



the mind of movement

PTV Map&Market 25h  
Service Description

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Shorttitle	Service Description PTV Map&Market 25h
Version:	1.1.1 dated 2021-08-27

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# 1 Service Description

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## 1.1 General profile

The PTV Map&Market 25h service is a map- and calendar-based web application for planning and optimising sales call trips for field sales staff. The service supports team leaders, dispatchers, call centre employees and sales representatives in their day-to-day work across all aspects of call trip planning.

With high-performance planning and analysis functionalities, factors affecting sales call trips within the current day or week, such as ad-hoc appointments, appointment postponements or cancellations, can be taken into account. This ensures that the sales call trips can be planned efficiently to optimise driving time despite unforeseen circumstances.

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## 1.2 Technical system description

### 1.2.1 General

PTV Map&Market 25h can be used as a **web client** via a web browser such as Mozilla Firefox®, Microsoft Edge®, Google Chrome™ or Safari®, or as a **web application for mobile devices (app)**. For example, sales call trips for the coming week can be conveniently created via the web client or existing precombined trips can be optimised, while the app supports staff in their daily work in the field. The web client and app are synchronised. The app is available for the two mobile operating systems, Android™ and iOS, and can be downloaded from the usual stores. Android is a trademark of Google Inc. and iOS of Apple Inc.

In addition, it is possible to use the web services for your own web application via a standardised application programming interface (API).

Depending on requirements, the services can, optionally, be provided via Windows Azure™, the company's own networks or PTV GmbH's data centre.

The exact use of the product is set out in the SOWs. The Service Description is not an assurance of a claim to all variants.

### 1.2.2 Technical requirements

#### Required client software/desktop browser

- Microsoft Edge
- Mozilla Firefox 50.0 or higher
- Google Chrome 50 or higher
- Safari version 10 or higher

## Client configuration

- ▶ Network bandwidth: recommended connection speed 4 Mbps or higher
- ▶ Screen resolution: XGA 1024x768 (high colour quality) or higher
- ▶ Processor: Intel Core i3
- ▶ Memory: 4 GB RAM
- ▶ Browser cache size 250 MB

## Operating systems

- ▶ Microsoft Windows 7, 8, 10
- ▶ Apple Mac OS X Lion or higher

## Mobile requirements

- ▶ Devices: Android 7.0 or higher, iOS 9.0 or higher
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## 1.3 Web client description

### 1.3.1 Map and map material

Customer objects and planned trips are shown on a digital map. Exact street address geocoding and routing are based on TomTom or HERE map data, depending on the map material purchased and country combinations.

### 1.3.2 Dashboard

The PTV Map&Market 25h dashboard is divided into three main areas: the calendar component displays all planned appointments, the customer list contains all assigned customer data records/orders and the map component displays the customer locations and planned trips. In Salesforce.com, the view is divided into customer and map.

In addition, the user can access the menu navigation via the dashboard. The menu is divided into the following areas:

- ▶ **User information**  
User, user role and user skill management
- ▶ **Customer information**  
Customer, product and product category management
- ▶ **Appointment information**  
Appointment type and status/basic management as well as appointment report
- ▶ **Data import**

Basic trips as well as customer, contact and appointment data

- ▶ **Configuration**

Rights, menu and customer assignment management

- ▶ **Settings**

Basic settings, user roles, trip status and device type management as well as interface design

Salesforce.com uses the existing infrastructure; there is no menu breakdown according to PTV Map&Market 25h.

### 1.3.3 Role concept

The role concept of PTV Map&Market 25h allows you to create different user roles. A user role comprises various tasks for which certain rights are required.

Each user can be assigned a suitable role and thus the corresponding set of rights. By assigning different roles, typical organisational structures in companies with sales representatives can be mapped:

- ▶ **Administrator**

The role of administrator receives all rights for application management, such as creating and managing users, user groups, languages and map servers, as well as for setting parameters for general, technical, employee-specific and planning-related basic settings.

