My personal sales-route planner

With portatour® for Dynamics® CRM, discover the future of fully automated sales-route planning for your field sales force, consultants, and service team members.

www.portatour.com/dynamics.crm/
More customer visits, fewer miles, more time

Are you spending more time in the car and planning than with the customer? Is it hard to put together a meaningful route plan with all of your customers, ranked by priority, honoring call frequencies as well as scheduled appointments, using a road map?

Our route planner creates your trips within seconds at the push of a button, providing you more valuable time which would otherwise just be spent on the road. Visit more customers, drive fewer miles.

Automatic itinerary planning cuts up to 25% of miles driven, reducing fleet costs and CO₂ emissions. New employees in particular will be efficiently integrated into your company: you start on the first day in your new sales territory with optimized routes, saving miles on the road.

The right customer at the right time

Reach your sales goals by focusing your work on important clients.

Use the route planner portatour® to visit A, B, and C customers at the right frequency. portatour® automatically selects whom to call while also optimizing the driving route.

Customers with high priority are included more often. No one is forgotten, letting you implement your sales strategy consistently and successfully.

Every business partner is different: business hours, call frequency, planned holidays and duration of your visit can be maintained for each customer and are individually included in portatour’s® calculations.

Scheduled appointments from your calendar are guaranteed to be included in the schedule. Gaps in your calendar are efficiently filled by portatour® with suggested stops. This way, you’ll visit the right customer at the right time.
Seamlessly integrated with Microsoft Dynamics® CRM

The portatour® solution integrates with Microsoft Dynamics® CRM (2011, 2013, 2015, 2016, 365) and synchronizes your existing accounts, contacts, leads and appointments for route optimization. You don’t have to worry about importing/exporting data to/from an isolated solution.

You can also enjoy the benefits of Microsoft Dynamics® CRM: Access possible from any web browser, centralised user management, individual access rights, customizable forms and low maintenance.

You are the ideal portatour® user

You...

- are active in the field
- plan your own tours
- serve more than 100 clients in your area
- visit at least 4 clients per day
- and spend 2 hours a day or more in the car.

You will come to value the help of portatour® in sales-route planning the more complex your planning needs are. This increases with the number of addresses to be visited daily, with different frequencies according to importance and the restricted visiting hours.

portatour® is suitable for any size of business: From a one-person company to large corporations with 1,000+ field staff. Users come from many different industries: Pharmaceutical, medical, food, industry, commercial equipment, cosmetics and many other sectors.
You decide the way you work

When does your **working day** start? Where do you start? Do you take breaks? How long do you work? The route planning algorithm takes your personal way of working into account.

Serve large areas with distant locations efficiently: portatour\(^\circ\) plans intelligent tours with **overnight stays** to reduce long travel times. Your preferences, such as your favorite hotels or the days you want to stay home, are naturally taken into account.

Do you like driving fast on motorways? Let portatour\(^\circ\) know, so you get schedules that fit your driving style.

Add non-sales appointments to your calendar, too. Now you can **automatically reconcile** meetings at company headquarters, telephone conferences, private appointments at your doctor and other errands **along with your client visits**, saving you time and hassle.

The racing car of route planners

Drive the racing car of route planners. At the push of a button, portatour\(^\circ\) puts together an optimized schedule within **seconds**.

portatour\(^\circ\) takes its processing power from the portatour\(^\circ\) server farm, which brings together many **high-performance servers** that provide a performance multiplier, when compared to laptop or smartphone processors.

From millions of possibilities, the algorithm provides a **mileage-optimized** proposed schedule with up to **125 customer visits** per week, intelligently selected from up to **1,000 active addresses** within a territory.
Your Assistant for Schedule Updates

You know as well as anyone: no matter how well planned a schedule is, unplanned changes happen in the course of the day: unexpected waiting times, contacts who don’t show up or who don’t have time, urgent appointments that need to be squeezed in, not to mention traffic congestion; all of which can mess up a carefully planned schedule.

