USER MANUAL
TRACKIFY

SALES PERSON TRACKING APP
& SOFTWARE

ABOUT TRACKIFY

Trackify is the Sales Person Tracking App by Equiconsulting Services Pvt. Ltd is a smart solution to manage and monitor your on-field sales team in real time. It helps businesses track location, attendance, client visits, and daily reports efficiently.
With GPS tracking, task management, and performance insights, the app improves productivity, accountability, and communication between teams and management — making field operations smoother and more transparent.

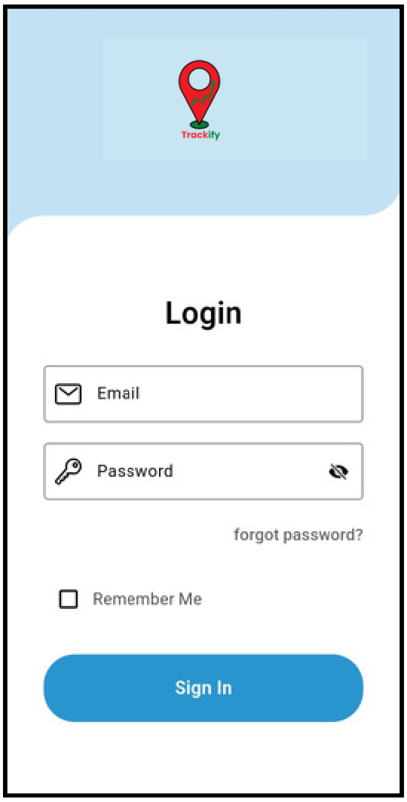
SIGN IN PAGE

The Sign In Page allows registered users to securely access the Sales Person Tracking App.
Steps to Sign In:

1. Open the app and navigate to the Sign In screen.
2. Enter your registered email/username and password.
3. Tap "Sign In" to access your dashboard.

Notes:

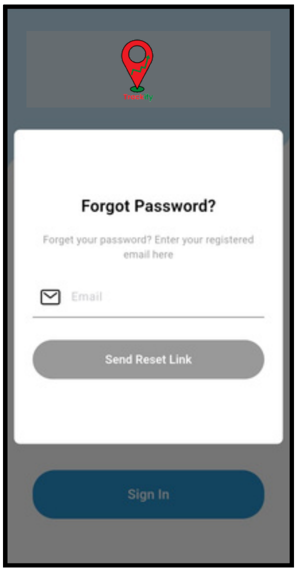
- Ensure your login credentials are correct.
- Use the "Forgot Password" option if you need to reset your password.
- Contact your admin if you face login issues or account access errors.



FORGOT PASSWORD PAGE

The Forgot Password Page helps users reset their password securely if they forget their login credentials.
Steps to Reset Password:

1. Tap on “Forgot Password” on the Sign In screen.
2. Enter your registered email.
3. Tap “Submit” to receive a password reset link.
4. Follow the instructions to create a new password.
5. Return to the Sign In Page and log in with your new password.

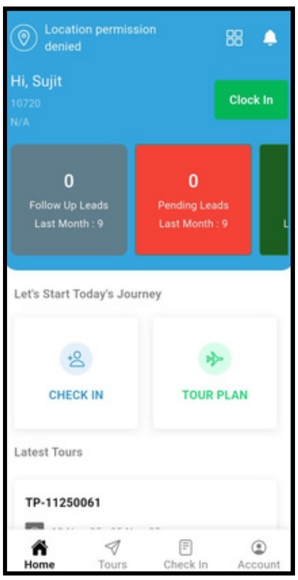


HOME PAGE

The Home Page is the main dashboard of the Sales Person Tracking App, providing a quick overview of your daily activities and performance.

Key Features:

- Enable Location: Allows real-time tracking for accurate attendance and visit logs.
- Notification Icon: Displays alerts, updates, and reminders.
- Clock In/Out: Marks your attendance start and end time for the day.
- Follow-Up Leads & Pending Leads: Shows upcoming and pending client follow-ups.
- Days Present: Displays the total number of active working days.
- Check-In: Records your visit start time at a client location.
- Tour Plan: Lists your scheduled client visits and travel routes.
- User Name: Shows your profile details at the top of the screen.
- Menu Option: Access all modules and settings from a single menu.
- Latest Tour: Displays recent tours or visits completed..



TOUR PLANS PAGE

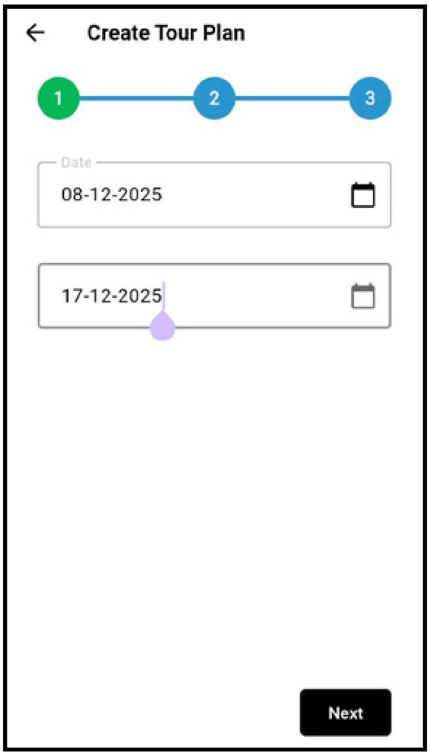
- The Tour Plans Page helps users manage and track their scheduled visits and travel plans efficiently.
- Key Features:
- Search Bar: Quickly find your tour plan using Plan ID, Visit Name, or keywords.
- Tour Details: View each plan’s Start Date, End Date, Tour Plan ID, and Status.
- Create New Plan: Tap the “+” button to add a new tour plan with required details.

CREATE TOUR PLAN PAGE

The Create Tour Plan Page allows users to schedule their upcoming field visits easily.

Steps to Create a Tour Plan:

- Select the Start Date and End Date for your tour.
- Review the selected dates to ensure accuracy.
- Click “Next” to proceed and add visit details.



