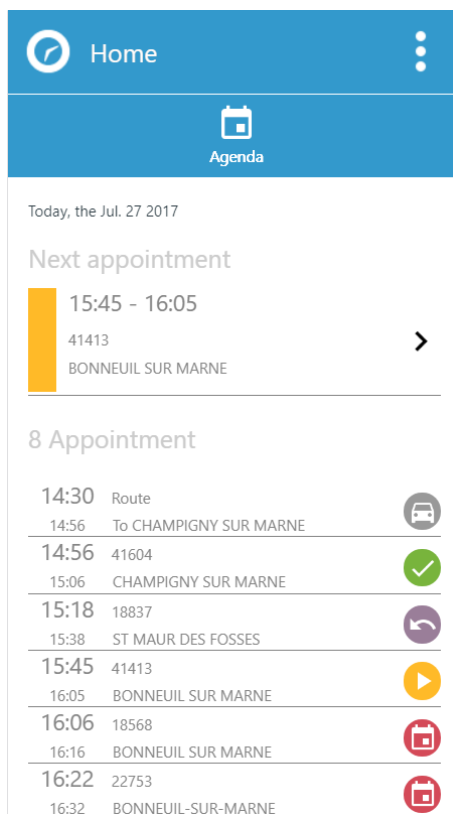
Log out

This function allows you to close the current session. The user is then returned to the connection page for the application.

Home

This page provides a preview of the next visit, visits and unavailabilities for the day, their status in terms of whether they have been fulfilled or not, and a short-cut to the **Agenda** module of the application.

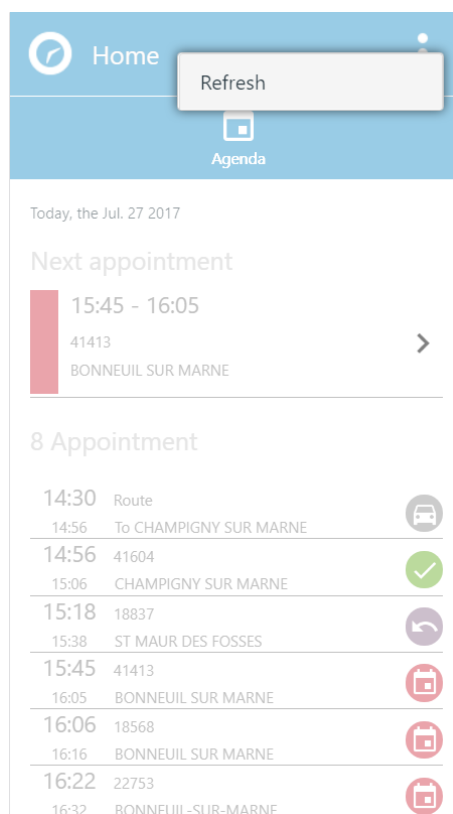
TourSolver mobile app Home Page



Refresh function

The button at the top right-hand edge of the page provides access to the Refresh function.

Home page Refresh function



This function allows you to trigger synchronisation as and when required between the mobile application and TourSolver. When activated, a synchronisation indicator displays at the centre of the screen until the synchronisation process is completed.

- ❗ This operation is only possible in connected mode. If the device used is not connected to any network (aircraft mode activated, networks de-activated or in white zone), no manual synchronisation will be possible. As the mobile application is synchronised with the TourSolver solution, any change made with regard to the solution itself is automatically applied to the application, and vice versa.

Short-cut to the Agenda module

A short-cut is suggested on the home page to the [Agenda](#) module. Tapping this button provides access to this module, without having to pass via the general menu in mobile app.

- ❗ The functionalities for this module are described in detail in the corresponding section of documentation.

Next visit

Under the short-cut to the Agenda module, today's date is displayed.

Under this date, a short-cut to the next visit is suggested here. A Brief summary is suggested and a colour code indicates the status of the visit.

Tapping on this visit then displays the associated page of details, and allows you to trigger different actions linked to its life cycle. ([Cf. section on Visits](#))

Activity of the day

The Home page finally presents today's visits and unavailabilities in the lower section. It is possible to re-synchronise data at any time with TourSolver in order to see if any changes have been made to any of the visits. ([Cf. the Refresh section above](#)).

A notification displays when it is time to leave for the first visit (depending on the journey time).