Now you can respond at the push of a button and portatour® will update your schedule for the rest of the day starting from your current location. You can customize your schedule at any time by dropping proposed visits or adding additional dates.

Get the overview

See all of your accounts, contacts and leads on a map. Where are contacts who haven’t been visited in a long time? What schedule is the route planner proposing for the coming days?

Take advantage of free time between appointments. Find surrounding customers who are open and stop in for a spontaneous visit.

Find your bearings with digital street maps that are updated regularly. The maps are included at no extra charge in portatour® – without having the hassle of third party licenses.
Perfectly connected on the go

Good news for sales representatives who prefer to ‘travel light’: You can leave your laptop at home! Your mobile will be all you need for route planning going forward.

portatour® turns any smartphone into a personal sales-route planner that automatically synchronizes with Microsoft Dynamics® CRM. You can update your itinerary at any point during your day by just tapping a button. Mobile access to account and appointment data with built-in call reporting are additional features of portatour®.

Use portatour® on any smartphone or tablet: Apple iPhone & iPad, as well as Android, Samsung, HTC, Nokia and other models are supported. Simply open the web browser and start immediately - no app installation is required.

Simple reports, intelligent analysis

Log every customer call right after the visit ends at the push of a button on your mobile phone or tablet. This means you can clear your head and get ready for your next presentation; you also spare yourself the burdensome catching-up on reports late in the evening. The data entry form for call reports can be adapted to your personal needs.

Analyze your work with portatour® Report. Statistics about your area, your accounts, frequency of calls will give you valuable information on how you can improve your strategy. You will also see how many visits per day you need to do over the long term to actually achieve your desired call frequency.
Start today

The installation in your Dynamics CRM can be done in 5 minutes; your administrator can make all necessary configurations. You are ready to go within an hour. Later, you can easily install updates.

To ensure the smooth implementation of automated sales-route planning with portatour® in your business, please contact our consultants and partners who will help you with best practices to get you started.

Technical Requirements


Languages: English, German, French, Spanish, Portuguese, Italian

Supported regions: Europe, North America, Central America, South America, Australia & New Zealand, South Africa

Other languages and countries on request.

Not using Microsoft Dynamics® CRM? Other supported platforms
Features

**Route Optimization**

- Intelligent multi-optimization
- Minimized driving distance
- Maximized calls/visits
- Automatic customer selection
- Manual customer selection
- Optimized call/visit schedule
- Optimized call/visit frequency
- Fast calculation: < 10 Sec.
- Long-term planning: up to 16 weeks
- Multiple stops per week: up to 125
- Optimize anytime
- Overnight routes
- Daily view
- Weekly view
- Drag-and-drop in the calendar
- Monthly view
- Map view
- Driving time and distance
- Include new leads
- Reminders
- Scheduled appointments
- Flexible appointments
- Full- and multi-day-appointments
- Overnight appointments
- Recurring appointments
- Appointment suggestions
- Telephone calls
- Special locations
- Business hours
- Preferred call times
- Accounts on vacation
- Call duration
- Launch navigation software
- Route export
- iCal sharing

**Supported Devices and Browsers**

- PCs & notebooks
- Tablets
- iPads
- Android tablets
- Smartphones
- iPhones
- Android phones
- HTML5 browser
- Internet Explorer
- Firefox
- Chrome
- Safari
- Microsoft Edge

**Help & Support**

- PDF manual
- Online help
- 1-2-3-tutorial
- Email support
- Reply within 24h
- Optional training

**Availability**

- Languages
  - English
  - German
  - French
  - Spanish
  - Portuguese
  - Italian
- Regions
  - Europe
  - North America
  - Central America
  - South America
  - Australia & New Zealand
  - South Africa

**Personal Settings**

- Home location
- Working hours
- Lunch break
- Driving speed
- Days off
- Preferred hotels
### Maps with Overview

