USER DOCUMENTATION

End User Manual

1. Setting up Twiga CRM

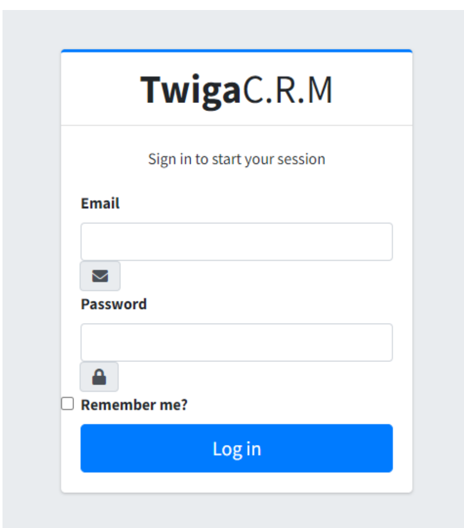
It couldn't be easier to get started with Twiga CRM.

All you need to set up your Twiga CRM is to enter a User Email and password

To set up your Twiga CRM:

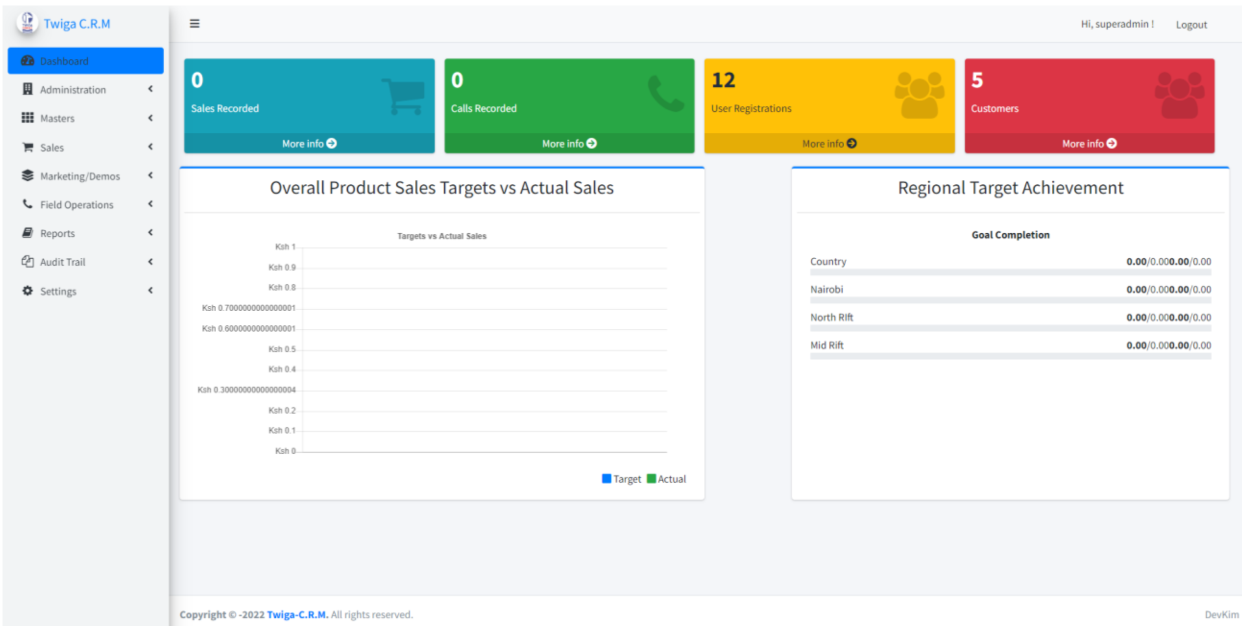
1.1 Go to: crm.twigachemicals.com

1.2 Enter your Twiga CRM Email and password, then click Log in:



2. Using the Dashboard

When you sign in to Twiga CRM, the Dashboard is always displayed first and provides a useful overview of CRM data.

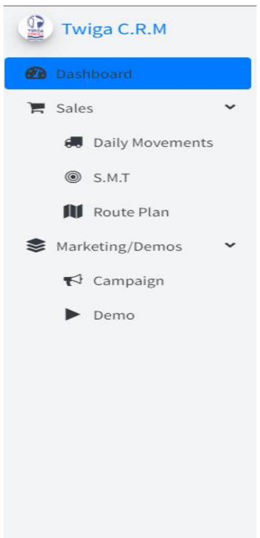


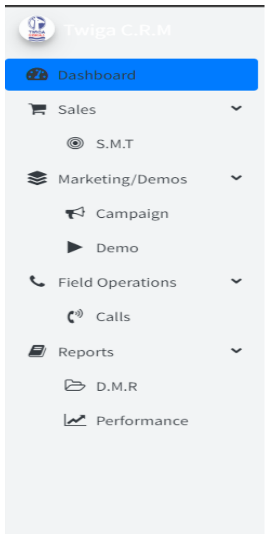
The Dashboard provides the following information:

- Info Cards
  - Sales Recorded – the total number of sales movement recorded and submitted by TMs.
  - Calls Recorded – the total number of calls recorded and submitted in the system.
  - User Registrations – the total number of registered users in the System.
  - Customers – the total number of customers in the System.
- Charts
  - Overall Product Sales Targets Vs Actual Sales - the Total Target vs the Actual Sales of the top 10 products for that month.
  - Regional Target Achievement – the percentage of target sales achieved per region.

3. Using the Navigation Bar

The navigation bar lets you move between the different areas of Twiga CRM.





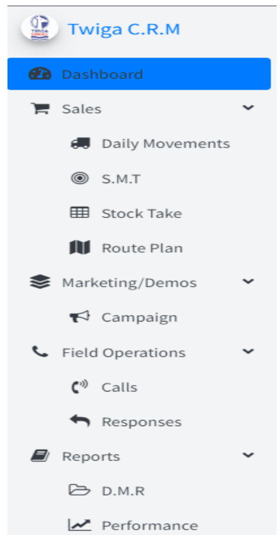
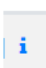
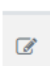


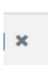
Figure 1: H.R.B Navigation Bar

Figure 2: F.O.A Navigation Bar

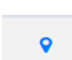
Figure 3: T.M / S.S.P Navigation Bar

 this is the view details page icon.

 this is the view edit page icon.

 this is the remove item icon.

 this is the approve item icon.

 this is the pin location icon.

 this is the view pinned location icon.

The toolbar contains links to the following areas:

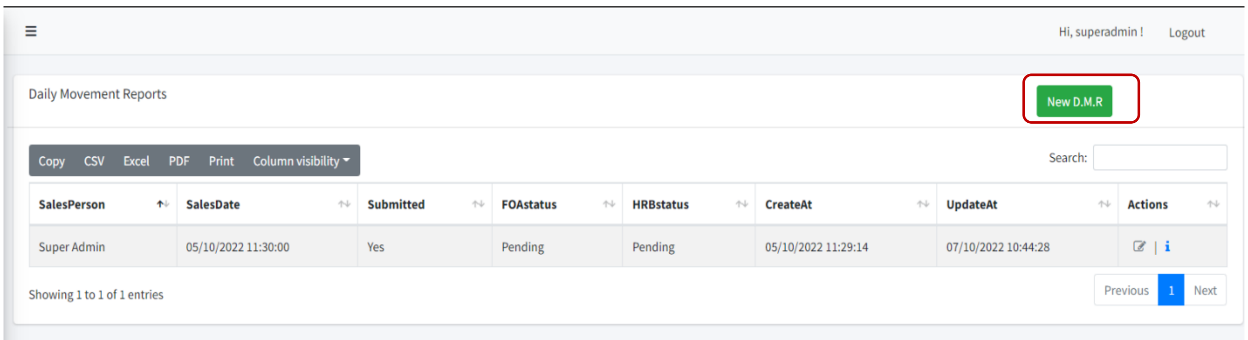
- Dashboard – For An overview of CRM Data.
- Sales -
  - DailyMovement – For recording, viewing and approving the Product Moved on a Daily.
  - S.M.T (Sales Movement Target) – For recording, viewing and approving Sales Target Assigned to T.M(s) and S.S.P(s).
  - Stock Take – For recording, viewing Stocks of Main Distributors.
  - Route Plan – For recording, viewing, approving the Route Plans of T.M(s) and pinning the location visited.
- Marketing/Demos –
  - Campaign – For applying, viewing and approving Marketing Campaigns.
  - Demo – For applying, viewing and approving Demos.
- Field Operations –
  - Calls – For recording, viewing and closing calls .
  - Responses – For viewing responses to questions asked during a call.
- Reports –
  - D.M.R – For viewing and approving submitted Daily Movements .
  - Performance – For generating Monthly and Weekly Performance Reports.

4. Sales

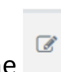
4.1 Daily Movement

This is where T.M(s) and S.S.P(s) will record their product movements of the day.

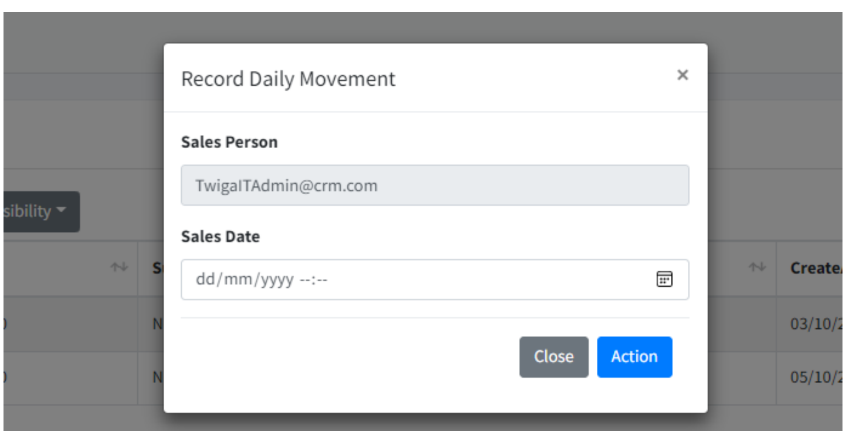
When you expand Sales on the Navigation bar and click on Daily Movements, the page with all the current user's daily movement reports is displayed.



The table contains some information about previously created Daily Movement Reports.

