

# Natural Insight Quick-Start Guide

## Need Support?

 (833) FLEX-ROC (3539-762)

 [Help.Flex@trocglobal.com](mailto:Help.Flex@trocglobal.com)

 [FlexROCconnect.com](https://FlexROCconnect.com) – T-ROC Assist &  
Ticket System



# Natural Insight Navigation

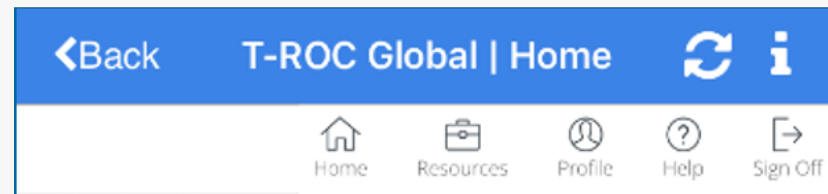
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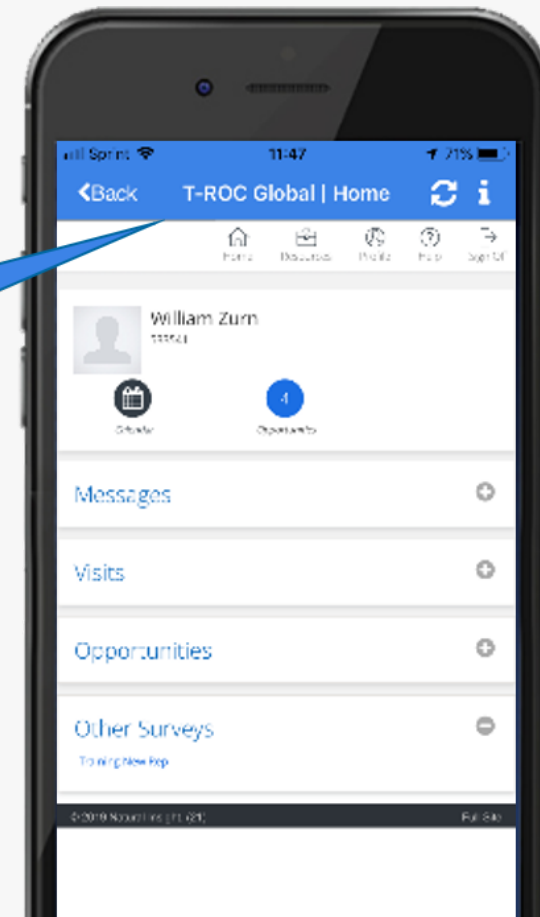
# Navigation Icons

Along the top of the screen are two sets of icons.

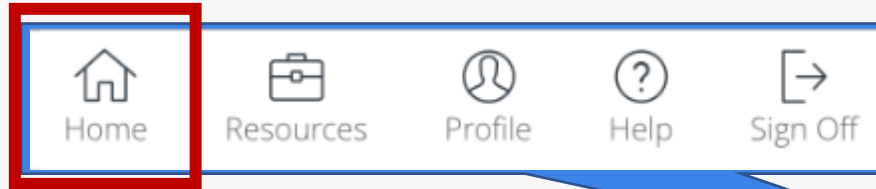
The icons in the Blue Bar navigate and control the individual app pages.



The Gray icons are the main pages within the app.



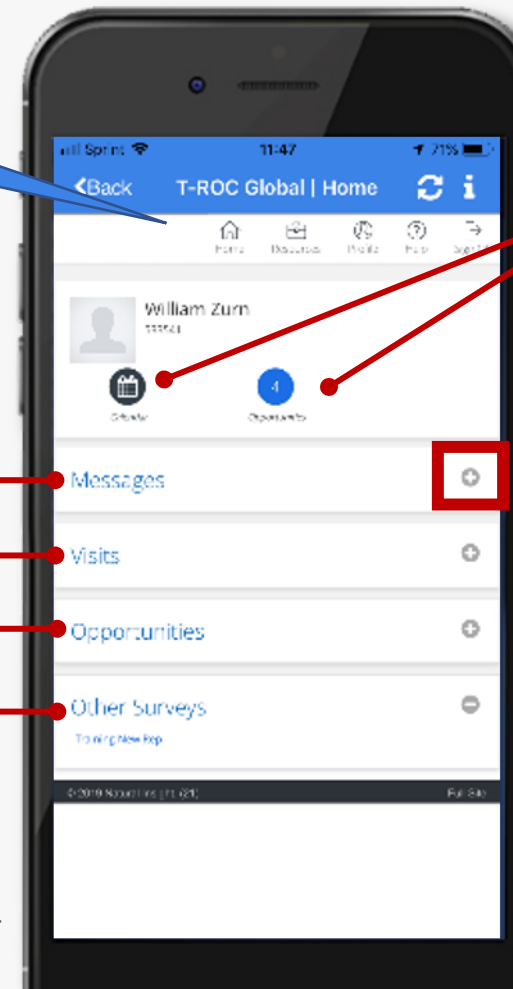
# Navigation – Home Screen



The **HOME** icon will bring you to the Home Screen.

The individual sections are called **PODS**.

- Messages Pod
- Visits Pod
- Opportunities Pod
- Other Surveys Pod

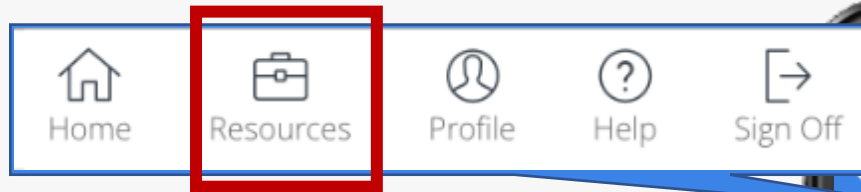


Shortcuts to Calendar and Opportunities.

Expand pods with the + icon.  
Close with the – icon.

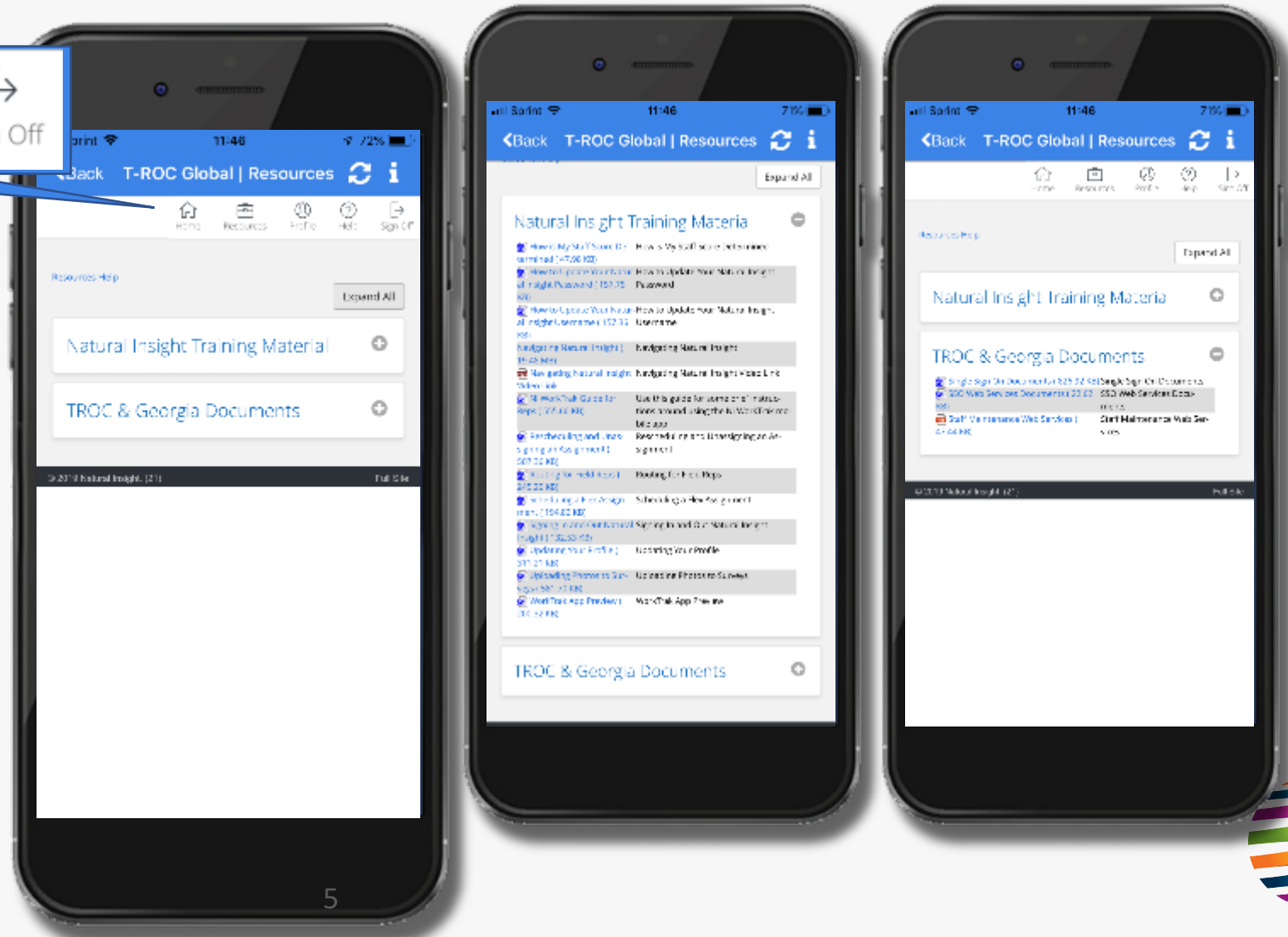


# Navigation – Resources

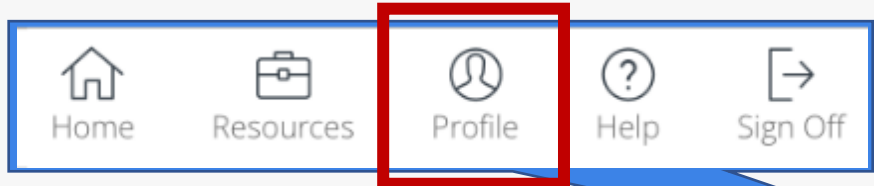


The RESOURCES icon will show you helpful How-To's.

Some documents and videos are provided by Natural Insight, and the others are provided by T-ROC.



# Navigation – Profile

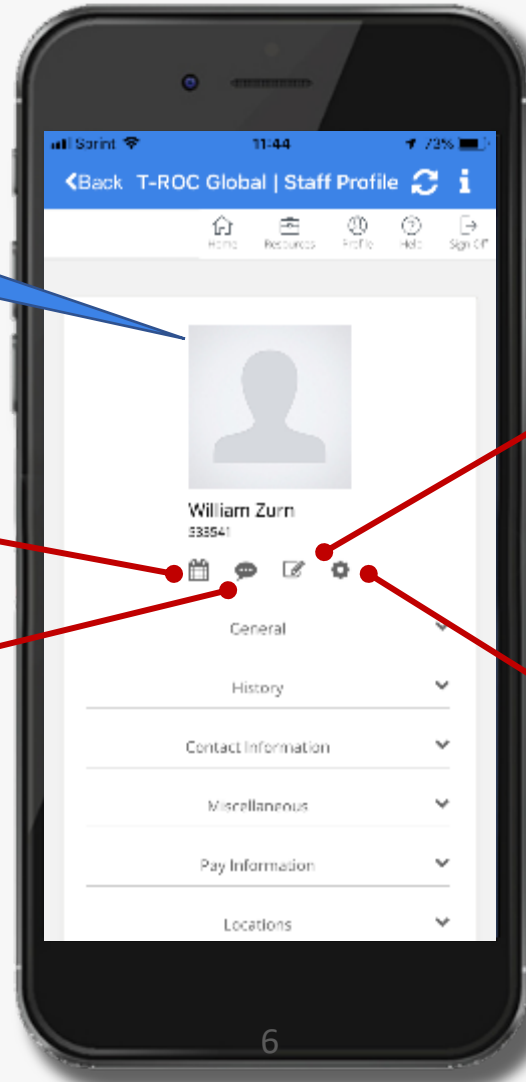


The PROFILE icon gives you access to Profile Information.

