

Field service: Structured, flexible and motivated. Cooperation between **PTV Group** and **Salesforce.com**



Combine your strategic-tactical planning and the operational flexibility of your sales team with PTV Map&Market 25h. By integrating with the Salesforce CRM platform, you can create an entirely new way of networking with your customers.

MORE TIME FOR CUSTOMERS

The user of PTV Map&Market gains additional time, perhaps for an additional customer appointment. The software visualises all customer addresses digitally on a map and the individual appointments in a calendar view. The sales force has planning authority for its areas and can react flexibly at any time. The call centre agent, for example, can also assign appointments - in familiar office systems. Nevertheless, the field service manager never gives up control and keeps the overview.

Sales organisation structures can be optimally mapped and managed. Automatic synchronisation takes place via smartphones or tablets.

THE CRM PLATFORM SALESFORCE

Salesforce is the world's leading CRM platform. The ease of use of the cloud-based applications for sales, service, marketing, and many other areas makes you an IT expert.

THE NEW SOLUTION

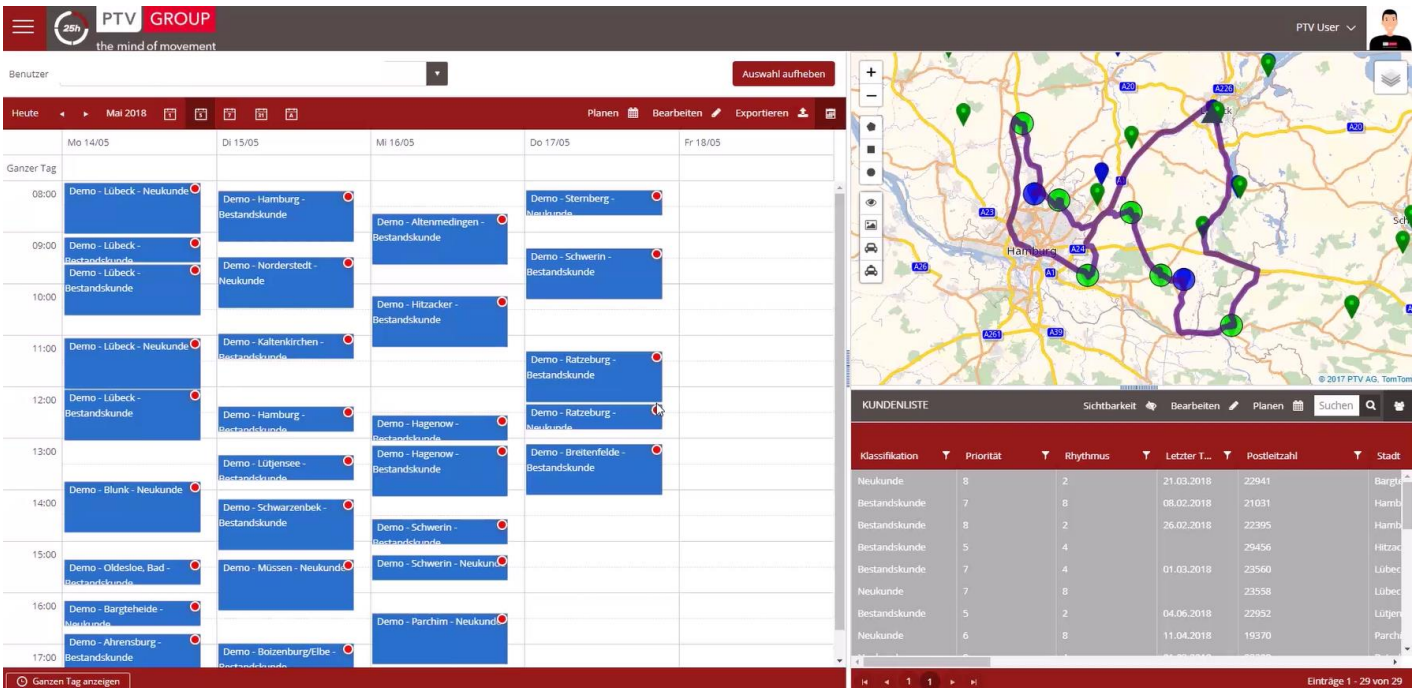
PTV Map&Market 25h is expected to be available as a certified app on Salesforce platform in summer 2018. Users can download the app from the Salesforce AppExchange online store.

In conjunction with the Salesforce platform, this creates an entirely new way of networking with customers.

BASIC FEATURES

Five essential functions are available for use in the operative field service:

- Fill calendar automatically
- Scheduling customer visits
- Propose dates for fixed appointments
- Circle search for time and corridor search
- Observe all restrictions and fixed dates



1. FILL CALENDAR AUTOMATICALLY

Customers can be easily filtered or selected. For example, it is sufficient to draw a polygon on the map. On this basis, tactical planning takes place several days in advance. The basic plan is in place. If required, the sales representative can conveniently group new appointments around the planned appointments.

2. SCHEDULING CUSTOMER VISITS

The sales representative must keep the overview. Which customers have to be visited next week? Typically, a set of rules forms the basis for the frequency with which customers visits are to take place.

The system takes the rules and all boundary conditions into account and reliably optimises the day of the sales representative. No appointment is overlooked.

3. PROPOSE DATES FOR FIXED APPOINTMENTS

The plan is in place, yet something always comes up. The sales representative must always remain flexible when planning his

appointments. The system's appointment suggestion function is now used for concrete scheduling. The field service employee can fix a new appointment for a specific customer ad hoc, extend or even shorten an existing appointment.

4. CIRCLE SEARCH FOR TIME AND CORRIDOR SEARCH

Searching for customer addresses within a radius of five kilometres, for example, is an easy task at first glance. If you take a conventional card application, radii are drawn. PTV Map&Market 25h takes a realistic and therefore much better approach. We are looking for customers that the sales representative can reach within a specified period. The corridor search even simultaneously displays the customer addresses that are still within a defined corridor on the way home. You can then utilise the time for an additional customer appointment.

5. OBSERVE ALL RESTRICTIONS AND FIXED DATES

This unique feature ultimately characterises PTV Map&Market 25h.

The solution also takes into account all restrictions relating to operational field service planning in every preparation and optimisation process. Whether fixed dates or specific time windows, changing dates or changing the tour; all boundary conditions are planned and optimised.