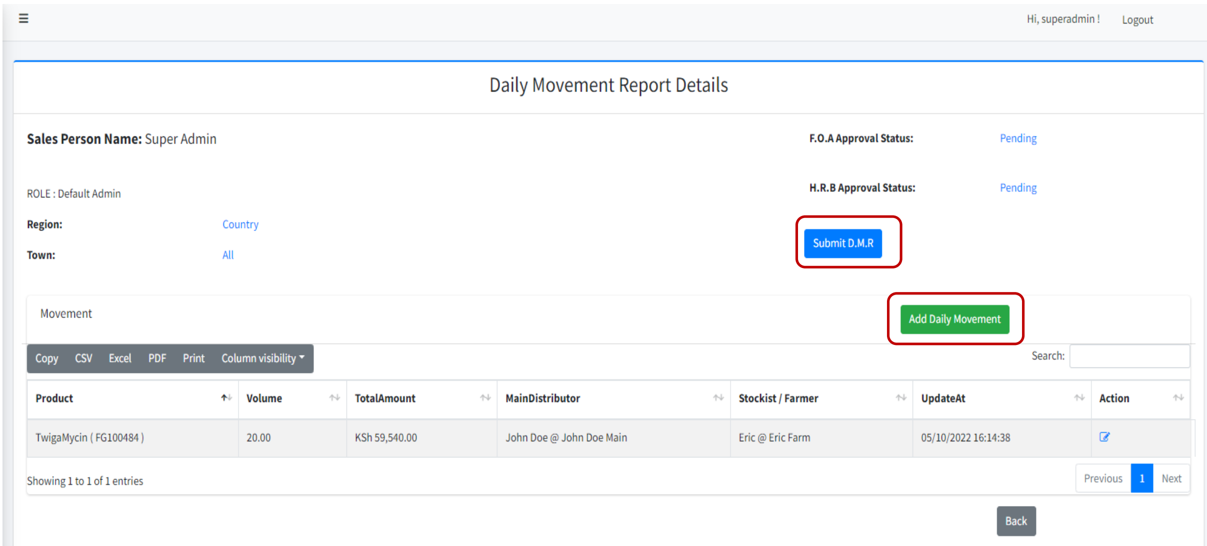
To view more information about these daily movement reports, click the  icon / details icon to show the daily movement report details page. To edit the daily movement, click the  icon / edit icon to show the daily movement report edit page.

To create a new Daily Movement Report, click on the button ***new DMR.***

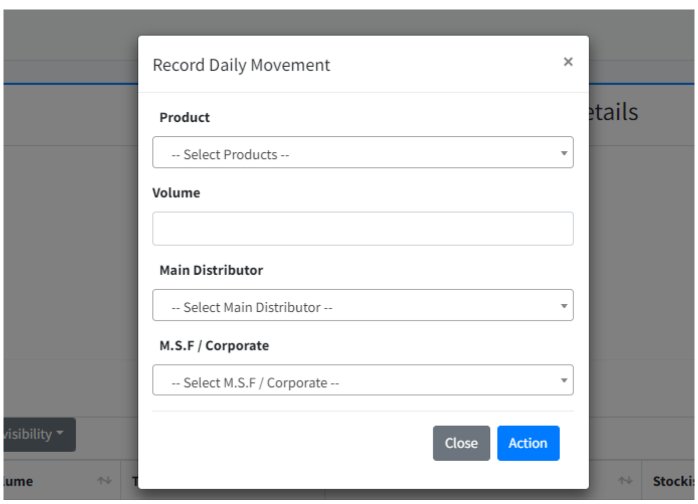


The pop up above will show. There is an input section for the date&time. This is the date&time when the product movement was done.

Click Action to create new DMR and take you to the daily movements report details page.



To add the product moved click the ***<u>Add Daily Movement</u>*** button, this will display this pop up:



In this page, the ***<u>Submit D.M.R</u>*** button will submit the Daily Movement Report for approval and processing.

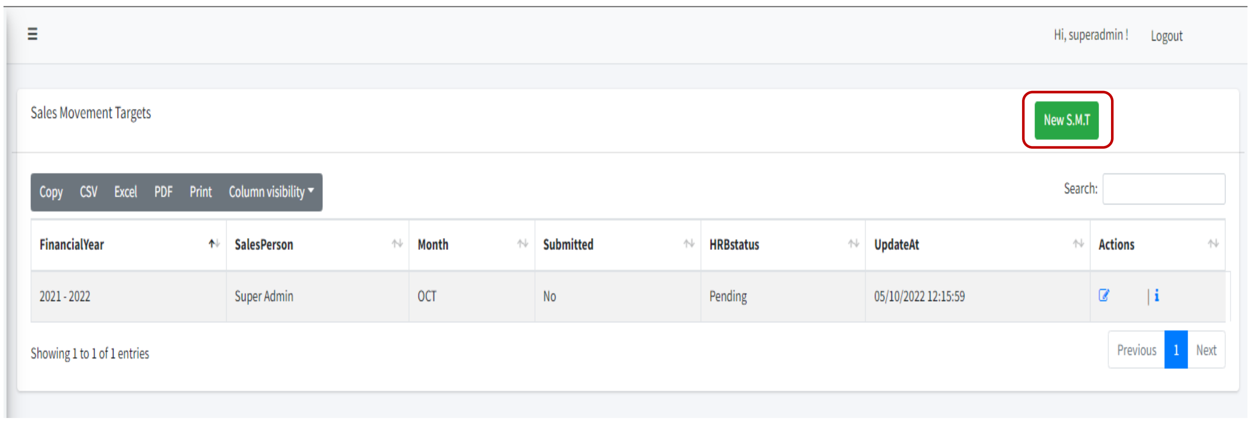
Once submitted the D.M.R cannot be edited via the edit button unless rejected during the approval process.

4.2 S.M.T (Sales Movement Target)

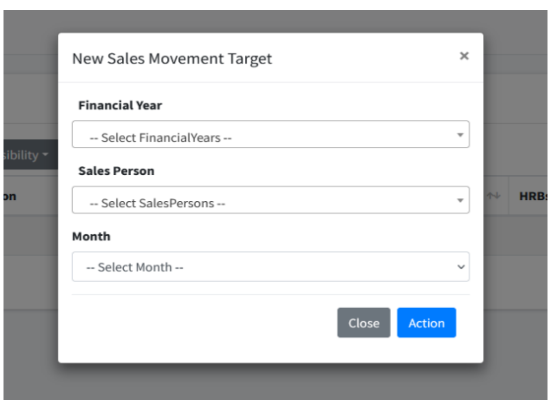
This is where T.M(s) and S.S.P(s) will view Targets assigned to them by F.O.A and approved by H.R.B.

And where the F.O.A will create the Sales Movement Targets for each T.M and S.S.P.

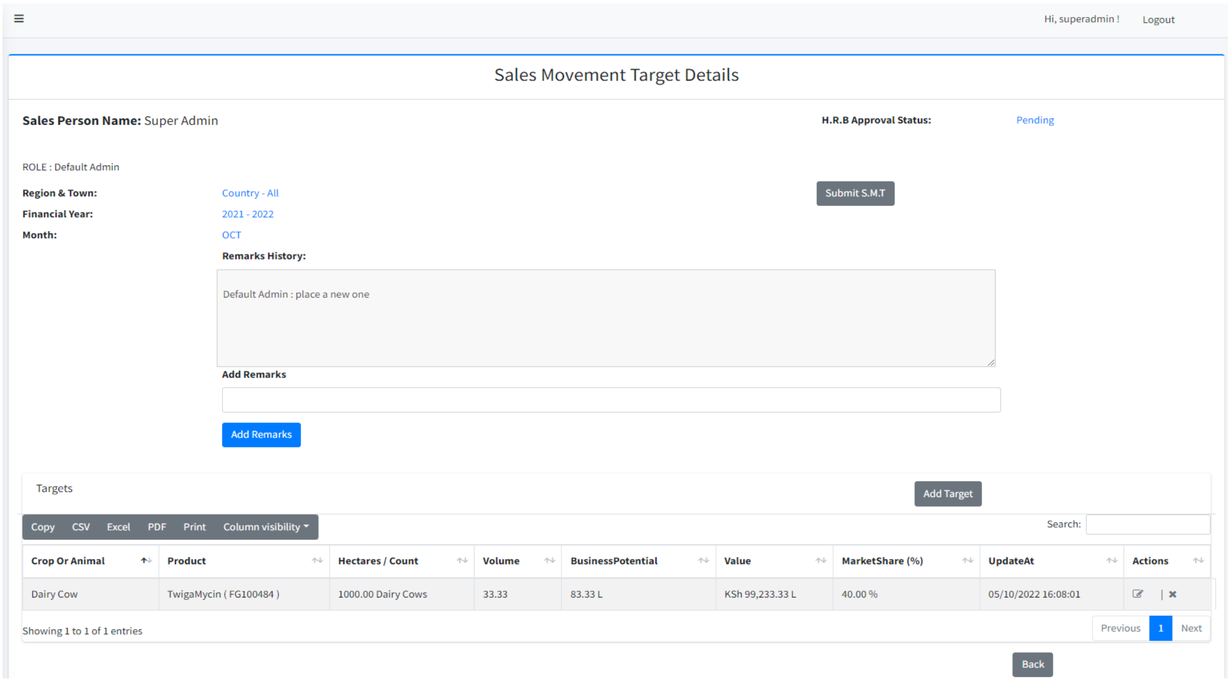
When you expand Sales on the Navigation bar and click on S.M.T, the page with all the sales movement targets is displayed.



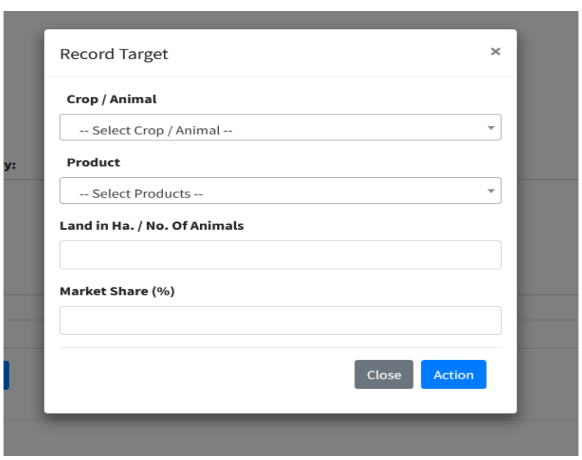
To create a new Sales Movement Target, click on the button ***new SMT.***



The pop up above will show. Fill the form and click Action to create a new and take you to the sales movement target details page.



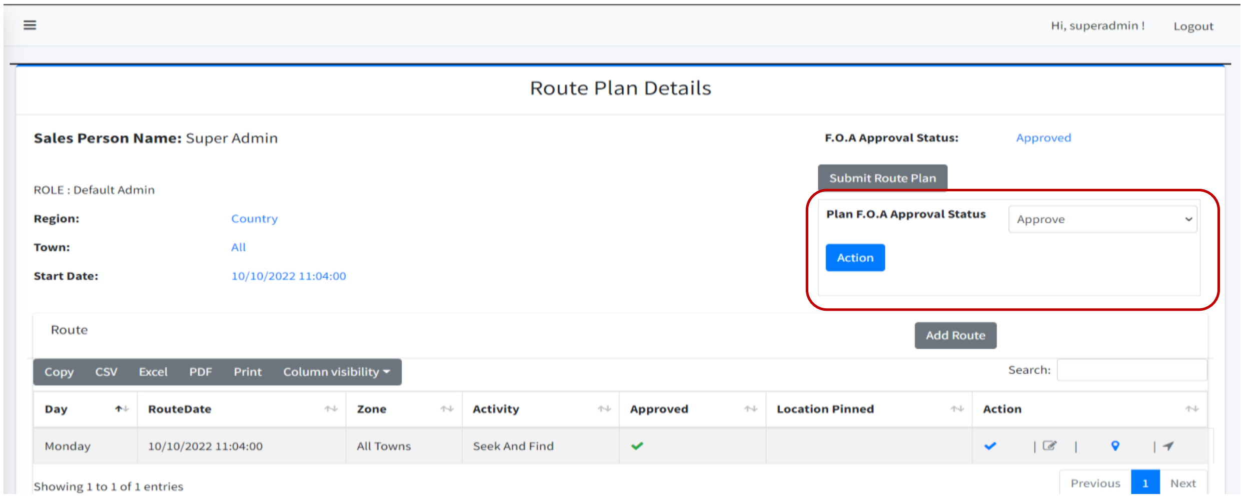
To add the targets, click the ***<u>Add Target</u>*** button, this will display this pop up:



In this page, the ***<u>Submit D.M.R</u>*** button will submit the Sales Movement Target for approval and processing.

