SFA Application FAQ Document

A Comprehensive Guide to Using the SFA Application

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Contents

1 Overview

1.1 What is the purpose of the SFA application?

The SFA application helps track client visits, schedule meetings, record expenses, and manage salesforce tasks digitally.[1]

2 Login

2.1 How can I log in to the SFA application as a user?

You need your Employee ID, Password, and Company Identifier to log in. Then tap the 'Login' button.[2]

2.2 Can an Admin or Manager log in with the same credentials format as a user?

Yes, Admins and Managers use the same credentials: Employee ID, Password, and Company Identifier.[3]

2.3 What is the role of the Company Identifier during login?

It links the user credentials to a specific organization and is mandatory for login.[4]

3 Outdoor Duty

3.1 How do I start or stop my Outdoor Duty (OD)?

Tap the 'Toggle Button' on the Dashboard to start or stop Outdoor Duty.[5]

3.2 Is it possible to view the route taken during OD meetings?

Yes, each meeting includes a 'Route' option that lets you view your OD path using a map.[6]

3.3 Is GPS tracking mandatory for OD and meetings?

Yes, GPS is used to calculate distance traveled and log actual meeting locations.[7]

3.4 What should I do if GPS is turned off or unavailable during a meeting?

Enable GPS manually. If still unavailable, the app may not allow you to proceed.[8]

3.5 Can users see a summary of their OD activities?

Yes, a report of OD start/end times, meeting count, and distance covered is available.[9]

3.6 How are distance and travel expenses calculated in the SFA App?

The app uses GPS tracking to calculate distance and link travel expenses to OD and meetings.[10]

4 Meetings

4.1 Why is it important to create a meeting for every client visit?

Creating meetings logs your visit and helps calculate travel distance, which is essential for tracking and reporting.[11]

4.2 How can I create a meeting for an existing client?

Tap 'Meeting', press the '+' button, select 'Existing Client', choose the client, and enter meeting details after the meeting ends.[12]

4.3 How can I create a meeting for a new client?

Tap 'Meeting', press the '+' button, select 'New Client', fill in client details, save, and submit the meeting details.[13]

4.4 What does 'Mark Meeting Without Info' mean?

It allows you to mark a meeting at a location without filling client or meeting details. Default info is saved automatically.[14]

4.5 Can I schedule a follow-up meeting while creating the current meeting?

Yes, follow-ups can be scheduled during the meeting entry process.[15]

4.6 How can I schedule a future meeting?

From the Leads/Clients list, choose the client, tap 'Schedule Meeting', enter details, and submit.[16]

[1] Keywords: SFA, salesforce, tracking, meetings, expenses, client visits, app features, SFA overview, benefits, productivity

[2] Keywords: login, Employee ID, Password, Company Identifier, user login, authentication, sign in, access, login steps

[3] Keywords: login, Admin, Manager, credentials, authentication, sign in, access, login steps

[4] Keywords: Company Identifier, login, organization, authentication, access

[5] Keywords: Outdoor Duty, OD, Toggle Button, start, stop, on field, check-in, GPS logs, track route

[6] Keywords: OD, route, map, meetings, GPS logs, on field, track route

[7] Keywords: GPS, tracking, OD, meetings, distance, on field, check-in

[8] Keywords: GPS, unavailable, enable, location, check-in, on field

[9] Keywords: summary, OD, distance, report, on field, track route

[10] Keywords: GPS, travel expenses, OD, distance, tracking, accountability

[11] Keywords: meetings, client visit, travel distance, tracking, appointments, client schedule, CRM, engagement

[12] Keywords: existing client, create meeting, meeting details, appointments, client schedule, CRM, engagement

[13] Keywords: new client, create meeting, submit, appointments, CRM, engagement

[14] Keywords: mark meeting, no info, location, appointments, field agents, engagement

[15] Keywords: follow-up, meeting entry, schedule, appointments, re-engage, CRM

[16] Keywords: schedule, future meeting, submit, appointments, client schedule, CRM

4.7 Can an Admin or Manager schedule meetings for other users?

Yes, Admins and Managers get a dropdown to assign meetings to users.[17]

4.8 What types of filters are available in the Meetings section?

Users can filter meetings by Date, Client, Status (Pending or Completed), and Meeting Type.[18]