Access your Calendar

Send a Message

(if you have access to send messages depending on your profile type)



Update Profile Info

(if you have access to update your profile depending on your profile type)

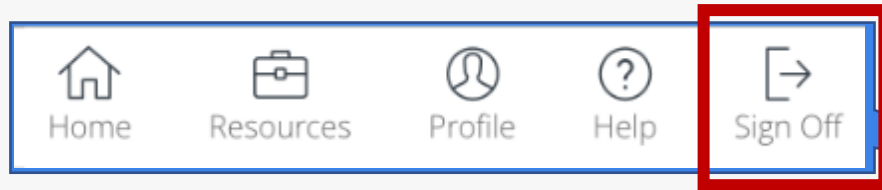
Update Your Info

Update Availability  
Change Password  
Change Username

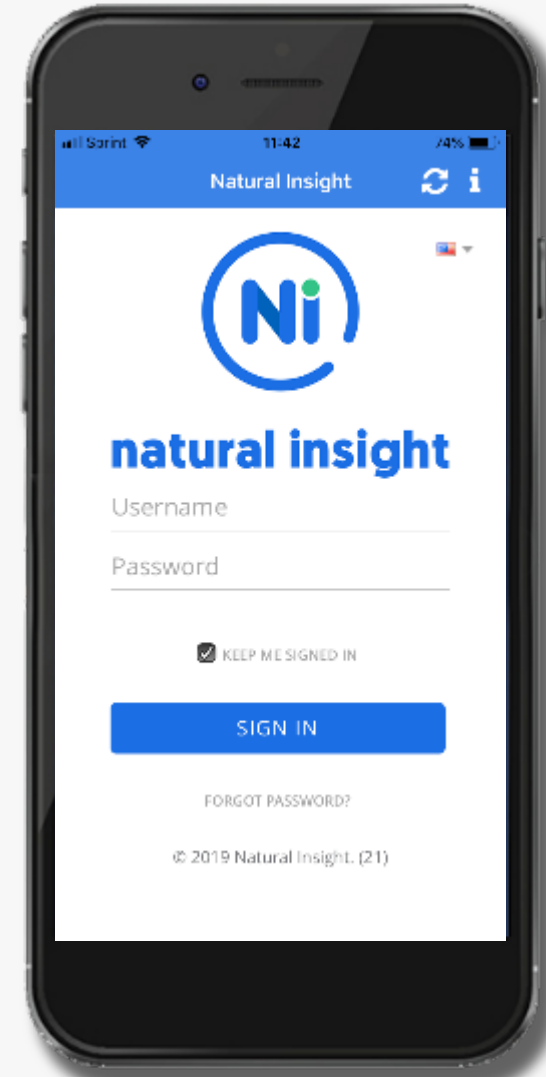
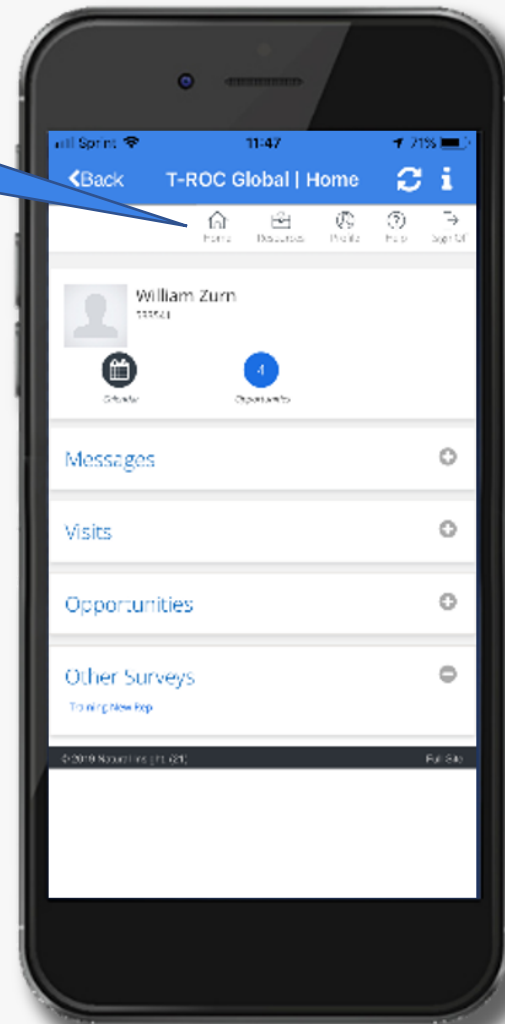
(if you have access to update your profile depending on your profile type)



# Navigation – Sign Off



The SIGN OFF icon signs you out of the NI App.



# Natural Insight Messages

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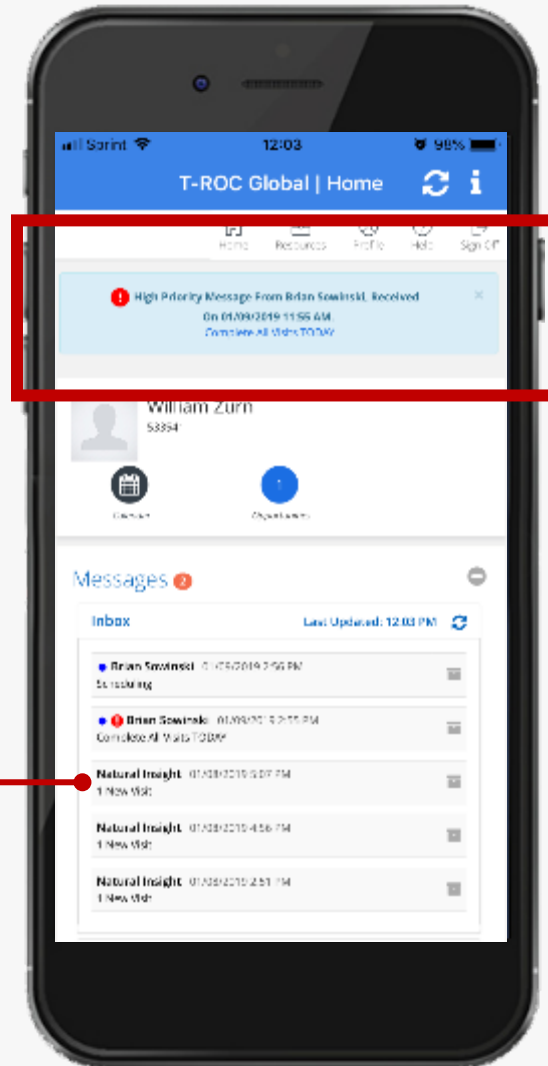




# Messages

Any **High Priority** messages will create a Blue Banner above your Profile Picture and appear in your Messages Pod.

Regular messages will **only** appear in the Messages Pod.



While viewing any message, if the message allows replies, you can reply at the bottom of the message.



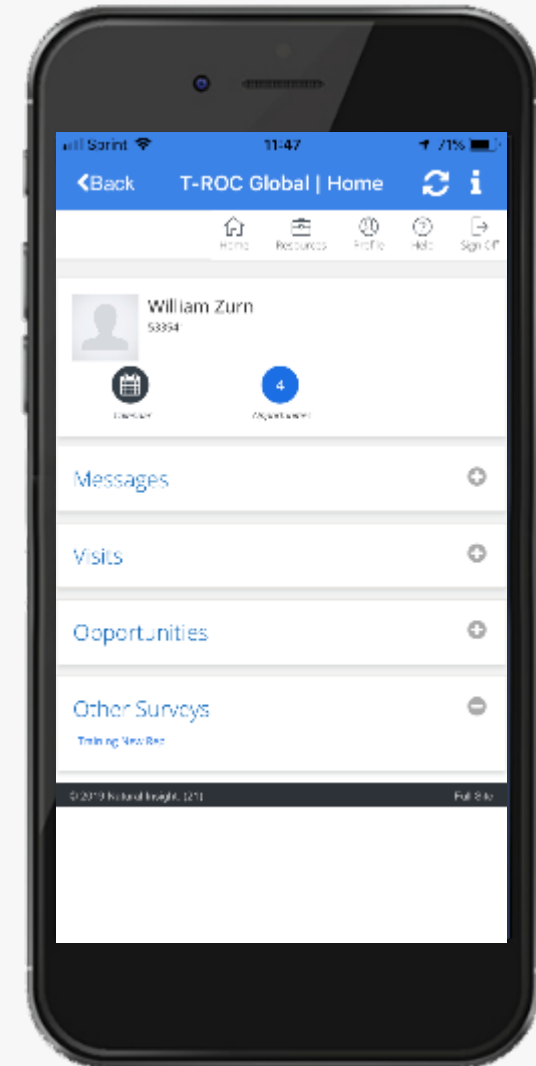
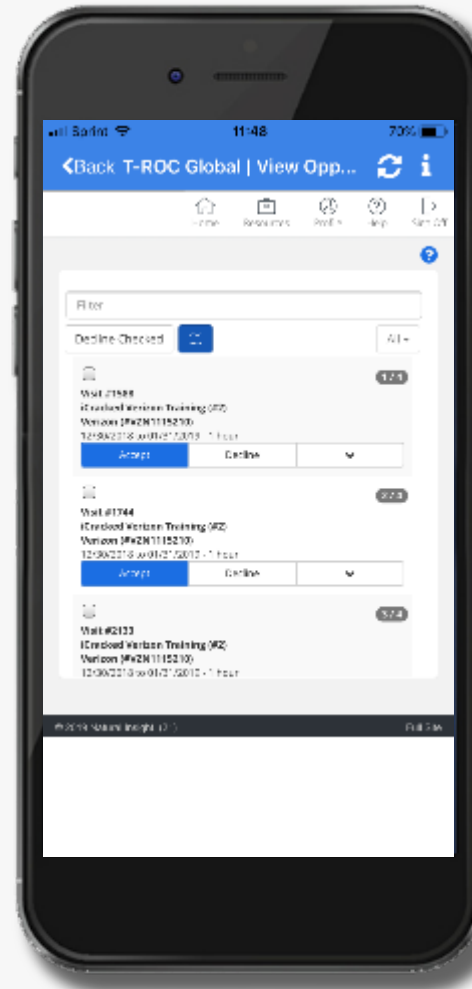
# Natural Insight Opportunities



# Opportunities

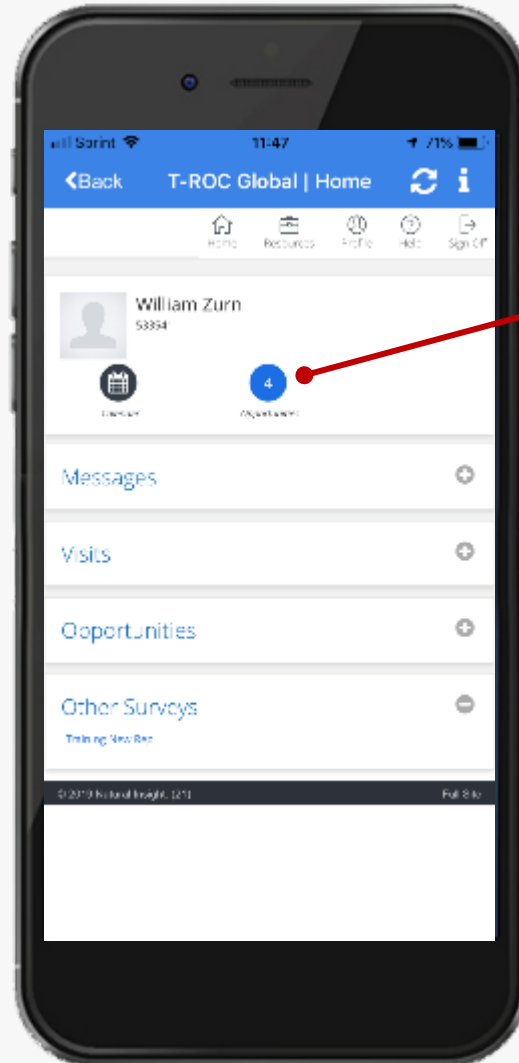
Opportunities are visits that need to be performed in your area.