Once submitted the S.M.T cannot be edited via the edit button unless rejected during the approval process.

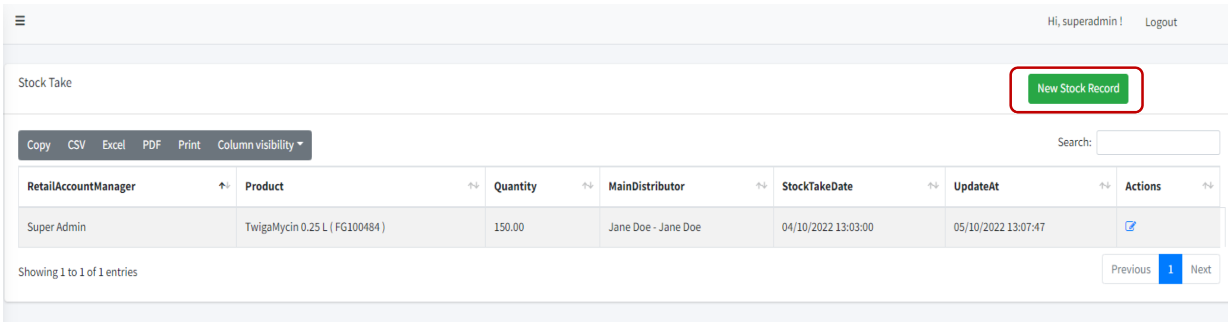
Once Submitted, Approve S.M.T Area will be displayed only visible by H.R.B as illustrated below:



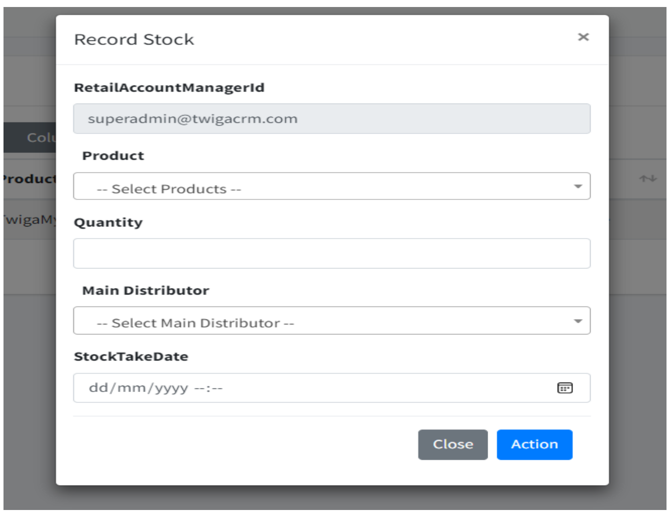
4.3 Stock Take

This is where Product Stocks from Main Distributor site will be recorded.

When you expand Sales on the Navigation bar and click on Stock Take, the page with all the stock records is displayed.



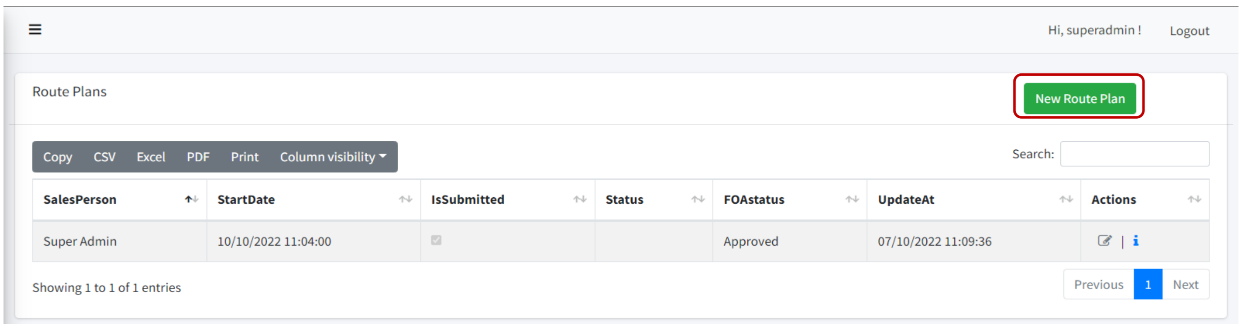
To create a new Daily Movement Report, click on the button ***<u>new Stock Record.</u>***



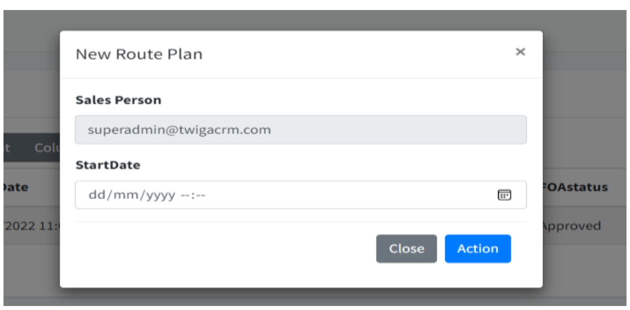
4.4 Route Plan

When you expand Sales on the Navigation bar and click on Route Plan, the page all route plans is displayed.

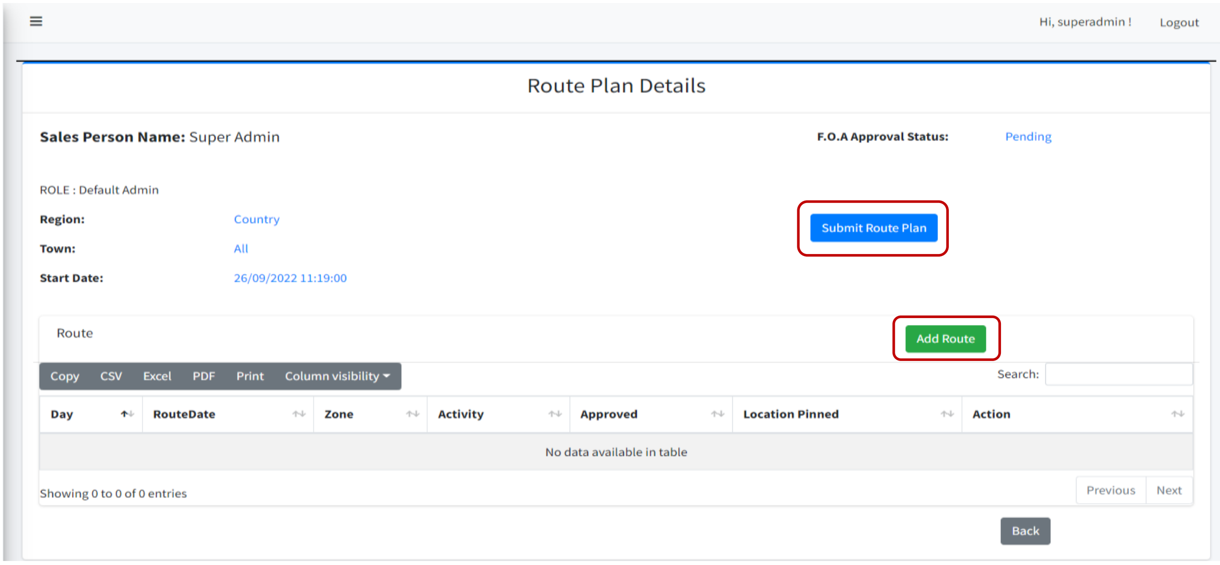
This is where T.M(s) and S.S.P(s) set their Route Plans and the F.O.A approves the route plans.



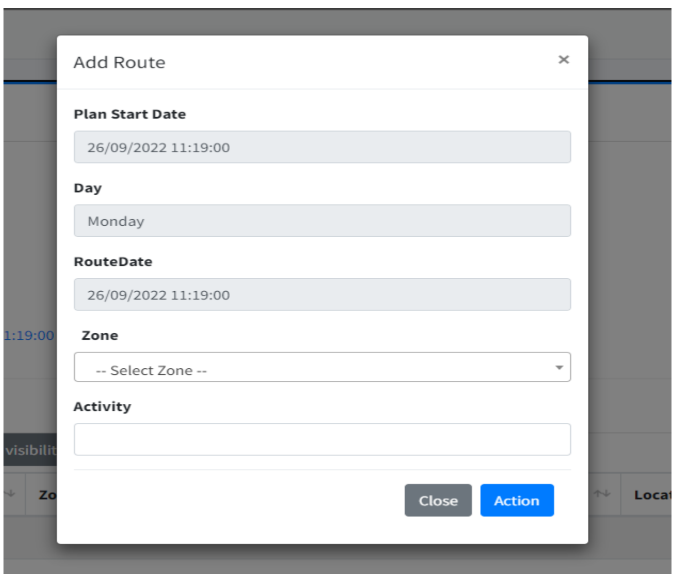
To create a new Route Plan, click on the button ***<u>new Route Plan.</u>***



The pop up above will show. Fill the form and click Action to create a new and take you to the Route Plan details page.



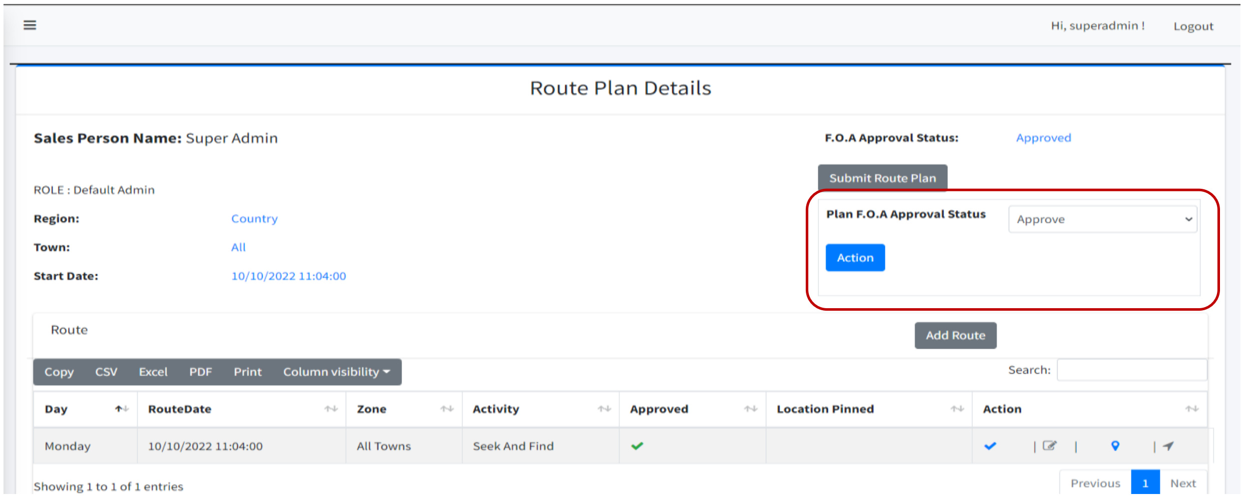
To add the targets, click the ***<u>Add Route</u>*** button, this will display this pop up:



In this page, the ***<u>Submit Route Plan</u>*** button will submit the Route Plan for approval and processing.

