Sales Studio User Guide

Welcome to **Sales Studio**—your centralized platform for managing client relationships and health insurance quotes. This guide walks you through all major features and user flows.

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Getting Started

When you log into Sales Studio, you land on the **Dashboard**—your central hub for managing all clients and quotes.

What You Can Do Here

- View all your clients at a glance
- Add new clients
- Search for specific clients
- Bookmark your most important clients
- Dive into detailed client work

The Dashboard

Main Client Table

The dashboard displays a comprehensive table of all clients with the following columns:

Column	What It Shows
Client Name	The company or individual you're quoting
Email	Primary contact email address
Quote Status	Combined status showing progress on both PEO and ACA quotes (e.g., "Intake" or "Proposal Ready")
Documents	Completeness percentage of required files uploaded
Actions	Button to manage the client

Searching & Sorting

- **Search**: Type in the search box to find clients by name or email (real-time filtering)
- **Sort**: Click column headers to sort:
  - **Name**: A-Z or Z-A
  - **Status**: Latest updates first
  - **Documents**: Highest to lowest completeness
  - **Recent**: Newest clients first

Bookmarking Clients

Click the **star icon** next to any client name to bookmark them. Bookmarked clients appear in a pinned section at the top for quick access.

Quick Client Info

Click anywhere on a client row to expand and see:

- Quote status details for PEO and ACA
- Document completeness percentage
- Recent activity snippets
- Last modified date

Managing Clients

Adding a New Client

1. Click the **"+ Add Client"** button at the top of the dashboard
2. Fill in the client information:
    - **Name** (required): Company or individual name
    - **Email** (optional): Primary contact email
    - **Notes** (optional): Any initial notes (scope, contact person, etc.)
3. Click **"Create Client"**
4. The new client appears in your table and is ready for quote work

Editing Client Information

From the client detail page:

1. Click the **pencil icon** in the client header
2. Edit the name, email, or notes
3. Click **"Save Changes"**

Archiving or Deleting Clients

From the client detail page:

1. Click the **three-dot menu** in the client header
2. Select **"Archive Client"** (soft delete—data preserved) or **"Delete Client"** (permanent)
3. Confirm the action

Bookmarking Clients

- Click the **star icon** anywhere (dashboard or client detail page) to bookmark
- Bookmarked clients appear in a pinned section on the dashboard
- Useful for your most active or priority clients

Working with Quotes

Each client has **two independent quotes**: one for **PEO** and one for **ACA**. You manage them separately but in the same client workspace.

Understanding the Quote Pipeline

Both PEO and ACA quotes move through a **7-stage pipeline**:

1. **Not Started**: Initial state; no work has begun
2. **Intake**: Gathering client information and requirements
3. **Underwriting**: Analyzing census data and risk
4. **Proposal Ready**: Quote proposal prepared and reviewed
5. **Presented**: Quote shown to client
6. **Accepted**: Client approved the quote
7. **Declined**: Client rejected; opportunity closed

Creating a Quote

1. Navigate to the client detail page
2. Find the **PEO Quote** or **ACA Quote** card
3. Click **"Start Quote"**
4. The quote status is set to "Not Started" and ready for movement through the pipeline

Updating Quote Status

1. Click the quote status card (e.g., "Not Started")
2. A dialog appears showing the current status
3. Click on the next status in the pipeline
4. (Optional) Add a note explaining the status change (e.g., "Client provided employee roster")
5. Click **"Update Status"**
6. The quote moves forward and a timestamp is recorded

Blocking a Quote

If a quote can't progress due to missing information or external dependencies:

1. Click the quote status card
2. Toggle **"Block This Quote"**
3. Enter a reason (e.g., "Awaiting final payroll data from client")
4. Click **"Save"**
5. The quote card displays a red "Blocked" badge until unblocked

Assigning Quotes to Team Members

1. Click the quote status card
2. In the **"Assigned Analyst"** field, type the team member's name
3. Their name appears on the card so everyone knows who owns this quote

Viewing Quote History

1. Click the quote status card
2. Scroll down to see **"Status History"**
3. View every status change with:
    - Who made the change
    - When it happened
    - Any notes added
    - The specific statuses involved

Uploading & Managing Files

The **Document Center** is where you upload and organize all supporting files for the client—census data, contracts, plan summaries, and more.