An icon on the right of each item indicates what kind of icon it is or its status if it is a visit:

- Journey: grey vehicle icon;
- Visit *started* (in progress): orange reading icon;
- Visit *accepted* (yet to be fulfilled) or *cancelled* (fulfilment under way): pink calendar icon;
- *Received* visit (yet to be fulfilled): red calendar icon;
- *Rejected* visit (at the time of accepting): purple calendar icon;
- *Finished* visit: green tick icon;
- *Abandoned* visit: purple back-arrow icon.



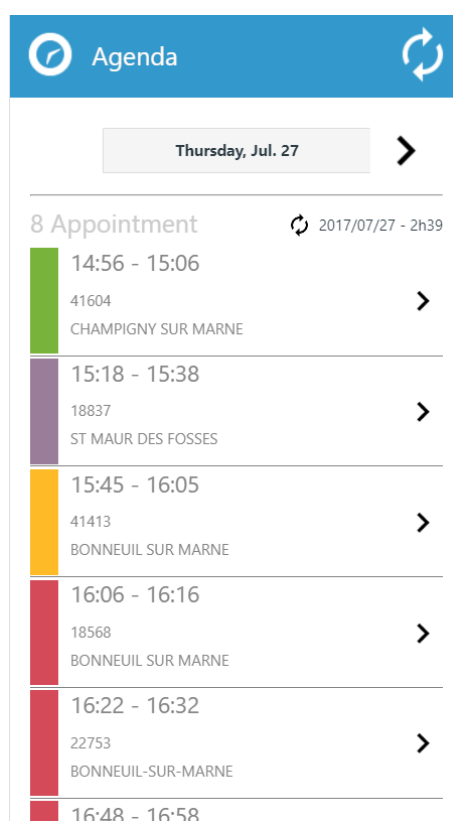
Pointing at an element displays an infobox stating kind and status.

Agenda


The Agenda is accessible from the home page, or from the mobile app menu, simply by tapping the dedicated icon.

The Home page in the **Agenda** menu consists of a main panel giving details of all visits scheduled for the calendar day. It is via this list that users will find they work most to track and amend the cycle of all their scheduled visits, and to consult all the associated information needed to deliver the service in question. Navigation in time is possible through selection of dates so the agenda for days to come can be viewed.

Agenda module



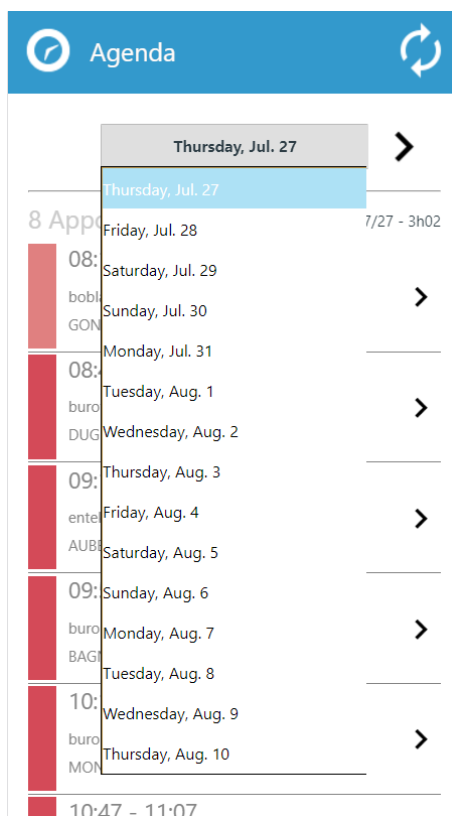
The colour code to the left of each item on the agenda indicates the nature and status of the element.

The  icon allows you to refresh the window in the Agenda menu to show any modifications made to visits scheduled for the day.

Navigation

In the Agenda module, the user can change the date in the upper part so as to view visits coming up over the next few days by tapping on the date of the day displayed above the detailed information about the visits.

Choose a day



The number of days that can be consulted in the application is defined from the server, in the Configure the mobile app menu. The maximum number of days that it is possible to show in the mobile app is, nevertheless, limited to 31 days.

Visits and unavailabilities

A visit consists of any scheduled meeting between the mobile resource in the field and a customer. In TourSolver, the visit will have a different status as it evolves over time. The status makes it possible for both resource and application to distinguish one visit from another in terms of its progress status (planned, fulfilled, etc) and handle the way the visit behaves accordingly.