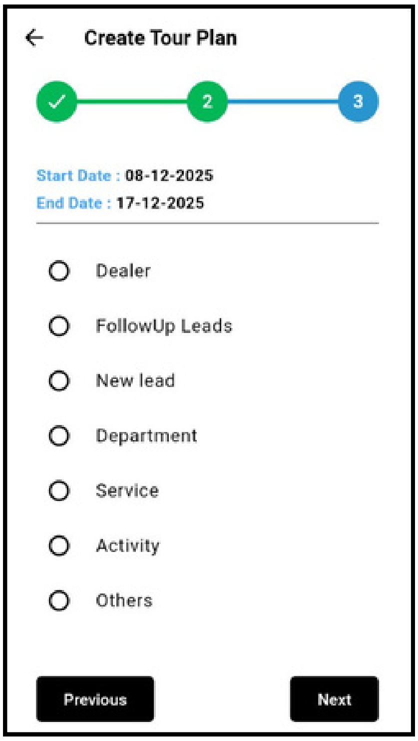
CREATE TOUR PLAN PAGE (STEP 2)

After selecting the Start Date and End Date, you can choose the purpose or type of your tour.
Options Available:

- Dealer Visit
- Follow-Up Leads
- Department Visit
- New Leads
- Etc.

Once you select the appropriate option:

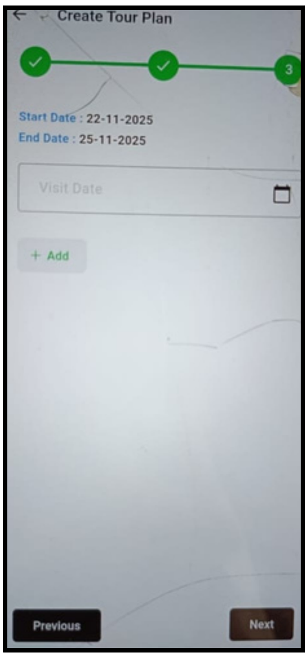
- Click “Next” to proceed
- Click “Previous” to go back and modify your selected dates.



CREATE TOUR PLAN PAGE (STEP 3)

After selecting the Tour Purpose, you can add detailed visit information for your plan.
Steps:

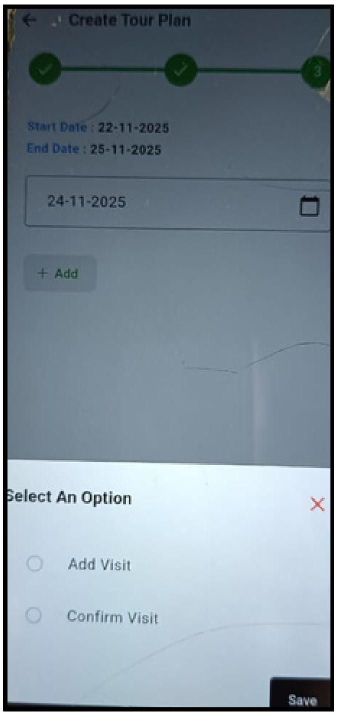
1. Select the Visit Date for your scheduled meeting or client visit.
2. Use the “Add” option to include multiple visits within the same tour plan.
3. Review all added visits to ensure accuracy.
4. Click “Next” to proceed or “Previous” to go back and make changes.



CREATE TOUR PLAN PAGE (STEP 4)

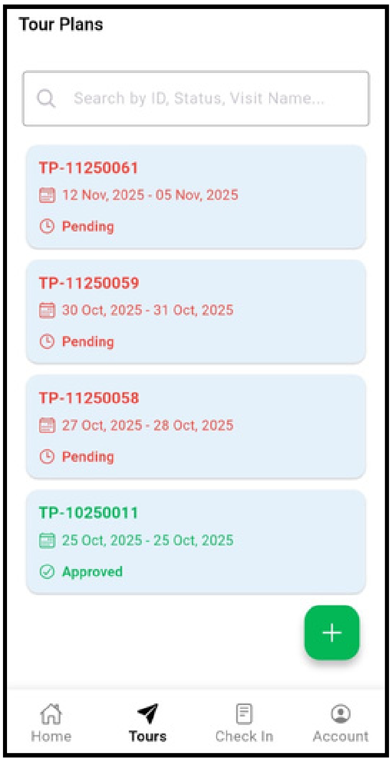
After adding the Visit Date, you'll reach the final step where you can manage and confirm your visits.
Steps:

1. Choose one of the following options:
    - Add Visit: To include additional client or location details in your tour plan.
    - Confirm Visit: To finalize the visit details for your schedule.
2. Once all visits are added and verified, click the "Save" button to store your tour plan.



TOUR PLAN APPROVAL

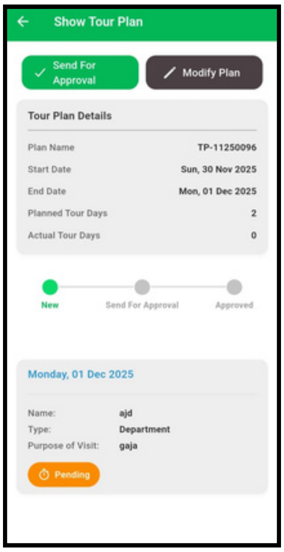
After saving your tour plan, it will be marked as "Pending" status.
The Admin will review your submitted plan and either approve or request changes. Once the plan is verified, the status will update to "Approved."
This pending stage ensures all tour plans are properly checked and authorized before field execution, maintaining accuracy and accountability.



SHOW TOUR PLAN PAGE

The Show Tour Plan Page allows users to view, manage, and modify their created tour plans.
Key Features:

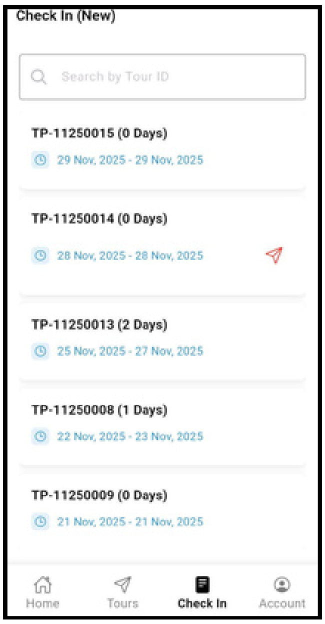
- View all your Tour Plans with details such as:
  - Plan Name
  - Start Date
  - End Date
  - Planned Tour Days
  - Actual Tour Days
  - Status (New, Sent for Approval, Approved)
- Modify Plan: Edit or update any existing tour plan before approval.
- Send for Approval: Submit your created or modified plan to the Admin for verification.



