Team 8: User Manual

Kerridge Commercial Systems Application

USER’S MANUAL
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1.0 GENERAL INFORMATION

The General Information section of this document will address the system and its purpose as well as the layout of the manual.

1.1 System Overview

The Kerridge Commercial Systems application is intended for use by those employed within Kerridge's sales team. The app allows for the storing of individual employees' meetings, sales, order and client information alongside personal notes. The stored information is saved to a database ensuring that information is connected to an employee's account rather than the individual device. Kerridge Commercial Systems operates on mobile devices running the Android operating system.

1.2 The Manual

The user's manual will be broken down into four sections: General Information, System Information, Getting Started and Using the Application.

The 'General Information' section generally addresses the system and its purpose for which it is intended.

The 'System Information' section outlines a general overview of the system. This overview will address the software and hardware requirements for the use of the system, the system's response to any erroneous behaviour and the individual user access levels.

The 'Getting Started' section will address how users can install the application on their device and log into their user account. It will also describe each part of the application and its intent.

The 'Using the Application' section will go into further details about the usage of the application as well as application functions.

2.0 SYSTEM INFORMATION

The System Information section of this document will provide a general overview of the system; explaining the software and hardware requirements, the system's response to any contingencies and user access levels.

2.1 Software and Hardware Requirements

The Kerridge Commercial Systems application will run on mobile devices uses the Android operating system and will require an Internet connection for information to be synced to the database.

2.2 Contingency Response

In the case that the user is not connected to the Internet, the application will fail to log in and will present the user with an error message. In the case that the user loses power in their device, all information is saved to the database upon submission and will redownload to the device upon power being restored.

2.3 User Access Levels

The application is intended for employees of the Kerridge sales team and thus, only registered users of the application may log in and interact with the database.

3.0 GETTING STARTED

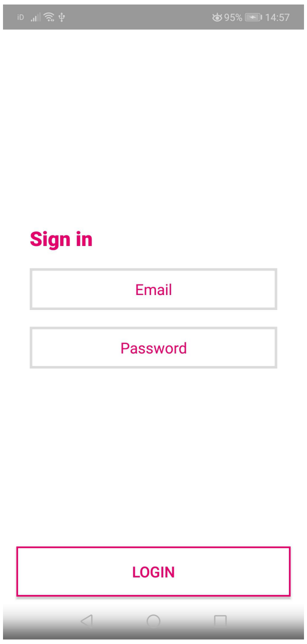
The Getting Started section of this document will outline how to get the Kerridge Commercial Systems application and install it on a mobile device. It will also briefly describe each part of the application and its intent.

3.1 Installation & Login Details

Distribution of the application will be handled by Kerridge and can be downloaded through their means and installed on the device. For instructions on how to install applications onto a specific device refer to that particular device's user manual. User email addresses and passwords will be set up and managed by Kerridge for use when logging into the application.

3.2 Login Screen

The first screen that appears upon launch of the application will be the login screen; the user will be expected to enter their given email address and password to gain access to the application.

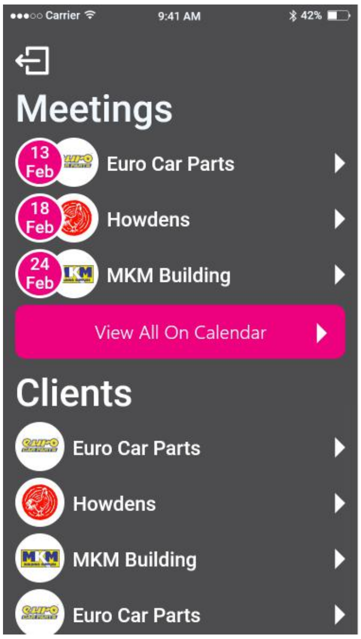


3.3 Loading Screen

Upon entering user details to log in, it is at this point where the application will either present an error message stating the reason for being unable to proceed or will proceed as usual to the home screen of the application.

