



**HRMates**  
Your Strategic Partner

## HRMates Field Visits Trial

This document describes Role wise steps for evaluation. App registration details will be provided to you in email.

Website: <https://www.hrmates.com/fieldvisits>

# Table of Contents

Role: Field Staff.....	3
Install app on Android .....	3
Install app on iOS.....	3
Register App.....	3
Home Screen.....	4
Mark Attendance.....	4
Apply Leave .....	4
Check Attendance .....	4
Open HRMates Dashboard .....	4
Work Punch .....	5
Route Calculation.....	5
View Route Plan .....	6
Expenses .....	7
Catalogue View.....	9
Offline Working.....	9
Fake Locations.....	9
Role: Operations Manager.....	10
Visit Planning .....	10
Manage Work Punch Data sheets.....	10
Track Workforce.....	10
Track Individual.....	10
Catalogue Sharing .....	11
Site Master Management.....	11
Role: HR / Admin / Accounts .....	12
Manage Employees.....	12
Approve Leaves and Attendance Regularization Requests.....	12
Manage Leave and Attendance .....	12
View Routes taken .....	13
Expense .....	14
Approve .....	14
Reimbursement.....	14
Route Planning.....	14
Reports.....	15
Payroll .....	17
Other HRMS Modules and features .....	17

# **Role: Field Staff**

## **Install app on Android**

<https://play.google.com/store/apps/details?id=com.hrmates.hrmates>

or search for hrmates in play store

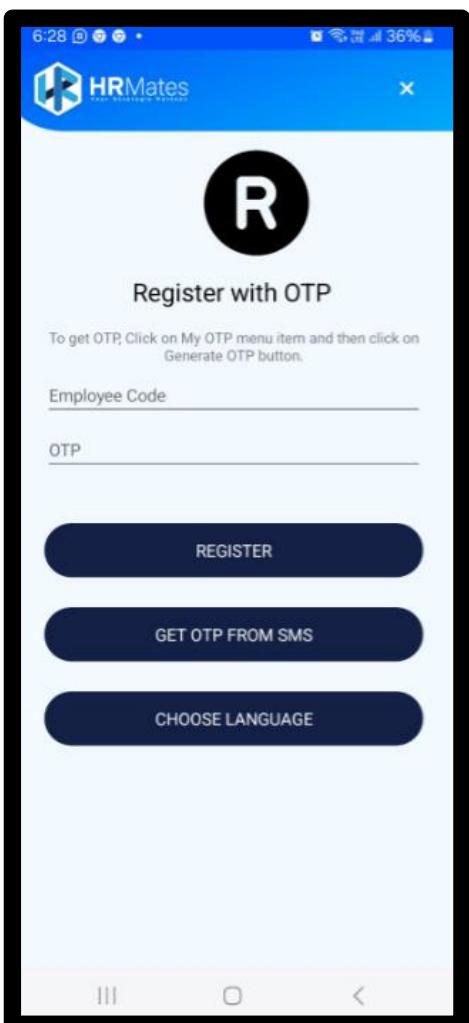
## **Install app on iOS**

<https://apps.apple.com/us/app/hrmates/id1604220316>

or search for hrmates in app store

## **Register App**

Use the Employee Code and OTP provided to you



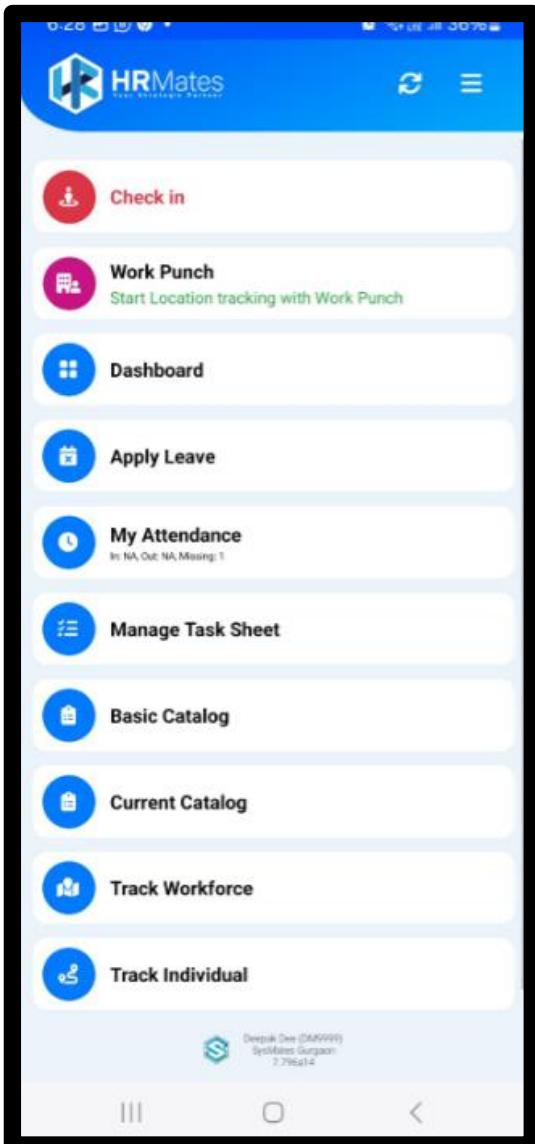
**For Quick demo Register with**

**Employee Code: DM9999**

**OTP: 999999**

# Home Screen

After Registration you will see the Home Screen as below



## Mark Attendance

Use Check In and Check Out Button, depending on setup you will be asked to take a self image along with face matching