- Route view ✔
- All customers on a map ✔
- Lasso-selection ✔
- Filter ✔
- Different Coloring ✔
- Individual symbols for customers ✔
- Current location ✔
- Surrounding customers ✔
- Automatic geocoding ✔
- Map license included ✔
- Map updates included ✔

### Start quickly

- Free trial
- Account in 5 minutes ✔
- No credit card required ✔
- Quick data import ✔
- Try with demo-data ✔
- Easy to use ✔

### portatour® for Salesforce

- Available in AppExchange ✔
- Installation in 15 minutes ✔
- Supported Versions
  - Professional Edition ✔
  - Enterprise Edition ✔
  - Unlimited Edition ✔
  - Force.com-Platform ✔
- Integration with Accounts ✔
- Integration with Contacts ✔
- Integration with Leads ✔
- Integration with Events ✔
- Uses existing data ✔
- Calculate schedule in Salesforce ✔
- View map in Salesforce ✔
- Synchronize with Anywhere ✔

### Rich Customer Management

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<th>3000</th>
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<td>Customers max.</td>
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<td>Import assistant</td>
<td>✔</td>
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<td>... from Excel (XLS, XLSX)</td>
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<td>... from OpenDocument (ODS)</td>
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<td>... from text-files (CSV, TXT)</td>
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<td>Update assistant</td>
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<td>Quick search</td>
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<td>Extended search</td>
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<td>Sort &amp; filter</td>
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<td>Custom fields</td>
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<td>Transfer to other users</td>
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### Portatour® for Microsoft Dynamics CRM

- Installation in 15 minutes ✔
- Supported Versions
  - Dynamics CRM 2011 ✔
  - Dynamics CRM 2013 ✔
  - Dynamics CRM 2015 ✔
  - Dynamics CRM 2016 ✔
  - Dynamics CRM 365 ✔
  - On Premise ✔
  - On Demand ✔
- Integration with Accounts ✔
- Integration with Contacts ✔
- Integration with Leads ✔
- Integration with Appointments ✔
- Uses existing data ✔
- Synchronize with Anywhere ✔
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<td>.. automatically daily/weekly</td>
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<td>Export of portatour® Report</td>
<td>Find surrounding customers</td>
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<td>Find surrounding customers</td>
<td>Find customers along the way</td>
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Screenshots
portatour® already in use by

... and many more.
A dynamic company such as Samsung requires a dynamic route planner! Call frequencies are now in firm control thanks to portatour®.

**Samsung**
Severin Bolliger

15% more revenue by visiting the right store at the right time.

**Scandinavian Tobacco Group**
Mark Hooks

Once our sales reps started using portatour®, we uncovered a wealth of potential new leads.

**Kao Australia**
Rodney Macnamara

portatour® has brought us a 6% increase in paying customers in just 9 months and has thereby considerably improved our sales revenue.

**TUNAP**
Sebastian Zimmermann

The sales force is always faced with the problem: “How do I structure my day?” With portatour® I finally have a system that plans my working day efficiently at the push of a button.

**KS Medizintechnik**
Jörg Heinser

With portatour®, we achieve more in less time because we implement the right activities with the right customers.

**mymuesli**
Adrian Müller

With portatour® we get an extra 20% visits to accounts in any given week. portatour® is a huge time-saver for us.

**Trupanion**
Ian Henry

The number of customer visits per week has increased by 25% thanks to portatour®. We now cover our territories much more effectively.