CHECK-IN PAGE

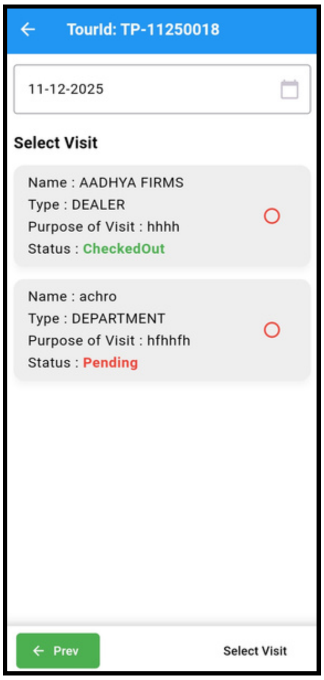
The Check-In Page allows users to search and view all their tour plans before checking in.
Key Features:

- Search Bar: Search your tour plans using the Tour Plan ID (TP ID).
- Tour List Display: After searching, you will see all matching tour plans with:
  - TP ID
  - Start Date
  - End Date
- View Details Button: Each tour plan has a button. When you click it



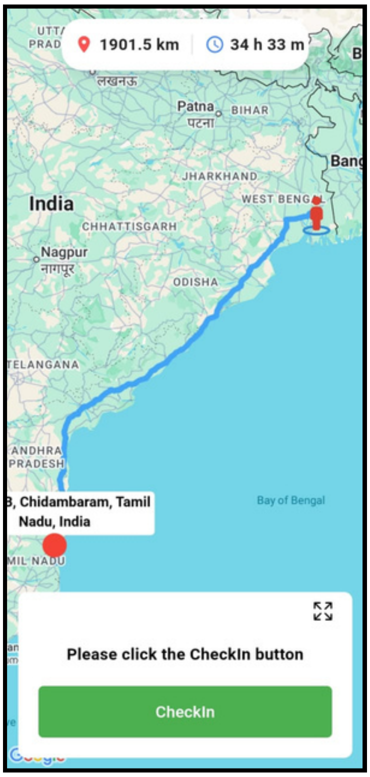
CHECK-IN PAGE (2ND PAGE)

- Select Visit Date – Choose the date on which you are performing the visit.
- All Visits List – View all the visits planned for the selected tour.
- Select Visit – Pick the specific visit you want to check in for.



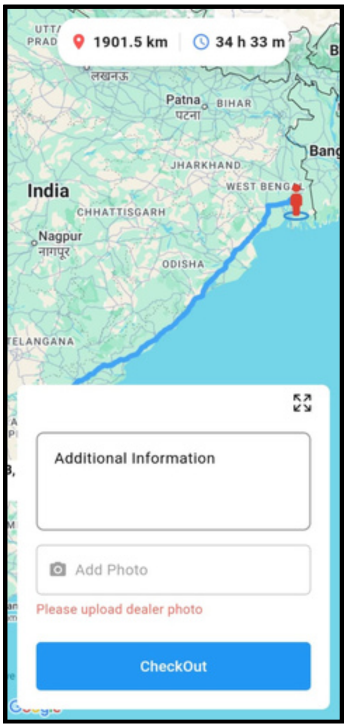
CHECK-IN MAP

- Shows your live current location on the map.
- Automatically detects your GPS position for accurate check-in.
- Helps verify that you are checking in from the correct location.
- You can confirm your check-in with a Check-In Button displayed on the map.



CHECK-OUT MAP

- Displays your current GPS location on the map at the time of check-out.
- Ensures you are checking out from the correct visit location.
- Shows a Check-Out Button on the map for quick checkout.
- Helps maintain accurate visit time and location tracking.



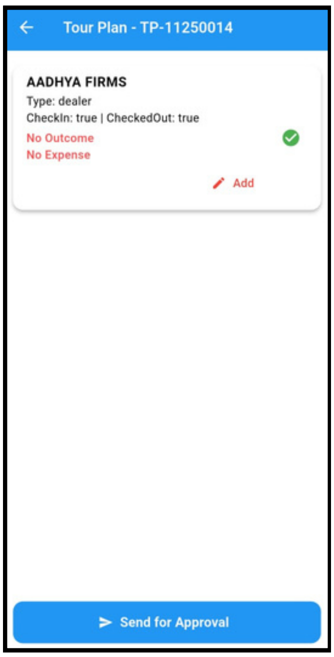
TP DETAILS PAGE

The TP Details Page provides complete information about a selected tour plan and allows users to manage key actions.
Displayed Information:

- Visit Name
- Visit Type
- Check-In Details
- Outcomes
- Expenses

Available Actions:

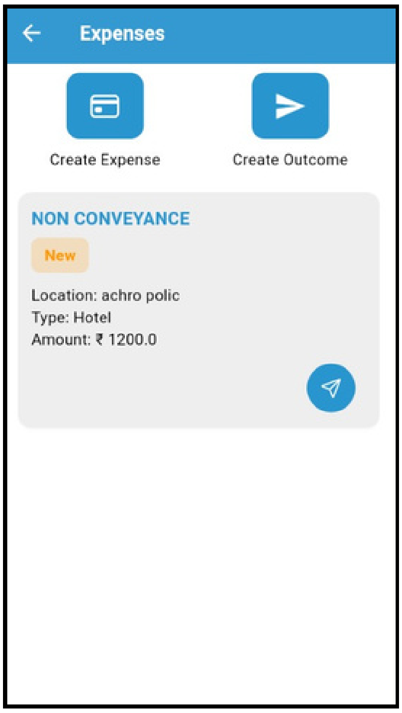
- Add Expense: Add tour-related expenses such as travel, food, or stay.
- Send for Approval: Submit the tour plan and its outcomes/expenses for admin approval.



EXPENSE & OUTCOMES

When you click the Add button from the TP Details page, you will be taken to a screen where you can manage both outcomes and expenses for that tour.
Available Options:

- Create Outcomes: Add the results, feedback, or remarks from your visit.
- Create Expense: Add any travel, food, stay, or other expenses related to the tour.



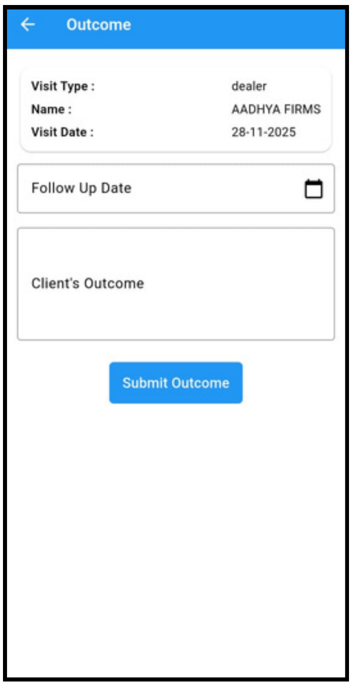
OUTCOMES PAGE

The Outcomes Page allows users to record the results of their client visits clearly and accurately.
Displayed Fields:

- Visit Type: Shows the type of visit (Dealer, Follow-Up, New Lead, etc.).
- Visit Name: Displays the client or location name.
- Visit Date: The date on which the visit took place.
- Follow-Up Date: Select the next follow-up date if required.
- Client Outcomes: Enter the outcome, feedback, or remarks from the meeting.