Once submitted, the Route Plan cannot be edited via the edit button unless rejected during the approval process.

Once Submitted, Approve Route Plan Area will be displayed only visible by F.O.A as illustrated below:

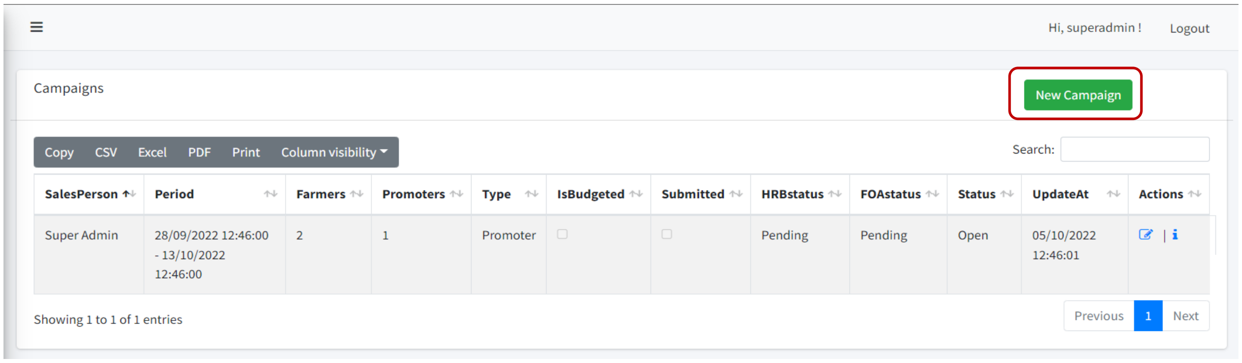


5. Marketing/Demos

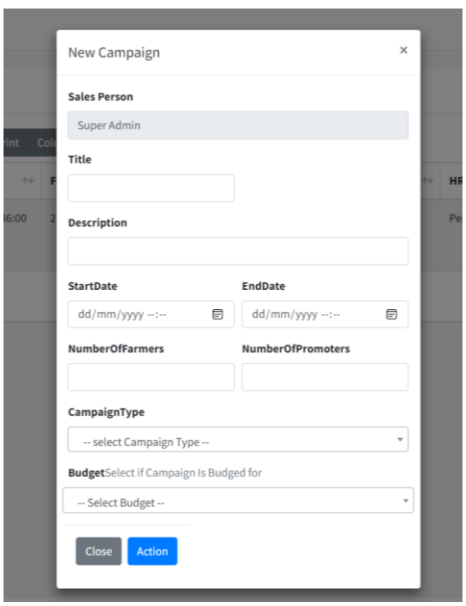
5.1 Campaign

This is where T.M(s) and S.S.P(s) will view and request for Campaign.

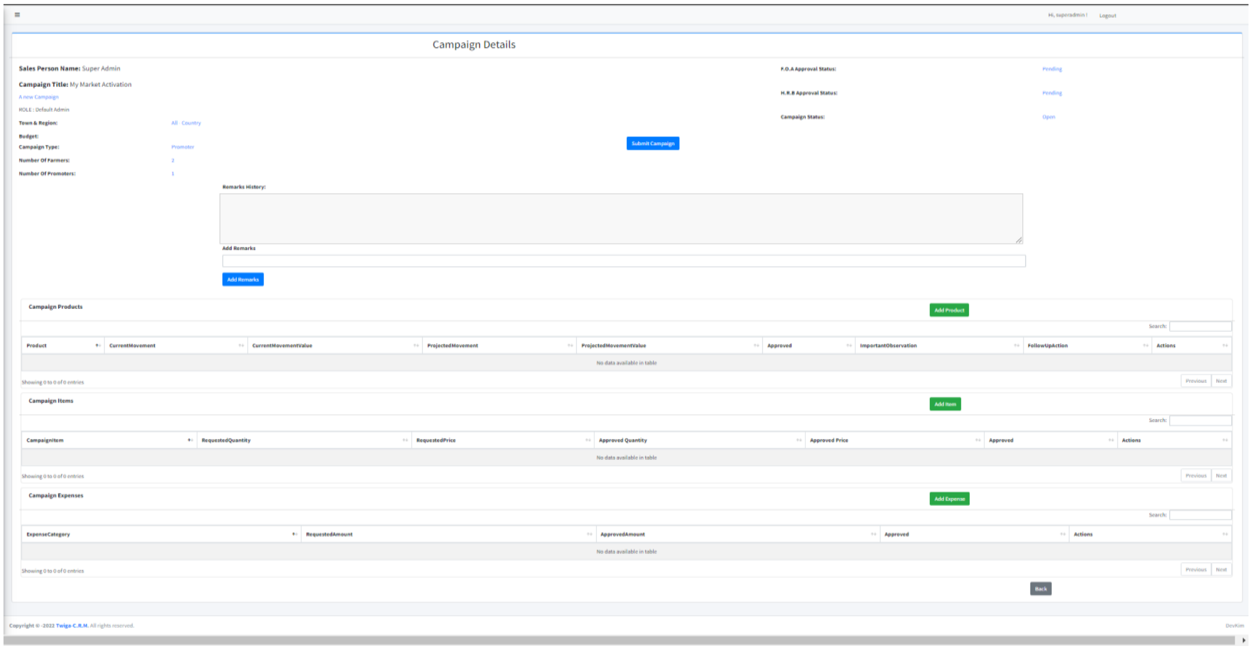
When you expand Marketing/Demos on the Navigation bar and click on Campaign, the page with all the campaigns is displayed.

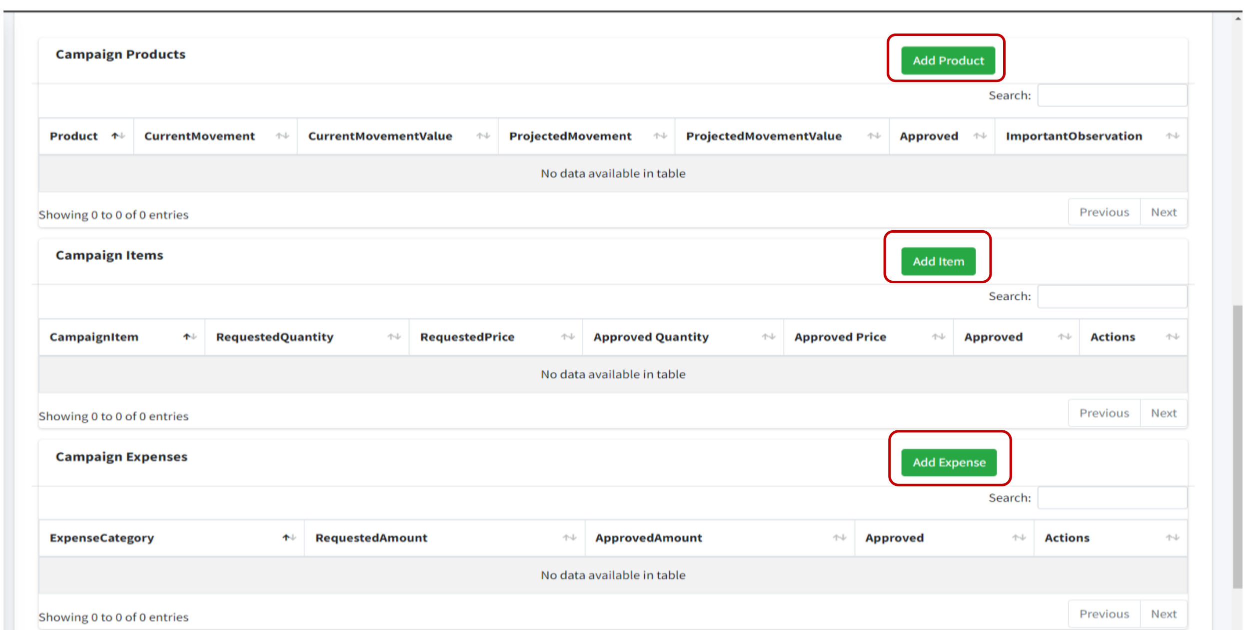


To create a new Campaign, click on the button ***new Campaign.***



The pop up above will show. Fill the form and click Action to create a new and take you to the campaign details page.

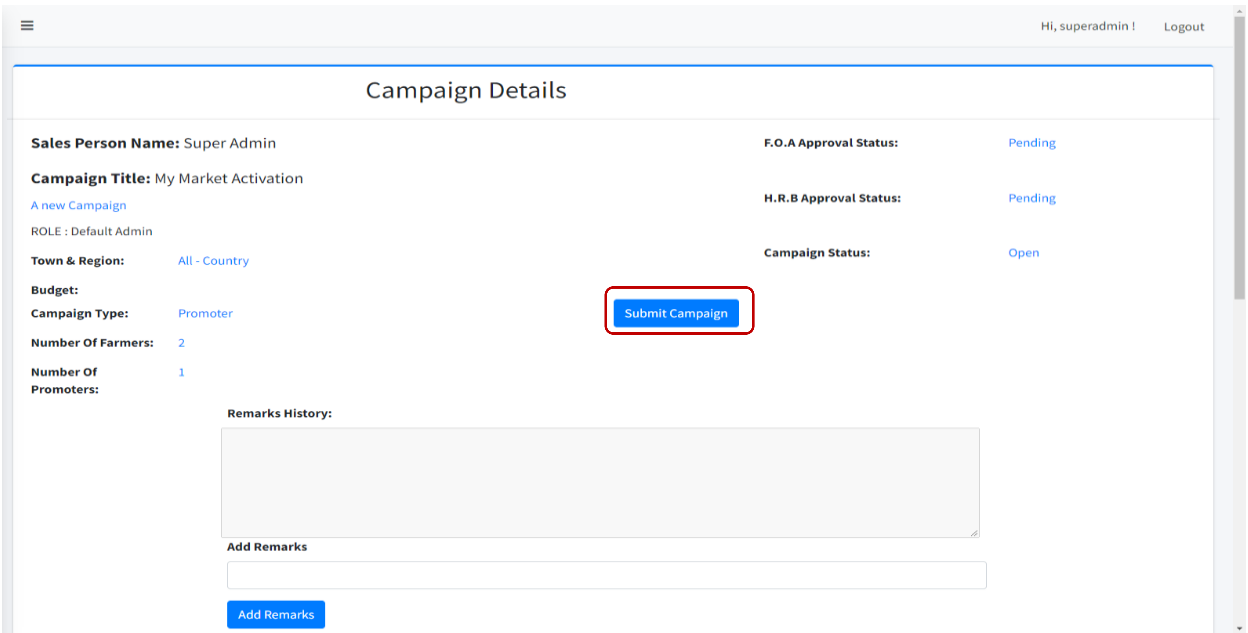




To add products requested for campaign click the ***Add Product*** button, this will display a pop up with a form to add product, current movement and projected Movement.

To add Items requested for campaign click the ***<u>Add Item</u>*** button, this will display a pop up with a form to add item and requested quantity of the item.