## Apply Leave

Use **Apply Leave** Button

## Check Attendance

Use **My Attendance** Button

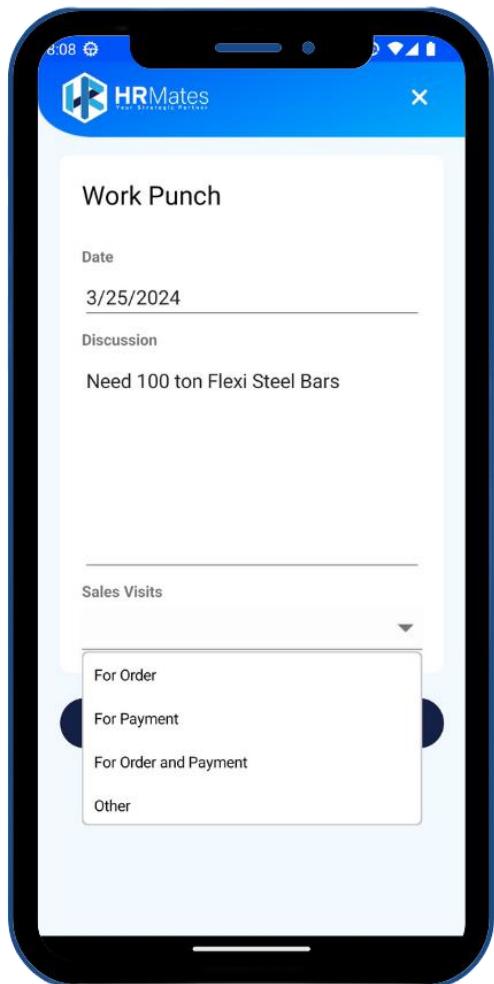
## Open HRMates Dashboard

Use **Dashboard** Button

## Work Punch

Work Punch Button is to mark your presence at a visit location like customer, dealer, etc. Depending on Setup you will get to

- Take a picture of self or visit location
- Face matching
- Take a picture of odometer of your vehicle
- Complete the work punch form



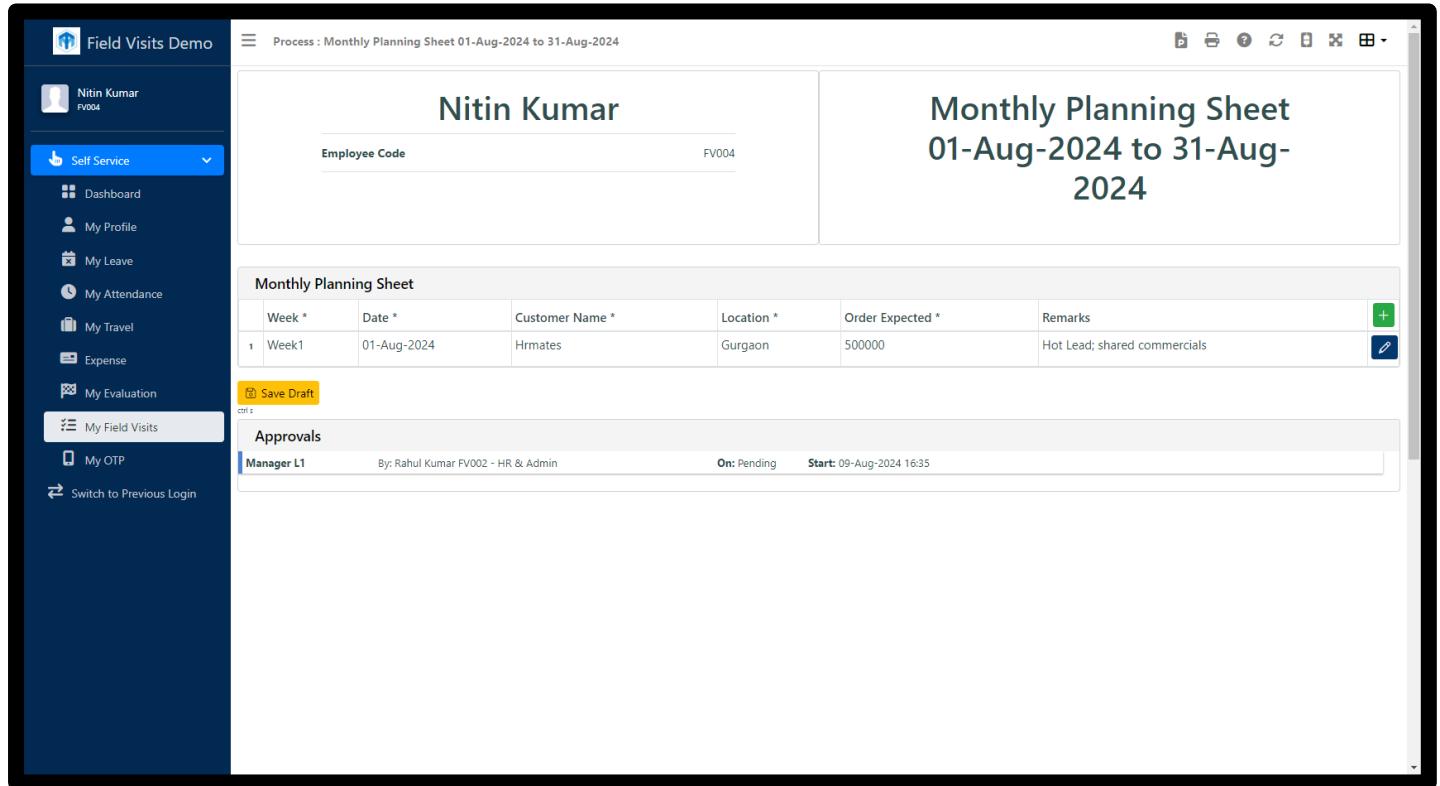
## Route Calculation

If setup HRMates will calculate google maps best route and distances from all Attendance Punches and Work Punches throughout the day