They can be offered to multiple reps or they can be visits specifically offered to you.



# Available Opportunities

Opportunities will appear on your Home Screen with a blue dot and white number.



The white number inside the dot represents the number of opportunities being offered to you.

Tap on the blue dot to view all Opportunities.



**Note: A yellow box shows you the number of opportunities that you need to schedule.**



# Allow Location Services

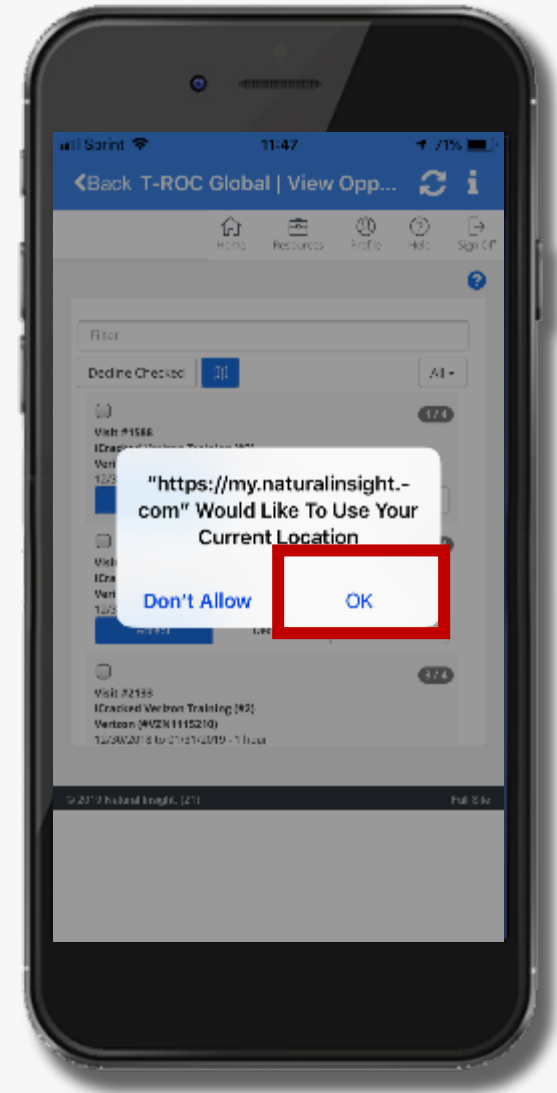
TAKE NOTE!



You **MUST ALLOW** location services on your phone so that Natural Insight can GEO-TRACK your location for mileage reimbursement, travel time, and location check-in & check-out.

**This is how your pay is determined!**

If you don't Allow your location, you may not be able to Accept Opportunities or Clock-In for Work!



# Opportunity Page Info

The screenshot shows a mobile interface for an opportunity. Red callout lines connect text labels to specific elements on the page:

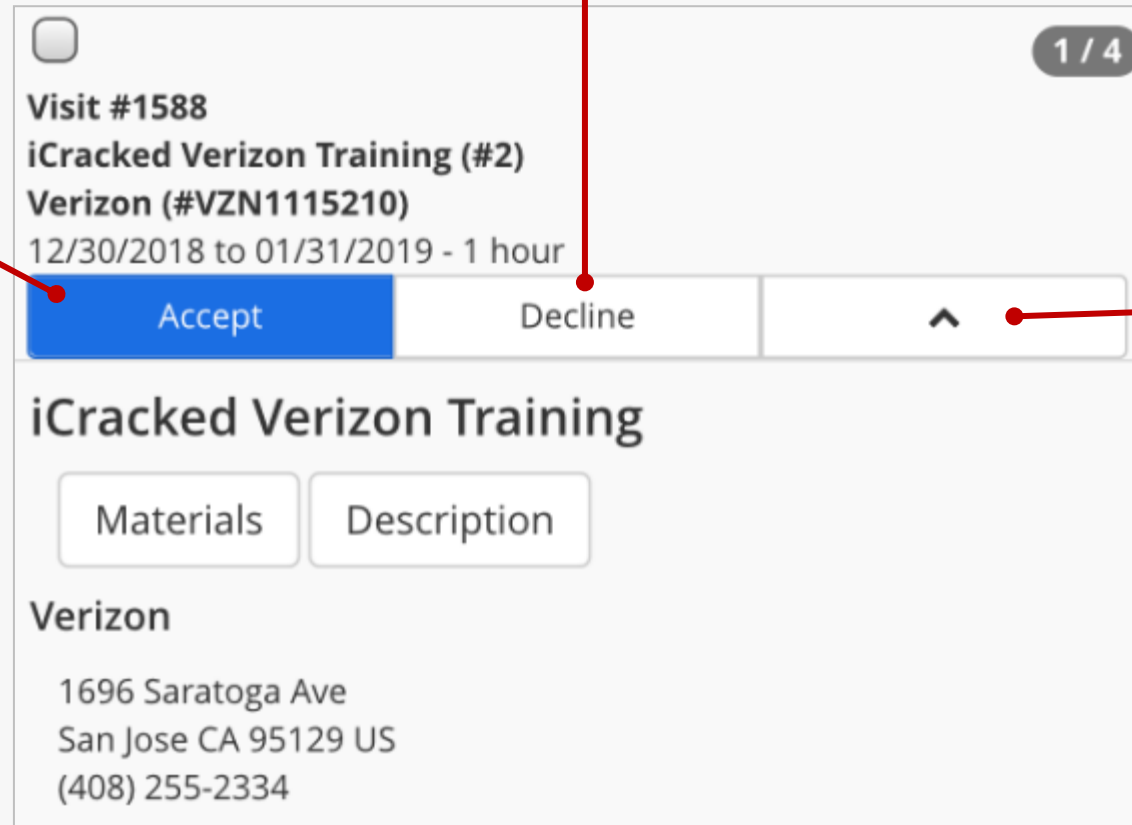
- Unique Visit ID** points to the text "Visit #1588".
- Program Name** points to the text "iCracked Verizon Training (#2)".
- Visit Name** points to the text "Verizon (#VZN1115210)".
- Scheduling Timeframe** points to the text "12/30/2018 to 01/31/2019 - 1 hour".
- Accept** and **Decline** buttons are visible below the scheduling timeframe.
- Visit Materials – tap the button to view** points to the "Materials" button.
- Visit Description – tap the button to view** points to the "Description" button.
- Location Address and Phone** points to the address "1696 Saratoga Ave", "San Jose CA 95129 US", and phone number "(408) 255-2334".
- Distance from Your Home** points to the text "392.11 mi from home".
- Total Time On-Site** points to the "1 / 4" indicator in the top right corner.



# Opportunity Page Actions

Tap the Decline button to delete the opportunity.

Tap the Accept button to schedule your visit.



1 / 4

**Visit #1588**  
**iCracked Verizon Training (#2)**  
**Verizon (#VZN1115210)**  
12/30/2018 to 01/31/2019 - 1 hour

Accept Decline ^

**iCracked Verizon Training**

Materials Description

**Verizon**

1696 Saratoga Ave  
San Jose CA 95129 US  
(408) 255-2334

Tap this button to view more information.



# Natural Insight Scheduling

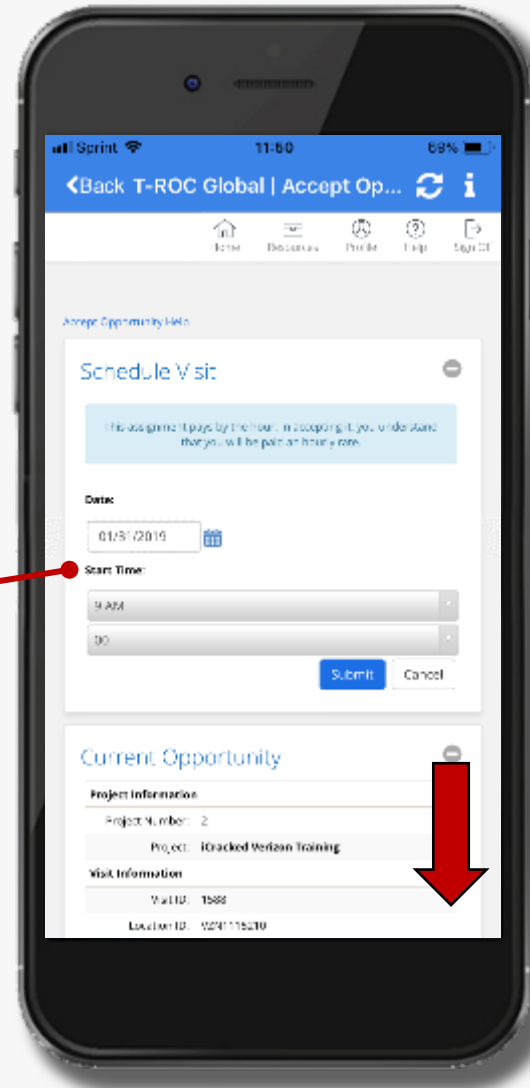




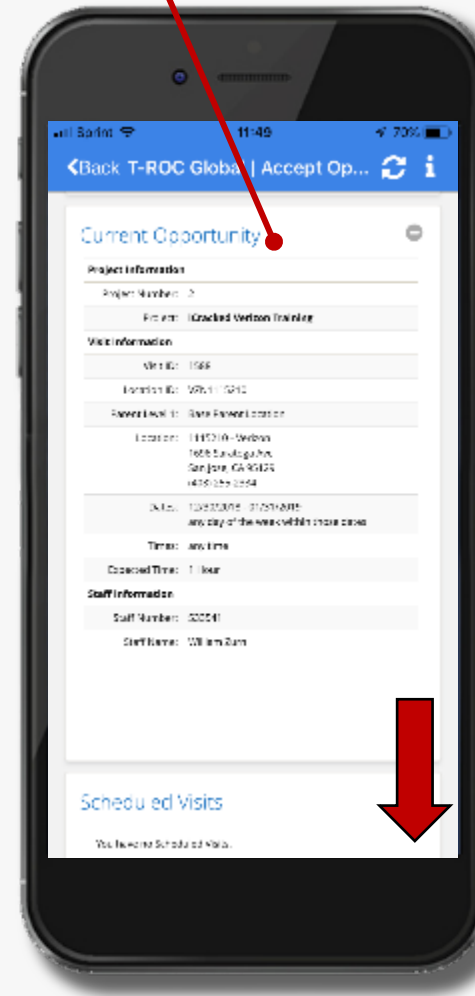
# Scheduling

You can schedule your visit once you accept the opportunity.

On this page, set the date and time you plan to visit the location.



Scroll down to see the opportunity info.

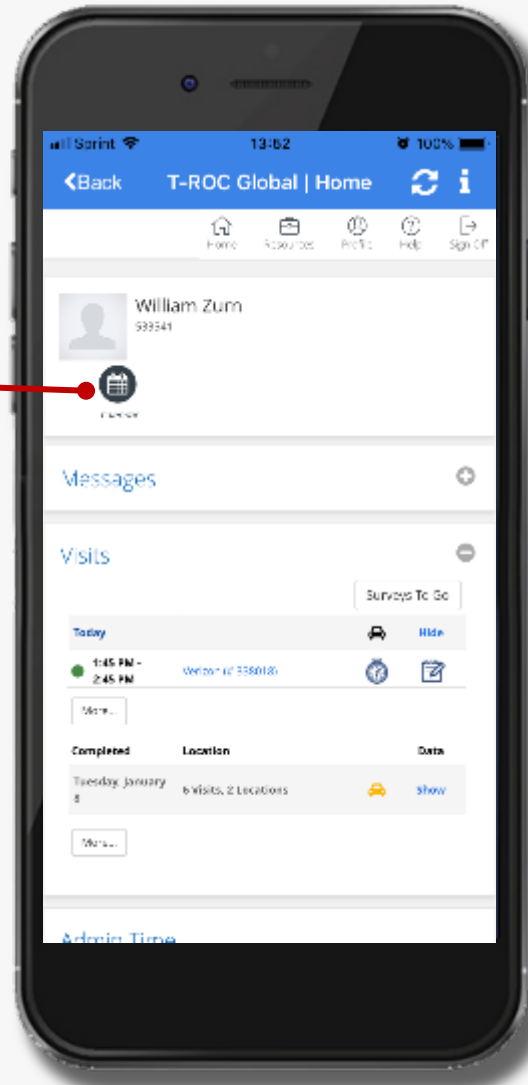


Scroll down further to show if you have more opportunities at the same location.