Action:

- Submit Outcomes: Click the button to save and record the visit outcome.

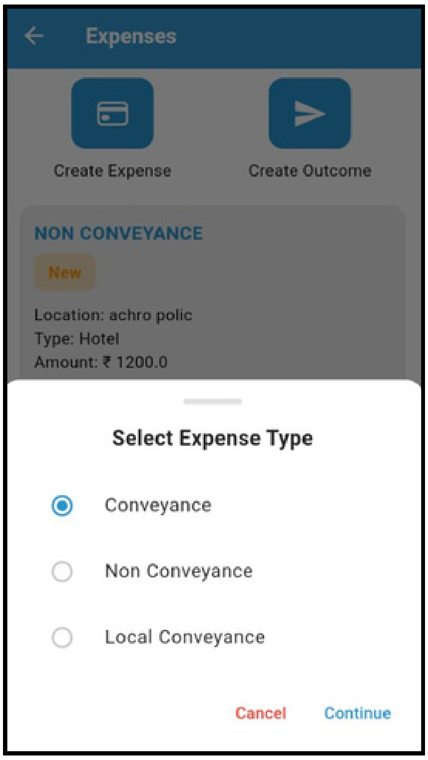


CREATE EXPENSE PAGE

The Create Expense Page allows users to add tour-related expenses quickly by selecting the appropriate category.
Expense Options:

- Conveyance: For travel-related expenses such as fuel, transport, or mileage.
- Non-Conveyance: For expenses not related to travel—like food, accommodation, or other charges.
- Local Conveyance: For short-distance or within-city travel expenses.

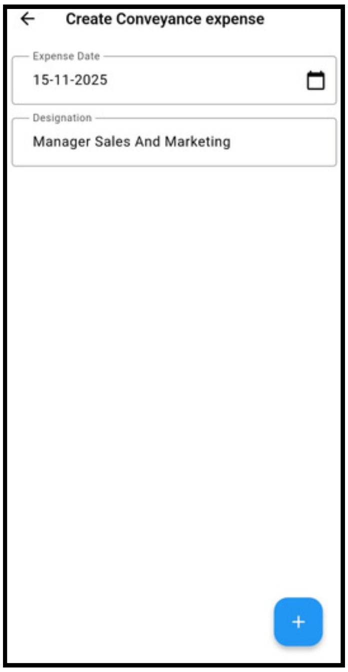
After selecting the correct category, enter the required details and click Save to add the expense.



CONVEYANCE PAGE

The Conveyance Page allows users to add travel-related expenses for a specific tour.
Fields & Options:

- Expense Date: Select the date when the expense occurred.
- Designation: Choose your designation or role for proper record mapping.
- Create Button: After filling in the details, click Create to proceed with adding the expense amount and upload receipts if required.



ADD NEW EXPENSE

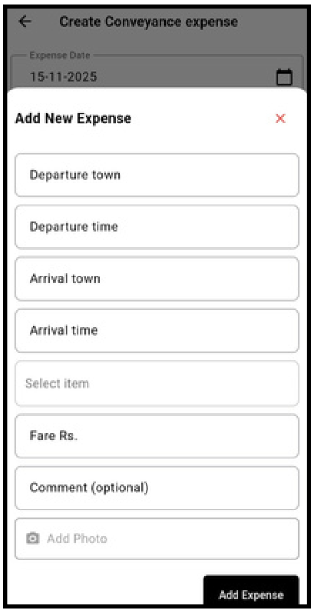
The Create Conveyance Page (Add New Expense) allows users to enter detailed travel expense information for a specific tour.

Fields to Fill:

- Departure Town: Enter the starting location of your travel.
- Departure Time: Select the time you began the journey.
- Arrival Town: Enter the destination of your travel.
- Arrival Time: Select the time you reached the destination.
- Select Item: Choose the type of travel item (bus, auto, taxi, train, etc.).
- Fare (₹): Enter the total travel amount.
- Comment: Add any notes or additional information.
- Add Photo: Upload a photo of the bill/receipt for verification.

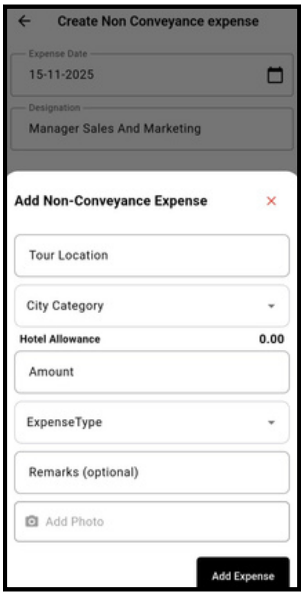
Action:

- Add Expense Button: Click to save the travel expense entry



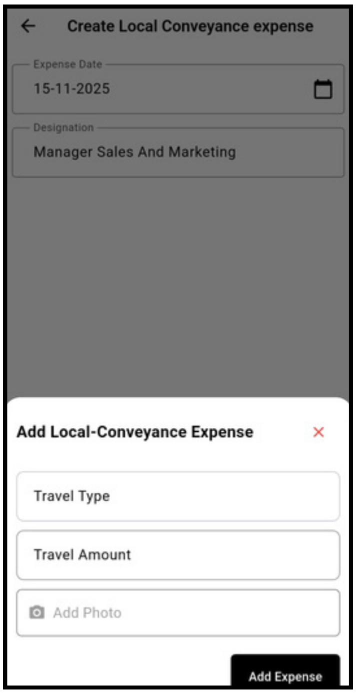
ADD NON-CONVEYANCE EXPENSE

- Tour Location – Select the specific location or city where the tour or official travel took place.
- City Category – Choose the applicable city category (A/B/C or custom categories) for allowance calculation.
- Hotel Allowance – Enter or select the hotel/lodging allowance applicable for the travel.
- Amount – Input the total expense amount claimed for this non-conveyance entry.
- Expense Type – Choose the type of non-conveyance expense (hotel, food, miscellaneous, etc.).
- Remarks – Add any additional notes or explanation related to the expense for clarity.
- Add Photo – Upload supporting documents or bill images as proof of the expense.
- Add Expense Button – Click to save and add this non-conveyance expense entry to the report.