# View Route Plan

**Self Service** menu > **My Field Visits** menu > open planning sheet of month

If there is some change in plan you can modify the sheet using **add** and **edit** buttons



The screenshot shows the 'Field Visits Demo' application interface. The left sidebar has a dark blue background with the user profile 'Nitin Kumar FV004' and a 'Self Service' dropdown menu. The dropdown menu includes 'Dashboard', 'My Profile', 'My Leave', 'My Attendance', 'My Travel', 'Expense', 'My Evaluation', 'My Field Visits' (which is highlighted in blue), 'My OTP', and 'Switch to Previous Login'. The main content area has a light gray background. At the top, it says 'Process : Monthly Planning Sheet 01-Aug-2024 to 31-Aug-2024'. Below this, on the left, is a box for 'Nitin Kumar' with 'Employee Code' FV004. On the right, a large box displays 'Monthly Planning Sheet 01-Aug-2024 to 31-Aug-2024'. The central part of the screen shows a table titled 'Monthly Planning Sheet' with columns: Week \*, Date \*, Customer Name \*, Location \*, Order Expected \*, and Remarks. A single row is visible: Week1, 01-Aug-2024, Hrmates, Gurgaon, 500000, and 'Hot Lead; shared commercials'. Below the table is a yellow 'Save Draft' button. At the bottom, there is an 'Approvals' section with 'Manager L1' listed, and status information: 'By: Rahul Kumar FV002 - HR & Admin', 'On: Pending', and 'Start: 09-Aug-2024 16:35'.

# Expenses

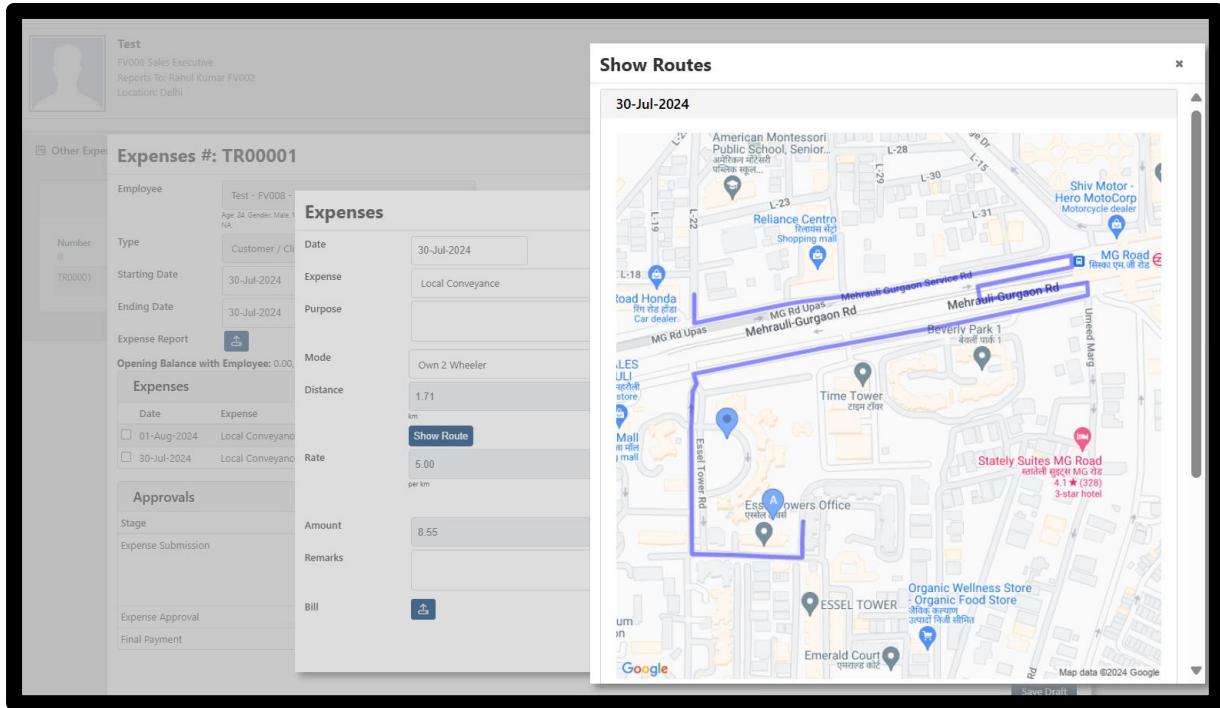
If Setup use Expense Module for employee to submit Travel Reimbursement from Distance Calculation and other daily expenses as per policy. After submission Expense sheet will go for approval.

