

# User Guide for JULIETT SaaS

## 1. Introduction

**Welcome to JULIETT** Welcome to JULIETT, your go-to Sales Business Intelligence tool. JULIETT helps you create, manage, and download reports to track your sales performance effortlessly.

### Overview of Key Features

- Intuitive interface for easy navigation
- Comprehensive report management
- Customizable report design
- Advanced scheduling options
- Detailed loading status monitoring

**System Requirements** To ensure optimal performance, make sure your system meets the following requirements:

- Operating System: Windows 10 or macOS 10.15 and above
- RAM: Minimum 4GB
- Disk Space: Minimum 500MB free space
- Internet Connection: Stable broadband connection

## 2. Login Page

### How to Log In

1. Open your web browser and go to the JULIETT login page.
2. Enter your username and password.

3. Click on the "Log In" button.
4. If your credentials are correct, you will be directed to the Home User Page.

### **Password Recovery**

1. Click on the "Forgot Password?" link on the login page.
2. Enter your registered email address.
3. Follow the instructions sent to your email to reset your password.

## **3. Home User Page**

### **Selecting an Account**

1. After logging in, you will be presented with the Home User Page.
2. Select the account you want to work with from the list provided.
3. Click on the account name to enter the account dashboard.

### **Navigating the Home Page**

- Use the navigation bar at the top to access different sections of the software.
- The Home User Page displays an overview of your account activities and recent reports.

## **4. Navigation Bar**

### **Profile Picture**

- Click on your profile picture in the navigation bar to access user-level options.

### **Links to User Level Pages:**

- **Documentation:** Access user manuals and guides.

- **Support:** Reach out to the support team for assistance.
- **Profile:** View and edit your profile information.

## **5. User/Account Level Pages**

### **Report Manager**

- Create new reports, view, and manage existing ones.
- Filter reports by date, type, or status.

### **Report Design**

- Customize the layout and content of your reports.
- Use templates or design your own from scratch.

### **Configuration**

- Adjust settings related to your account and reports.
- Manage user permissions and preferences.

### **Scheduler**

- Schedule reports to be generated and sent out at specified times.
- Set up recurring schedules for regular report generation.

### **Loading Status**

- Monitor the status of data loading processes.
- View detailed logs and error messages if any issues arise.

## **6. Features**

## Creating Reports

1. Go to the Report Manager page.
2. Click on the "Create New Report" button.
3. Follow the prompts to select data sources and customize your report.

## Managing Reports

- Use the Report Manager to edit, delete, or duplicate existing reports.
- Apply filters to quickly find the reports you need.

## Downloading Reports

- Click on the report you want to download.
- Select the desired format (PDF, Excel, etc.) and click "Download."

## Tracking Sales Performance

- Use JULIETT's analytical tools to track and visualize your sales data.
- Generate detailed performance reports to gain insights into your sales trends.

## 7. Troubleshooting & FAQs

### Common Issues and Solutions

- **Login Issues:** Ensure you are using the correct username and password. If you've forgotten your password, use the password recovery option.
- **Report Generation Errors:** Check the data sources and configurations. Ensure all required fields are filled out.

### Frequently Asked Questions

- **How do I change my password?** Go to the Profile page and click on "Change Password."

- **Can I share my reports with others?** Yes, use the sharing options in the Report Manager to email or share links to your reports.

## **8. Support and Resources**

### **How to Contact Support**

- Email: [support@juliect.com](mailto:support@juliect.com)
- Phone: +1 234 567 890

### **Online Resources and Tutorials**

- Visit our [Help Center](#) for video tutorials and detailed guides.
- Join our community forum to connect with other JULIETT users and exchange tips and best practices.