LOCAL CONVEYANCE EXPENSES PAGE

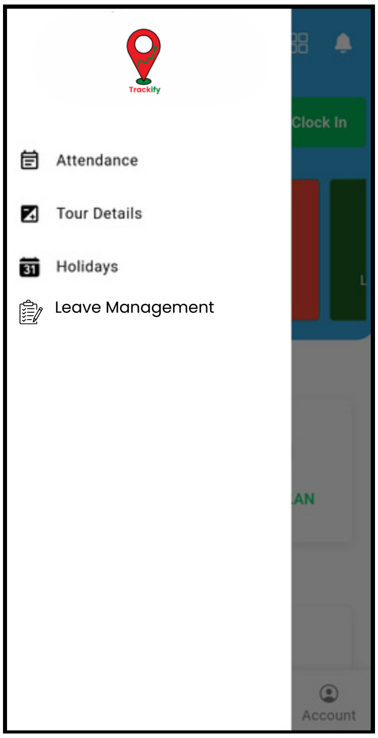
- Travel Type – Select the mode of local travel (auto, cab, bus, bike, etc.).
- Travel Amount – Enter the total amount spent on local travel.
- Add Photo – Upload the bill, receipt, or any proof of the local travel expense.
- Add Expense Button – Click to save and submit the local conveyance expense entry.



MENU SECTION

The Menu section serves as the main navigation hub of the Sales Person Tracking App, allowing users to quickly access key modules.
Available Options:

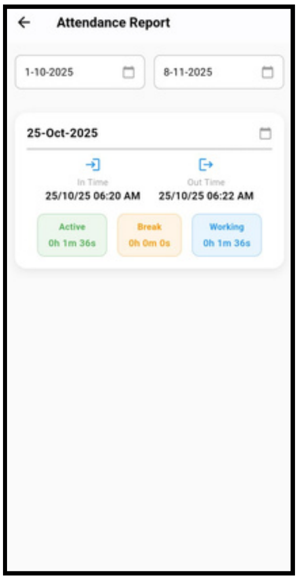
- Attendance: View and track your daily attendance records.
- Tour Details: Access and manage your tour plans, check-ins, and approvals.
- Holidays: View the official company holiday calendar and upcoming holidays.



ATTENDANCE PAGE

The Attendance Page allows users to view their attendance records for a selected period.
Steps:

1. Choose the Start Date and End Date to define your report duration.
2. Click View Report to see your attendance details.
3. The report will display Present Days, Absent Days, and Working Hours (if applicable).



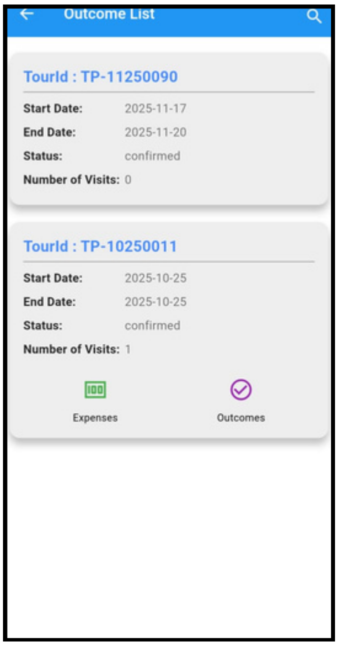
TOUR DETAILS PAGE

The Tour Details Page provides a complete summary of your submitted and approved tour plans.
Displayed Information:

- Tour Plan ID (TP ID)
- Start Date
- End Date
- Status (Pending, Approved, or Completed)
- Number of Visits

Available Options:

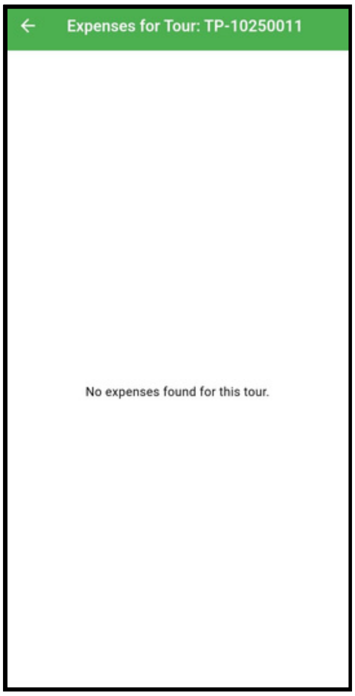
- Expenses: View or add your tour-related expenses such as travel, accommodation, or meals.
- Outcomes: Record the results or feedback from each client visit.



EXPENSES PAGE

The Expenses Page allows users to view and manage all expenses related to a particular tour plan.
Key Features:

- Select a specific Tour Plan (TP ID) to view its expenses.
- See detailed expense entries such as Expense Date, Category (Conveyance / Non-Conveyance / Local), Amount, and Remarks.
- View all expense types added during the tour in one place for easy tracking.



OUTCOMES PAGE

The Outcomes Page allows users to view the results and feedback of a particular tour plan.
Key Features:

- Select a specific Tour Plan (TP ID) to view its outcomes.
- See details such as Client Name, Visit Date, Purpose, and Result/Remarks.

HOLIDAY CALENDAR PAGE

The Holiday Calendar Page displays all official company holidays in a clear, date-wise format.
Key Features:

- View upcoming holidays for the current and upcoming months.
- Check holiday names and dates easily.
- Stay informed about company-wide off days and plan your work schedule accordingly.

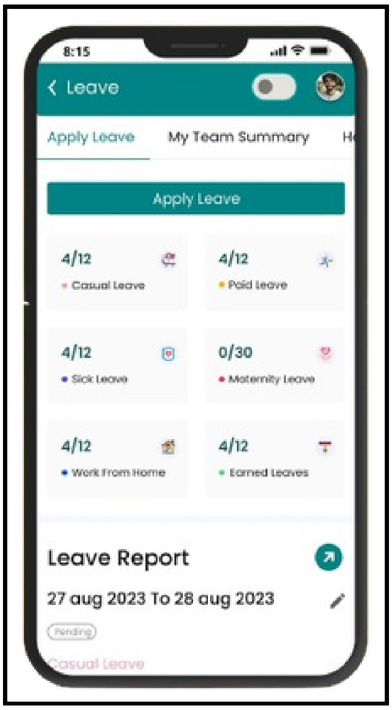
LEAVE MANAGEMENT

The Leave Management Page allows employees to easily apply for and manage their leave requests in one place.