The list of agenda items that is consultable for each day displayed in the application, presents for each one:

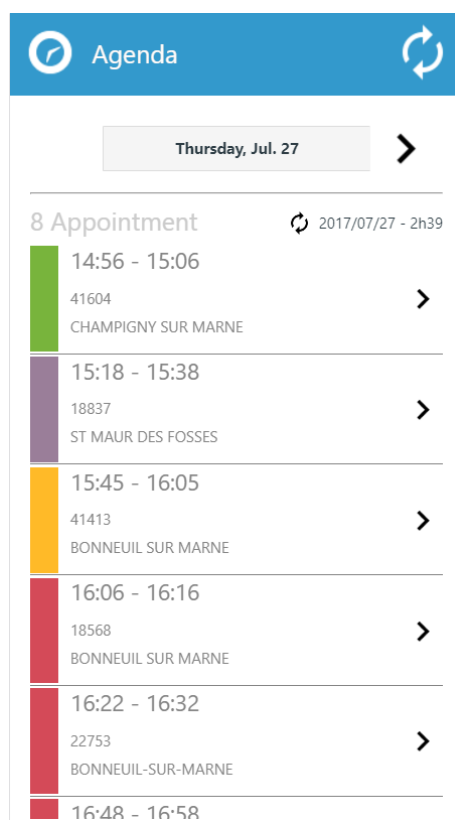
- for unavailabilities:
 - the start and finish time (or the start and finish date/time if this is a multi-day event);
 - the type (rest time, lunch break etc).
- for visits:
 - the start and finish time (or the start and finish date/time if this is a multi-day event);

- the description of the visit;
- the town.

Categories of status

The Agenda module handles the user's visits. The user taps on each visit to access it, and enters details about progress for the current day's visits as these are confirmed, fulfilled, cancelled, etc...

Managing the Agenda




The colour of the left-hand bar on each element indicates its type (unavailability or visit) and the status of each visit. Each colour corresponds to a specific status:

- Unavailability;
- Received visit;
- Accepted visit;
- Rejected visit;
- Started visit;
- Finished visit;
- Abandoned visit.

The form for an item in the agenda

Information



At any time, you can return to the list of elements by tapping the  icon at the top left of the screen.

Information about a visit

Tapping on a visit in the agenda, a page opens to display different items of information about the visit.

Information relating to a visit

The screenshot shows a mobile application interface for an appointment. At the top, there is a blue header bar with a back arrow on the left, the word 'Appointment' in the center, and a location pin icon on the right. Below the header, the text 'My plus' is centered. The main content area is divided into sections by horizontal lines:

- Information**:
 - Start**: 2018-02-13 07:37 AM
 - End**: 2018-02-13 07:47 AM
 - Address**: 105 BLD HENRI BARBUSSE, 78806 HOUILLES, France
 - Opening hours**: Not communicated
 - Description**: My plus
- Report**:
 - To visit**: [Empty text input field]
 - Visit duration**: [Empty text input field]

At the bottom of the form, there are two blue buttons: 'Reject' with a red 'X' icon and 'Accept' with a white checkmark icon.

In the majority of instances, the information displayed are:

- the start and finish time of the visit;
- the address of the visit;
- the opening hours of the customer;
- the description of the visit;


To this can be added a visit report: the visit report fields must be created beforehand and configured via the TourSolver platform, in the Configure the mobile app menu.

Information about an unavailability

Tapping on an unavailability, the user opens a page that displays the various information items concerning the unavailability:

- the start date/time;
- the end date/time;
- description of the unavailability.

Map

The  icon is shown in the form when the agenda item is localised. When you tap on it, this icon accesses the localisation for the visit on a map and its tour.