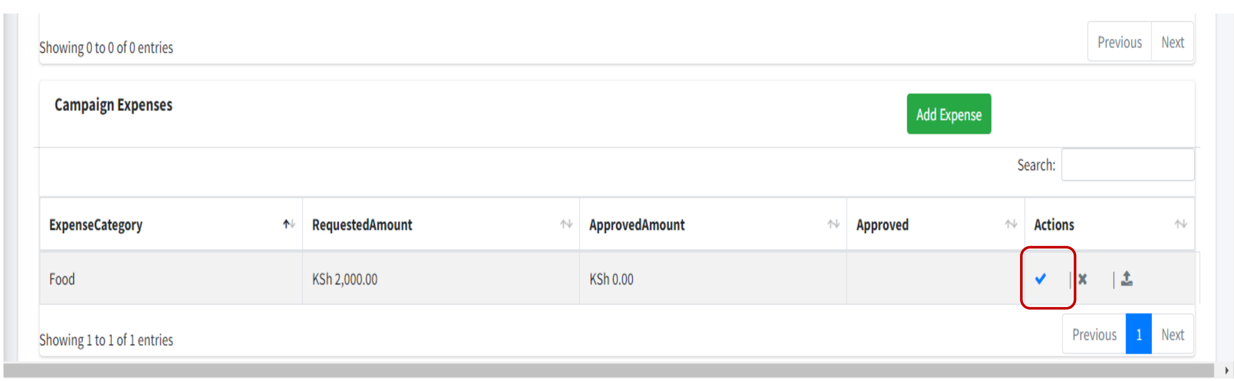
To add Expenses requested for campaign click the ***<u>Add Expense</u>*** button, this will display a pop up with a form to add Expense Category and Requested Amount.



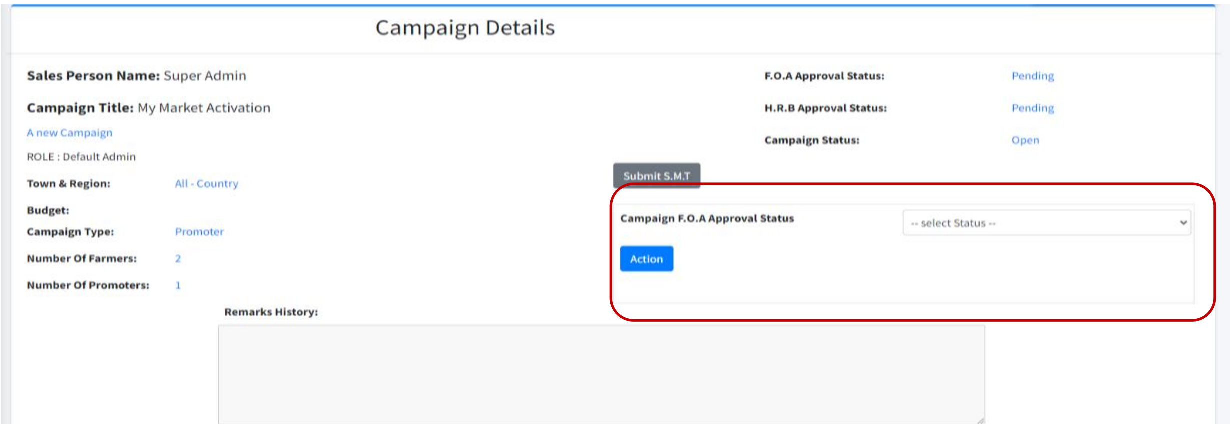
In this page, the ***<u>Submit Campaign</u>*** button will submit the Campaign for approval and processing.

Once submitted the Campaign Details cannot be edited via the edit button unless rejected during the approval process.

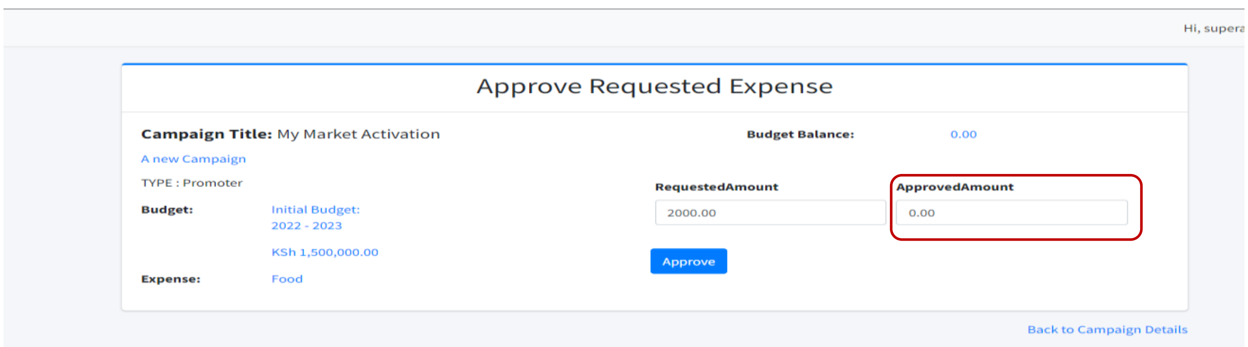
Once Submitted, Each Item, Product and Expense have to be approved before approving the whole campaign. The individual approval will look something like this:



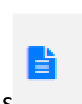
Once Submitted, Approve Campaign Area will be displayed only visible by F.O.A and H.R.B as illustrated below:



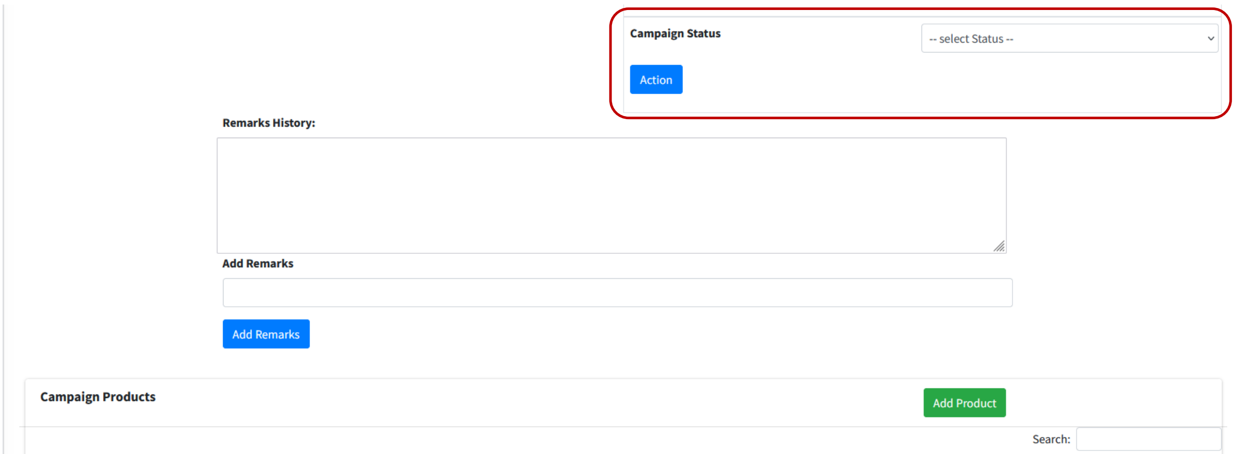
Approval of Expense and Campaign Items will require filling the form provided with approved values as illustrated below:



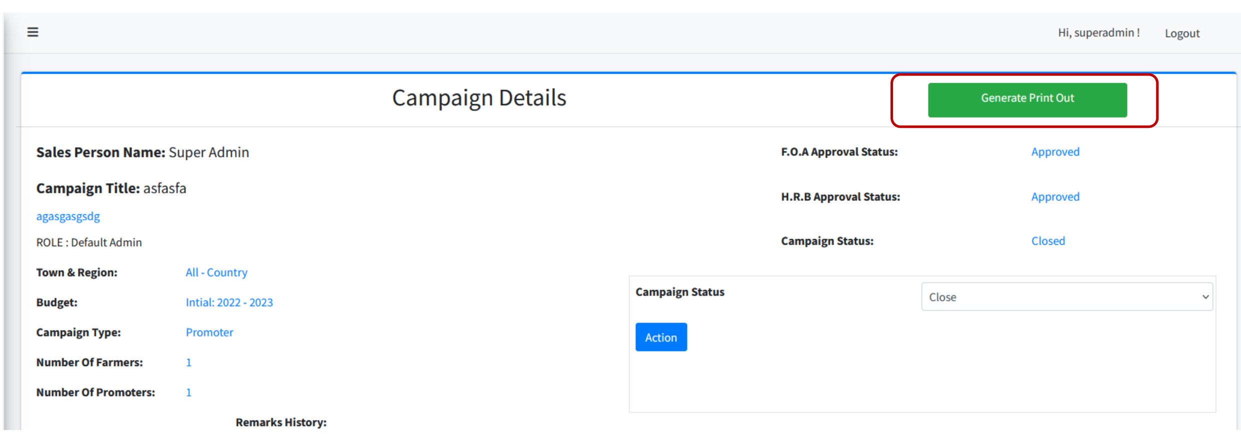
Before the Campaign can be closed, the T.M/S.S.P must fill the report to show the actual movement after the campaign, important observations and follow up actions.

To do this find this  icon on the row of requested products and fill the form accordingly.

To close the Demo, the T.M / S.S.P must have indicated the Actual Movement After the Campaign, the important observation and the follow up action to show the close Campaign area as illustrated below:



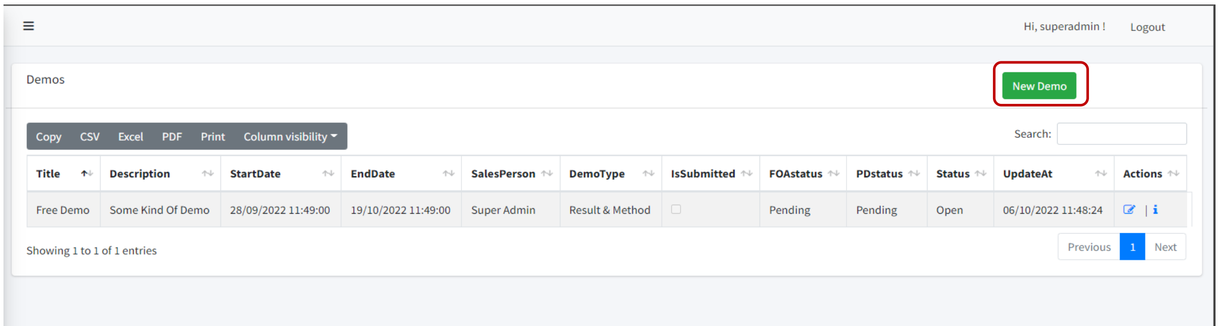
Once the Campaign has been close, the Campaign Print Out can be generated and printed using the button highlighted below:



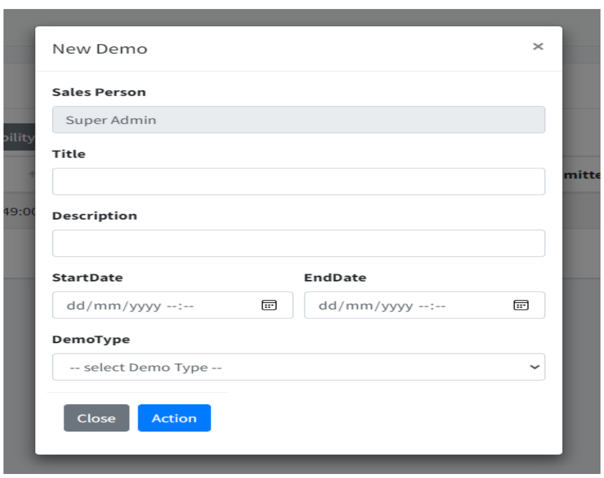
5.2 Demo

This is where T.M(s) and S.S.P(s) will view and request for Campaign.