Key Features:

View and apply for different leave types by selecting date(s) and providing a reason.

Track leave status (Pending, Approved, Rejected) in real time.
Check available leave balance and view complete leave history for better planning.



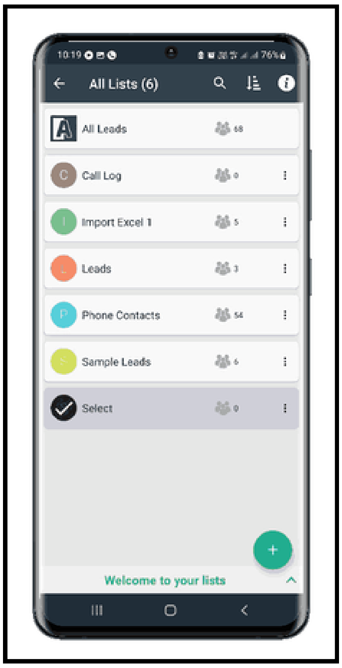
LEAD CAPTURE

The Order / Lead Capture Page (Cold Calling) enables users to record leads and manage customer interactions during field visits.

Key Features:
Add new orders or leads instantly during visits.

Submit outcome results for each interaction.

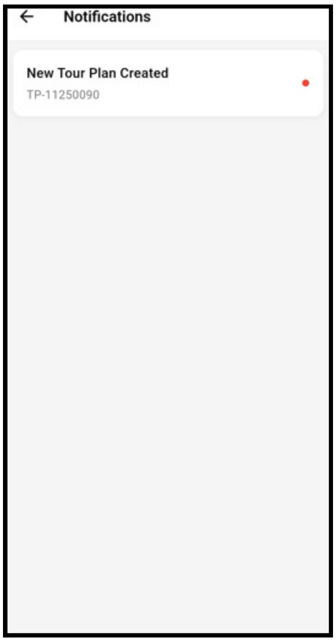
Select the next action, such as Follow-up, Close, or Drop, to manage leads effectively.



NOTIFICATIONS PAGE

The Notifications Page keeps users informed about all important updates and alerts within the app.
Key Features:

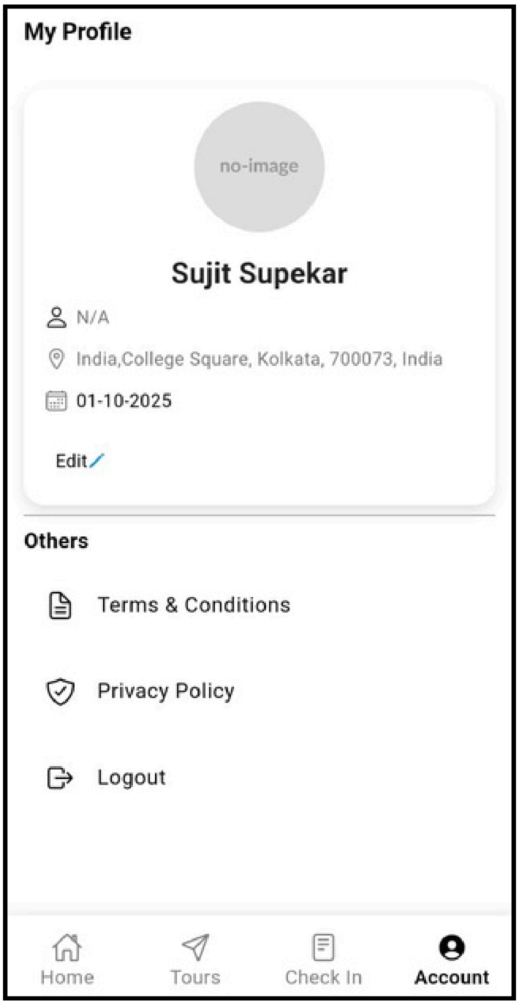
- View real-time notifications about approvals, new tasks, follow-ups, and announcements.
- Get alerts for tour plan approvals, leave status updates, and attendance reminders.
- Tap on any notification to view complete details or take quick action.



ACCOUNT PAGE

The Account Page allows users to view and manage their personal profile and app settings.
Key Features:

- Profile Icon & Name: Displays your profile picture and registered name.
- Location & Date: Shows your current location and the date.
- Edit Option: Update your personal details such as name, contact, or photo.
- Terms & Conditions: View the company’s usage policies and app guidelines.
- Privacy Policy: Understand how your data is collected and protected.
- Logout: Securely sign out of the application.

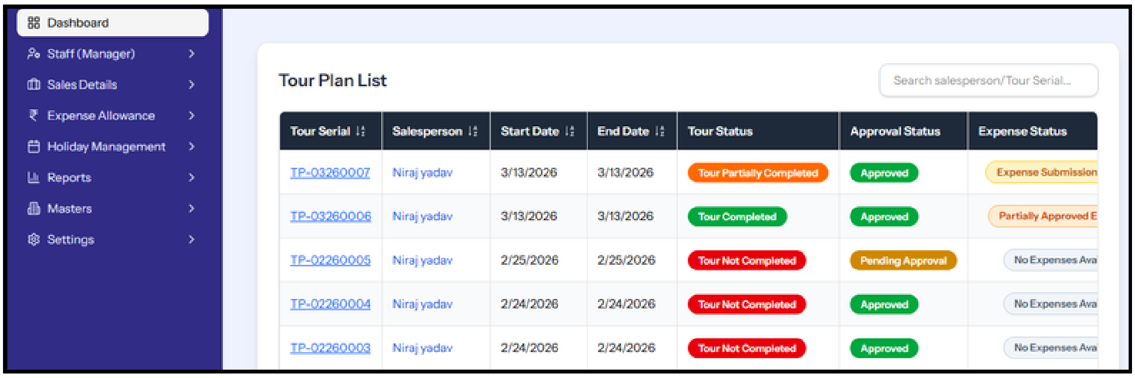


TRACKIFY SOFTWARE

DASHBOARD

The Trackify Dashboard provides a complete overview of daily operations and quick access to all modules.

Key Features:
Access all menus from a single dashboard with a convenient search bar for quick navigation.
View the Tour Plan list including Tour ID, Salesperson Name, Start Date, End Date, and Status.
Helps users monitor activities and manage plans efficiently in one place.