4.9 What is the use of 'Mark Without Meeting Info'?

It allows field agents to quickly mark their location when client or meeting details arent available on the spot.[19]

4.10 Can I edit a meeting after it has been submitted?

No. You may request a manager to review or log a follow-up instead.[20]

5 Expenses

5.1 How can I.ConcurrentModificationException meeting-wise expenses?

Go to the Meeting list, select a meeting, tap 'Add Expense', fill in details, and submit.[21]

5.2 How can I add day-wise expenses?

Go to the 'Expenses' section, tap the '+' button, enter the expense details, and tap submit.[22]

5.3 Can I view the status of my submitted expenses?

Yes, users can filter and view approved or rejected expenses in the Expenses section.[23]

5.4 Who can approve or reject submitted expenses?

Only Managers or Approvers can approve or reject expenses.[24]

5.5 Can partial approvals be made for expenses?

Yes, but only for individual expenses, not cumulative totals.[25]

[17]Keywords: Admin, Manager, assign, meetings, appointments, CRM
[18]Keywords: filters, Date, Client, Status, Meeting Type, CRM, appointments
[19]Keywords: mark, location, field agents, CRM, appointments
[20]Keywords: edit, submitted, follow-up, CRM, appointments
[21]Keywords: expenses, add, meeting-wise, submit, cost, finance, reimbursement, claims
[22]Keywords: day-wise, expenses, submit, cost, finance, reimbursement, claims
[23]Keywords: status, expenses, approved, rejected, finance, claims
[24]Keywords: approve, reject, expenses, Managers, Approvers, finance
[25]Keywords: partial approvals, individual, expenses, finance, claims

6 Clients/Leads

6.1 How do I create a new lead or client in the system?

Go to 'Leads/Clients', tap the '+' button, fill in the required fields, and tap 'Add Lead/Client'.[26]

6.2 How can I update an existing lead or client?

Select a lead or client, tap 'Edit' on the top right, modify details, and tap 'Update'.[27]

6.3 Can I add branches to an existing client?

Yes, use the 'Branch' option while editing a client to add branches.[28]

6.4 What information is required to create a new client?

Client Name, Contact Number, Email, Address, and optionally GST details.[29]

6.5 Can I add images or attachments while adding client or meeting details?

Yes, the system supports uploading client images and meeting photos if required by your company.[30]

7 Follow-Ups

7.1 What is the Follow-Ups section used for?

It allows users to view, reschedule, cancel, or reassign previously scheduled follow-up meetings.[31]

7.2 Under what conditions can a meeting be rescheduled?

Only if the assigned user hasnt started OD and the meeting time hasnt started.[32]

7.3 How can I reschedule a meeting?

Go to Follow-Ups, select a meeting, tap 'Reschedule', fill in the details, and submit.[33]

[26]Keywords: create, lead, client, Leads/Clients, prospects, contact management, new entry, customer data
[27]Keywords: update, lead, client, edit, contact management, customer data
[28]Keywords: branches, client, edit, contact management, customer data
[29]Keywords: Client Name, Contact, Email, Address, GST, new entry, customer data, prospects
[30]Keywords: attachments, upload, client, meeting, customer data, records
[31]Keywords: follow-up, view, reschedule, cancel, reassign, next steps, reminders, re-engage, follow-through
[32]Keywords: reschedule, conditions, OD, next steps, follow-through
[33]Keywords: reschedule, submit, next steps, re-engage, follow-through

7.4 How can I cancel a scheduled meeting?

Go to Follow-Ups, select the meeting, tap 'Cancel', provide a cancellation remark, and submit.[34]

7.5 Can managers reassign meetings to other users?

Yes, from the Follow-Ups section, managers can select a meeting, tap 'Re-assign', choose a user, and submit.[35]

8 Attendance

8.1 How to mark attendance in the SFA App?

Users can mark attendance when starting Outdoor Duty. Integration with HRMS is also supported.[36]

[34] Keywords: cancel, remark, submit, reminders, follow-through

[35] Keywords: reassign, managers, submit, follow-through, next steps

[36] Keywords: attendance, HRMS, Outdoor Duty, presence, check-in, availability, timing