Uploading Files

Drag-and-Drop Method

1. Scroll to the **Document Center** section
2. Drag files directly onto the **upload zone** (or click to browse)
3. Select one or multiple files
4. Files begin uploading with a progress indicator

After Upload

1. Each file appears in the file list
2. System auto-detects the **category** based on filename:
    - Census data (e.g., "census.xlsx")
    - Plan summaries
    - Claims history
    - Renewal letters
    - Proposals
    - Contracts
    - Other
3. If a file matches census data patterns (contains columns like "DOB," "Salary," "Zip," "Plan Tier," "Coverage"), it's flagged for census processing

File Organization

Files are organized in **two tabs**:

Files Tab

- List of all uploaded documents
- Shows name, upload date, uploader, category, and team badges

Requirements Checklist Tab

- View all required vs. optional documents
- Track which documents are still needed
- Specific requirements vary by quote type (PEO vs. ACA)

Filtering & Finding Files

Use the filter dropdowns to find specific files:

- **Category Filter**: All | Census | Plan Summary | Claims History | Renewal Letter | Proposal | Contract | Other
- **Team Filter**: All | PEO | ACA

Example: Filter to "Category: Plan Summary" to see all plan documents in one place.

Working with Files

Each file has the following actions available:

Action	Purpose
Verify	Mark file as reviewed and approved (your name is recorded as verifier)

Comment	Add a note or question about the file
Download	Download the file to your computer
Delete	Remove the file (permanent)

File Metadata

Each file shows:

- **Name**: Click to download
- **Category**: Auto-detected or manually set
- **Date Uploaded**: When the file was added
- **Uploader**: Team member who uploaded
- **Team Badges**: Which teams need it (PEO, ACA, or both)
- **Required Badge**: Shows if file is required (not optional)
- **Verified Badge**: Green checkmark if approved by a team member

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Processing Census Data

Census data (employee rosters) is the most critical component. Sales Studio automatically detects and processes census files with sophisticated validation.

What is Census Data?

Census data is an **employee roster file** (Excel or CSV) containing employee information such as:

- Employee names
- Dates of birth
- Zip codes
- Salary information
- Hire dates
- Hours per week
- Coverage tiers

Uploading Census Data

1. Upload your census file via the **Document Center**
2. System checks the file for census indicators (column headers like "DOB," "Salary," "Plan Tier," "Coverage")
3. If detected as census, a dialog appears: **"This looks like census data. Would you like to process it?"**
4. Click **"Yes, Import"** to proceed

Previewing Before Import

Before committing census data:

1. **Column Mapping Preview** shows detected columns:
    - System lists all detected fields
    - Columns marked with ✓ match expected fields
    - Columns marked with ⚠ may need review
2. **Sample Data** shows first few employee rows
3. Review the data for accuracy, then click **"Confirm Import"**

Understanding Census Validation

Once imported, census data is automatically validated against **two standards**:

PEO Requirements

The employee data must have:

- Employee Name ✓
- Date of Birth ✓
- Zip Code ✓
- Salary ✓
- Coverage Tier ✓

ACA Requirements

In addition to PEO requirements, must also have:

- Hire Date ✓
- Hours Per Week ✓

Viewing Validation Results

The **Census Tab** in the right panel shows a **Validation Summary** with:

- **PEO Quality Score**: 0-100% (percentage of rows meeting PEO requirements)
- **ACA Quality Score**: 0-100% (percentage of rows meeting ACA requirements)
- **Issues Found**: Count by type:
  - Missing columns (fields not in the file at all)
  - Missing values (fields present but empty for some rows)
  - Invalid values (data in wrong format)
- **Affected Rows**: How many rows have issues

Exploring the Census Table

Below the validation summary is an **interactive census table** displaying all employee records:

Row Colors

- **Green rows**: All data valid ✓
- **Yellow rows**: Has one or more data issues ⚠

Cell Colors

- **Red cells**: Missing value (empty field)
- **Yellow cells**: Invalid format (e.g., birthdate in wrong format)
- **White cells**: Valid data ✓