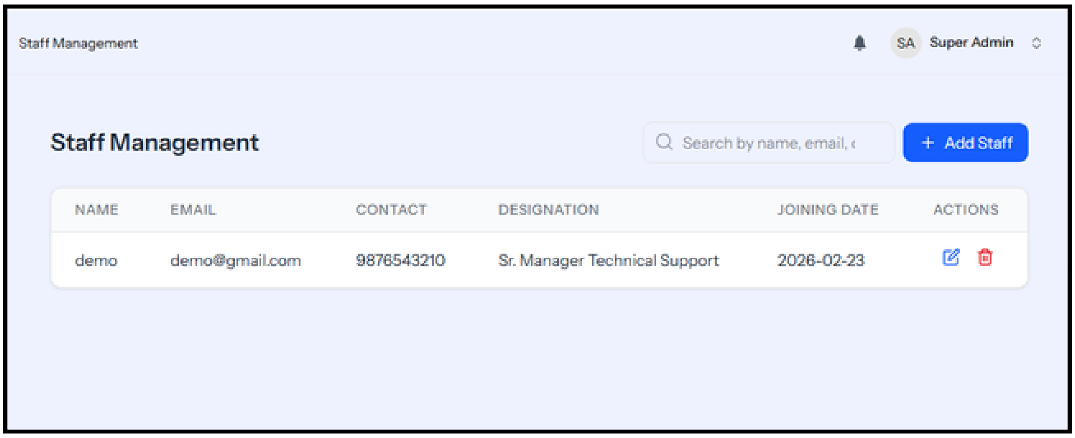


STAFF MANAGEMENT

The Staff Management Page helps users manage and organize employee details in one place.

Key Features:

- View staff details such as Name, Email, Designation, and Joining Date
- Access action options to manage staff records
- Use the search bar to quickly find specific employees
- Add new staff by clicking the “Add Staff” button and entering the required details



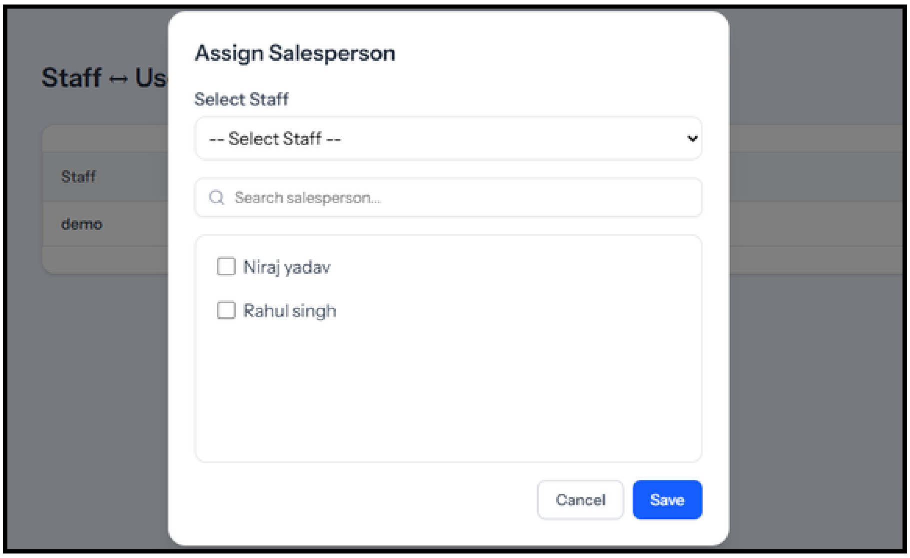
ASSIGN SALESPERSONS

The Assign Salespersons Page allows users to assign tasks or responsibilities to sales staff.

Key Features:
• Search or select salespersons from the list

• Easily assign them to tasks or plans

• Save the assignment with a single click for quick updates



SALES DEATILS

The Salesperson List Page provides a complete overview of all sales staff and their details.

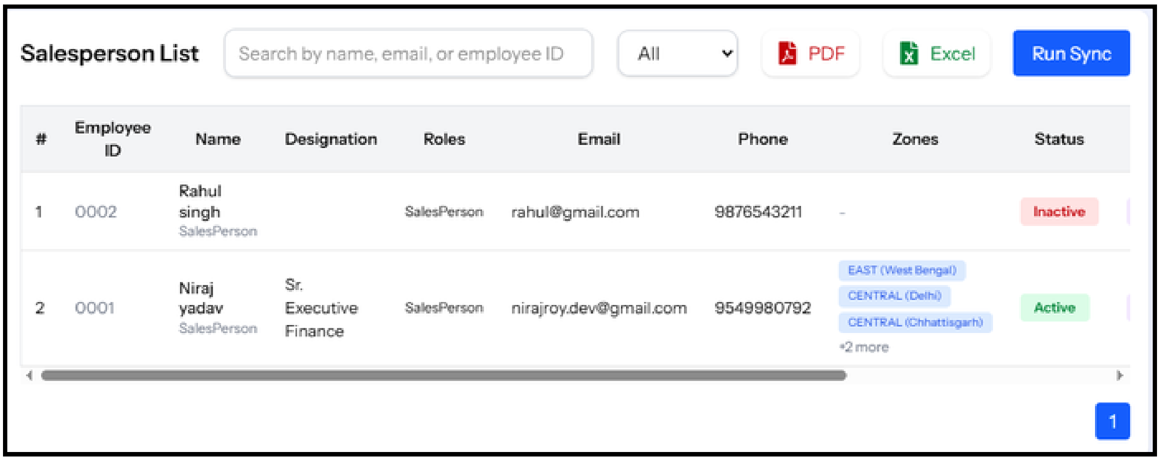
Key Features:
• View salesperson details such as Name, Email, Designation, and Zones

• Access action options to manage records

• Use the search bar and filters to find specific data easily

• Download data in Excel or PDF format

• Use the “Run Sync” option to update and refresh records



ASSIGN CITY

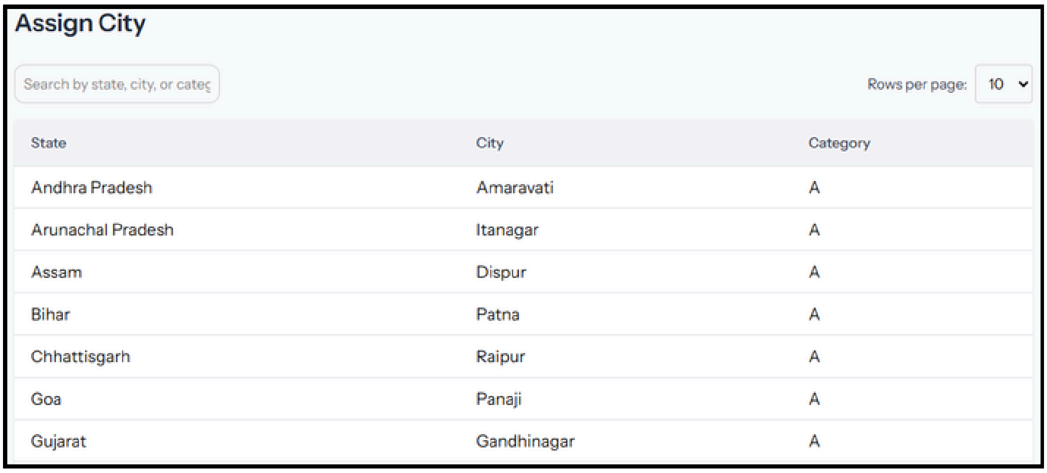
The Assign Cities Page allows users to manage and assign cities efficiently.