**Self Service** menu > **Expense** menu > **Apply** button

The screenshot shows the 'Expenses' application interface. At the top, there is a user profile for 'Test' (FV008 Sales Executive) with details: Reports To: Rahul Kumar FV002, Location: Delhi. The main section is titled 'Expenses #: TR00001'. It includes fields for Employee (Test - FV008 - Sales Executive), Number (TR00001), Type (Customer / Client Visit), Starting Date (30-Jul-2024), and Ending Date (30-Jul-2024). Below these are buttons for 'Expense Report' and a summary line: 'Opening Balance with Employee: 0.00, Requested: 13.55, Approved: 0.00, Paid to Employee: 0.00, Balance with Employee: 0.00, Closing Balance with Employee: 0.00'. The 'Expenses' table lists two entries: '01-Aug-2024 Local Conveyance Mode: Own 2 Wheeler, Distance: 1.00, Rate: 5.00' and '30-Jul-2024 Local Conveyance Mode: Own 2 Wheeler, Distance: 1.71, Rate: 5.00'. The 'Approvals' section shows two stages: 'Expense Submission' (Role: Self, Approver: Test FV008 - Sales Executive) and 'Expense Approval' (Approver: Rahul Kumar FV002 - HR & Admin) and 'Final Payment' (Approver: Accountant, Approver: Rahul Kumar FV002 - HR & Admin). A 'Submit' button is visible in the approvals section. At the bottom right is a 'Save Draft' button.

## Add Expense

Expenses grid > + button



The screenshot shows the 'Add Expense' screen with the following details:

- Employee:** Test - FV008 - Age: 24, Gender: Male, I.N.A.
- Type:** Customer / Client
- Starting Date:** 30-Jul-2024
- Ending Date:** 30-Jul-2024
- Expense Report:**
- Opening Balance with Employee:** 0.00
- Expenses:**
  - Date: 01-Aug-2024, Expense: Local Conveyance
  - Date: 30-Jul-2024, Expense: Local Conveyance
- Approvals:**
  - Stage: Expense Submission
  - Expense Approval:

On the right, a 'Show Routes' map is displayed for the date 30-Jul-2024, showing a route from MG Road Upas to MG Road. The route is highlighted in blue, and various landmarks are marked with pins, including Reliance Centro, MG Road Upas, MG Road, and Esse Tower.

- Select **Date**, **Expense** type and **Distance** will get filled in automatically based on your route.
- Use **Show Route** button to view route on map
- Save Expense popup and enter other expenses if any using different **Expense** type
- Finally submit the sheet for approval

## Catalogue View

If Setup view catalogs using Catalog Buttons



## Offline Working

If Network is not available HRMates will still be able to capture location using GPS. Following Actions are saved offline and uploaded as soon as network is available

- Check In Check Out
- Work Punch

## Fake Locations

App does not allow fake locations

# Role: Operations Manager

## Visit Planning

If setup Manager can plan visits for field employees in advance.

## Manage Work Punch Data sheets

Make any changes to Field Employee Work Punch data from Field Visits > Open Employees for month > Open Employee Sheet > Edit entries

## Track Workforce

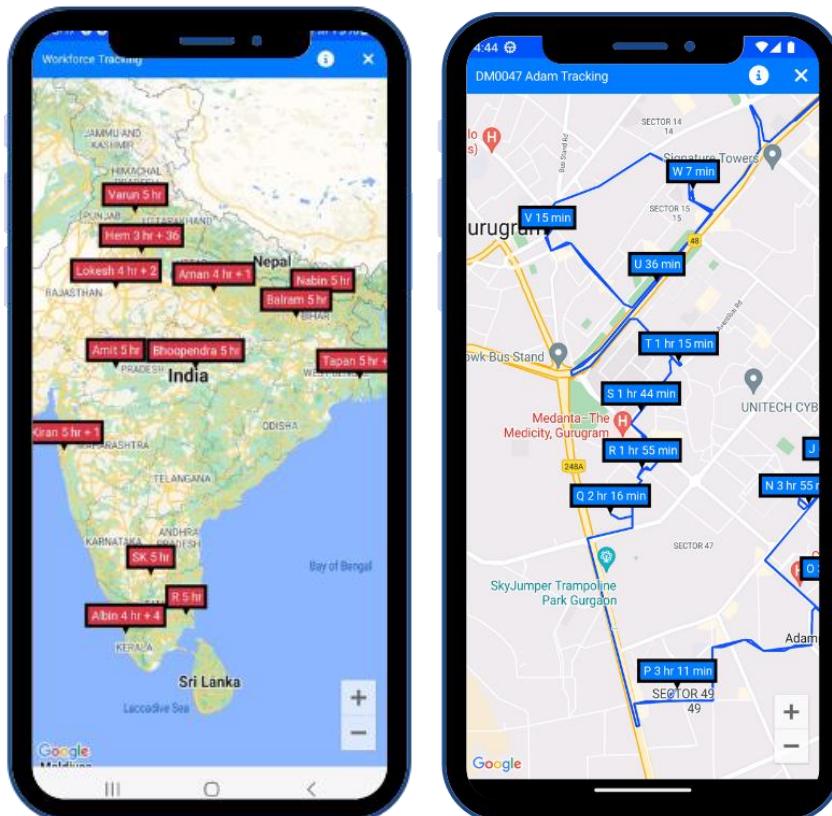
Setup will involve setting up who can track whom. For example Manager can track his team and Sales Head or Owner can track everyone.

You will see the last known location of team members. Using i button you can see the reason for latest location not available for a team members. Reasons can be **No Network, Location switched off**

## Track Individual

Setup will involve setting up who can track whom. For example Manager can track individual members of team and Sales Head or Owner can track everyone.