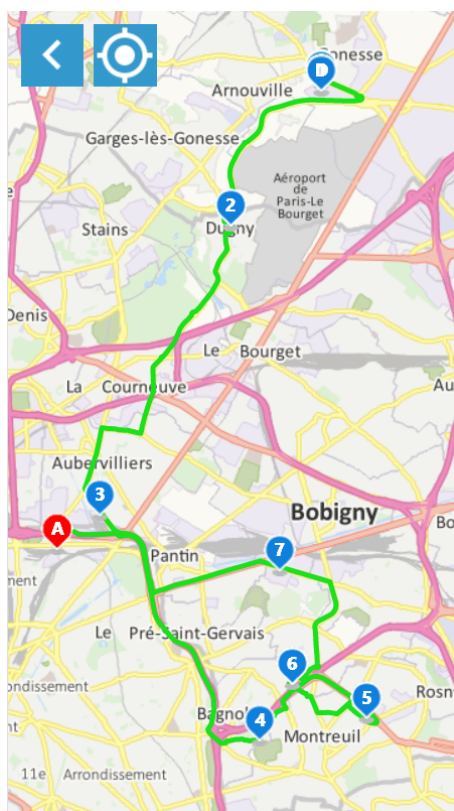
The choice of the mapping service can be defined in the mobile app settings. (Cf. [section on Settings](#))

Geoconcept mapping service

When the Geoconcept mapping service is used, different functions are suggested in the upper part of the map:

- return to the previous page describing the agenda item;
- positioning in the map on the current geolocation (available only if the corresponding parameter has been enabled from the server, in the Configure the mobile app menu).

Geolocating a visit on the map



Google mapping service

If the Google mapping service is configured, the Google Maps application is then called (clearly it has to have been installed beforehand on the device being used) and the series of functionalities associated to Google Maps are then available.

- different types of cartography;
- geolocalisation;
- information about road traffic conditions;
- guided navigation to the list observed in the map;
- ...

Waze Mapping Service

If the Waze mapping service is configured, the Waze application is then called (for this to happen, it must have been installed previously on the device used) and the series of Waze functionalities are then available:

- itinerary search;
- localisation on a map;
- information about road traffic conditions;
- guided navigation to the list observed in the map;
- ...

Visit life cycle

When consulted in the agenda, a visit will suggest several possible actions linked to its life cycle, that might modify the visit status:

- Before accepting the visit:
 - Reject: visit status changes to unplanned/requested (available only if the corresponding parameter has been enabled from the server, in the Configure the mobile app menu);
 - Accept: visit status changes to confirmed/handled;
- Before fulfilment of the visit:
 - Abandon: visit status changes to abandoned (available only if the corresponding parameter has been enabled from the server, in the Configure the mobile app menu);
 - Begin: visit status changes to confirmed/in progress;
- During its fulfillment:
 - Cancel: visit status changes to planned/confirmed;
 - Done: visit status changes to fulfilled/accomplished status.

Fulfilment of the visit

Begin

Tapping on the **Begin** button, the user indicates that the visit is starting. The visit status changes to Started.

The Begin button



The visit's real start time then appears in the Report section.

The Report section

The screenshot shows a mobile application interface for reporting an appointment. The header is blue with a white back arrow on the left, the word 'Appointment' in the center, and a white location pin icon on the right. Below the header, the word 'Report' is displayed in a large font. The form contains several input fields: 'Start' with the value '27/07/2017 15:04', 'To visit' with the value 'Yes', 'Visit duration' with the value '00:20', 'Require all skills to be compatible' with the value 'Yes', 'Opening days 1' with the value '1-5', and 'Latitude' with the value '2.442527'. At the bottom of the form are two blue buttons: 'Cancel' with a white 'X' icon and 'Done' with a white checkmark icon.

Finish

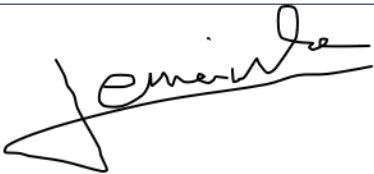
Before terminating the visit and/or having finished the visit, certain information items can be entered in the various editable zones. A signature and some photos can also be taken (this option is only available if the corresponding parameters have been activated from the server, in the Configure the mobile app menu). These information items are then sent, via the TourSolver platform, to the Planning Manager who can take action in response to messages uploaded from the field.

Signature and photo shoot

< | Appointment | 📍

To visit

Visit duration



Update Delete

Take a photo 📷

✕ Cancel ✓ Done

Tapping on the **Done** button, the visit status will change to Fulfilled/Completed, and the **Send** button sends the data to the TourSolver solution.