- ▶ **Regional manager**

The rights of this role enable the regional manager to, for example, view and access the PTV Map&Market 25h user interface of the employees assigned to them. For example, a team leader, dispatcher or call centre agent could get a purely visual/informative overview of an employee's call trip planning, or they could access call trip planning in order to edit it. The employee concerned is informed by push notification if their appointment schedule is changed.

- ▶ **Sales force management**

In this role, the user is explicitly only able to view and access the customer data or sales call trip plans assigned to them. They can, if they wish, change and adapt the sales call trip plans so that changes that are relevant to the current day and/or week can be taken into account during trip planning.

Salesforce.com uses the existing infrastructure. PTV Map&Market 25h has no user management.

### 1.3.4 Importing and exporting data

Using the Data Import Wizard, customer and contact data as well as sales call trip plans can be imported in Microsoft CSV format. Automatic data exchange via a third-

party system is possible on request and can be implemented on a project-specific basis.

Sales call trip plans can be exported in Microsoft Excel™ format.

### 1.3.5 Geocoding data

PTV Map&Market 25h contains a geocoding component. This means that address data can be provided with geocoordinates and located on a digital map with street address accuracy. Importing data in geodecimal format is also possible.

### 1.3.6 Managing appointments

Visits and appointments can be created and managed using a calendar component, and can be displayed with a colour scheme for quick recognition. In addition, the user can choose between different calendar view formats.

### 1.3.7 Managing customer data

The imported customer data are stored in the cloud as a table. There are various table functions available to the user, such as creating, deleting and editing individual data records or groups, as well as filters and search options.

### 1.3.8 Visualisation and analysis

PTV Map&Market 25h offers various visualisation and analysis functions to help the user choose the most appropriate route during trip planning. Customer fields can be classified by colour assignment, symbol type and symbol size.

This gives the user a quick overview of important data details such as customer priority (ABC customer classification), sales stages or sales. In addition, customers with overdue visits that are outside the visit frequency can be identified quickly. The user is assisted in their daily work by various filter and selection functions.

Salesforce.com uses standard import. PTV Map&Market 25h has no function here.

### 1.3.9 Main functions

#### Show position

*Show the position of a selected appointment on the map.*

By selecting an appointment in the calendar, the corresponding customer object is automatically highlighted on the map.

#### Outline route/trip

*What is the route for the selected day?*

By selecting one or more calendar days, the route is displayed graphically on the map.

#### Radius search

*Which customers are in the immediate vicinity of the selected customer object?*

Entering distance criteria (time or route length) initiates the radius search function. All customer, contact or address objects within set distance criteria are selected, making them available for further actions, such as creating a new appointment.

### Corridor search

*Which customers or potential customers are on the way?*

All customer objects that can be reached within the specified corridor (distance criterion: route length) between two or more objects are selected and are available for further functions. It is also possible to use the employee's home address as the starting point or destination of a corridor search.

### Day optimisation

*Optimise the visit sequence of the route in terms of driving time*

With this function, the user can optimise their day trip based on driving time. Fixed appointments that are already included can be retained. The sequence of the other appointments scheduled on this day is checked and, if necessary, optimised in terms of driving time. Using the customer list, the user can filter additional customers/potential customers and add them to the day's schedule. The system automatically arranges these customers into the best sequence and shows which appointments are no longer feasible on that day based on the preset parameters, e.g. working hours, opening hours, duration of visit, etc.

### Multi-day planning

*Optimise the visit sequence of the route in terms of driving time for a specified time period*

Sales call trips can be planned with or without overnight stays. It is possible to specify whether and when an overnight stay is permitted, depending on the number of days and the distance. Fixed appointments and places of residence (optionally an alternative home or hotel address) can be taken into account here.

### Appointment suggestion function

*Creation of a list of suggested appointments for a new customer appointment, taking into account the planned sales call trip*

The appointment suggestion function offers all calculable appointments for a selected customer. This calculation is based on the existing appointments in the calendar, personal working hours, customer opening hours and the individually selected routing speed parameters. PTV Map&Market 25h searches for free time slots, in which a routing to the selected customer, the stay on site and a routing to the following appointment are feasible in terms of time, and lists them. An appointment can be created automatically in the calendar for the selected time period. The additional time required and the route to be covered are specified for each suggested appointment.