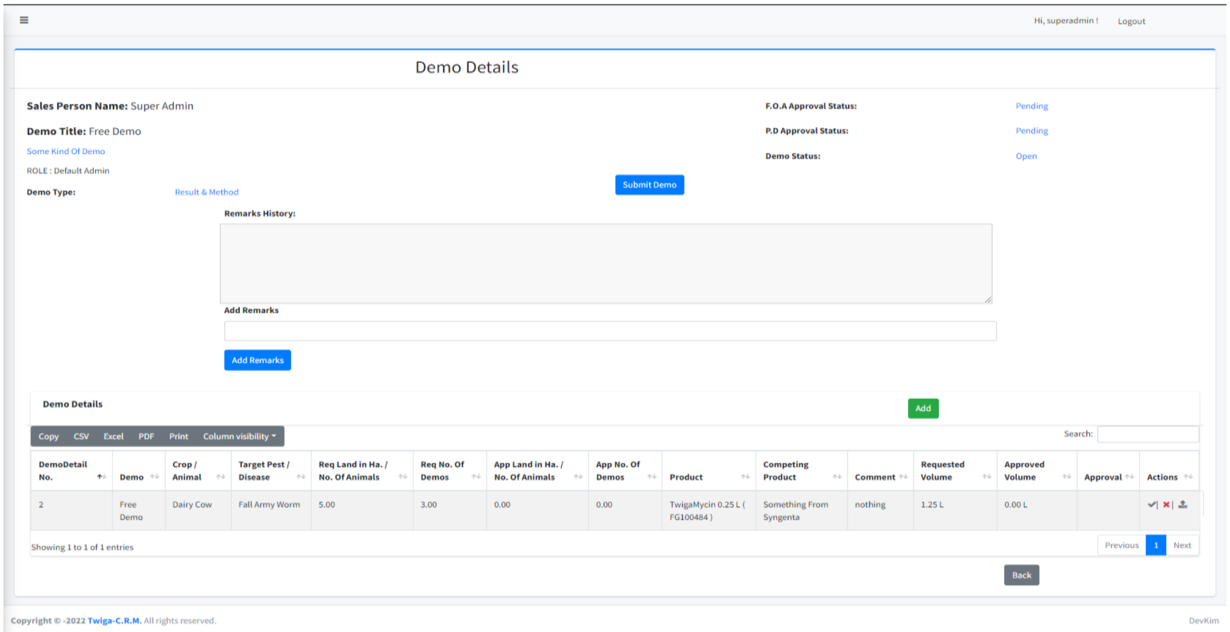
When you expand Marketing/Demos on the Navigation bar and click on Demo, the page with all the demos is displayed.



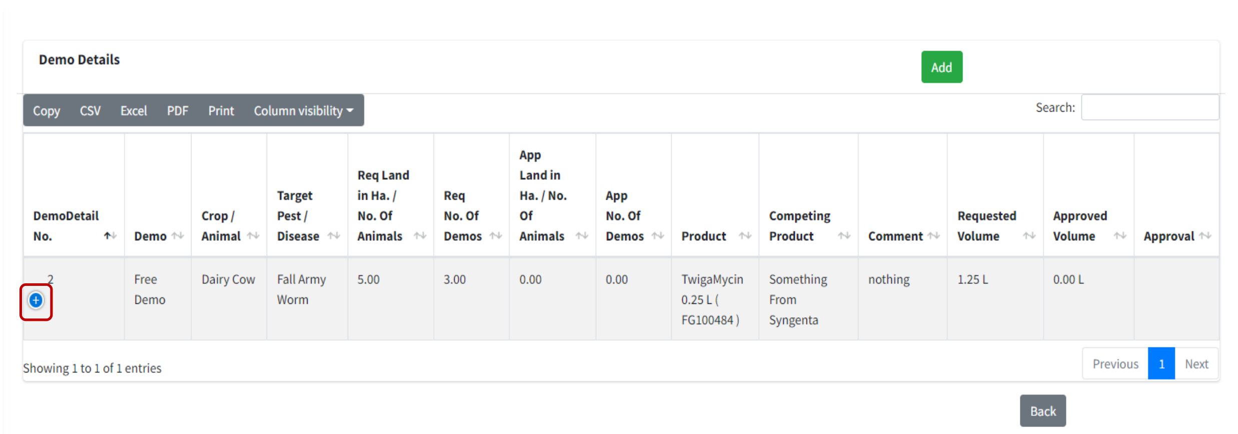
To create a new Demo, click on the button ***new Demo.***



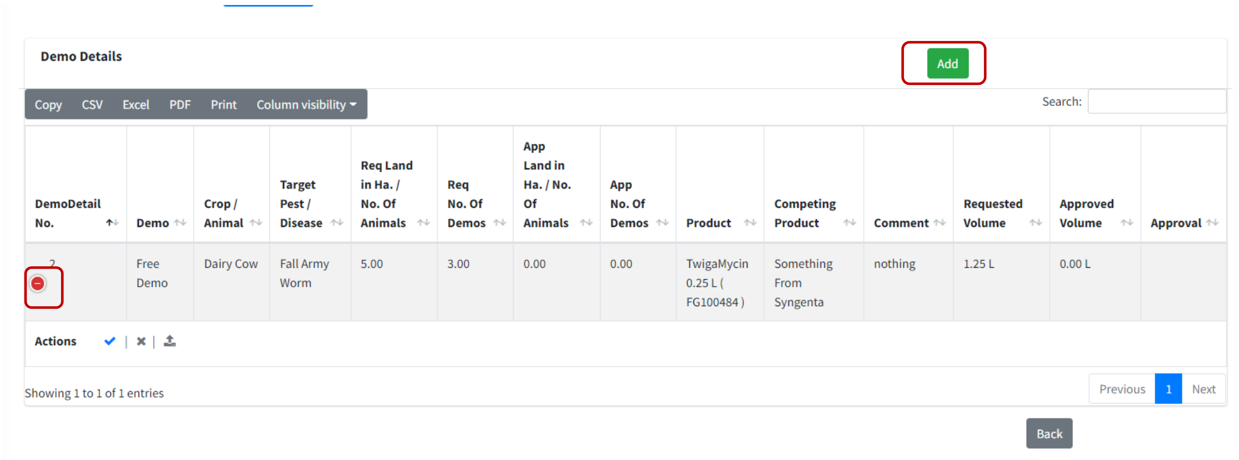
The pop up above will show. Fill the form and click Action to create a new and take you to the campaign details page.



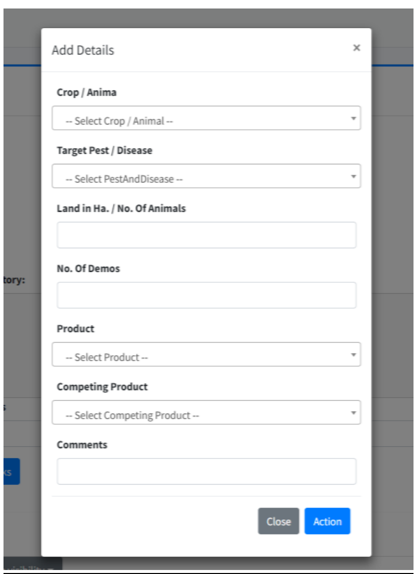
The figure above is a zoomed out image of the demo details page.



The figure above show the table has some collapsed columns, by clicking the  icon the columns can be made visible as shown below:

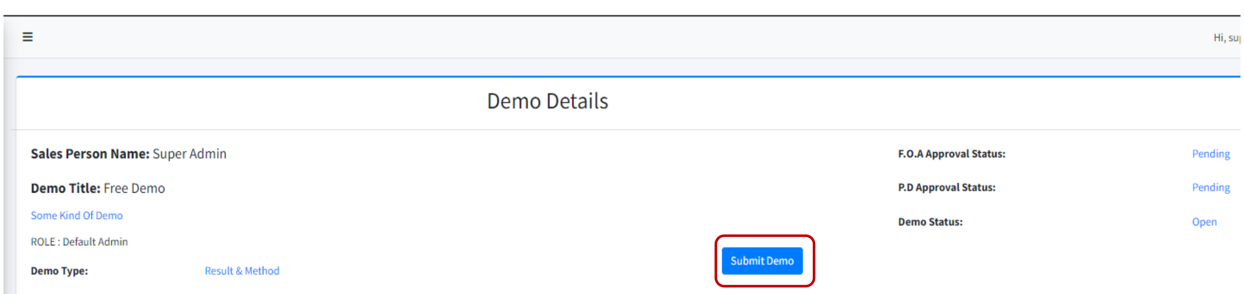


To add demo details for the Demo, click the ***Add*** button, this will display a pop up below.

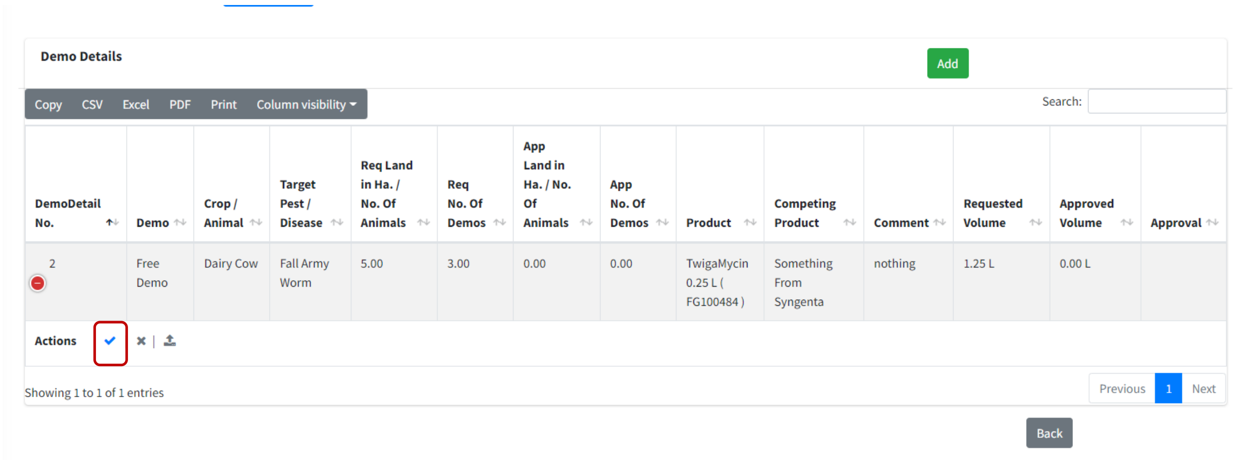


In this page, the ***Submit Campaign*** button will submit the Campaign for approval and processing.