**Sani Marc**
François Belisle

References
Products

portatour® is available in the following versions:

Anywhere

The portatour® Anywhere route planner runs in your web-browser on your desktop PC, notebook, tablet and smartphone. Create your account, upload addresses, and start driving on your optimized sales-route today. You don't have to install anything, no need for extra software.

portatour® for Salesforce®

The portatour® route planning app seamlessly integrates with Salesforce and Force.com applications and uses your existing accounts, contacts, leads and appointments in your calendar. The installation in your Salesforce organization via Salesforce AppExchange can be done in less than 15 minutes; your administrator can make all necessary adjustments on the first day.

portatour® for Microsoft Dynamics® CRM

For both on-premise and on-demand versions of Dynamics CRM 2011, 2013, 2015, 2016 and 365, we offer a complete solution for synchronizing accounts, contacts, leads and appointments between CRM and portatour®. Within 15 minutes, your administrator has installed and configured the app, users can access the full functionality of portatour® to plan routes and report calls as a webapp on their smartphones, tablets and notebooks.

portatour® Veeva CRM Connector

portatour® Veeva CRM Connector is an off-the-shelf software which is installed as a managed solution in your Veeva CRM Organization. The data from Accounts, Office Best Times, Cycle Plans, and saved Calls are taken into account when portatour® automatically creates schedules to minimize travel times and maximize the number of visits. Your employees will continue to use Veeva CRM, portatour® provides them a “magic calendar” that helps them meet their cycle plans for all customers. More details in the Feature List.

portatour® API

portatour® makes your customer data mobile. Whichever ERP/CRM system you use, the portatour® API provides your field service with all the relevant data for route planning on smartphones, tablets and notebooks. The API is included in all portatour® company accounts, which you have as of two field rep licenses. The synchronization can be done in both directions. As part of an API workshop, we are happy to help you integrate portatour® into your IT landscape and adapt it to your requirements.
How portatour® works

Customers
- Geocoded address
- Planned call interval
- Date of last call
- Opening hours
- Expected call duration

Appointments
- Fixed customer appointments
- Business and private appointments
- Important phone calls

Sales Rep Data
- Home location
- Current location
- Working hours and breaks
- Accommodations

Street Maps
- Street level details
- Frequently updated
- Distances: shortest drive between all customers

Optimized schedule

Sales route instantly planned

Personalized Schedule
- Drop customer calls
- Add calls
- Set planning parameters
- Respond to schedule updates
Frequently Asked Questions

How much do I save with portatour®? How soon does it pay off?
You currently spend an average of 50€ per customer visit, all expenses considered. With portatour®, one additional visit per day is possible, meaning 20 additional visits per month. This generates added value equivalent to 1000€ per field rep and per month.

In addition, following call suggestions proposed by portatour®, leads to more frequent visits to important customers and thus higher turnover per customer. Customers with lower priority are visited less frequently, in accordance with the call interval - but are not forgotten!
Fine-tune this return-on-investment calculator to match your situation.

Which use cases is portatour® suitable for?
portatour® is used for route planning in field sales with regular client calls, one-time visits as part of a product launch, pricing and inventory control in outlets, mystery shopping, new customer acquisition, recurring service activities.

I'd like to get a demonstration of portatour®.
Would you like to present the sales-route planning software portatour® to your company? We are happy to prepare an online presentation for your management, sales management, IT management and key sales representatives, where we cater to your situation and answer individual questions. Contact us today.

Can I try portatour® without obligation or cost?
Yes. Sign up for a free trial of portatour® Anywhere, a web-version without further requirements. The trial license will automatically expire after 30 days and is limited to one field rep. There are no costs. You can also try an integration with the CRM of your choice.

Will portatour® record the routes I drive?
No: portatour® does not store GPS records of drives. portatour® is not a de-motivational and legally questionable surveillance tool. Instead, portatour® is a great help for field reps. Visiting more customers, driving fewer miles, and spending less spare time for planning is a big motivation for field reps.

Can I use portatour® with Salesforce, Dynamics CRM or other CRM/ERP systems?
Yes, portatour® works with Salesforce, Microsoft Dynamics CRM 2011, 2013, 2015, 2016 and 365, Siebel CRM, Sugar CRM and other CRM/ERP systems.

Somebody calls and wants to have an appointment – how does portatour® react?
You can enter the appointment directly into portatour®. portatour® detects conflicts in your schedule and optimizes your itinerary to reflect the revised schedule. That way, you still have an optimized route even if your schedule changes. By the way: all your appointments will be synchronized with Microsoft Dynamics® CRM.