Navigation & Filtering

- **Page Through Data**: Use pagination controls to view all rows (shown 50 per page)
- **Filter by Status**: Dropdown to filter:
  - "All Rows": See everything
  - "Valid Rows Only": Green rows only
  - "Rows with Issues": Yellow rows only
- **Hover for Details**: Hover over a red or yellow cell to see the specific issue in a tooltip

Requesting Missing Information

When you find census issues, you can quickly notify the client:

1. Click **"Request Missing Info"** button (in the validation summary)
2. A dialog opens pre-populated with detected issues:
    - Lists specific fields that are missing or invalid
    - Identifies which rows are affected
    - Pre-populates a request template
3. Customize the request if needed
4. Click **"Send Request"** to notify the client
5. Client receives a list of exactly what you need and can provide corrections

Managing Multiple Census Versions

Census History Tab

Clients often send updated census data multiple times. Track all versions:

1. Click the **"Census History"** tab
2. View a list of all census uploads with:
    - Upload date and time
    - File name
    - Row count
    - Current status (is this the active version?)
3. Click to expand any version and see its validation details

Switching Between Versions

- Use the **dropdown menu** at the top of the Active Census section to select a different version
- The census table updates to show that version's data
- Only one census can be "active" at a time

Comparing Two Versions

1. Click the **"Compare"** button in the Census History tab
2. Select two versions from the dropdown menus
3. View their validation scores side-by-side
4. See what changed between versions

Cloning Census to Another Client

If two clients have very similar employee data:

1. Open the **census detail** for the source client
2. Click **"Clone Census"**
3. Select the destination client
4. Click **"Clone"**
5. The destination client gets a copy of this census version (marked as "Cloned from [source client]")

Quality Trends

As you collect multiple census versions over time, track improvement:

1. Click the **"Quality Trend"** tab
2. View a **chart** showing PEO and ACA quality scores across all versions
3. See a **data table** with:

- Version number
- Upload date
- File name
- Row count
- Quality scores (color-coded)

This helps you see if the client is providing cleaner data over time.

Best Practices for Census Data

- **Upload often**: New versions create a trail of progress
- **Compare versions**: Use the comparison feature to track what changed
- **Request early**: Use "Request Missing Info" as soon as you spot issues
- **Review regularly**: Check quality scores as new versions arrive
- **Document issues**: Leave comments on census to explain what you need from client

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Team Collaboration

Comments & Activity Feed

The **Activity Feed** on the right side shows all client activity and allows team collaboration.

Viewing Comments

1. Scroll to the **Comments** section on the right panel
2. See all comments in chronological order (newest first)
3. Each comment shows:
    - Author name and team (PEO, ACA, or Sales)
    - Comment text
    - Timestamp
    - "Resolved" status (checked or unchecked)

Filtering Comments

- **By Team**: Click tabs to show only comments from PEO, ACA, Sales, or all teams
- **Search**: Use the search box to find comments by keyword

Adding a Comment

1. Click the **"Add Comment"** button at the bottom
2. Enter your comment text
3. Select your team (PEO, ACA, or Sales) from the dropdown
4. Click **"Post"**
5. Your comment appears in the feed with your name and team
6. Other team members can see and respond

Marking Comments as Resolved

Once you've addressed a comment:

1. Hover over the comment
2. Click the **checkbox** to mark as resolved
3. Resolved comments are visually distinguished (grayed out)
4. Click again to unresolve if needed

Information Requests

Formal way to request specific information from a client.

Creating a Request

1. Click **"Create Request"** in the Outstanding Requests panel
2. Select which quotes need information:
   - PEO Quote
   - ACA Quote
   - Both
3. Add specific items requested:
   - Type in each item (e.g., "Updated payroll for 2024")
   - Mark if item has been received
4. (Optional) Add notes for context
5. Click **"Send Request"**

Automatic Pre-Population

When you click **"Request Missing Info"** from the census validation summary, the dialog is pre-populated with:

- Detected missing or invalid fields
- Affected row counts
- Suggested request text

