# 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 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

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# 2.0 System Terminology and uses.