# Sales Connection Manual/Guide Documentation.

System Introduction  
Salesconnection system is a website that provides a system for companies to manage their companies and work flow.

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# Navigation Side Menu Bar.

Clicking on the top left side menu bar, displays many optional dropdown menus that act like a display directory tree. Clicking on the branches displays more pages or more branches.

(System Note: Branches are assigned by the 1.1 and 1.1.1 design, if an item is 1.1.1 it is under the branch of 1.1 vice versa 1.1.1.1 is under/inside 1.1.1.)

# 1.1 Business management Navigation

The Business management Navigation branch offers navigation to the Schedule Branch, Dashboard Branch, Site List page, Contact List page, Asset List page and Product/Services list Page. Clicking on the pages brings the user to the pages. Clicking on the branches opens out a dropdown to more page options.

## 1.1.1 Schedule Branch

The Schedule Branch contains the dropdown options to the Job Schedule page, Asset Schedule page, Job category Schedule page, Project Schedule page and List View page. Clicking on these pages in the dropdown brings the user to these pages.

### 1.1.1.1 Job Schedule Page

* In the Job Schedule, there is a calendar Widget In which in which the Allows the user how they would view it. The default Settings Daily shows a week of task.
* The user can Sort the Calendar Based on the filters Which are Pending Jobs, Overdue jobs, alerted and order by descending.
* Other Filters also include the jobs assigned to Departments, Access Type and User's Assigned. And allows the user to Favorite the Filters they commonly use.
* User can also Move the calendar to see the previous weeks and next week's calendar.
* Allows the User to Add new Jobs By clicking on the Blue Add icon on the bottom right.

### 1.1.1.2 Asset Schedule Page

* In the Asset Schedule, users will see the dates of when certain assets are scheduled for.
* Users can add Jobs on this page as well.

### 1.1.1.3 Job Category Schedule Page

* Job category functions similarly to Job schedule, but instead of displaying which staff is assigned to the job. It shows the Job category, and which dates the jobs fall on.
* Users cannot sort the job category to display which ones appears at the top.
* The user can add jobs on this page as well.

### 1.1.1.4 Project Schedule Page

* Project Schedule Firstly requires the user to sort by the customer associated, then select the project under the

### 1.1.1.5 List View Schedule Page

* List View is a Daily Calendar that displays the work scheduled and assigned for the day.

## 1.1.2 Dashboard Branch

The Dashboard Branch contains the dropdown option to the Job Page, Project page and the Digital Form Pages.

#### 1.1.2.1 Job Dashboard

* Job Dashboard displays jobs sorted by their categories.
* The user can create/add jobs on this page as well.

#### 1.1.2.2 Project Dashboard

* Project dashboard displays projects sorted by their categories.

#### 1.1.2.3 Digital Form Dashboard

* The digital Form Dashboard provides the option to pick 1 of the 7 templates and displays a dashboard of the Digital forms in the template.
* The Digital forms are sorted by category.

### 1.1.3 Site List Page

* The Site list holds a list of sites which could be a client, company, or customer.
* Users can add new Site(s) using the Add button.
* To view details of the site(s), click on the “open in new tab” button.

### 1.1.4 Contact List Page

* The Contact List holds the contact information of the clients, companies, and customers.
* Users can add new contacts by clicking on the “Create New Contact” button on the top right.
* Users can click on the View button action to display the details of the contact.

### 1.1.5 Asset List page

* The Asset List page stores a list of all the asset(s) in the system.
* Users can add new asset(s) to this page with the “Add Asset” button.
* Clicking on the “open in new tab” button displays more details about the asset.

### 1.1.6 Product/services List Page

* The Product/Services list page stores all the products and services in the system which is used for keeping track of products and Billing customers for invoices.
* Users can use the “add Button” to add new Product/Services
* Clicking on the “open in new tab” button displays more details about the asset.

## 1.2 Business Reports

Business reports help users keep track of all the system statuses, changes, and details. Users can filter the reports by many variables and sort them as well.

### 1.2.1 Job report

* Job report displays all the jobs depending on the filters set, by the default jobs are sorted simply by the job number.
* Users can click on the “open in new tab” to view the job details.

### 1.2.2 Job Update Report

* Job Update report focuses on the updates and changes made on the jobs.
* Changes like changing statuses will be shown on the list.
* Users can click on the “open in new tab” to view the job details.

### 1.2.3 Project report

* The project report displays all the projects depending on the filter set.
* Users can click on the “open in new tab” to view the project details.

### 1.2.4 Project Update Report

* Project update report focuses on the update and changes made on the projects.
* Changes and updates like changing statuses will be shown on the list.
* Users can click on the “open in new tab” to view the project details.

### 1.2.5 Asset Update Report

* Asset update report Displays a list of all the assets in the system.
* Main purpose of asset update report is to display all changes and actions relating to the asset such as attaching/assigning to a job, site, or client.

### 1.2.6 Asset History Report

### 1.2.7 Digital Form Report

* Digital form reports display all the digital forms created under one of the seven digital form templates.
* Users can pick which Digital form template they would like in the filter.
* Users can see the rating, status, ID, and customer in the report details.

### 1.2.8 Digital Form Update Report

* Digital Form update report displays the updates and changes made to the Digital forms such as changing the status or commenting on the digital form.

### 1.2.9 Digital Customer Feedback Form Report

* Digital Customer Feedback Form report allows the user to find the feedback left by the customer, the feedback could include the clients comments, rating and signatures.

