Field Sales (iField)

See which visits happened and what needs follow-up

For field sales managers and representatives

Controlled beta: core visit workflow shown on demonstration data; scope and timing are agreed in your proposal.

Does this sound familiar?

Representatives finish the day, but the office still chases updates and cannot tell which customer needs attention.

Visits go unreported, follow-ups slip and representatives spend their evenings writing up the day.

From the problem to the business gain

Conceptual illustration, not a product screen

The problem	What your team does	What you get	What the business gains
Updates arrive late, by phone and message	Check in, record the outcome and next action	Visit record and next action on the account	**Less chasing and faster, better-informed follow-up**

Three practical gains

Less chasing for updates

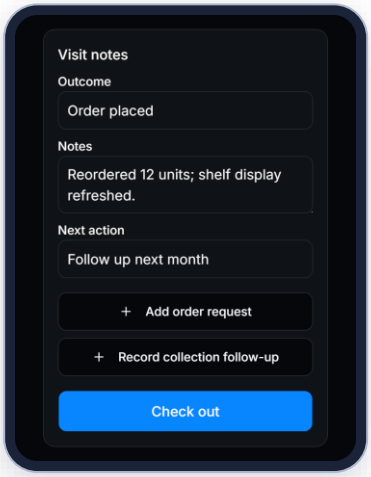
Outcomes are recorded once, at the customer, so the manager sees them without asking.

More time for customers

Representatives report as they work instead of writing end-of-day reports.

Follow-up that uses the visit

The next action sits on the customer record, ready for whoever acts next.



Visit outcome recorded on the phone. Demonstration data; location simulated in testing.

The useful output

- A visit record on the customer timeline, with location recorded at check-in and check-out
- Order requests and collection records for your team to follow up

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What it needs

- **Customer records in iConnect CRM**
  In controlled rollout; each visit is kept against its customer
- **Representatives' phones with a current browser**
  No app installation
- **Location permission on the phone**
  Recorded at check-in and check-out only. Accepted with simulated location; real-phone acceptance pending
- **Field sales roles**
  Organisation admin, sales manager, sales supervisor and sales representative

What you gain by connecting it

4 → 1 CRM

— Demonstrated in testing

iField is designed to put the visit outcome and next action on the customer timeline in iConnect CRM (Controlled rollout) and to notify the manager when a visit is completed.

4 - - ▸ 2 iSales

- - Planned

iSales (Controlled rollout) reads the same customer timeline; a deal hand-off straight from the visit is planned.

Demonstrated in testing: shown working in test environments, before your own set-up · Planned: illustrative; not implemented yet

How your team uses it

Representative
Checks in, records outcome and next action
→ A recorded visit on the customer timeline

→

Manager
Reviews visits in progress and check-in location evidence
→ Visits closed with a stated reason where needed

→

What your business gains
The office stops chasing updates, and the next action builds on what happened at the visit.

Next step

Book a tailored iField demo with your visit workflow

We show it on demonstration data, shaped around your workflow, and agree the first scope together.

https://iconsultants.tech/iconnect/demo

Technical detail: iConnect Technical Evaluation Guide

Scan to request the demo