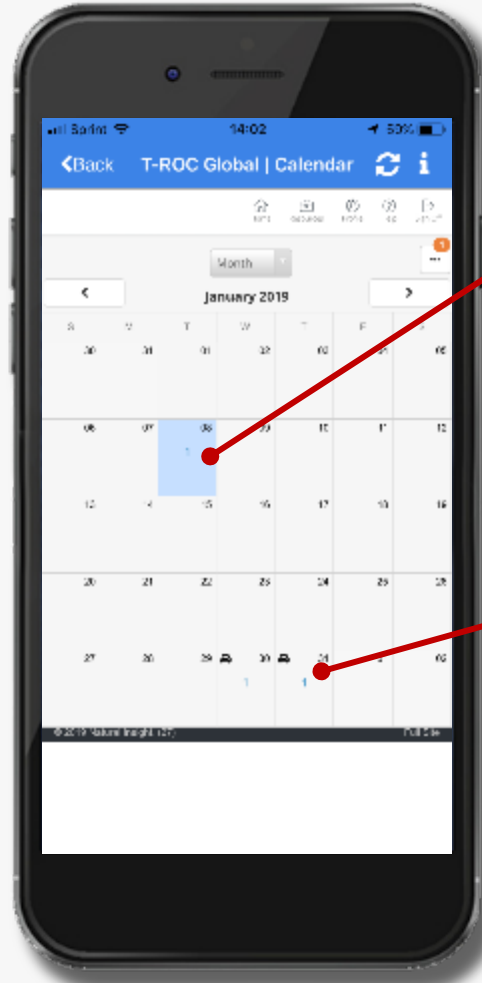
# Calendar

To view your schedule, tap the calendar icon.



Each day with a number indicates ONLY an at-home survey needs to be completed.

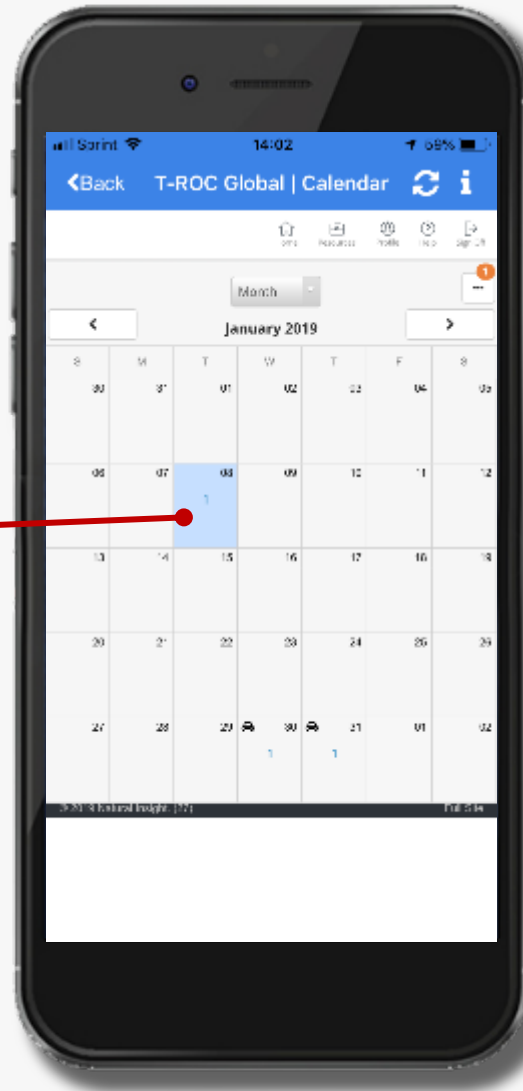
Each day with a number AND a car icon indicates a visit that will occur on-site at a location.



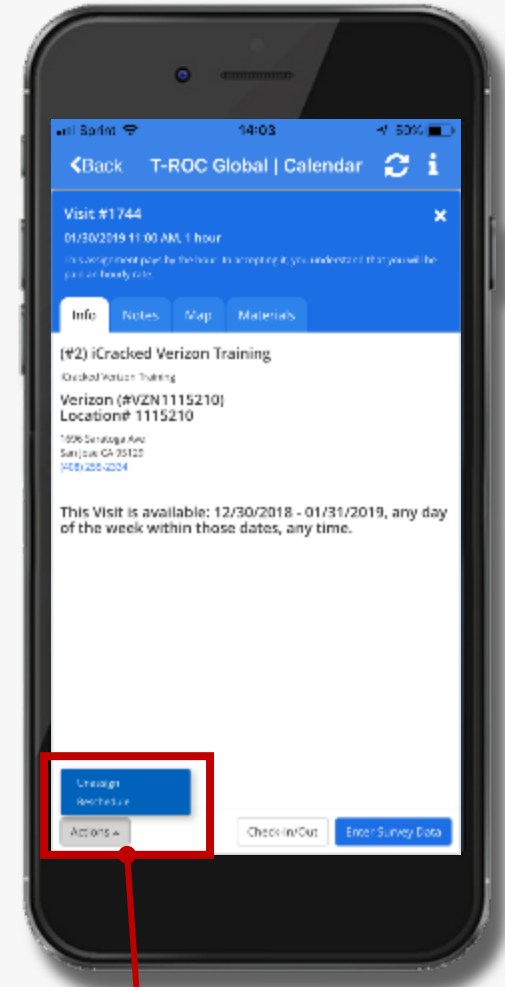
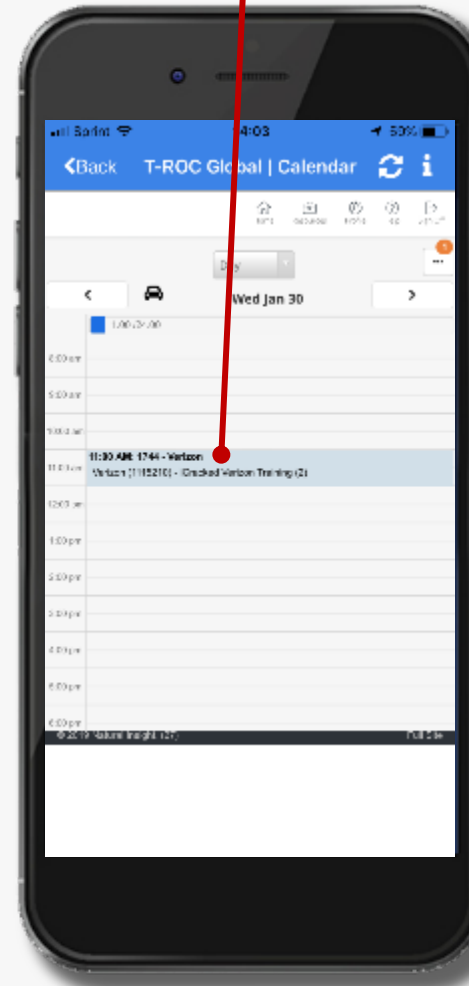
# Reschedule a Visit

If you need to Re-Schedule a visit, the easiest way is to open the calendar.

Tap on the day that contains the visit(s) that need to be re-scheduled.



Scroll down to see the opportunity info.



You can Unassign or Reschedule the visit.



# Natural Insight Working Your Schedule

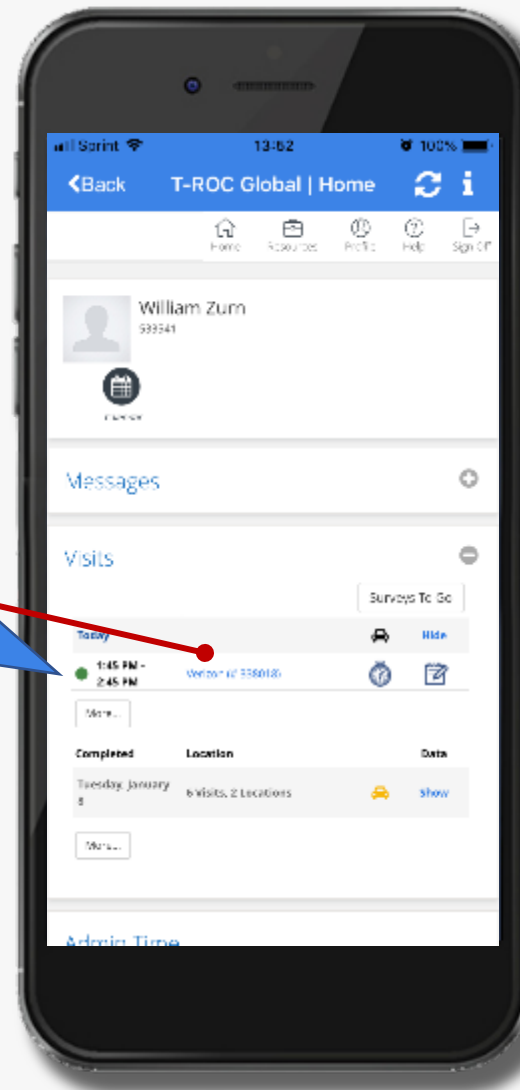
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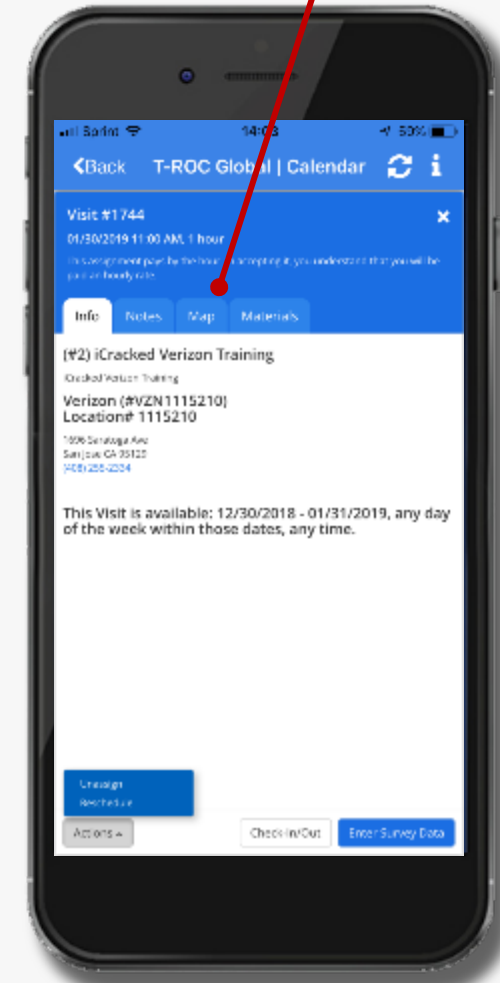
# Daily Visits

All the visits you have scheduled for the day will appear under your Visits Pod on your Home Screen.

Tap on the Visit to prepare!