You will see the route taken by the team member during the day. Using i button you can see the reason for latest location not available for a team member. Reasons can be No Network, Location switched off



## **Catalogue Sharing**

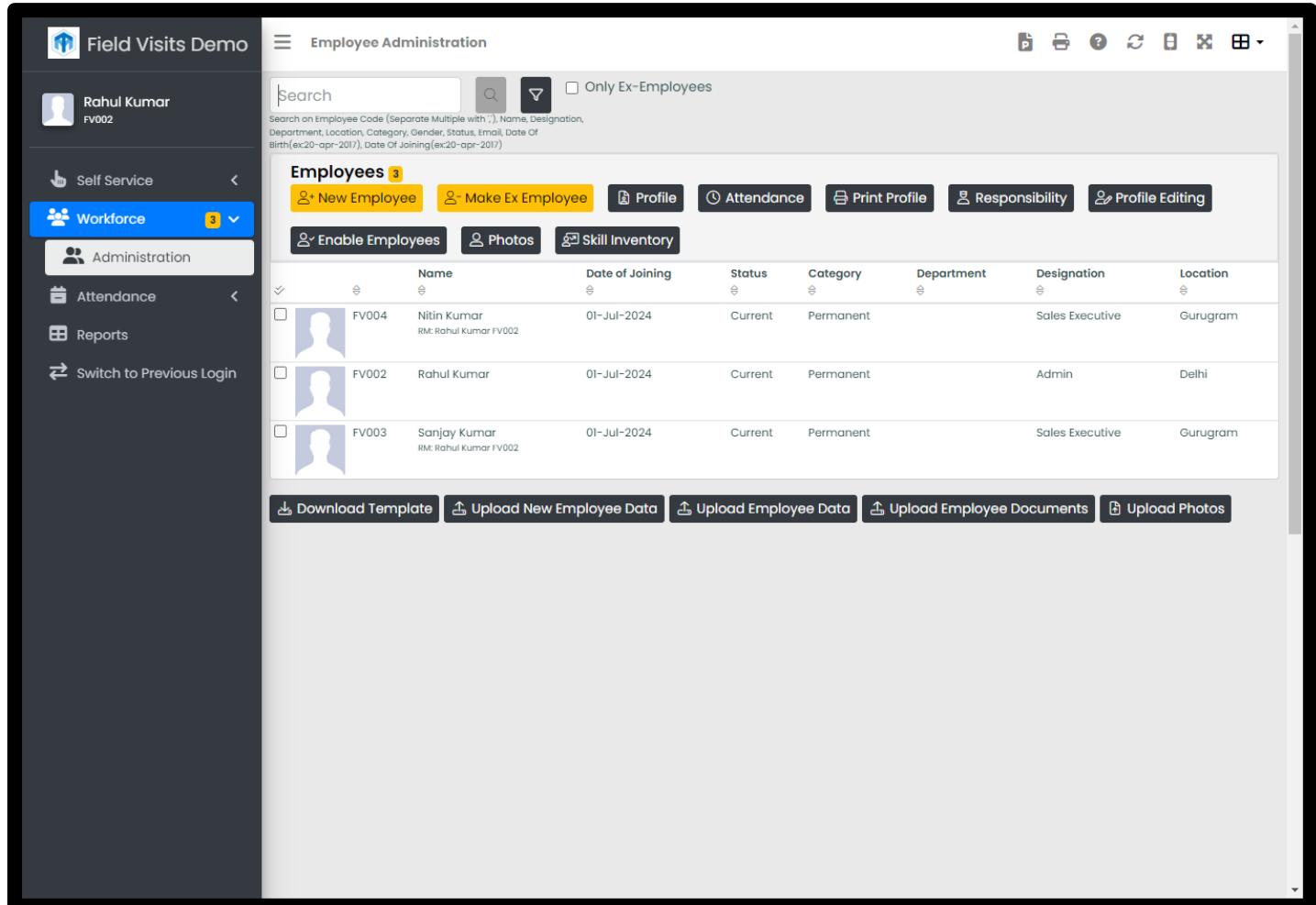
If Setup Admin can share catalogs as PDF or jpeg with field staff via HRMates App via Workforce -> Employment -> Terms and Conditions

## **Site Master Management**

If Setup Masters for sites visited will be managed by manager, Field employees can choose the site name in work punch form.

# Role: HR / Admin / Accounts

Login to HRMates with URL, Email and Password provided



## Manage Employees

From Employee Administration, Add new Employee, Make Ex Employee and more

## Approve Leaves and Attendance Regularization Requests

From Dashboard notifications

## Manage Leave and Attendance

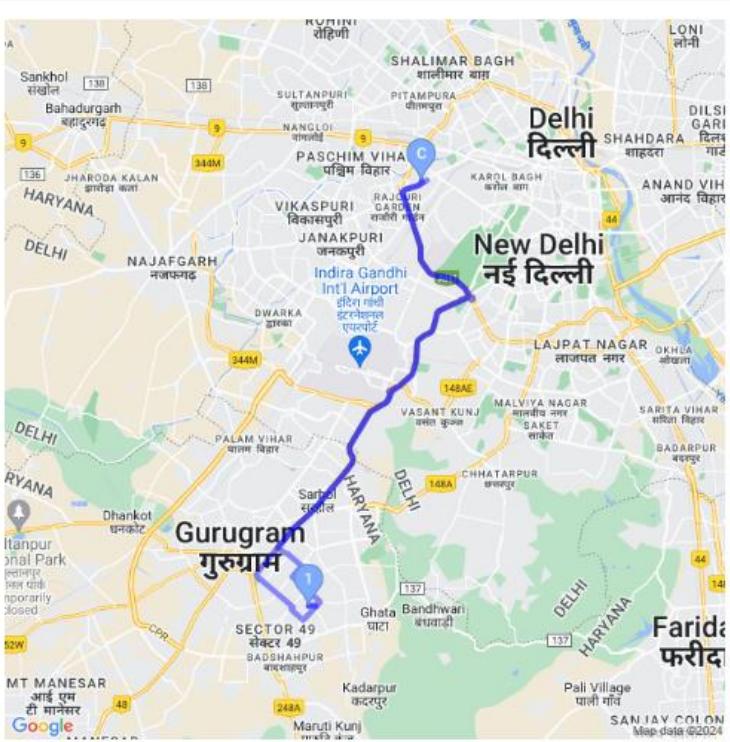
**Workforce** menu > **Administration** menu > **Search Employee** field > **Leave** or **Attendance** Button

# View Routes taken

From **Workforce > Administration > Attendance > Show Route** button.