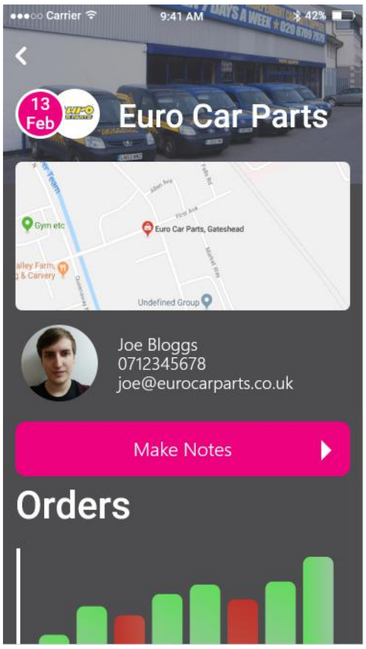
3.4 Home Screen

The home screen will be the primary interface of the application and is split into two main areas to allow for fast access to the most important information. The employee's list of meetings will be shown at the top of the screen above their list of clients which will be shown underneath.



3.5 Meeting Screen

The meeting screen will show the user the information about a specific meeting that they have chosen such as the location, time, date and attendees of the meeting.



3.5.1 Meeting Notes

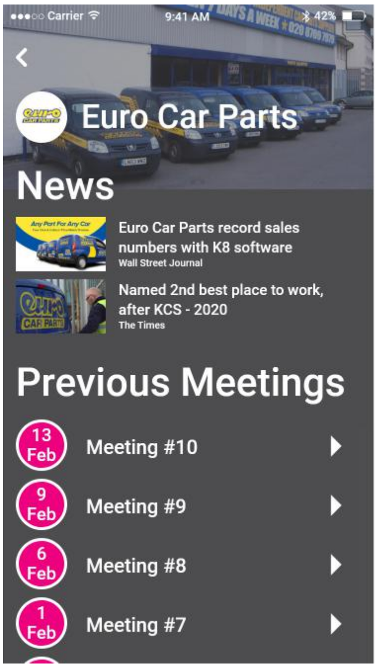
Upon selecting an existing meeting, the user will be able to create notes specific to that meeting which will allow them to add additional information.

3.5.2 Sales Data

Another option alongside notes is viewing previous sales information associated with the selected client attending the meeting.

3.6 Client Screen

The client screen will provide the user with a list of their current clients, from this screen users will be able to view the previous sales data associated with that client (refer to 3.5.2 of this document).

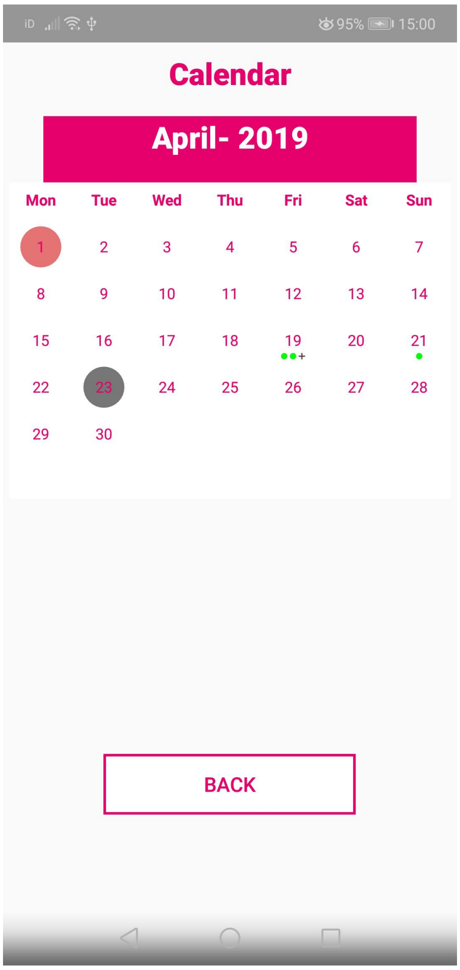


3.6.1 Client Information & Previous Meetings

Upon selecting a client, the application will provide further information about the client as well as a list of the previous meetings with that client.

3.7 Calendar Screen

The calendar screen shows the user a calendar of the selected month, and an icon is shown underneath each day if there is a meeting associated with it. If a day is selected which has a meeting associated with it, then the application will show a list of the meetings for that day at the bottom of the screen.