Depending on the Visit, you'll see tabs labeled: **Info**, **Notes**, **Maps**, and **Materials**

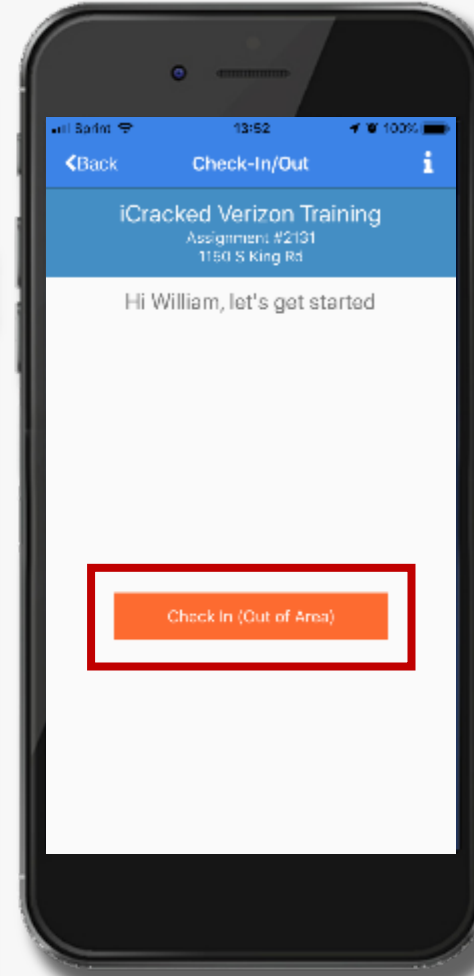
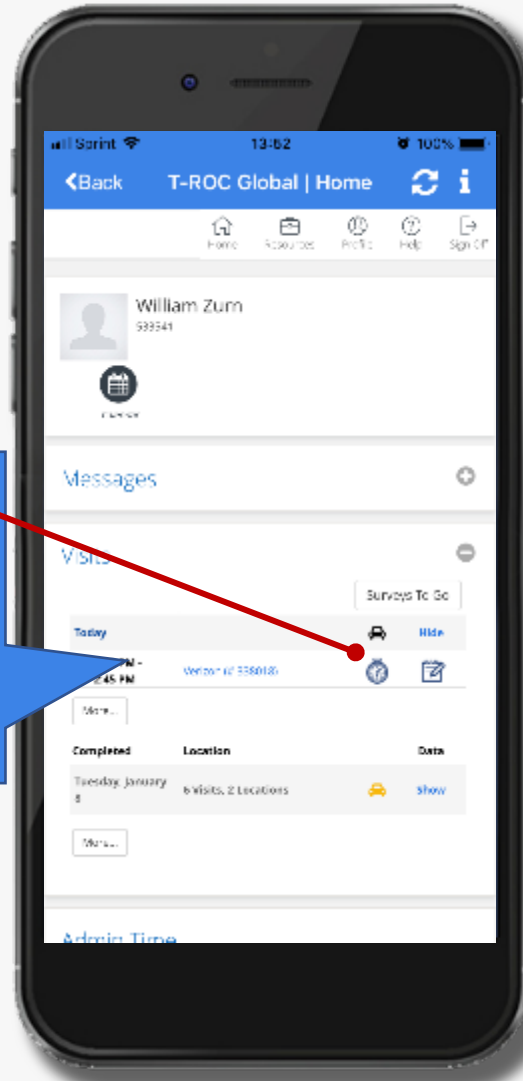


# Time Clock - Start

To start working a visit, tap the **Stopwatch icon** to clock-in *when you arrive on-site.*



Once Checked-in, the icon will change to a Checked Stopwatch.



**Warning:** If you tap on the clock too fast, you may clock out for the entire day.

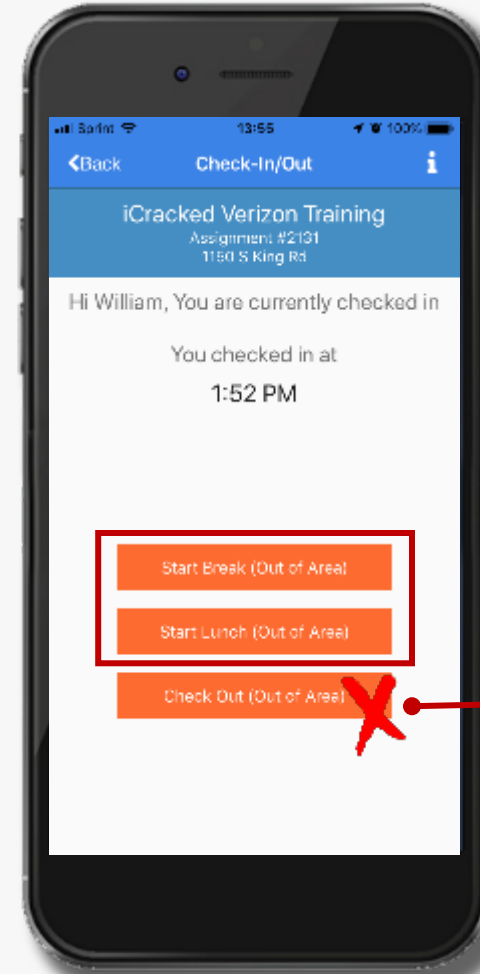
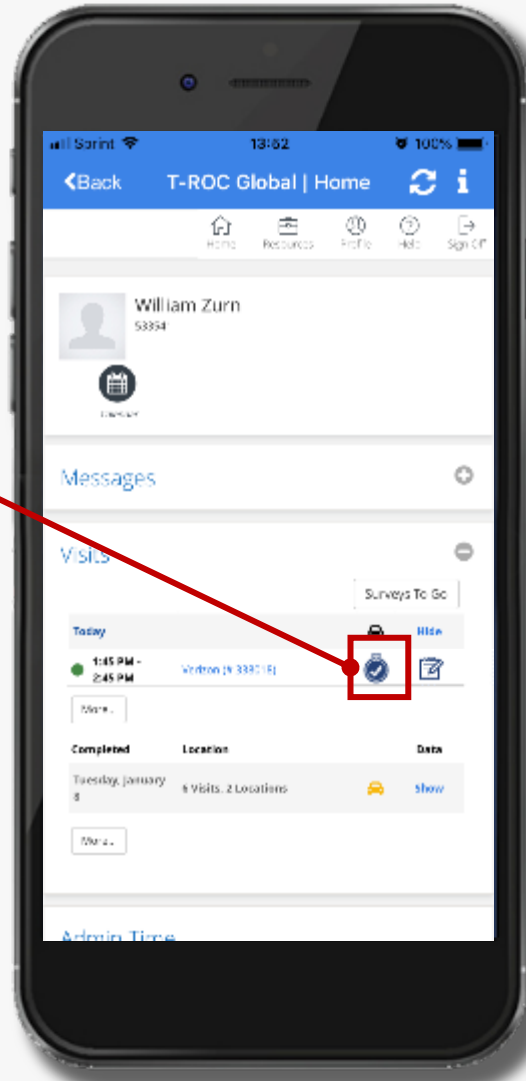
Instead, you can also use the check in tab, punch out/in for your lunch and then complete and submit your survey.



# Time Clock - Breaks

Once Checked-in, the icon will change to a Checked Stopwatch.

Tap the Checked Stopwatch to record the Start and Stop of all Lunch and Dinner breaks that happen *during* your visit.



  
**DO NOT USE.**

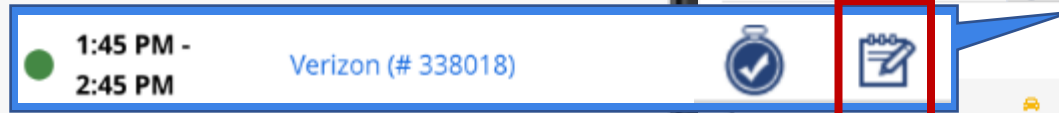


# Survey Data

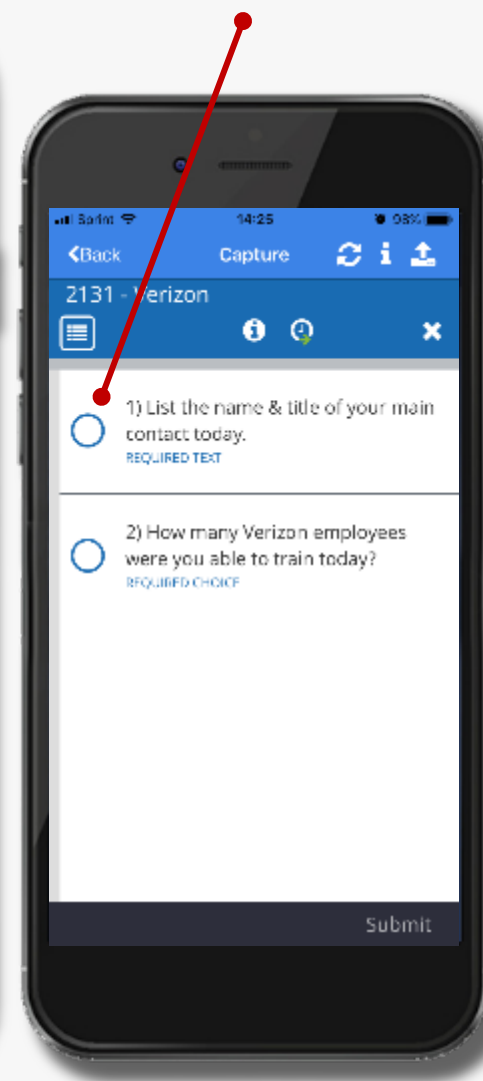
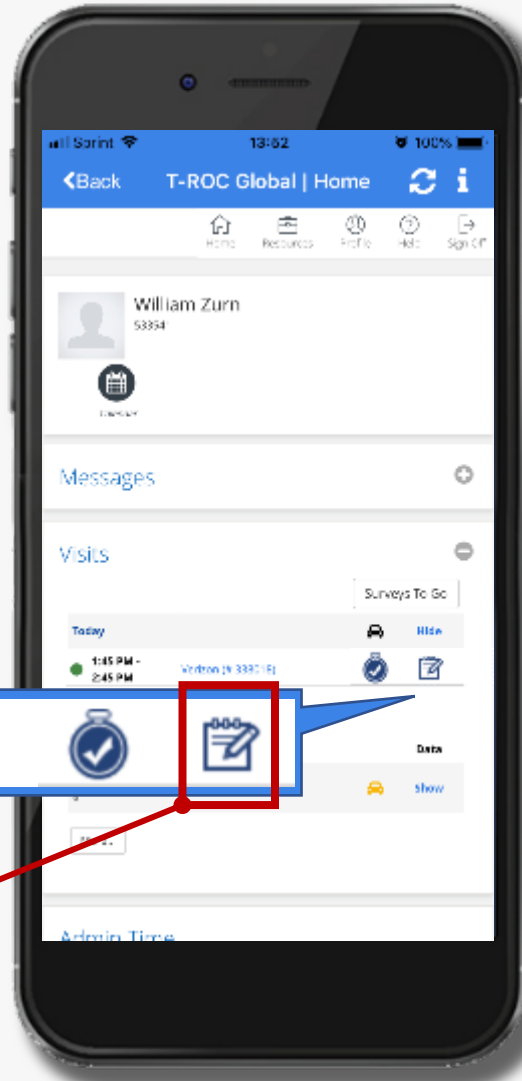
At the end of each visit, you'll need to answer questions based on the events of your visit. Natural Insight calls them Surveys.

You will clock-out through the Survey!

Tap on the first question to begin answering the survey questions.



On the visit, tap the Notepad icon to open the Survey.