Tracking Request Status

1. View **Outstanding Requests** panel at top of client detail
2. Each request shows:
   - Date requested
   - Quote type(s)
   - Status: Pending | Received | Cancelled
   - List of items with checkmarks for received items
3. Click to expand and see notes
4. Mark items as received as client provides them

Sending Reminders

1. Click on a request
2. If it's past due, click **"Send Reminder"**
3. Client receives notification that you're waiting

Tips & Best Practices

For PEO Teams

- **Focus on PEO quality scores** in the census validation
- **Request in order**: Employee name → DOB → Zip → Salary → Coverage Tier
- **Use comparison mode** to see if client data is improving
- **Filter census to "Issues Only"** to focus on what needs fixing
- **Leave detailed comments** explaining what format you need (e.g., "DOB in MM/DD/YYYY format")

For ACA Teams

- **Check ACA quality scores** (which include PEO requirements plus Hire Date and Hours)
- **Coordinate with PEO team** on missing data—they often work on the same client
- **Request hire dates and hours early** since client may not track these regularly
- **Flag hiring date issues** as these determine eligibility

For Sales Teams

- **Bookmark key accounts** for fast access on the dashboard
- **Upload all supporting documents** promptly (plans, claims history, contracts)
- **Mark documents as verified** once reviewed
- **Use the Requirements Checklist** to ensure nothing is missing before presenting quote
- **Leave comments in Sales context** to keep the audit trail clear
- **Monitor quote status** to ensure both PEO and ACA are progressing together

For Everyone

- **Use status notes**: When updating quote status, add context (e.g., "Waiting for client payroll data")
- **Check history regularly**: View status history to see who did what and when
- **Create requests proactively**: Don't wait until you're blocked—ask early
- **Comment on files**: Use file comments for specific document questions (not general comments)
- **Filter & search**: Use filters to focus on what you need right now
- **Track multiple versions**: Keep census history clean; it's your proof of progress
- **Respond to comments**: Even just an emoji reaction helps team communication
- **Archive old clients**: Clean up your dashboard by archiving closed deals

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Keyboard Shortcuts & Quick Tips

- **Search on Dashboard**: Ctrl/Cmd + K to focus search box
- **Expand Client Row**: Click anywhere on the row (except buttons)
- **Filter Tabs**: Quickly switch between Files | Requirements Checklist tabs
- **Pagination**: Use arrow buttons to navigate large census tables
- **Cell Details**: Hover over red/yellow cells in census to see issue details
- **Download Files**: Click file name to download
- **Quick Add**: "+ Add Client" button is always at the top of dashboard

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Troubleshooting

Census Not Detected as Data

Problem: Uploaded a file but system didn't recognize it as census data.

Solution:

- Ensure file has standard column headers (DOB, Date of Birth, Salary, Zip Code, Hire Date, Hours, Coverage Tier, Plan Tier, etc.)
- System uses keyword matching; non-standard header names may not trigger detection
- You can manually flag it as census in the file properties

Quality Scores Not Improving

Problem: Sent request to client, but new census still has low quality scores.

Solution:

- Review the specific issues in the census table (filter to "Rows with Issues")
- Use cell-level details (hover over red/yellow cells) to see exact problem
- Be specific in your request—include examples of correct format
- Follow up with phone call if multiple requests haven't moved the needle

Can't Find a Client

Problem: Client doesn't appear in dashboard.

Solution:

- Check if client is archived (look in a filtered view showing archived clients, if available)
- Try searching by email if name search returns nothing
- If recently deleted, check with admin if it can be restored

File Upload Failed

Problem: Drag-and-drop didn't work.

Solution:

- Try clicking the upload zone to browse files instead
- Check file size isn't too large
- Try a different file format (e.g., rename .xls to .xlsx)
- Refresh page and try again

Comments Not Showing

Problem: You added a comment but don't see it.

Solution:

- Check the team filter—you may have filtered out your team
- Try searching for your comment text
- Refresh the page if it's not updating
- Make sure you clicked "Post" (not just typed)

Support & Feedback

Have questions or found a bug? Contact your Sales Studio administrator or submit feedback through the app's built-in feedback feature.

Happy quoting! Sales Studio is here to keep your team aligned and your clients' data organized.