



Team Members Best Practice Guide for JO Corporate

16 November 2019


1.  All Business Customers must be geofenced with the Customers name and category set to Business.

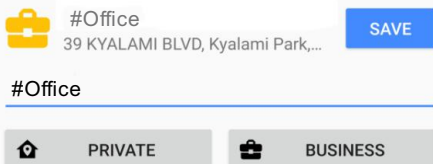
If Business Customers are not geofenced then

- Visits to these customers will **not** be recorded as a Customer Visits.
- The km to these customers will **not** be included in Business KM Travelled unless the trip is manually marked as Business from the JO button or from the App.
- The time spent at these customers will **not** be included in the Time at Customers.
- The Driving time to these customers will **not** be included in the Business Driving Time.
- These visits will **not** be included in the Arrival Time at First Customer of the day.
- These visits will **not** be included in the Departure Time from Last Customer of the day.

2.  Your home geofence should be set as Private. If you work from home and only very occasionally visit the company office then you can geofence your home as Business starting with a # ie #Home Office.

3.  Private places you visit on a **regular** basis can be Geofenced with category set to Private.


4.  All Business Geofences that are not actual customers must start with a # example #Home, #Work, #Garage, #Hotel, #Airport etc. You can also use a square bracket [] eg [Work]

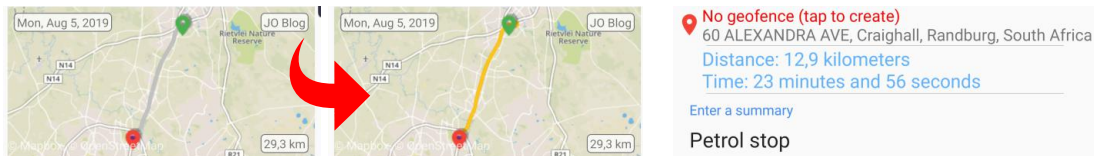








#Office
39 KYALAMI BLVD, Kyalami Park, ...

#Office

PRIVATE BUSINESS

5.  If you stop at a garage or for lunch etc on your way to a Business Customer there is no need to make a geofence for this visit, but you must mark the trip as business via the button on the JO or via the App. If you do not mark the trip as business the km travelled will not be included in your Business KM Travelled. For reporting purposes you should add a simple comment example 'stopped for petrol' 'lunch' etc



6.  Non-Recurring Business Stops - example Service/Breakdown call out.
If you go out for a service, breakdown then you must geofence the address as a Business Geofence and you can name the geofence as 'Breakdown-7Oct19' and if you have another breakdown on the same day then name it 'Breakdown2-7Oct19' etc etc.
7.  Each visit to a Business Customer or Non-Recurring Business Stop must have a Summary Report about the visit - The summary report must include useful information about the visit or call out and must be in proper English that can be read and understood by management.
Each report must be done after each visit and not the next day etc.
8.  Visits to Offices - if spending considerable time at the office then include a brief report.
9.  Summary text reports to be entered on the trip to the customer ie red location icon.
10.  Mobile Data and Bluetooth must be enabled on phones.
11.  If you require to use another car for business travel (for whatever reason) you must transfer your JO to this vehicle. If you are using JO for Tax Travel Report purposes then unpair the JO from your normal Vehicle and create a new vehicle in the App and pair the JO to the new Vehicle. Remember to unpair the temporary vehicle and pair the JO back to your normal vehicle.

