



User Guide

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Next Best Customer

Mapadore is your personal diary. Everything has already been set for you according to your own criteria.

Your customers are your own priority but some tasks are more urgent than others.

Next Best Customers allows you to quickly visualise in your homepage what you need to do first, second, third etcetera. The clients are organised in a to-do list in accordance to those criteria that are relevant to you. You are helped in your decision making process through time tabs that give you a quick glance at the travelling time you need to consider when planning your journey.

You can choose how many clients you want to visualise and filter them according to your day-by-day needs and decision making processes.

If you click on the funnel you will be able to enable the following functions:

- **Without appointment** allows you only to see the clients with whom you haven't scheduled an appointment.
- **With a recent appointment** allows you only to see the clients with whom you have recently booked an appointment.
- **With a future appointment** allows you only to see the clients with whom you'll have an appointment within the next 14 days.
- **Without call** allows you only to see those clients that you haven't called yet.
- **With a recent call** allows you only to see those clients that you have called in the past 14 days.
- **With a future call** allows you only to see those clients that you're planning to call within the next 14 days.

Custom filters are available as well. If you click on "Filter" you will be able to choose from the different options you might have set beforehand.

Smart Planner - Smart Nearby - Map&Details

Once you have organised and profiled your Accounts, Contacts and Leads inside the relevant tabs and you have set your own priority criteria, Mapadore is able to suggest when exactly you should go visit your Account, Contact or Lead according to the distance between the client (or potential so) and the previously scheduled appointments that are recorded in your calendar.

Each Account, Contact or Lead's page has a list of time effective suggestions for future appointments with the company. The offered suggestions show the best optimized appointment solutions in relation to the constraints given by your calendar and your scheduled commitments locations.

Each suggestion in the list provides you with important information:

- Exact day and time suggested for the appointment according to your calendar and the distance you need to cover.
- The broader still available time span during that suggested day that you haven't filled with previous tasks and commitments (in case you want to edit the time that Mapadore suggested for you).
- A one to three stars ranking that visually classifies the appointment suggestion on an overall tasks/distance optimisation basis.

Mapadore's suggestion list changes in accordance to the appointment duration, which you can set from the relevant tab by choosing amongst different possibilities, ranging from 15 to 90 minutes.

Smart Nearby is to be used in tandem with Smart Planner, as it makes you aware of other clients that happen to be relatively close to that specific Account, Contact or Lead. The client list shows the travelling time in the blue tabs on the left, thus suggesting distance as the generally preferred and default relevance criteria. If distance is not your priority though, any other relevance criteria can be set according to what is most important to you.

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Should you want to visualise Mapadore's suggestions on the map, Map & Details gives a most complete overview, thus showing the reference client together with all the others in the area. Map and Details allows you to interact with the map while keeping the companies list as presented in Smart Planner and in Smart Nearby on the left.

Smart Journey - Reshuffle Appointments - Fill my Journey

Mapadore's homepage gives you a most straightforward and insightful way of looking at your daily schedule.

Smart Journey is more than just a calendar. It allows you to see all the appointments that you have scheduled on a daily basis and where it is. Once you have entered the date, your appointments will list in chronological order and show on map.

The ring graph below shows how efficiently you have planned your client visits, whilst the bar graph delivers a more complete overview of your 11 hours working day, hence an esteem of the total time you'll spend with the client, the total in-between travelling time and finally the total time you have left free of any visiting commitments.

If the graphs show that your schedule could be better organised and optimised more rationally, Reshuffle Appointments will suggest a different appointment order that you can accept and save or otherwise discard.

The map window allows you to quickly see all your appointments and the distance between them. However, for a more detailed overview and route guidance, Show Route will open the relevant Google Maps journey plan for your reference.

In case you need to remind yourself that a specific appointment with a client is to be considered as binding and should never be edited, move to Calendar, open your appointment and tick the Immovable option. Mapadore now knows that this appointment should be considered as permanent and unmodifiable.

If you don't have scheduled appointments or you have few, Fill my Journey can be used for suggestions on how to fill the day.

In case of already scheduled appointment, it will suggest appointments for customers closer to those already on the agenda, otherwise you can select where you would like to set your appointments.

In both cases you can accept and save or otherwise discard the proposed appointments.

Journey Reports

If you are a rep or if otherwise your job is to oversee your reps' diary and keep track of their appointments, this tool will keep you updated through a simple and straightforward information layout.

Through Transfer Reports, you may be able to look into a specific rep's schedule by clicking on On behalf of and choosing from the reps list.

Start Date and End Date narrow down your search to the specific period in the future or past that you want to explore.

By clicking on Show Report you will be able to learn about the events for that given period, wherever they are taking place:

- Date
- Event start time
- Event end time
- Event description
- Location
- Travel time in minutes
- Distance to be covered
- A visual representation of an 11 hours working day through a bar graph that shows the ratio between time spent with the client, amount of time spent for travelling and the remaining commitment-free time. The total travelling distance is also given.

- Show on Map opens a window map allowing to quickly locate the clients. By clicking on Show Route inside the window map, the relevant Google Maps journey plan will open up in another page.

Smart Team

Let's say that you are responsible for assigning appointments directly to the company reps.

Having activated the On Behalf function in Settings, you are able to schedule an appointment for another user, who will hence find the event in his/her calendar. Moreover, Mapadore helps you assign the best possible professional for that specific client, as it considers key factors like individual expertise, previous history with the client, travelling time and availability.

If instead your reps are referenced collectively (for instance on a geographical basis) and have complementary expertise, then you may need to manage them as teams or groups and communicate with them accordingly.

Once you have created and activated a group or team in Settings, you are able to assign it an appointment.

Go to Accounts, Contacts or Leads and choose the best suited Smart Team to take part in the event that you are about to schedule. Once you have chosen the Team, a number of suggestions with possible dates and times will show in the Smart Planner list. Choose amongst the given appointment options, bearing in mind that the appointment duration may affect Mapadore's suggestions.

Each member of the Team will now be able to see the appointment in the calendar.

Smart Check-In

You scheduled the appointment and you are now ready to meet the client in a few minutes.

Look up for the appointment in Calendar and open it. Click the Check-In tab and a pop-up window will show your current geographical position, date and time and allowing you to confirm the appointment.

The information you have saved is now recorded inside the event page in Calendar and can be included in your Reports.

Smart Check-Out

You have just met with the client and now you want to leave an output record for future reference before you move on to your next activities.

Look for the appointment in Calendar and open the dedicated page. Click the Check-Out tab and a pop-up window will show your current geographical position, allowing you to choose amongst a selected number of different check-out options, which you can customise in Settings.

Once you have specified whether the appointment was successful and under which terms, you'll be able to save your check-out record.

The information you have saved is now recorded inside the event page in Calendar and can be included in your Reports.

Time Availability

Sales reps often have a fixed time availability but sometimes they don't. By using personal time availability, sales reps can set their daily work schedule. There are three time availability options: date, date range and days of the week (default). Priority is given to time availability within a specific day, second the availability within a given period of time, third the usual availability in consideration of the professional's normal daily routine.

Date: we mean a specific day. You should set the date and the time range when you are available

Date Range: we mean a specific period. E.g. Month, week, a given number of days, etc. You should set the start date and the end date of the period and then you should set the time range when you are available.

Days of the week: the default working routine, your typical working hours.