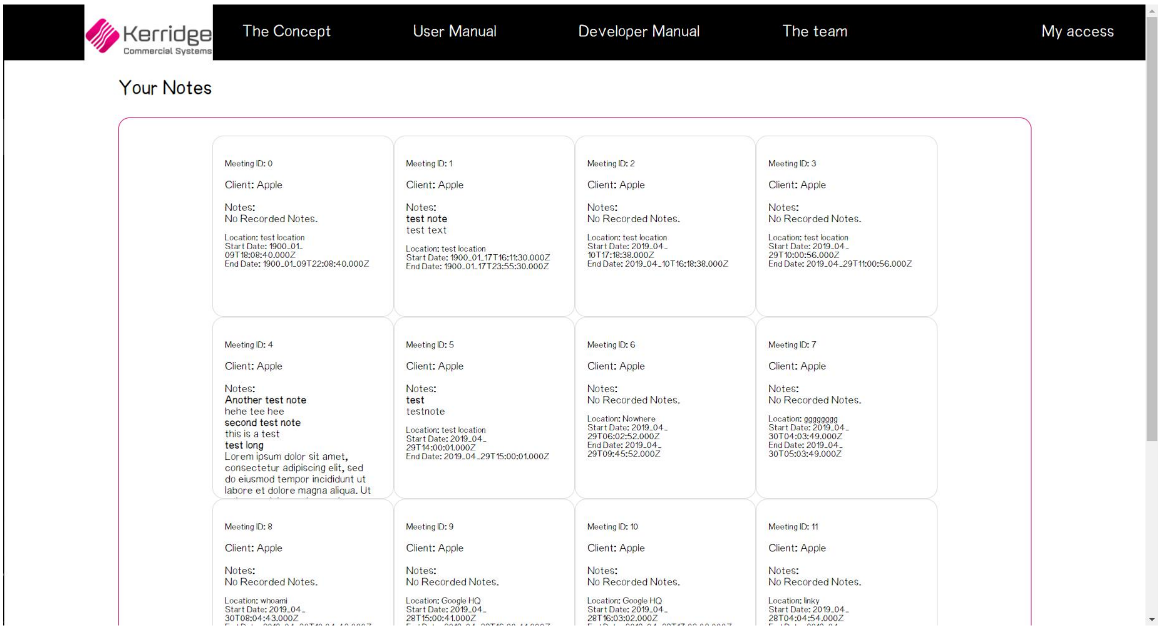


3.8 Exiting the Application

The application is closed through the same method every application can be closed on Android; another alternative is the button located in the top-left of the home screen.

3.9 Website 'My Access'

The user can access their meeting information through the website's 'My Access' tab, this page will show the user each of their meetings in a table form and will display information such as the associated notes, time, date, client name and location.


Kerridge
Commercial Systems
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The team
My access
Your Notes
Meeting ID: 0
Client: Apple
Notes:
No Recorded Notes.
Location: test location
Start Date: 1900_01_09T18:08:40.000Z
End Date: 1900_01_09T22:08:40.000Z
Meeting ID: 1
Client: Apple
Notes:
test note
test text
Location: test location
Start Date: 1900_01_17T16:11:30.000Z
End Date: 1900_01_17T23:55:30.000Z
Meeting ID: 2
Client: Apple
Notes:
No Recorded Notes.
Location: test location
Start Date: 2019_04_10T17:18:38.000Z
End Date: 2019_04_10T16:18:38.000Z
Meeting ID: 3
Client: Apple
Notes:
No Recorded Notes.
Location: test location
Start Date: 2019_04_29T10:00:56.000Z
End Date: 2019_04_29T11:00:56.000Z
Meeting ID: 4
Client: Apple
Notes:
Another test note
hehe tee hee
second test note
this is a test
test long
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut
Meeting ID: 5
Client: Apple
Notes:
test
testnote
Location: test location
Start Date: 2019_04_29T14:00:01.000Z
End Date: 2019_04_29T15:00:01.000Z
Meeting ID: 6
Client: Apple
Notes:
No Recorded Notes.
Location: Nowhere
Start Date: 2019_04_29T06:02:52.000Z
End Date: 2019_04_29T09:45:52.000Z
Meeting ID: 7
Client: Apple
Notes:
No Recorded Notes.
Location: gggggggg
Start Date: 2019_04_30T04:03:49.000Z
End Date: 2019_04_30T05:03:49.000Z
Meeting ID: 8
Client: Apple
Notes:
No Recorded Notes.
Location: whoami
Start Date: 2019_04_30T08:04:43.000Z
Meeting ID: 9
Client: Apple
Notes:
No Recorded Notes.
Location: Google HQ
Start Date: 2019_04_28T15:00:41.000Z
Meeting ID: 10
Client: Apple
Notes:
No Recorded Notes.
Location: Google HQ
Start Date: 2019_04_28T16:03:02.000Z
Meeting ID: 11
Client: Apple
Notes:
No Recorded Notes.
Location: linky
Start Date: 2019_04_28T04:04:54.000Z

4.0 USING THE APPLICATION

This section will go into further detail about the usage of each section of the application.