Can I use portatour® for districting or geo-marketing?
No: portatour® is a sales-route planner and therefore requires an assignment of accounts to sales representatives. For sales region planning, we work with partners proficient in districting.

Can portatour® help me avoid traffic jams?
In order to calculate better and more realistic routes for you, portatour® uses historical traffic data as the basis for its optimization algorithm. “Historical traffic data” are speed data collected by navigation system and mobile phone providers through measuring the travel data of millions of drivers and providing them to us for the respective road sections in the form of a big data base, which portatour® uses for route optimization. Live traffic data is only a snapshot of the situation and is not taken into account for planning. Use the navigation system of your vehicle or smartphone. portatour® can start your smartphone’s navigation system at the push of a button.

Can I buy a perpetual portatour® license?
No – portatour® is a “software as a service” application. You subscribe to portatour® as a service and save yourself costs for server hardware, software, installation, maintenance and operation. portatour® is ready from the first day, is constantly updated, works on any device with a web browser and uses the computing power of the portatour® server farm. You can choose between quarterly and annual payments.

Does the portatour® route planner help me win new leads?
Yes. Import your prospects into Microsoft Dynamics® CRM and portatour® calculates optimized route plans for you to reach new businesses in the most efficient way in addition to attending to your existing buyers.
Is there an offline version of portatour®?
portatour® is an online-web-application with support for offline data storage. In situations without internet connection, your most important data is readily available offline in your browser. portatour® is optimized for using a low bandwidth, as is typical for mobile use. Being a web-application, it removes the need for installation and updates on your mobile devices and leverages the computing power of the portatour® server farm for route-optimization.

How secure is portatour®?
portatour® uses the most advanced security standards: The communication between the device and portatour® servers is SSL encrypted; to gain access you need a username and password. The portatour® servers are protected by firewalls; data is stored on encrypted disks on multiple database servers. The data centre has biometric access control and video surveillance. We do not share your data with third parties. More information on data security at portatour®.

For which industries is route planning suitable?
portatour® is suitable for any size of business: From a one-person company to large corporations with 1,000+ field staff. Users come from many different industries: Pharmaceutical, medical, cosmetic, food, industrial and commercial needs, wholesale, collection agencies, toys, paper and stationery, merchandise, chemicals, paints and coatings, electronics, workshop supplies, craft supplies, car accessories, optics, drinks, food and beverage, tobacco, heating and sanitary, market research, mystery shopping, building services, sports and leisure goods, clothing and textiles, machinery, spare parts, materials, furniture and equipment, telecommunications, dental needs.

Is portatour® compliant with GDPR?
Yes – portatour® is compliant with GDPR. You will find information on data protection in our Privacy Policy and in the Licence Terms. If you need an order processing contract in accordance with GDPR, please contact us.

Is the route planner portatour® available 24/7?
portatour® is designed for high availability: Multiple redundant high performance servers with automatic load balancing and failsafes, 24/7-Monitoring with automatic alarm, redundant fiber connectivity to the Internet, redundant power supply, additionally UPS and diesel generator, redundant air conditioning and fire alarm system with smoke detection and extinguishing system.

How do I get help and support for portatour®?
When receiving your account data you also get access to tutorial videos and PDF manuals in English, French and German. Within the application you will find online help. Additionally, our support team is happy to help you via email. Read more about help & support here. Optionally, we offer individual online setup workshops and user trainings for you and your team.

Where is the login? How do I get my access link?
Do you already have a trial or paid account? Then you received your personal access link in an email with subject “your trial account” or “your account”. If you are an employee of an enterprise using portatour®, you receive your access link from your administrator. Your access link works on PCs, smartphones, and tablets. If you do not have an account yet, you can sign up for a free trial here.
Contact us!

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If you are unable to reach us due to different timezones, please send an email to sales@portatour.com.

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