The Done button



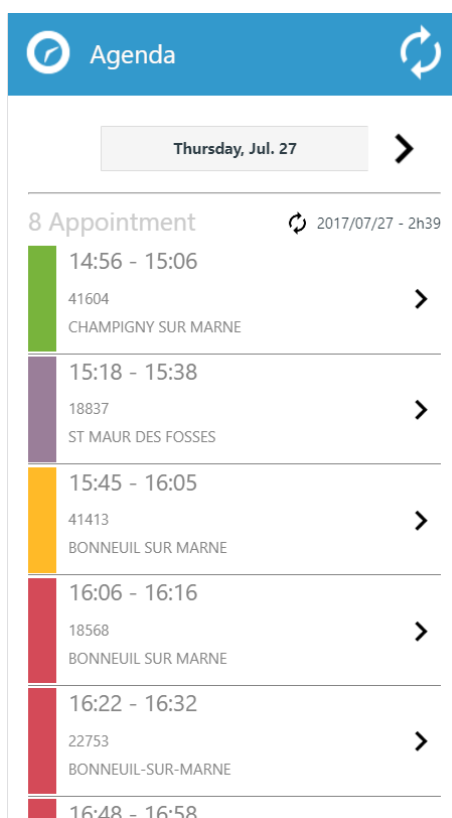
The Send button



As the mobile application communicates with the TourSolver solution, any information filled in at the application interface level will be automatically put on-line on the platform so that scheduling staff can follow-up the progress on visits.

Within the agenda, the colour of the band associated to the visit changes as a function of its status and shows that the visit is finished.

Change in status



The visit has automatically been updated on the platform.

Update on the TourSolver platform

n°	Step	Address	Planned	from	to	Duration	Driving	Start	End	Status
PAUL 13/02/2018										
-	Departure	10 RUE DES NOELS 92230 GENNEVILLIERS FR	On time	06:55	06:55	00:00	00:00	-	-	
1	Capro	9 /11 RUE DE LA RIVIERE	On time	07:10	07:30	00:20	00:15	11:36	11:36	Finished
2	Musée	105 BLD HENRI BARBUSSE	On time	07:37	07:47	00:10	00:06	11:36	11:36	Scanned

The user can also cancel a visit that has already started if circumstances dictate, by tapping on the **Cancel** button.

The Cancel button



Tapping on the **Cancel** button returns the user to the visits page, without applying any modifications made. The visit assumes a status of Planned/Confirmed.

Abandon

The user can specify that a visit has not taken place by tapping on the **Abandon** button (available only if the corresponding parameter has been enabled from the server, in the Configure the mobile app menu).

The Abandon button



Having first tapped on the **Abandon** button, an interactive window prompts for the reason(s) the visit has not taken place, and then prompts the user to either **Confirm** or **Cancel** the action. Filling in the reason for abandoning the visit enables the scheduling team to take appropriate action (Plan a new visit, for example).

Confirming abandonment of a visit

The status of the visit will change in the main **Agenda** menu window. It now appears with the appropriate colour to indicate its new status.



When abandonment of a visit is confirmed, the application sends the data to the TourSolver platform. As in the case of a finished visit, the status of the visit is updated on the platform. It disappears therefore from the current day's visits.

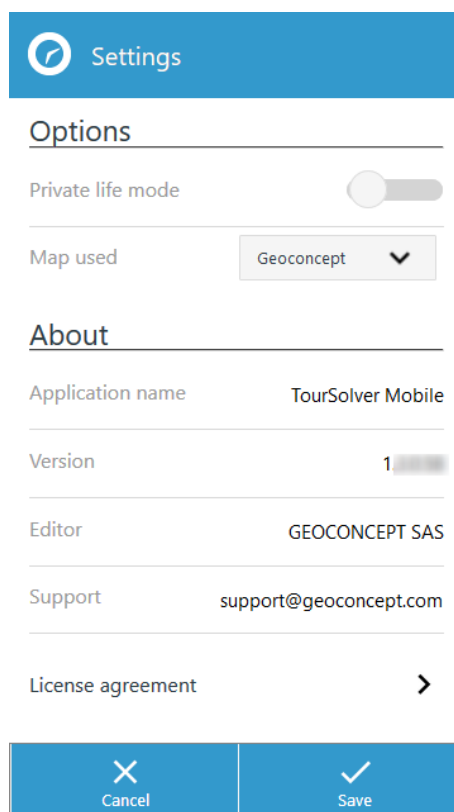
Updating in the TourSolver platform after abandoning a visit