**Show Routes**

27-Jul-2024



**Key:** 1: A, B, D, Last

Serial	Start Time	End Time	Start Address	End Address	Distance
A1-B1	27-Jul-2024 10:10	27-Jul-2024 10:40	Time: 27-Jul-2024 10:10 AM Orchid Island 1 Flat-434, Sector 51, Gurugram, Orchid Island Road, Haryana, 122018	Time: 27-Jul-2024 10:40 AM 853/51, Sector 51, Gurugram, 853/51, Orchid Island Road, Haryana, 122018	0.00
B1-C	27-Jul-2024 10:40	27-Jul-2024 11:52	Time: 27-Jul-2024 10:40 AM 853/51, Sector 51, Gurugram, 853/51, Orchid Island Road, Haryana, 122018	Time: 27-Jul-2024 11:52 AM 110015, Bali Nagar, New Delhi, Delhi, 110015	41.82
C-D1	27-Jul-2024 11:52	27-Jul-2024 17:51	Time: 27-Jul-2024 11:52 AM 110015, Bali Nagar, New Delhi, Delhi, 110015	Time: 27-Jul-2024 05:51 PM 843/51, Sector 51, Gurugram, 843/51, Orchid Island Road, Haryana, 122018	38.86
D1-Last1	27-Jul-2024 17:51	27-Jul-2024 18:35	Time: 27-Jul-2024 05:51 PM 843/51, Sector 51, Gurugram, 843/51, Orchid Island Road, Haryana, 122018	Time: 27-Jul-2024 06:35 PM	0.00
<b>Total</b> 80.68					

Dev Links: ShowRoutes skin to code

# Expense

## Approve

- Open **Expense** notification from **dashboard** and click on Employee Expense row
- If you need to modify the expense amount enter new expense amount
- To see route on map use Show Route button
- Click on Approve to approve the expense

## Reimbursement

- Download Expense Report for the month

# Route Planning

- Go to **Dashboard** menu > **Field Visits** notification > **Monthly Planning Sheet** line item
- Manager will fill the form and Employee will be able to see it after approval by Manager in **Self Service** menu > **My Field Visit** menu
- Route planning can be setup for employee to submit the plan and manager will modify and approve

Field Visits Demo

Field Visits : Monthly Planning Sheet 01-Aug-2024 to 31-Aug-2024

Nitin Kumar

Employee Code: FV004

Monthly Planning Sheet  
01-Aug-2024 to 31-Aug-2024

Week *	Date *	Customer Name *	Location *	Order Expected *	Remarks
1 Week1	01-Aug-2024	Hrmates	Gurgaon	500000	Hot Lead; shared commercials

Save Draft

Approvals

Manager L1 By: Rahul Kumar FV002 - HR & Admin On: Pending

Approve

Approve Remarks

# Reports

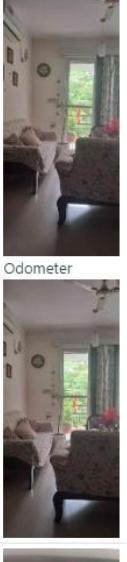
- Route Report for month to see day wise distances travelled with monthly totals.