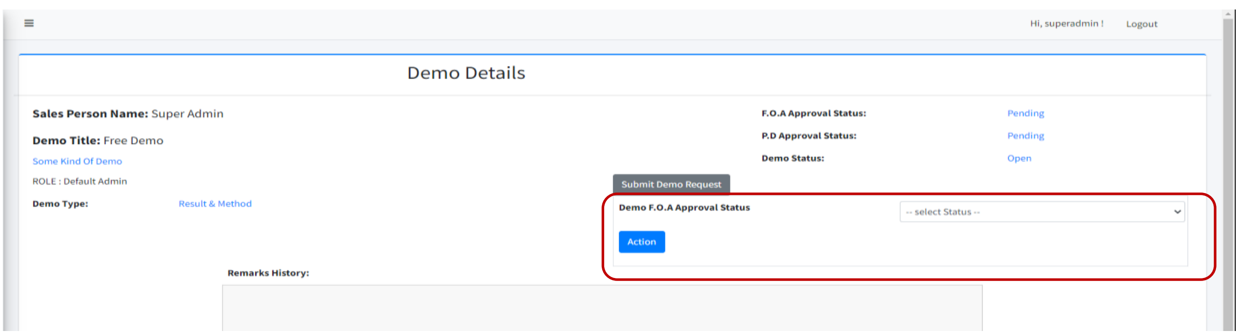
Once submitted the Campaign Details cannot be edited via the edit button unless rejected during the approval process.



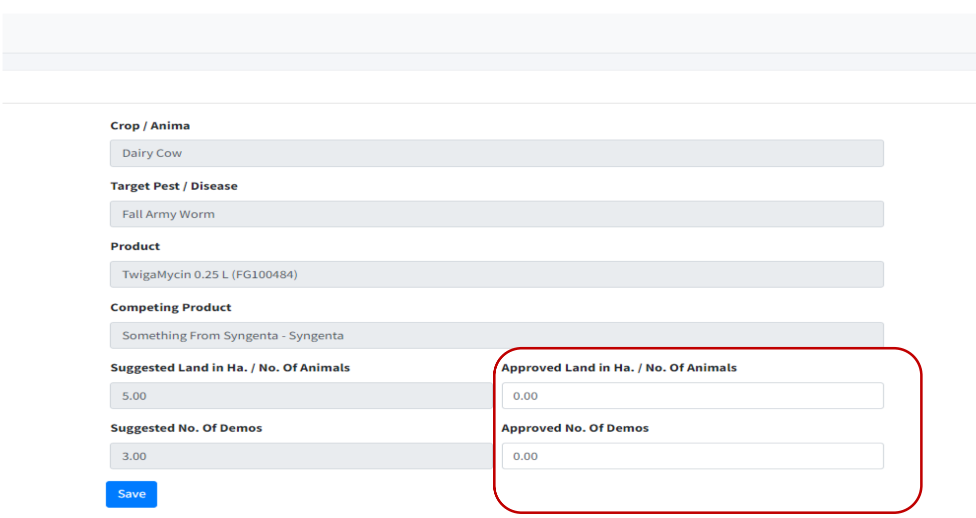
Once Submitted, Each Detail has to be approved before approving the whole demo. The individual approval will look something like this:



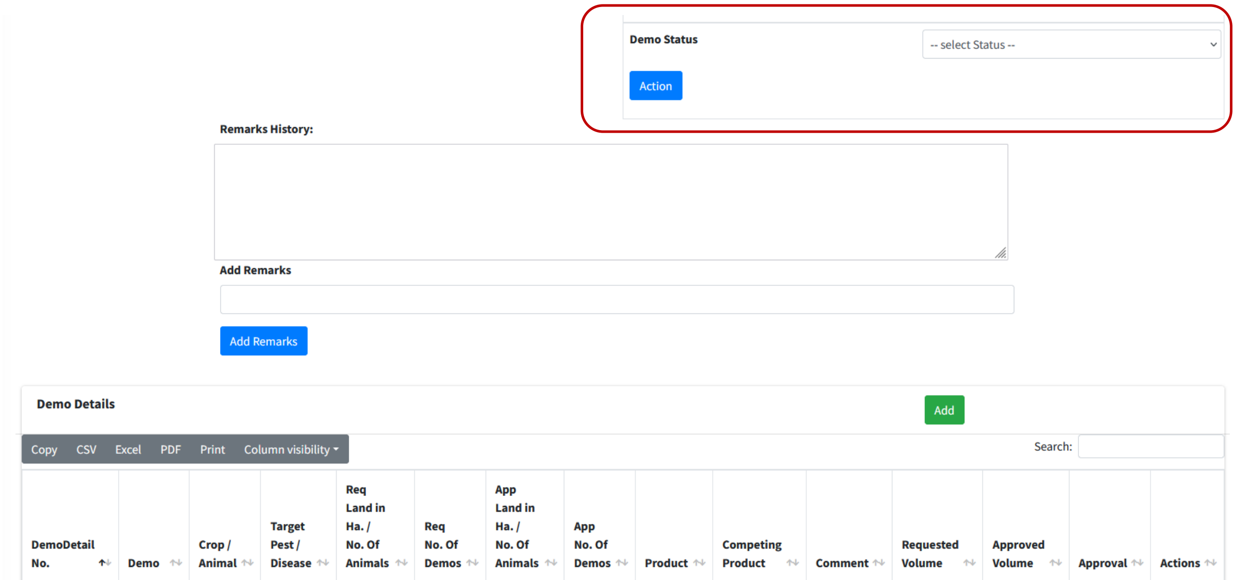
Once Submitted, Approve Demo Area will be displayed only visible by F.O.A and P.D as illustrated below:



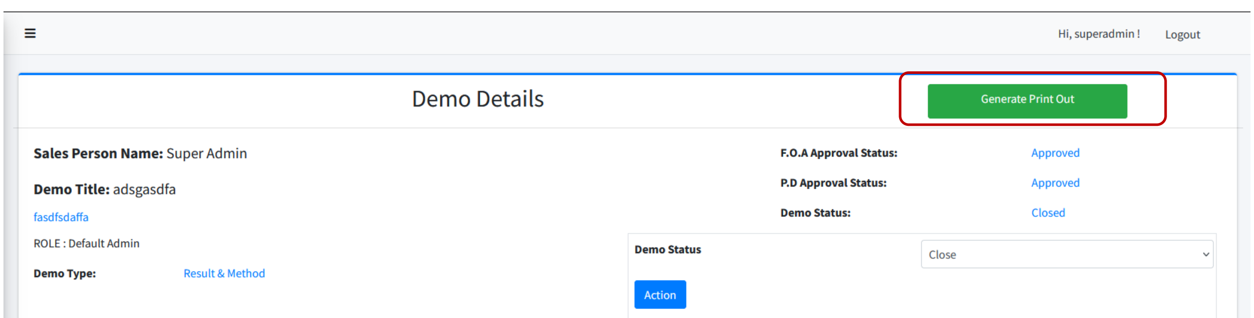
Approval of Demo details will require filling the form provided with approved values as illustrated below:



To close the Demo, the T.M / S.S.P must have submitted their final report to show the close Demo area as illustrated below:



Once the Demo has been close, the Demo Print Out can be generated and printed using the button highlighted below:

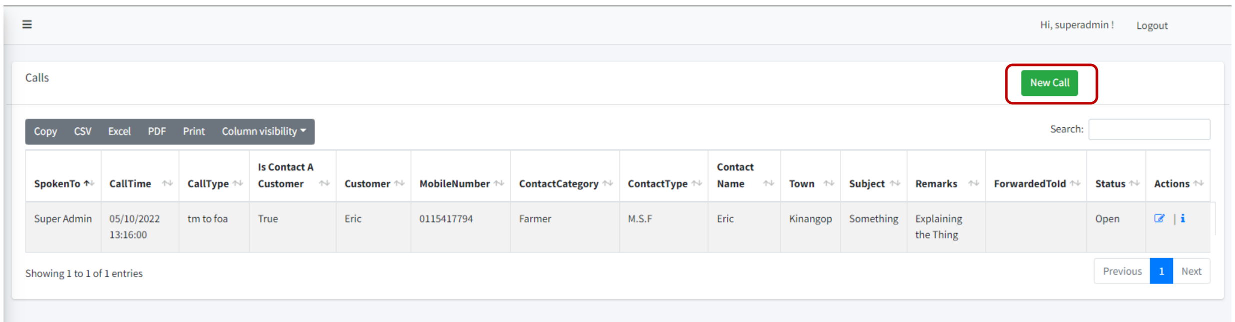


6. Field Operations

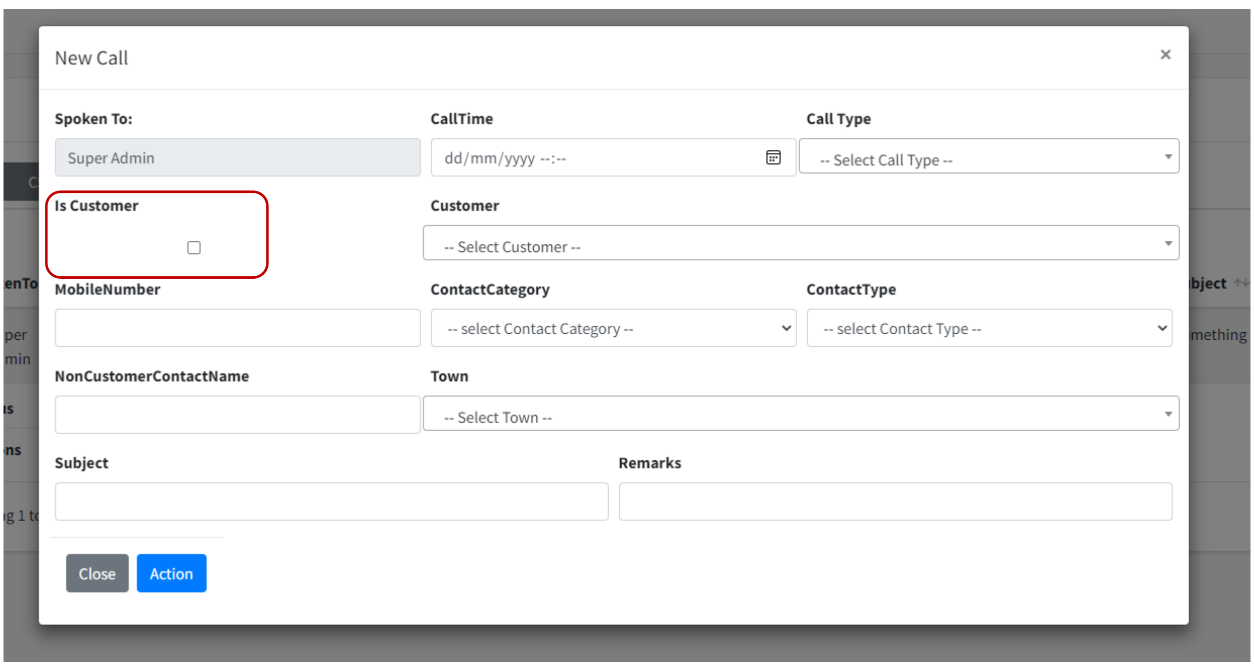
6.1 Calls

This is where Calls are recorded in the System.

When you expand Field Operations on the Navigation bar and click on Calls, the page with all the calls is displayed.