## Filling the calendar

*Which customer appointments can be made in addition to the planned sales call trip?*

This function allows interesting filtered customers to be optimally scheduled within a user-defined time period. This makes it possible to fill free time slots in the appointment calendar or to create a new trip plan for several days.

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## 1.4 Description of the web application for mobile devices (app)

The PTV Map&Market 25h mobile solution supports employees in the field with many aspects of call trip planning, leaving them to concentrate fully on the sales talks. The following functions are available:

### 1.4.1 Dashboard

The dashboard provides employees with all of the important information (KPIs) for their current trip, as well as information for the entire week:

- ▶ When are the first and last customer appointments today?
- ▶ How long is the working day today or how long is the working week?
- ▶ How long is today's sales call trip?
- ▶ What is the trip itinerary today or throughout the week?
- ▶ How many visits are scheduled for today or throughout the week?
- ▶ How many visits have not yet been made this week?
- ▶ How many phone calls have to be made today?
- ▶ How many overdue customer appointments are there?

### 1.4.2 List of customers

Every user has access to all stored data information relating to the customers assigned to them via the customer list. Moreover, contact or product information on the respective customer can be shown if these data have been recorded.

### 1.4.3 Navigation

The user can click on the next customer data record to be visited and be navigated there. The device's own navigation software can be used for this.

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Note: The app does not provide a stand-alone navigation solution. Onboard navigation, Waze or HERE WeGo can be used.

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### 1.4.4 Calendar

The calendar area is the heart of the app. Here, employees can quickly and easily get an overview of the scheduled appointments and their sales call trips. They can choose between the daily, weekly or monthly view. In addition, a wide range of other

applications can be started via the calendar area: create and manage appointments, initiate customer calls or email notifications, start radius search, optimise visit sequence, create appointment suggestion, etc.

#### **1.4.5 Creating and managing appointments**

Appointments can be created and managed easily and conveniently via the app.

#### **1.4.6 Notifying customers by telephone**

Customer contacts can be notified by telephone directly via the app, provided all contact information is recorded.

#### **1.4.7 Optimising visit sequences**

The visit sequence of the trip is optimised, if necessary, in terms of driving time for a specified time period.

#### **1.4.8 Creating appointment suggestions**

The appointment suggestion function offers all calculable appointments for a selected contact. This calculation is based on the existing appointments in the calendar, personal working hours, opening hours of the contact and the individually selected routing speed parameters. PTV Map&Market 25h searches for free time slots, in which a routing to the selected contact, the stay on site and a routing to the following appointment are feasible in terms of time, and lists them. You can transfer an appointment with the contact directly into the calendar for the desired time period. The additional time required and the route to be covered are specified for each suggested appointment. This means that the employee can propose the most convenient appointment suggestion to the customer.

#### **1.4.9 Suggestions list**

You can use the suggestions list to show overdue or upcoming customer data records so that these can be taken into account for call trip planning if required.

#### **1.4.10 Map**

The digital map gives the user a quick and easy overview of their sales area, whether it's the individual customer address, the complete customer universe or the trip itinerary for today or tomorrow that they want to see.

#### **1.4.11 Radius search**

The current GPS position represents the centre of the radius search. The distance criterion specified in the basic settings defines the extent of the radius. Employees are therefore quickly informed whether potential customers in their immediate vicinity could be reached within a free time slot in order to make spontaneous appointments.

#### **1.4.12 Corridor search**

All customer objects that can be reached within a specified corridor (distance criterion: route length), for example one kilometre, between two or more objects are selected and are available for further actions. This makes it quick and easy to check whether customers are close to the planned route for spontaneous appointments.

#### **1.4.13 Creating visit reports**

Visit reports can be created simply and conveniently, and can be tailored to a specific company. The employee can fill in the visit report directly via the app. If there is a direct interface to a leading system, this process can be synchronised.

#### **1.4.14 Profile - and general settings**

The employee's individual profile settings, such as residential address, working hours, etc., can be implemented quickly and easily. The same applies to general settings for the functions, such as default values for the radius and corridor search, etc.



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