n°	Step	Address	Planned	from	to	Duration	Driving	Start	End	Status
PAUL 13/02/2018										
-	Departure	10 RUE DES NOELS 92230 GENNEVILLIERS FR	On time	06:55	06:55	00:00	00:00	-	-	
1	Capro	9 /11 RUE DE LA RIVIERE	On time	07:10	07:30	00:20	00:15	11:36	11:36	Finished
2	My plus	105 BLD HENRI BARBUSSE	On time	07:37	07:47	00:10	00:06	11:36	-	Abandoned

Settings

The mobile app **Settings** page provides the user with access to the configuration for the application as well as to information relating to it. It is accessed via the mobile app menu. (Cf. [the section of this guide](#))

Settings page



Options

The **Options** section allows handling of parameters for configuring mobile app as shown in the interface and made accessible to the user through configuration.

Private life mode


When activation of private life mode is authorised (and shown in the interface by means of the TourSolver configuration), it is possible to activate private life mode manually, and this will interrupt the sending of a geographic position to TourSolver automatically and regularly. Disabling Private life mode re-activates the possibility of sending the geographic position. In this way, a switch allows you to set private life mode to **ON/OFF**.



A message may display in the interface in the case where day/time windows have been defined for activation of tracking in the mobile application configuration on the TourSolver server.

If mobile application is used outside these day/time windows, the following message displays:
Your position will not be returned to the server because the working hours timeslot is not in progress

Map used

This parameter defines the mapping service accessible via the  icon, located at the top of the form for a visit. In this way, the user can choose between the following servers:

- Geoconcept;
- Google;
- Waze

Once parameters have been modified, the user can EITHER **Save** button, OR **Cancel** the modification made using the dedicated buttons at the bottom of the settings page.

Save button



Cancel button



About

The **About** section provides access to information about the mobile application:

- Application name;
- Version number;
- Publisher;
- Address for technical support;
- End User Licence Agreement (this line provides a link to the page of the mobile application software licence).

Mobile application End User Licence

 License agreement

Enduser licence for Software Products published by GEOCONCEPT SAS

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DEFINITIONS

The following definitions are applicable to the terms used in this document :

- «Bug»: a fault in the software that manifests as a permanent and reproducible dysfunction, that is, as an operational malfunction within the software preventing it from functioning as described in the accompanying documentation, and that cannot be ascribed to incorrect utilisation on the part of the Licensee or any other user, whether authorised or not;
- «Order or Product proposal»: any document defining the order and its terms and conditions as issued by the LICENSEE and accepted by GEOCONCEPT SAS or

Log out

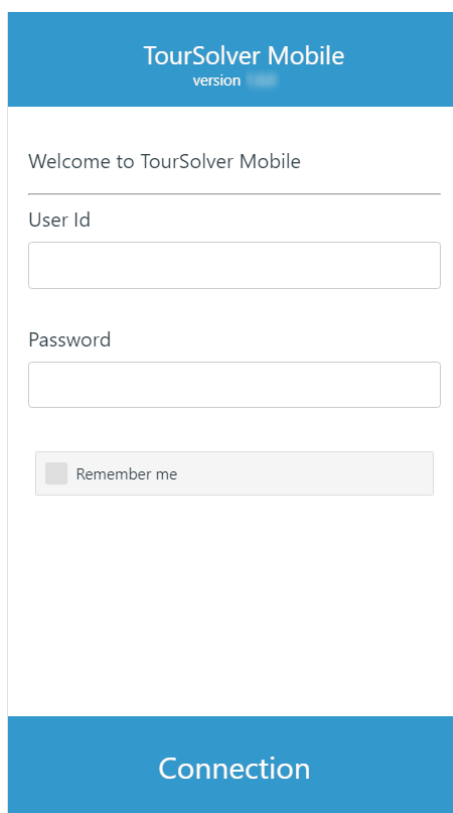
Tap **Log out** to close the current session.

"Logout" button



Tapping this button disconnects the application from the TourSolver server and prompts the user to enter their TourSolver identifier/password. (Cf. [section on Connection](#))

Identification page



TourSolver Mobile
version

Welcome to TourSolver Mobile

User Id

Password

Remember me

Connection