4.1 Logging In

In order to log into the application, the user will have to provide their email address and password associated with their account, once both fields have been filled in with the appropriate information the user will be able to select 'Login'. The system will then validate the information given and if correct, will sign the user into the application, if any of the details are incorrect, the application will present the user with an error message stating the reason for the error. Possible reasons for an error would be incorrect an email address, incorrect password or not being connected to the Internet.

4.2 Using the Home Screen

Upon logging in, the home screen will be displayed. The home screen displays a section of both the meetings screen and the client screen, and the user has multiple options whilst on this screen. The user will be able to select an existing meeting from the list which will take them to that meeting's page which will provide further information on the meeting, they will be able to select an existing client from the list which will take them to that client's page which will provide further information on the client as well as previous sales history. The user may also select to view their calendar which will show the current month in the form of a calendar and will provide information for each day based on whether or not the user has any meetings for that day.

4.3 Using the Meeting Screen

The meeting screen will show the user a smaller sized list of their upcoming meetings while also showing the time, date and name of the meeting. From this screen, the user will be able to select one of their meetings to view more detailed information about that specific meeting or will be able to choose from three options at the bottom: 'View All', 'Schedule Meeting' and 'Client List'.

4.3.1 View All

The 'View All' selection will expand the smaller sized list and will show every meeting that the user has scheduled and will allow the user to scroll through and select a meeting of their choosing which will then provide further information about that meeting.

4.3.2 Schedule Meeting

The 'Schedule Meeting' selection will bring the user to a new screen that will show them multiple fields to fill to add the meeting to their list successfully. The user will be able to select a client to associate the meeting with as well as decide on a date and time for the meeting to take place. The user will also be able to type in a location to associate the meeting with and if they wish to do so, may also add further contacts from their phone's address book to the meeting. Upon filling out all the required fields, the user will be able to select 'Schedule' located at the bottom of the screen and the system will validate all given information, assuming everything was input correctly, the meeting will now be added to the meeting's list for that user.

4.3.3 Meeting Information

Once a specific meeting is selected from the user's list, another screen will be shown dedicated to that specific meeting. The user will be shown the date, time, location and name of the meeting alongside two options: 'View Notes' and 'View Sales Data'.

4.3.3.1 View Notes

This screen will be a dedicated notes section for a specific meeting, allowing the user to take any important notes that are relevant to that specific meeting and client. These will be viewable at any time before, during and after the meeting has taken place. The notes will always remain editable and can be changed as many times as needed.

4.3.3.2 View Sales Data

The sales data of a particular client will be available from this screen; it will show the user the previous sales and order information from a selected client.

4.3.4 Client List

The client list screen functions similarly to the meetings screen in that it shows a list that can be selected. The list will show each client associated with the user and can be selected to view further information about that specific client.

4.3.4.1 Client Information

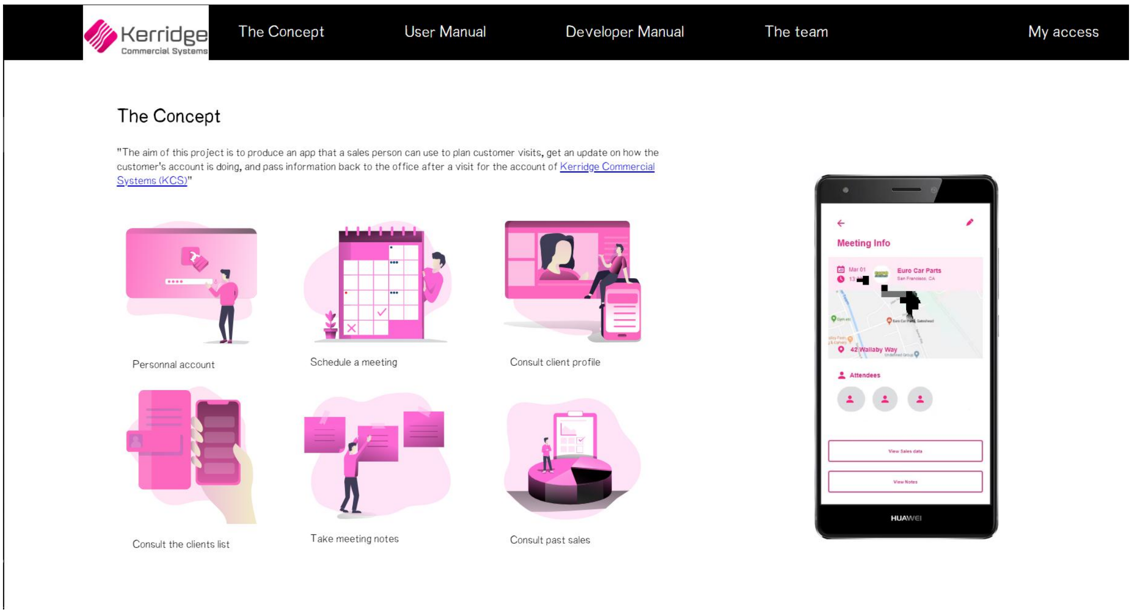
The client information screen will show the user detailed information about the client as well as a list of all the previous meetings held with that client which provides access to the notes screen of each previous meeting too, meaning that no information will be lost once a meeting has been completed. The application will also show the user recent news surrounding that client through the 'News' section of the screen; these can each be selected to be brought to the news page.