## 1.3 Business Metrics

### 1.3.1 Metric Dashboard

* The metric Dashboard display charts and graph on the system data mainly to provide a simple and digestible analysis of the system.
* Some default metrics are total job completions in a month and new clients added into the system.
* Users can change the dashboard displayed by clicking on the dashboard drop down on the top left and select the dashboard template.

### 1.3.2 Customer Analytics

* Customer analytics displays a list of customers sorted by the customer number and can be filtered.

### 1.3.3 Project Analytics

* Project analytics display a list of projects sorted by the project number and can be filtered by settings.

### 1.3.4 Job Analytics

* Job analytics display a list of Jobs sorted by the job number and can be filtered by the settings.

### 1.3.5 Digital form analytics

* Digital form analytics display a list of Digital forms depending on the digital form template chosen and filters set.

## 1.4 Business map

### 1.4.1 Business travel

### 1.4.2 Overview

* The Overview page allows users too see the check-in details of other users and display the check-in location on a map.

### 1.4.3 Geolocation

## 1.5 HR Suite

### 1.5.1 Claims management

* In the Claims management page, admins and approve and look at the claims made by users and staffs.
* Claims such as fuel milage and food claims made by the users can be approved here.

### 1.5.2 Overtime management

### 1.5.3 Attendance List

* The attendance list allows admins to view the attendance, check-in and check-out dates and times.
* The attendance list helps track if a employee is present in their work site or if they are late.

### 1.5.4 Office Check-in Settings

* Office check-in settings contains the list of offices and locations users can check in to.
* Admins can assign which users can check-in into which offices and locations.
* Admins can Add new locations by using the “Add location” which presents a list of Site locations to add.

## 1.6 Reminder & Marketing Broadcast

### 1.6.1 Reminder Report

### 1.6.2 Marketing Report

### 1.6.3 Marketing campaign

## 1.7 Smart Scheduler

### 1.7.1 Project Asset Schedular

### 1.7.2 Project Smart Scheduler

### 1.7.3 Site Smart Scheduler

## 1.8 Company settings

### 1.8.1 Site Settings branch

#### 1.8.1.1 Site Status

* The Site status display all the Statuses for a Site
* Users can add, create, and remove possible statuses a Site can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.1.2 Site Category

* Site category page displays the possible categories a Site can have.
* Admins can add, edit, and remove the categories.

### 1.8.2 Project Settings

#### 1.8.2.1 Project category

* Project category page displays the possible categories a Project can have.
* Admins can add, edit, and remove the categories.

#### 1.8.2.2 Project Status

* The Project status display all the Statuses for a project
* Users can add, create, and remove possible statuses a project can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.2.3 Project Status Segmentation

* The Project Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain project category.

#### 1.8.2.4 Default Project Creation

* The default project creation is a feature that pops up w

#### 1.8.2.5 Project too Do List

* The To-Do List page allows users to set requirements before a status can be changed.
* Requirements such as having the user leave comments or actions before a status can be changed.

### 1.8.3 Job Settings Branch

#### 1.8.3.1 Job Category

* Job category page displays the possible categories a Job can have.
* Admins can add, edit, and remove the categories.

#### 1.8.3.2 Job Status

* The job status displays all the Statuses for a job.
* Users can add, create, and remove possible statuses a job can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.3.3 Job Status Segmentation

* The Job Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain job category.

#### 1.8.3.4 Job to Do List

* The To-Do List page allows users to set requirements before a status can be changed.
* Requirements such as having the user leave comments or actions before a status can be changed.

### 1.8.4 Digital Form Settings Branch

#### 1.8.4.1 Manage Access

* The Manage Access Page allows Admins to manage user access to Digital forms.
* Admins can disable access of users or departments to be unable to use certain templates.

#### 1.8.4.2 Digital Form Category

* Job category page displays the possible categories a Job can have.
* Admins can add, edit, and remove the categories.

#### 1.8.4.3 Digital Form Status

* The job status displays all the Statuses for a job.
* Users can add, create, and remove possible statuses a job can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.4.4 Digital Form Status Segmentation

* The Job Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain job category.

#### 1.8.4.5 Digital Form Email Setting

#### 1.8.4.6 Digital Form Email template Setting

#### 1.8.4.7 Remote Signature Email Template Settings

1.8.4.8 To do list Branch

1.8.5 Public Form Settings branch

1.8.5.1 Public Form Category

1.8.5.2 Public Form Status

1.8.5.3Public Form Status segmentation

1.8.5.4 Public Form Banner Settings

1.8.5.5 Public Form to Do List

1.8.6 Asset Settings branch

1.8.6.1 Asset Category

1.8.6.2 Asset Status

1.8.6.3 Asset Status Segmentation

1.8.6.4 Asset To Do List

1.8.7 Product/Services Settings Branch

1.8.7.1 UOM Settings branch

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1.9.4 Asset Import

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1.9.6 Product/Services Import

1.9.7 UOM Import

1.9.8 Site Bulk Update

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1.9.12 UOM Bulk Update

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1.10.2 Project Templates

1.10.3 Job templates

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1.10.7 contact templates

1.10.8 QR Code templates

1.10.9 Product/Services templates

1.10.10 Reminder templates

1.11 User Management Branch

1.11.1 User List

1.11.2 Copy Account

1.11.3 User Account Customization

1.11.4 Company Profile Settings

1.11.5 Check Pending Update

1.11.6 Invite User

1.11.7 User Import

# 2.0 System Terminology and uses.