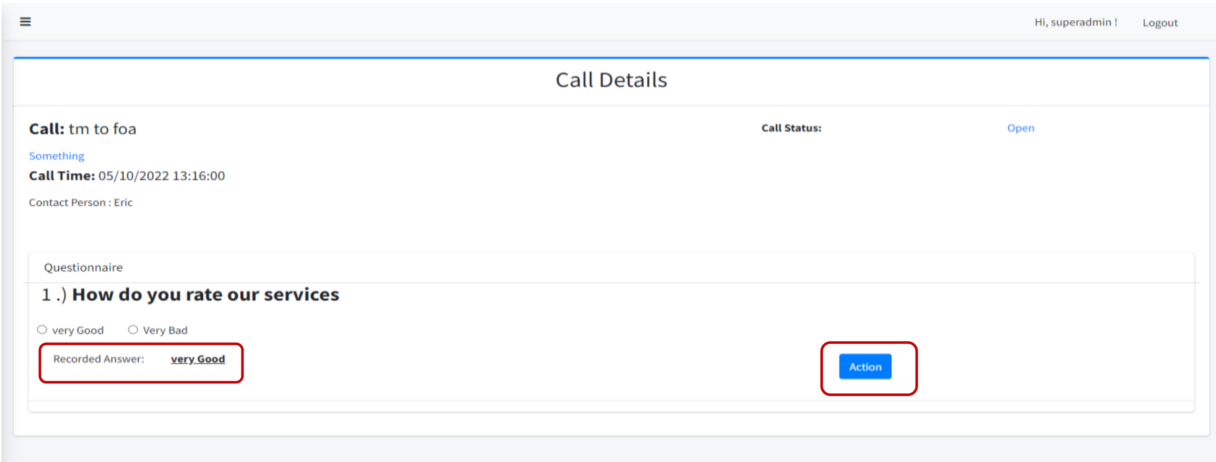
To create a new Demo, click on the button ***new Demo.***



The pop up above will show. Fill the form and click Action to create a new and take you to the campaign details page.

If The Contact Person is a registered customer in the C.R.M, please check the box highlighted.

Below is call details page:

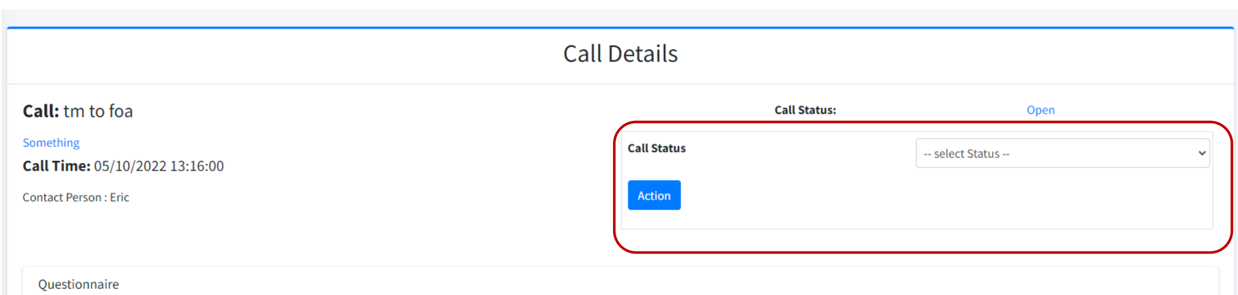


Here, the questionnaire will be displayed based on the call type selected during recording the new call.

The ***Recorded Answer*** area shows the previous answer provided for the same call.

Click the ***Action*** button to save each questions answer.

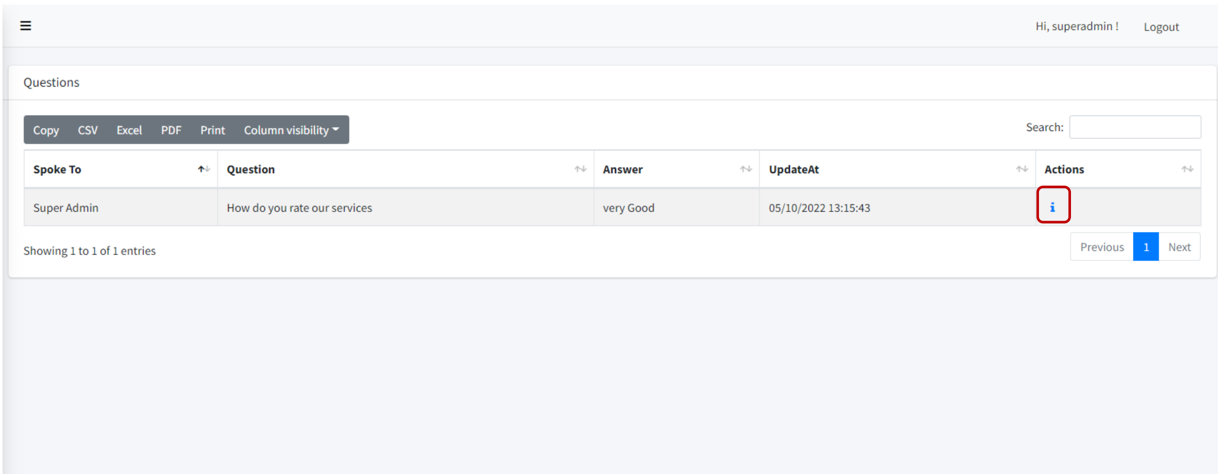
To close a Call, the below area will be displayed for user with close call permissions:



6.2 Responses

This is where we can view responses questionnaires filled during calls.

When you expand Field Operations on the Navigation bar and click on Responses, the page with all the responses is displayed.



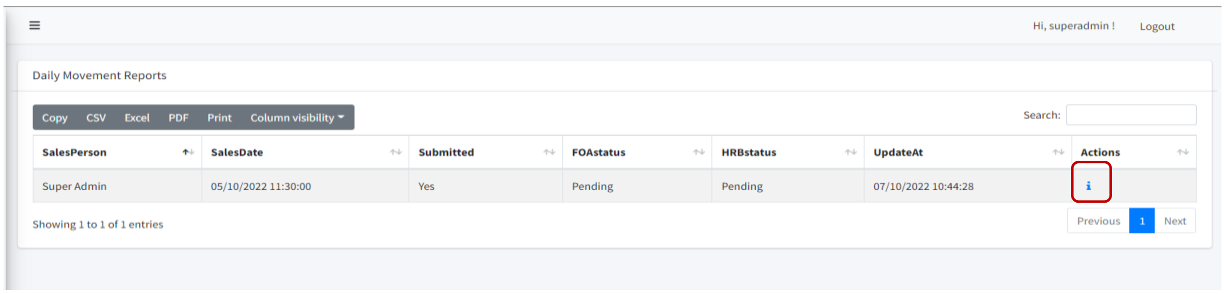
The highlighted button will take us to the specific call details that the response was provided at.

7. Reports

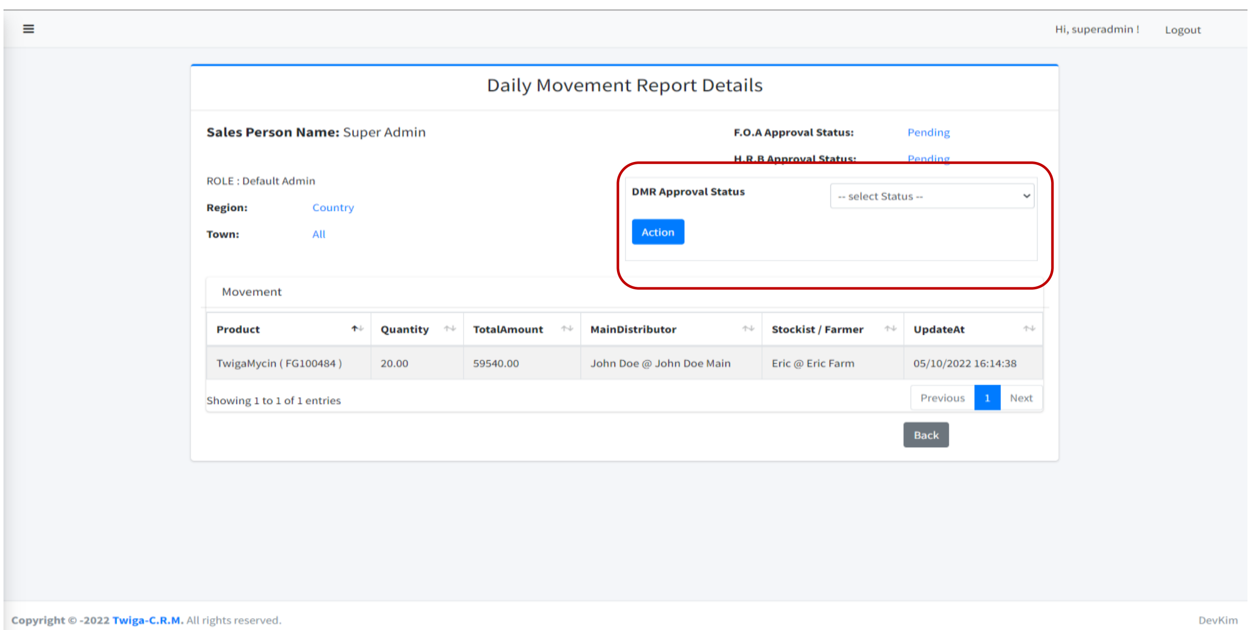
7.1 D.M.R

This is where Submitted Daily Movement Reports can be viewed and approved.

When you expand Reports on the Navigation bar and click on D.M.R, the page with all the submitted daily movement reports is displayed.



Clicking on the icon will take us to the Daily Movement Report Details Page shown below:

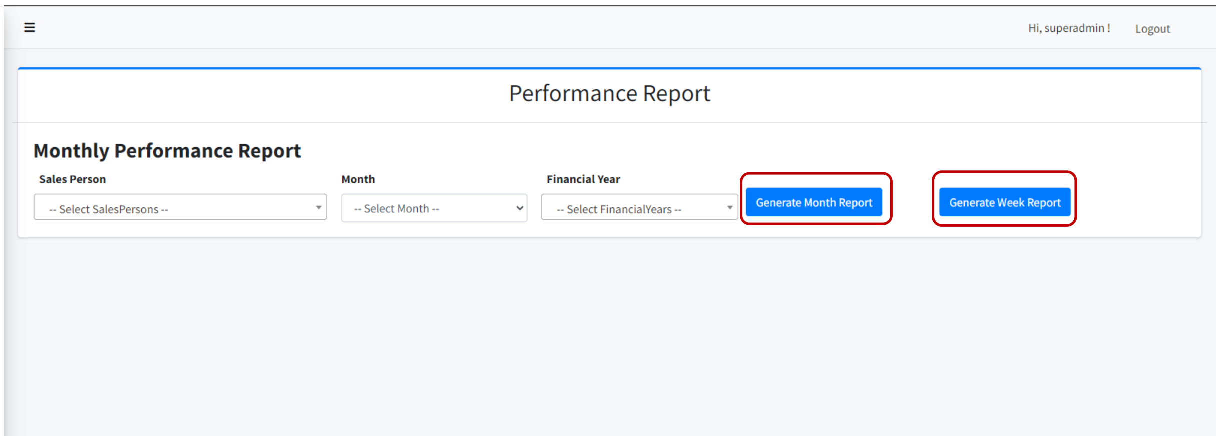


The area highlighted above is the D.M.R approval area, used to approve the D.M.R.

7.2 Performance

This is where Monthly and Weekly Performance Reports are generated.

When you expand Reports on the Navigation bar and click on Performance, the page with a form is displayed.



To generate a monthly performance report, fill the form and click the first highlighted button ***Generate Month Report.***

To generate a weekly performance report, fill the form and click the second highlighted button ***Generate Week Report***.