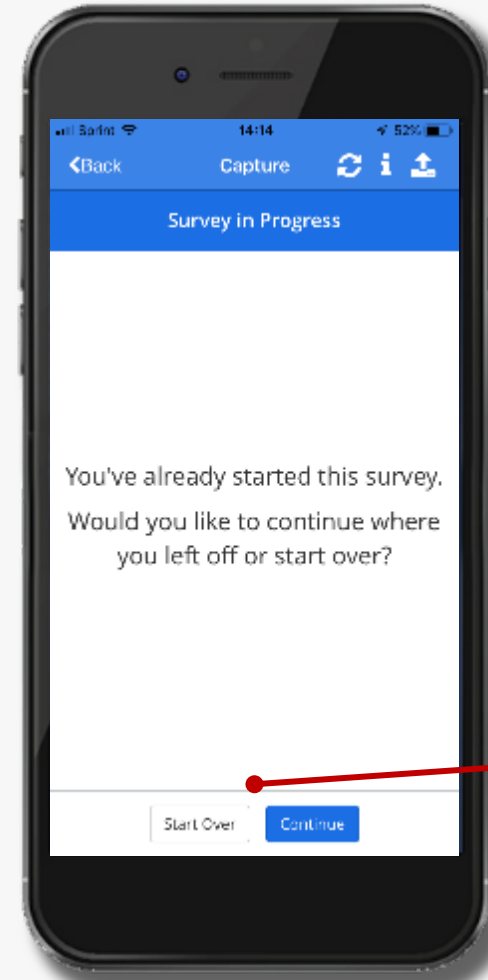
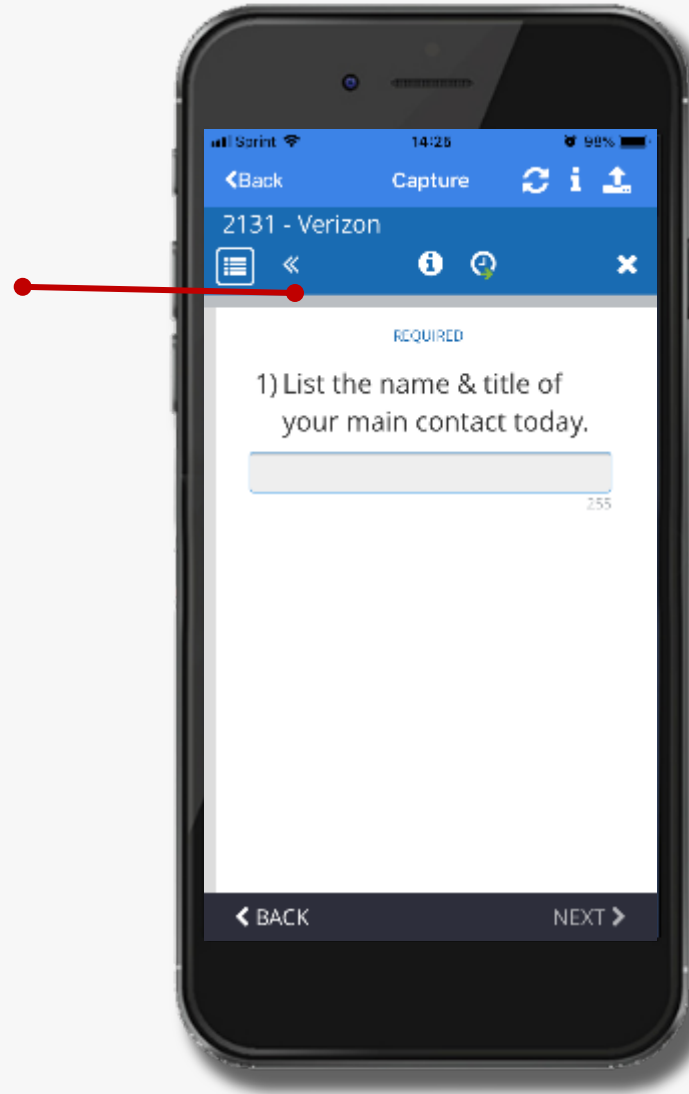




# Exit Survey

If you need to EXIT the survey to gather information, tap the Back icon in the blue bar.

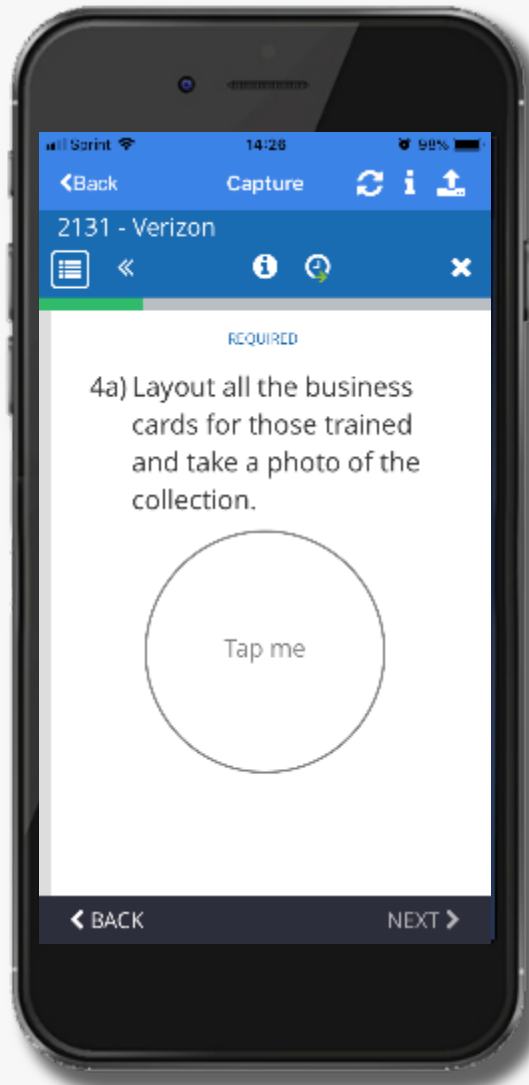
Your progress will be saved!



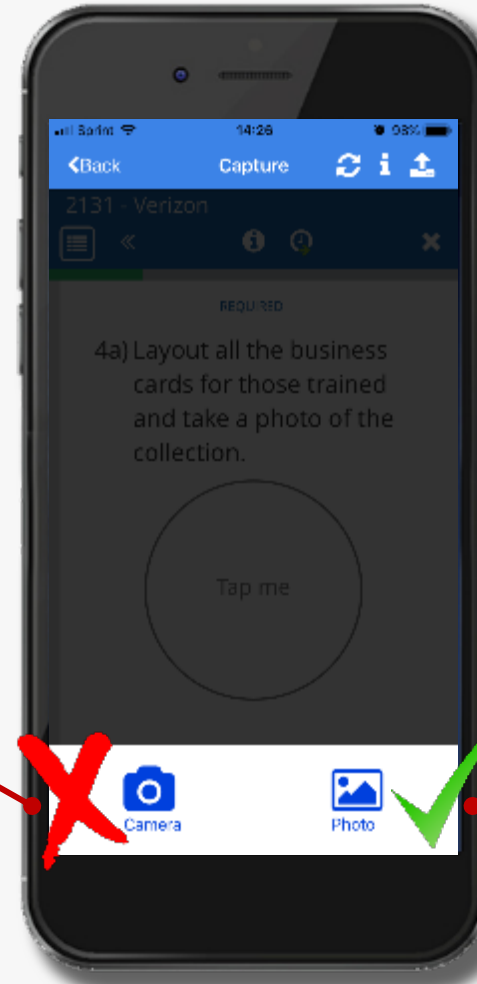
When you re-enter the survey, you can Start Over or Continue where you left off.



# Survey Photos



Some questions will require a photo. **DO NOT take the photo with the Survey's Camera.** It's possible to lose the photo if you leave the survey, or your phone screen turns off, when you submit.



Instead, exit the survey, take the photo with your phone's camera app so the image is in your phone's photo album, then attach to the Survey using the Survey's Photo option.

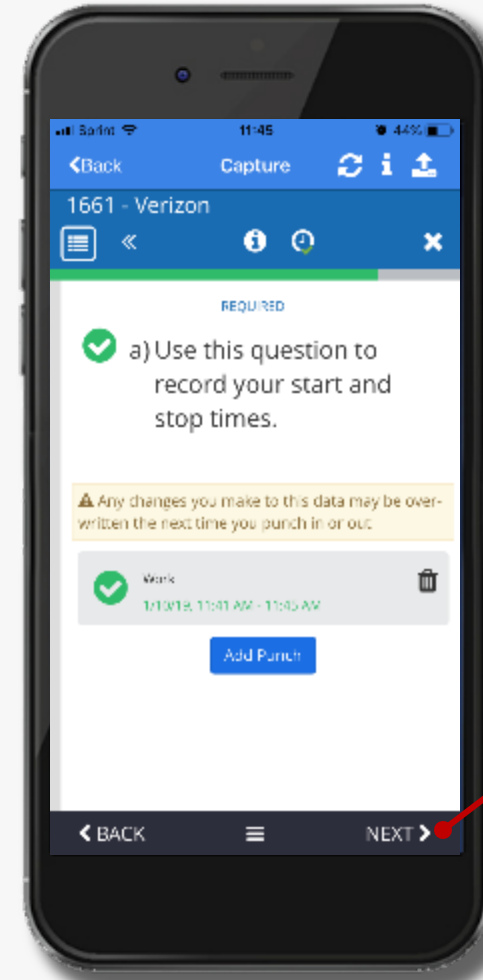
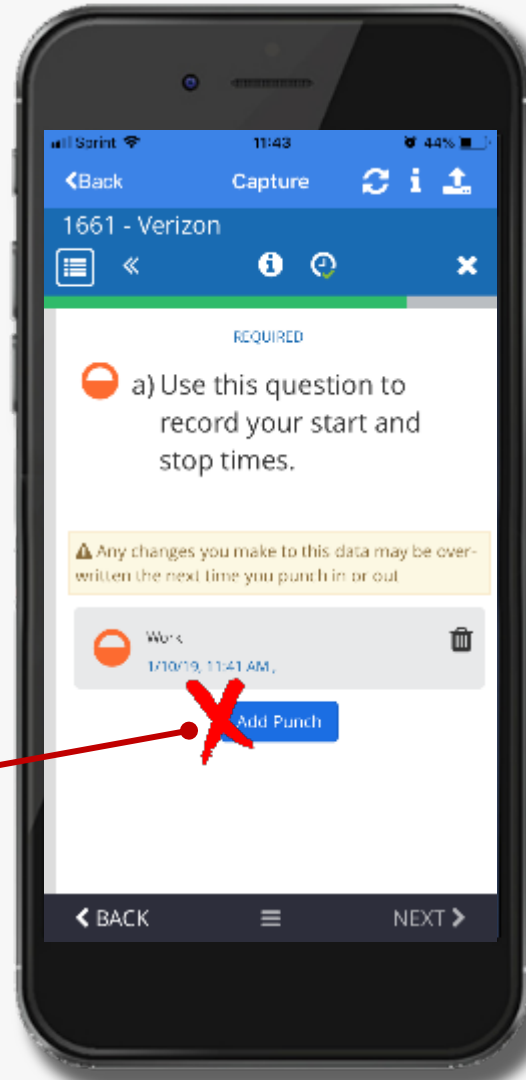


# Survey - Clock Out

The last question of the Survey is a time clock question. Clock-Out through the Survey, this ensures your time is tracked for filling out the Survey!



**DO NOT USE the Add Punch button.**



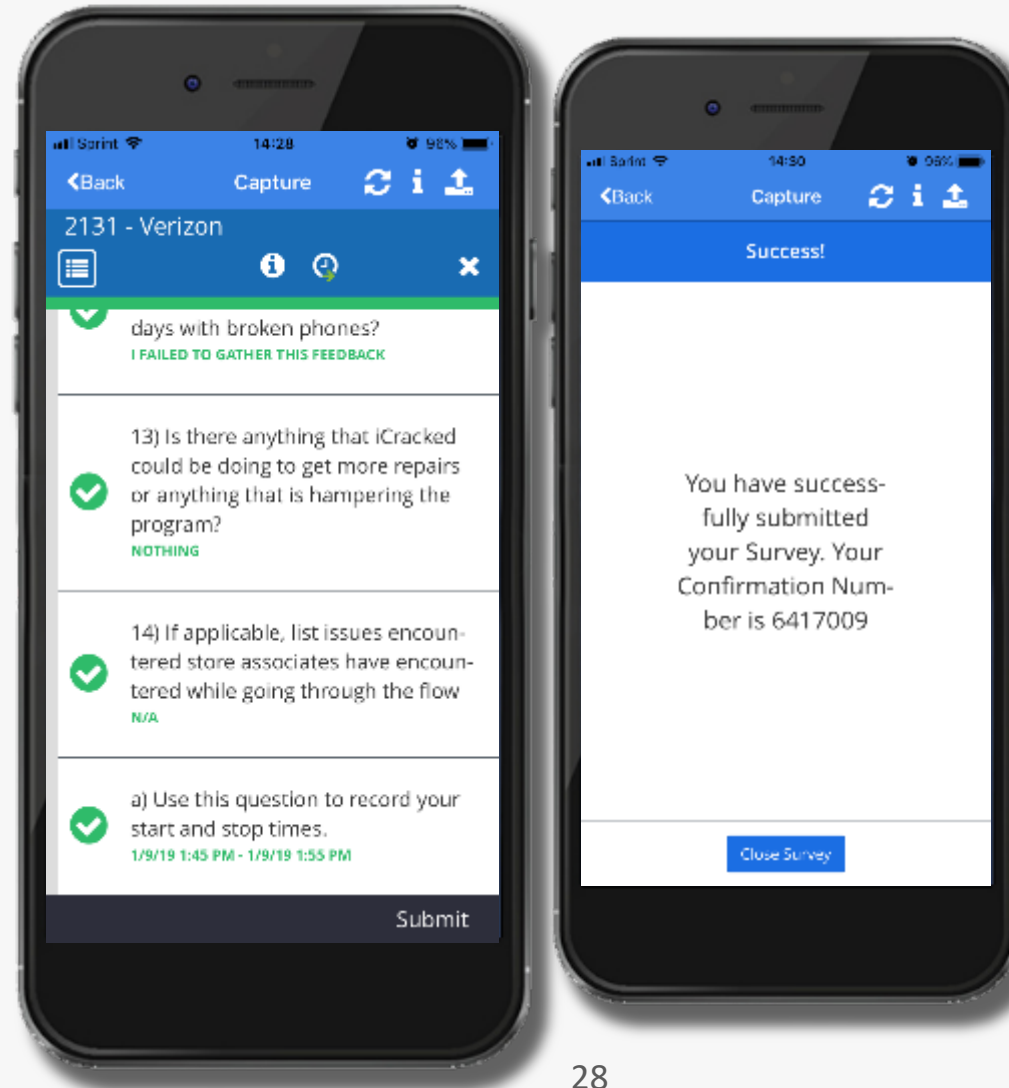
Once you have Clocked-Out, you can tap Next to review and submit your survey.