Routes Details Report Time 06-Jul-2024 13:08											
Staff Id	Name	Start Address	Start Remarks	Start Time	End Time	End Address	End Remarks	Duration	Duration in Decimal	Distance	
36	Ronskey Shehan Gabriel	2V3P+2CR, Hennala South, Wattala, Adi Vissa Road, Western Province	leaving home	03-Jun-2024 07:57	03-Jun-2024 09:05	Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	office ..came at 8.30am	1:08	1.14	16.13	
		Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	office ..came at 8.30am	03-Jun-2024 09:05	03-Jun-2024 14:18	Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	done in the office	5:13	5.21	0.00	
		Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	done in the office	03-Jun-2024 14:18	03-Jun-2024 14:19	Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	work on uk exhibition work col issue mas t 14 orders	0:01	0.02	0.00	
		Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	work on uk exhibition work col issue mas t 14 orders	03-Jun-2024 14:19	03-Jun-2024 16:30	106, Grandpass, Colombo, 106, Khetarama Mawatha, Western Province, 01400	at Hela Casual.. struggling to make the punch as the app is not functioning properly.. I'm at Hela Casual since 3.30pm	2:11	2.18	15.55	
		106, Grandpass, Colombo, 106, Khetarama Mawatha, Western Province, 01400	at Hela Casual..	03-Jun-2024 16:30	03-Jun-2024 17:43	WVF+233, Grandpass, Colombo, Western Province	done at hela casual	1:13	1.21	0.66	
		WVF+233, Grandpass, Colombo, Western Province	done at hela casual	03-Jun-2024 17:43	03-Jun-2024 18:33	2VFI+4JJ, Kandana, Saint Jude's Mawatha, Western Province	came to handover some of Dhanushkas samples	0:51	0.55	14.63	
		2VFI+4JJ, Kandana, Saint Jude's Mawatha, Western Province	came to handover some of Dhanushkas samples	03-Jun-2024 18:33	03-Jun-2024 18:38	2VFI+4JJ, Kandana, Saint Jude's Mawatha, Western Province	handover the samples	0:05	0.08	0.20	
		2VFI+4JJ, Kandana, Saint Jude's Mawatha, Western Province	handover the samples	03-Jun-2024 18:38	03-Jun-2024 19:30	2V3P+2CR, Hennala South, Wattala, Adi Vissa Road, Western Province	home	0:52	0.56	3.80	
		2V3P+2CR, Hennala South, Wattala, Adi Vissa Road, Western Province	leaving home	04-Jun-2024 07:26	04-Jun-2024 08:23	Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	office	0:58	0.59	16.13	
		Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	office	04-Jun-2024 08:23	04-Jun-2024 09:53	Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	done in the office.. work on the stall update work on the T14 MAS ISSUE SILUETA NEW BOX DEVELOPMENT	1:30	1.59	0.00	
		Sri Lanka Office XJRJ+CP7, Mawaramandya, Katukurunda Vatta Road, Western Province	done in the office.. work on the stall update work on the T14 MAS ISSUE SILUETA NEW BOX DEVELOPMENT	04-Jun-2024 09:53	04-Jun-2024 12:30	MMI Center, Rajapura, Sri Jayawardenepura Kotte, Western Province	DONE AT EMAY.. CAME AT 11.00 AM THERE IS AN ISSUE IN THE APP AS THE PUNCHS ARE NOT RECORDING AT ONCE.. HAVE INFORM MALINDA ALREADY	2:37	2.61	19.90	
		MMI Center, Rajapura, Sri Jayawardenepura Kotte, Western Province	DONE AT EMAY.. CAME AT 11.00 AM THERE IS AN ISSUE IN THE APP AS THE PUNCHS ARE NOT RECORDING AT ONCE.. HAVE INFORM MALINDA ALREADY	04-Jun-2024 12:30	04-Jun-2024 13:00	501, Colombo 08, Colombo, 501, Baadhatola Mawatha, Western Province, 06000	AT RITZ CLOTHING	0:30	0.50	1.73	
		501, Colombo 08, Colombo, 501, Baadhatola Mawatha, Western Province, 06000	AT RITZ CLOTHING	04-Jun-2024 13:00	04-Jun-2024 13:32	9, Colombo 08, Colombo, 9, Ehigala Mawatha, Western Province, 06000	DONE AT RITZ CLOTHING	0:32	0.54	0.64	
		9, Colombo 08, Colombo, 9, Ehigala Mawatha, Western Province, 06000	DONE AT RITZ CLOTHING	04-Jun-2024 13:32	04-Jun-2024 15:00	32a, Colombo 06, Colombo, 32a, Balapokuna Road, Western Province, 06000	AT HEA CASUAL	0:17	0.29	3.94	
		32a, Colombo 06, Colombo, 32a, Balapokuna Road, Western Province, 06000	AT HEA CASUAL	04-Jun-2024 13:50	04-Jun-2024 14:12	49, Colombo 06, Colombo, 49, Balapokuna Road, Western Province, 06000	Done at HEA CASUAL	0:22	0.37	0.69	