4.4 Using the Calendar

The user will be able to use the calendar screen without having any clients or meetings added to their account; however, it will just be a simple calendar. To take full advantage of the calendar screen, the user should make sure all of their meetings and clients have been documented in the application, once the calendar is opened, it will show the user via icons how many meetings are on each day to give the user a visualisation of how busy a day/week/month will be.

4.5 Using the Website's 'My Access' Tab

The user will be able to access their meetings information by clicking the tab located in the top right corner of the website labelled 'My Access'. This will prompt the user to log into their account using the same details that they use to log into the application on their mobile device. Upon logging in, the user will be shown all of their meetings in a tabled form. The meetings shown are read-only and can only be edited from within the application.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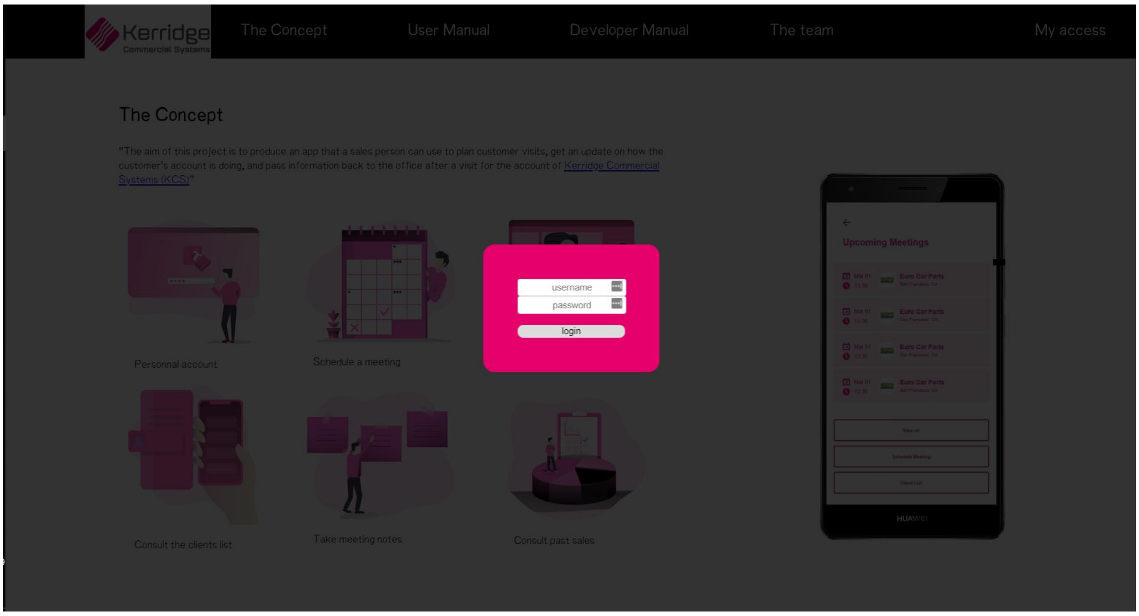
"The aim of this project is to produce an app that a sales person can use to plan customer visits, get an update on how the customer's account is doing, and pass information back to the office after a visit for the account of Kerridge Commercial Systems (KCS)"
Personnal account
Schedule a meeting
Consult client profile
Consult the clients list
Take meeting notes
Consult past sales
Meeting Info
Euro Car Parts
Attendees
HUAWEI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password
login
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Upcoming Meetings
Euro Car Parts
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HUAWEI