# Submitting Your Survey

Once all questions are answered you can review your responses before submitting.

If you need to edit any answers, tap on the question to return to that point in the survey.



Once you submit the survey, you'll be brought to a Success screen and given a Confirmation Number that the survey was successfully submitted.



# Report Errors to Your Manager

TAKE NOTE!



Always report any errors in your working time to your manager through Work Chat immediately.

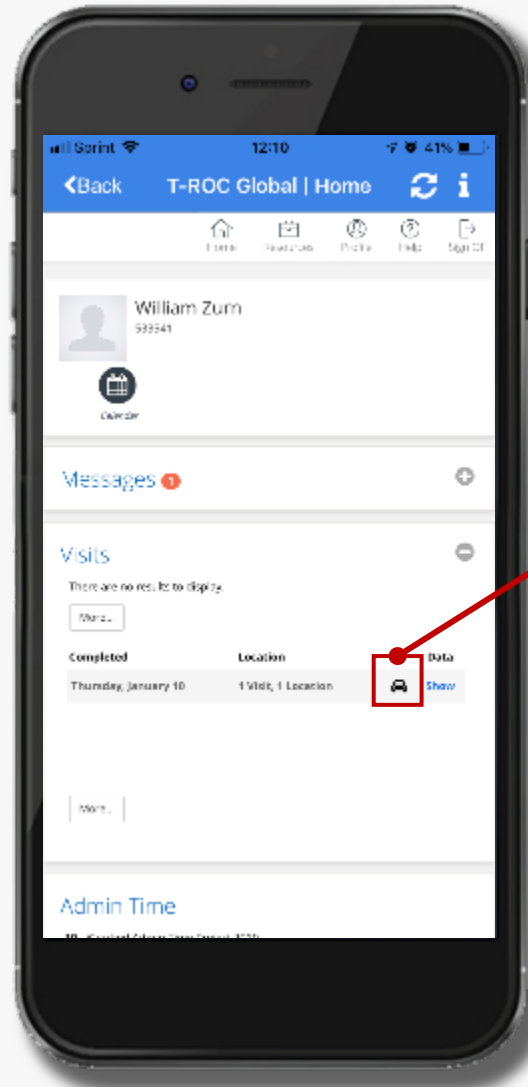


# Natural Insight Finishing Your Day

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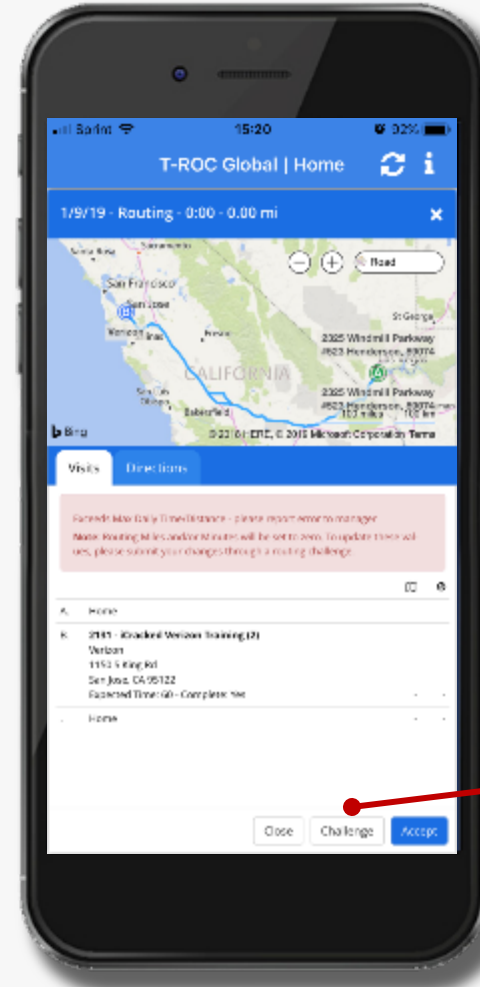


# Routing



After all surveys have been submitted for the day, you still need to Accept your Routing so you can be paid for your mileage and travel time.

Tap on the car icon to open Routing.

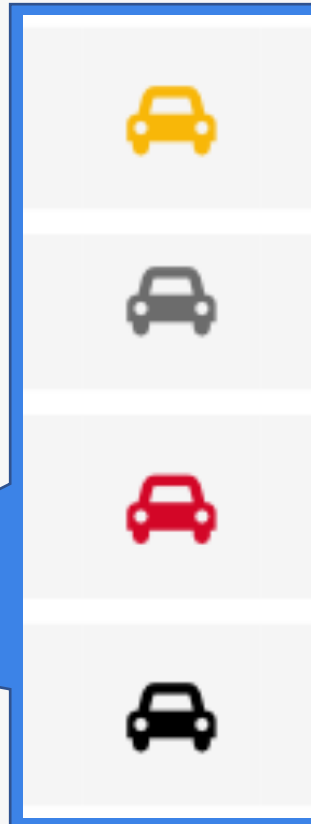
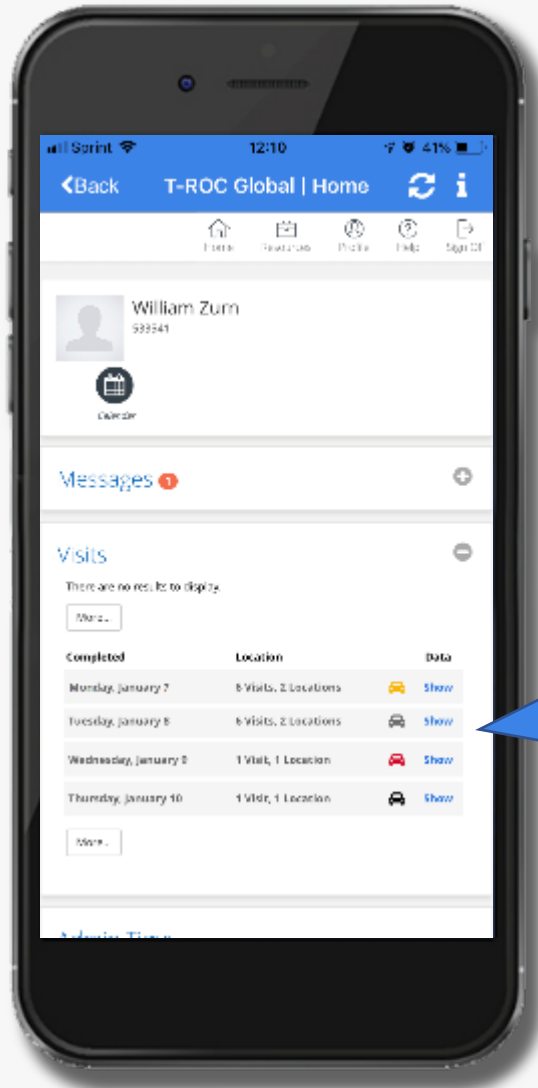


You can Accept or Challenge the route. Tap Accept to complete Routing.

If you think you might need to Challenge a route, speak with your Field Manager or District Manager.



# Routing Status



A **Yellow Car** is Challenged Routing waiting for Manager Review/Approval.

A **Gray Car** is Accepted Routing.

A **Red Car** is Past-Due Routing that that you need to Accept.

A **Black Car** is Today's Routing that you need to Accept.





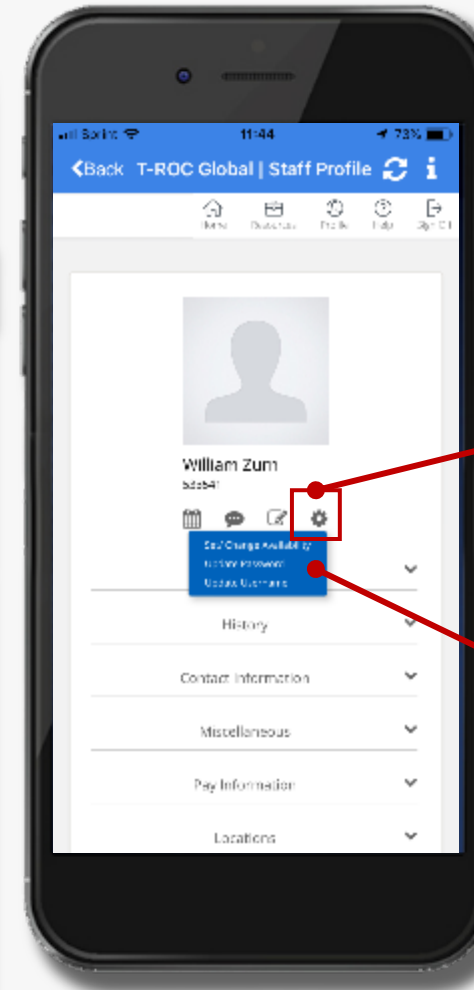
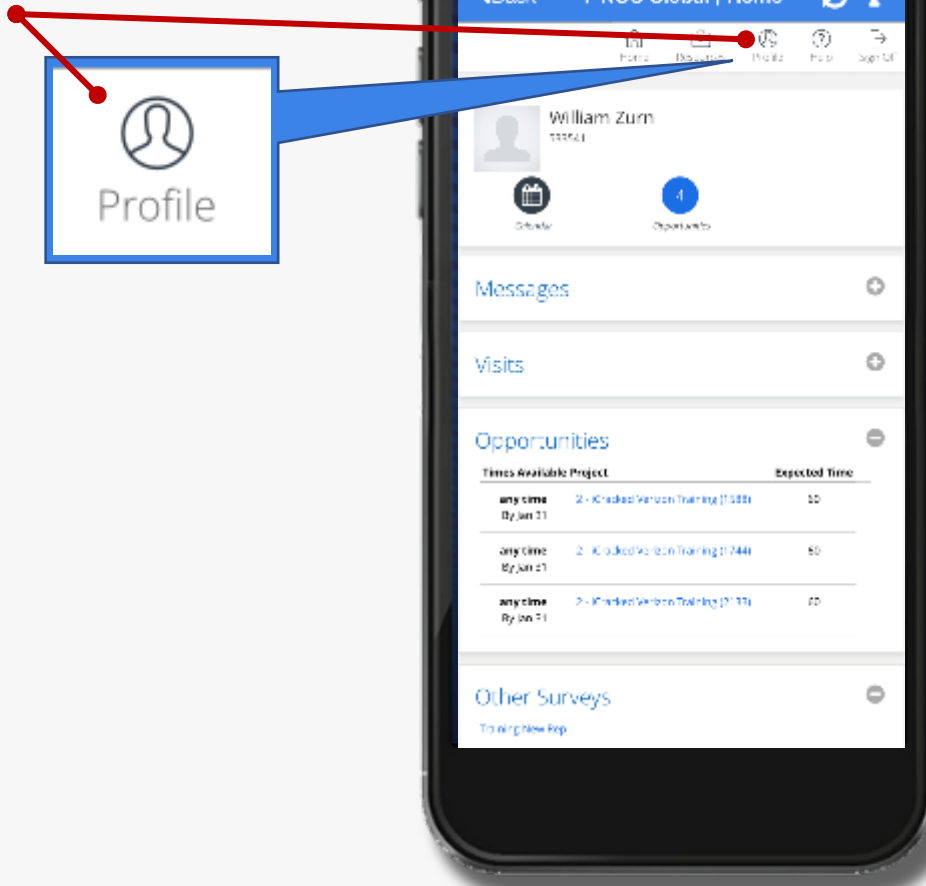
# Natural Insight Working Your Schedule

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# Change Your Password

Tap Profile.