Key Features:

• Use the search bar to quickly find specific records

• View details such as State Name, City Name, and Category

• Helps in organizing and assigning locations properly



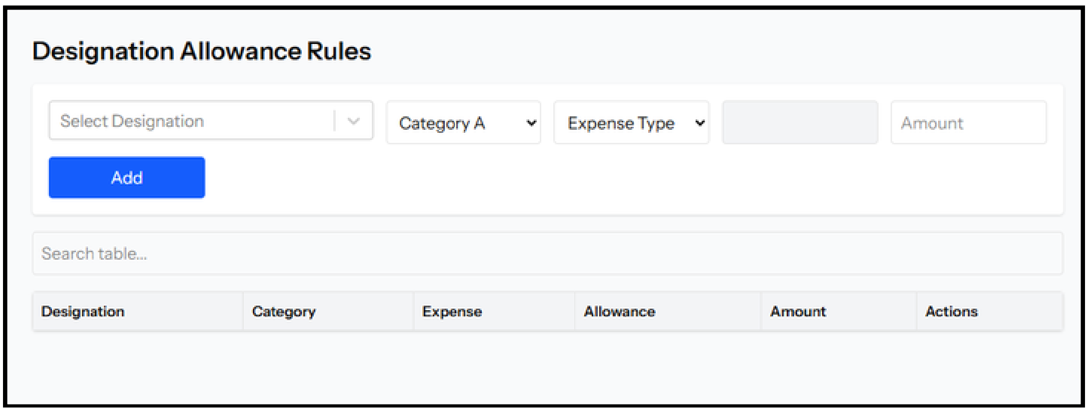
State	City	Category
Andhra Pradesh	Amaravati	A
Arunachal Pradesh	Itanagar	A
Assam	Dispur	A
Bihar	Patna	A
Chhattisgarh	Raipur	A
Goa	Panaji	A
Gujarat	Gandhinagar	A

DESIGNATION ALLOWANCE RULES

The Designation Allowance Rules Page allows users to create and manage allowance rules easily.

Key Features:

- Select Designation – Choose the employee role.
- Select Category – Pick allowance category.
- Select Expense Type – Choose the type of expense.
- Enter Amount – Add allowance value.
- Add Rule – Save the rule; it will appear in the list.

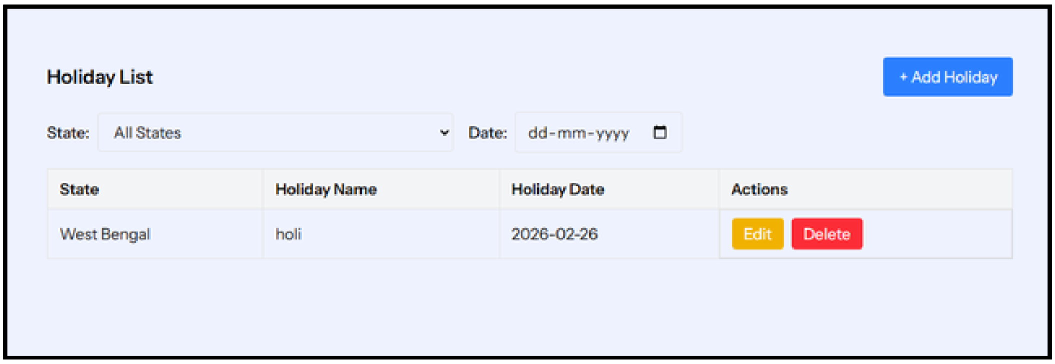


HOLIDAY LIST

The Holiday List Page allows users to manage and view holidays efficiently.

Key Features:

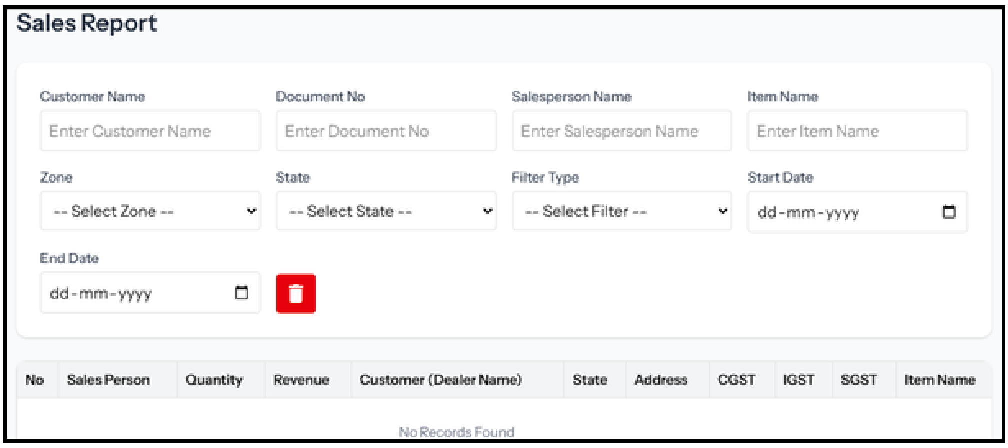
- Select State – Choose the state for the holiday.
- Select Date – Pick the holiday date.
- Add Holiday – Enter holiday details and save.
- View Report – See the list of holidays and use filters for easy search.



SALES REPORT

The Reports Page allows users to view different types of reports in one place.
Key Features:

- Sales Report – View all sales-related data.
- Inventory Report – Check inventory details.
- Expense Report – Track expenses efficiently.
- Tour Report – Monitor tours and visits.
- Attendance Report – See employee attendance records.
- Lead Report – Track leads and opportunities.



THANK YOU