## • Field Visits Detailed Report

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Market Data														
Employee	Staff Id	Location	#	Date	Name of Customer	Type Of Customer	Address	Contact Person	Contact No	Further Action	Punch Time	Punch Address	Punch Snaps	Products
4	John Smith	DM11	Pune											
5	David Moon	DM12	Kolkata											
6	David John	DM6	JAMNAGAR											
7	R Singh	DM14	MUMBAI	1	04-Jul-2024 TJ Corp	Sub dealer	1 Colorado	Jon Smith	9878798988	Enquiry for premi	14:34	68d, Kalbari Out, Work Punch	CUTTER	
8				2	04-Jul-2024 David Impex	Sub dealer	200 New York	Nikhil Salot	1877979797	Product introduct	15:07	50, Kalbadri Out, Work Punch	WELDING MACHINE	
9				3	04-Jul-2024 Kyada tools corp	Sub dealer	676 Sanfransisco Homato		9878798988	Product introduct	15:21	Mohammed Out, Work Punch	DRILLING TOOLS	
10				4	04-Jul-2024 Moon Brother	Direct	Dealer visit	Chirag Mehta	1877979797	Report of Rotary E	16:28	Karshan Ja Out, Work Punch	CARBIDE CUTTER	
11	Rahul Kumar	DM9	INDORE (MP)	1	04-Jul-2024	TJ Corp	Sub dealer		9878798988		10:16	174, Laxmji Out, Work Punch	CUTTER	
12				2	04-Jul-2024 Indiana fab tech	Direct	566 London	V Gupta	1877979797	For order follow u	12:17	V2R+G2J, J Out, Work Punch	WELDING MACHINE	
13				3	04-Jul-2024 Metal Works	Direct	989 Paris	R Singh	9878798988	new enquiry	12:44	46-B, Sanwi Out, Work Punch	DRILLING TOOLS	
14				4	04-Jul-2024 Siraj engineering	Direct	232 Delhi	R John	1877979797	for order follow u	15:08	26, Indore C Out, Work Punch	CARBIDE CUTTER	
15				5	04-Jul-2024 Siraj welding	Sub dealer	454 Doha	D Perera	9878798988	for HSS and ultra	18:11	A4, Indore C Out, Work Punch	CUTTER	
16				6	04-Jul-2024				1877979797					WELDING MACHINE
17				7	04-Jul-2024				9878798988		19:17	174, Laxmji Out, Work Punch	DRILLING TOOLS	
18	Chris Johnston	DM7	COIMBATORE	1	04-Jul-2024 TJ Enterprise	Direct	1 Colorado	Jon Smith	1877979797	Follow up needec	13:22	66, Jeedime Out, Work Punch	CARBIDE CUTTER	
19				2	04-Jul-2024 David Impex	Direct	200 New York	Nikhil Salot	9878798988	Follow up needec	14:29	1-8-27/5, Br Out, Work Punch	CUTTER	
20				3	04-Jul-2024 Kyada tools corp	Direct	676 Sanfransisco Homato		1877979797	Follow up needec	15:49	141/4, Bhoi Out, Work Punch	WELDING MACHINE	
21	Emilji John	DM15	Delhi	4	04-Jul-2024 Moon Brother	Sub dealer	Dealer visit	Chirag Mehta	9878798988	fellow up	09:14	5/6, Trilokp Out, Work Punch	DRILLING TOOLS	
22				5	04-Jul-2024				1877979797		12:23	5411, Sector Out, Work Punch	CARBIDE CUTTER	
23				6	04-Jul-2024 Indiana fab tech	Direct	566 London	V Gupta	9878798988	fellow up	15:37	265, Sector Out, Work Punch	CUTTER	
24				7	04-Jul-2024 Metal Works	Sub dealer	989 Paris	R Singh	1877979797	fellow up	17:52	Faridabad, Out, Work Punch	WELDING MACHINE	
25				8	04-Jul-2024 Siraj engineering	Sub dealer	232 Delhi	R John	9878798988	fellow up	18:06	5410, Sector Out, Work Punch	DRILLING TOOLS	
26				9	04-Jul-2024 Siraj welding	Sub dealer	454 Doha	D Perera	1877979797	fellow up	21:07	5/6, Trilokp Out, Work Punch	CARBIDE CUTTER	
27	Malinda Balasoo	DC14	BHARUCH	1	04-Jul-2024 Ekon abrasive	Sub dealer	1 Colorado	Jon Smith	9878798988	meeting for big si	13:25	6, Moti Doo Out, Work Punch	CUTTER	
28				2	04-Jul-2024 Prince engt works	Direct	200 New York	Nikhil Salot	1877979797	promote all rang	15:10	P206+PWJ, Out, Work Punch	WELDING MACHINE	
29				3	04-Jul-2024 Universal Metals	Sub dealer	676 Sanfransisco Homato		9878798988	promote all rang	15:45	19, Moti Do Out, Work Punch	DRILLING TOOLS	
30	Ankit Sata	DC5	JAMNAGAR	4	04-Jul-2024 Indiana fab tech	Sub dealer	Dealer visit	Chirag Mehta	1877979797					CARBIDE CUTTER
31	K Liu	DM3	Delhi	5	04-Jul-2024 Indiana fab tech	Sub dealer	566 London	V Gupta	9878798988	Cold Visit	13:44	Kalindi Kur Out, Work Punch	CUTTER	
32				6	04-Jul-2024 Metal Works	Sub dealer	989 Paris	R Singh	1877979797	Cold Visit	13:49	Kalindi Kur Out, Work Punch	WELDING MACHINE	
33				7	04-Jul-2024 Siraj engineering	Sub dealer	232 Delhi	R John	9878798988	Cold Visit	14:12	G83+POG, Out, Work Punch	DRILLING TOOLS	
34				8	04-Jul-2024 Siraj welding	Direct	454 Doha	D Perera	1877979797	Marketing	19:06	34, Molar B Out, Work Punch	CARBIDE CUTTER	
35	Shailesh Chandr	DM16	Pune	9	04-Jul-2024 Ekon abrasive	Direct	1 Colorado	Jon Smith	9878798988	.	09:32	113/190, Ch Out, Work Punch	CUTTER	
36				10	04-Jul-2024 Prince engt works	Direct	200 New York	Nikhil Salot	1877979797	Required to meet	19:26	9/273, Chin Out, Work Punch	WELDING MACHINE	
37				11	04-Jul-2024 Universal Metals	Direct	676 Sanfransisco Homato		9878798988	Meeting	10:20	173/195, Ch Out, Work Punch	DRILLING TOOLS	
38				12	04-Jul-2024 Columbia Tools	Sub dealer			1877979797	Required to meet	12:24	Talawade F Out, Work Punch	CARBIDE CUTTER	

- View Punches

FV004	26-Jul-2024 10:50	Work Punch 2RH8+VWR, Nowgam, Srinagar, Sector A, 190015	site visit +00:00:05	
FV004	26-Jul-2024 15:05	Work Punch 2QFP+CHQ, Srinagar, 190005	Visit site at Dr ijtaba +00:00:05	
FV004	27-Jul-2024 10:10	Work Punch <a href="#">Orchid Island 1 Flat-434, Sector 51, Gurugram, Orchid Island Road, Haryana, 122018</a>	+00:00:03	
FV004	27-Jul-2024 10:40	Work Punch <a href="#">853/51, Sector 51, Gurugram, 853/51, Orchid Island Road,</a>	+00:00:03	
FV004	27-Jul-2024 10:40	Work Punch <a href="#">853/51, Sector 51, Gurugram, 853/51, Orchid Island Road,</a>	+00:00:03	

- Many more Leave and Attendance Reports
- Employee Reports

# **Payroll**

Can be setup, Details available in [HRMates Modules and Features document](#).

## **Other HRMS Modules and features**

Details available in [HRMates Modules and Features document](#).