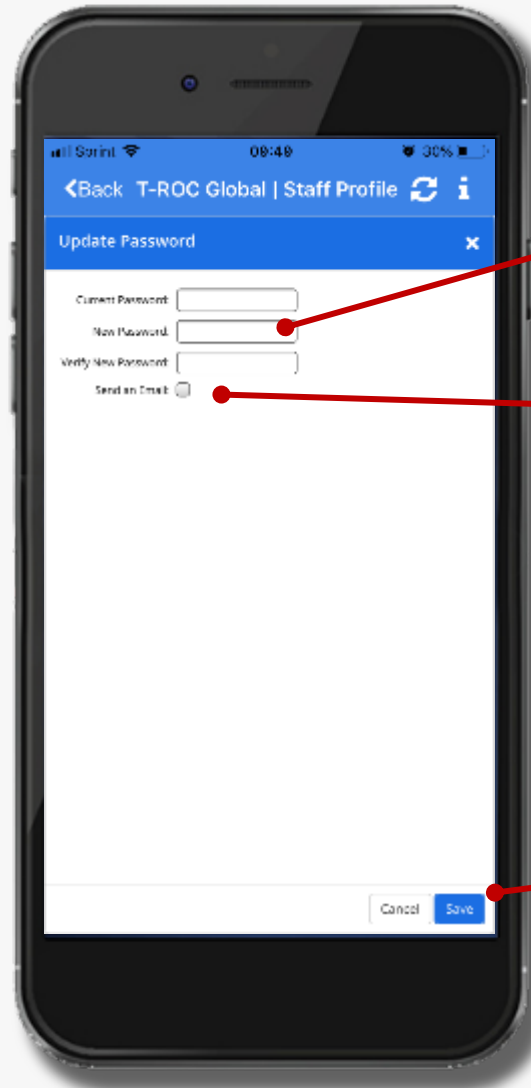


On your Profile Page, tap on the Gear Icon to access the blue dropdown menu.

Select Update/Change Password from the menu.



# New Password Continued



Enter your current password, then enter the new password you want, twice.

You can check the box to have an e-mail sent to you for your records.

Then Tap Save.



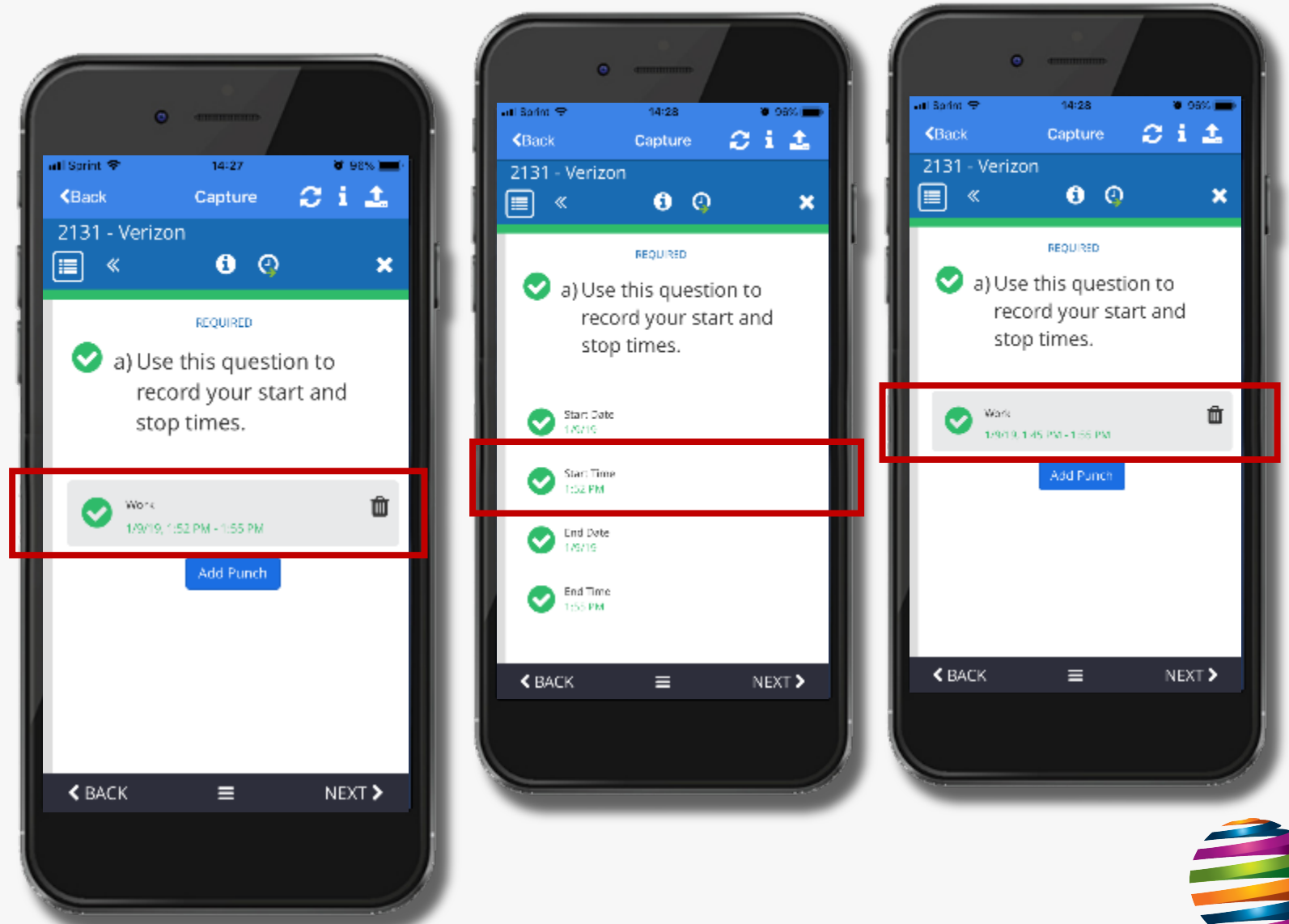
# Natural Insight Adjusting Punch-Times



# Editing a Punch

If you need to edit a punch-time, follow this process at the end of the survey.

1. Tap on the punch you want to edit.
2. Tap on the Start Date, Start Time, End Date, or End Time, and adjust as needed.
3. Once updated, tap Next until you return to the verification screen – with your new punch.



# Compensation



# WorkTrak by Natural Insights

## TAKE ACTION!

Download the WorkTrak by Natural Insights App (we refer to this as NI).



You must capture all compensable time and mileage into NI. Time/Mileage not captured correctly in NI cannot be compensated manually.



# Capturing Your Day



When you arrive to your first store:

1. Check into the visit/location.
2. Complete your assignment
3. Answer all questions in the visit survey.
4. Check out of the visit/location.

When you arrive to your next store:

1. Check into that visit/location.
2. Complete your assignment.
3. Answer all questions in the visit survey.
4. Check out of the visit/location.

When you have finished all visits for the day:

1. Click on the CAR icon in the VISITS section on your home page.
2. The app will figure what your drive time and mileage was based on where you went and in what order.
3. If the travel time/mileage that the app calculated is inaccurate, click on "challenge" and enter corrected time and/or mileage and a reason for the difference.





# Travel Time and Mileage

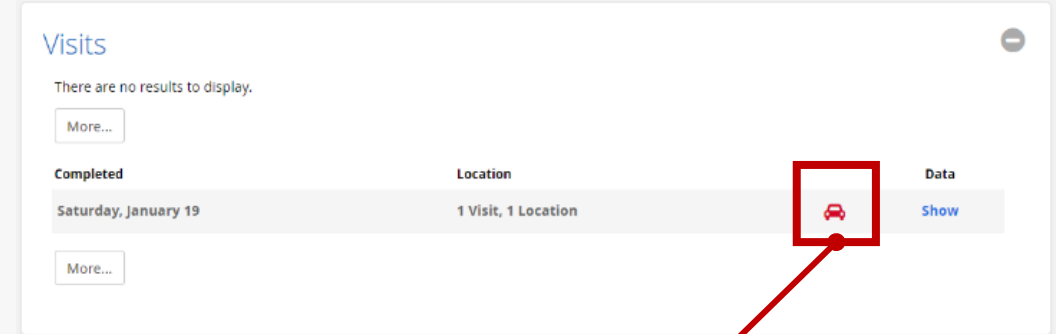
Travel time and mileage are only compensable IN BETWEEN stores you visit on behalf of FLEX-ROC clients UNLESS you travel more than 30 miles to your first store, or from your last store.

If you only visit ONE store for FLEX-ROC in a day, there will be **no** compensable mileage or travel time that day if that location was less than 30 miles away.

Travel time is usually reimbursed at a lower rate than your in-store time.

Refer to the Project Launch Form of each program you support for the specific hourly rate.

Mileage is reimbursed at \$0.485 per mile



At the end of your day click on this icon to see what your compensable travel time and mileage is.

Then choose Agree to accept or Challenge to correct.



# Reporting Travel Time

NOTE: You should endeavor to START and END at a location that is near your home so that uncompensated travel is minimized.

TAKE NOTE!




HOWEVER, if we ask you to visit a store that is more than 30 miles one-way from your home, and there is no other assignment on the way that will break up that travel for you, we will reimburse you for any travel time and mileage over 30 miles/30 minutes each way for that visit.

THERE IS NOTHING YOU NEED TO DO to report this. NI will automatically figure your mileage starting at 30 miles from your home and travel time 30 minutes from your home.



# Mileage Examples



**Reminder:** You do not need to do anything special in NI to get compensated for mileage over 30 miles from your home, and travel time over 30 minutes from your home. When you click on the  icon at the end of the day, NI will figure this for you.



# Admin Time

Administrative time is any time you complete outside of a store on behalf of FLEX-ROC and/or one of its clients.

## Examples of Admin Time Activities

Reading and answering FLEX-ROC communications, such as email, voicemail, Workchat

Time on the phone with your manager

Scheduling your visits in NI

Submitting expenses to your manager or in Concur

Writing and submitting your weekly recap

Conference calls

Required self-training or formal training

**This is not a complete list – other activities may also be considered admin time.**

## Admin Time

5 - T-ROC Global Admin Time Project 2019

T-ROC Global-Report Admin Time

12/24/2018 - 12/31/2019

16 - Jennifer Adams Admin Time Project 2019

Jennifer Adams Admin Time

01/16/2019 - 12/31/2019

Choose the appropriate client that the administrative time relates to.

Then you'll answer questions about what admin time you performed and enter your compensable time.



# Finish Getting Set Up

TAKE ACTION!



1. Once you have completed reviewing this document, and performing all of the tasks, please log into NI and report your time for this self-training.
  - NOTE: there is a separate training module (which you will receive from RISE Learning through Workchat) on how to use NI.
2. Use the TROC Global Report-Admin Time survey.




# Now let's get started and call your manager for work!

## Need Support?

Penny G. and Chi T. are your  
Support Desk Coordinators.

 (833) FLEX-ROC (3539-762)

 [Help.Flex@trocglobal.com](mailto:Help.Flex@trocglobal.com)

 [FlexROCconnect.com](http://FlexROCconnect.com) – T-ROC Assist & Ticket  
System

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