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Mayvis Website User Manual

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Submitted By:

Jeb Gallarde

Evan Mah

Melody Miranda

Travis E Simmons

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# Mayvis Proposal Builder and Client Approval Website

## Introduction

Welcome to the Mayvis User Guide. This user guide is designed to provide documentation for people who will use Mayvis on a daily basis. This document is designed to be read by any user of Mayvis, as most users will have access to the features documented here. Employee and client functionalities are covered in separate sections of this guide.

#### I.1. What is Mayvis

Mayvis is a website developed to assist Keen Creative company in organizing and sending out the estimates proposals they create. Mayvis consists of two main components: Proposal Creation and Client Proposal Approval.   
  
Keen Creative employees will primarily use the Proposal Creation section. Within this section, they can create templates that will be used to as a foundation for generating estimates proposal for clients. Employees will also have the capability to monitor the status of the proposals, whether they have been approved or denied by the client.   
  
On the other hand, clients will utilize the Client Proposal Approval section. Here, they can access proposals sent by Keen Creative employees, review them and subsequently either approve or deny them. Additionally, clients have the ability to provide comments on the proposals, offering valuable feedback that can be utilized by Keen Creative employees to enhance future proposals.

A screenshot of a website

Description automatically generated

## Log In / Sign-up

### A) Log In

Every user must login in order to use the functions of the website.

1. To log into the system, enter your username or email address and password in the respective fields.
2. Click “Log in”

A screenshot of a login screen

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### B) Forgot Password

If the user had forgotten your password; you may reset, by clicking “Forgot password” to process resetting of password.

1. Enter a valid email address in the email field and click “Reset Password” to proceed to reset your password. An email notification will be sent to you.

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1. Check your registered email and confirm your password reset action by clicking on reset password “link”. It will direct you to the new password page.

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1. Enter your new password in password field and the same password in the verify password field and click “Reset Password” to continue.

A screenshot of a login screen

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1. Upon completion, a successful password reset confirmation will be displayed.

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### D) Register for a New Account

New client must have a registered email with Mayvis to be able to sign-up. Select “Register for a New Account” from the main login screen.

1. You will be prompted to enter your First name, Lastname, Username, User’s email address and password.

* The username or user’s email you enter will be used as your login ID for your account.
* Password requires a minimum of 6 characters and could be uppercase, lowercase or symbol.

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# Employee View

## Dashboard

The dashboard is divided into several parts: favorite templates, recent activity, templates, proposals, create proposal, create template, profile, check client responses and user control.

The menu options for the Mayvis employee dashboard are briefly explained here.

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### Favorite Templates

Once you click Templates from the employee dashboard, it will direct you to the Templates page.

1. Select a category from the category list to see the templates in a particular category.
2. Once the drop-down menu is viewed, select the template you want to use multiple times.
3. Click “Add to Favorites” to easily access the template from the employee dashboard.

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1. Once you click the template name in the Favorite Templates from the employee dashboard, you will be directed to a page where you can edit or delete the template.

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### Recent Activity

Once you click “View Details” in Recent Activities, it will show you the details of the proposal and the status if it is waiting for approval, approved or denied.

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### Templates

Templates will show you the categories and once you click it, a drop-down list of the templates can be viewed. By clicking the ellipsis icon, you can either edit, delete, set the template as hidden or add to favorites. You may also view the hidden templates by clicking the eye icon.

For “New template” tab, please see III. Create Template page 25.

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### Proposals

The proposals tab will show you all the proposals made by Keen Creative.

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Once you click “Your Proposals” it will show just the proposals of the employee who is currently logged in.

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Once you click “View Details”, a detailed view of the proposal including the proposal status will be shown. If the proposal is approved, denied or waiting for approval.

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### Create Proposal

This tab discusses on how you will create a new proposal. The process will be explained further in Section II.

### Create Template

This tab discusses on how you will create a new template. The process will be explained further in Section III.

## Create Proposal

The progress bar at the top illustrates the percentage of the task that is complete. Above the progress bar, it shows which step you are currently working on.

### Choose Client

1. New Client

For first-time client, you will need to enter the Client Company name, Client contact name (First name and Last name) and contact email address and click next.

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1. For existing client, click the checkbox beside the “Use existing client”.

b.1. Click “select Client” and choose one in the list of companies the proposal is for.

b.2 Click “Next”.

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### Title of Proposal

Enter Title of Proposal and choose the date it was created by choosing from the calendar icon then click “Next”.

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### Personal Letter

Write a brief description of the proposal content. You may edit your plain text using the text editor functions above the text box. Once done, you may click “Next”.

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**Text editor**

### Choose Deliverables

Choose the deliverables needed for the proposal.

1. To select multiple deliverables, ctrl + click chosen deliverables.
2. You may change the quantity for each deliverable.
3. Click “Next”.

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### Finalize

Review proposal details. You will be able to edit the “proposal letter”, “quotation price” and “created by”.

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Detailed View of the proposal will be shown. Once you click send now, the proposal will be sent to all contacts of the client you selected. You will be able to add another contact for the client company if they are new to the company. No changes can be made once you hit “Send Now” and the client will be notified.

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## Create Template

### Choose Category

1. Create New Category

New template will be placed in the new Category created. Enter the new category name, title of the template, template description and price in their respective fields. Then click “Submit”.

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1. Select from Existing Categories

Click “Select Category” and a drop-down list of categories will be shown. Enter the title of the template, template description and price in their respective fields. Then click “Submit”. Created templates will be shown in the template’s directory in their respective categories.

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## Profile

In the profile page, you can edit your password by entering the details in their respective fields. You will also be able to upload a profile picture and receive email notification once there is a status update on your proposal/s by clicking on the check box beside that option.

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## Client Responses

Once you click “Client Responses”, you will be directed to the “Your Proposals” page. You can view the status of the proposal and the client’s comments once you click “View Details”.

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## User Control

In the user control page, you can see the employee details “existing users’ and the client details “created contacts”. You can change the details in the edit button.

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# Client View

## Dashboard

The dashboard is divided into several parts: proposal history, what’s new, tutorial, my proposals, and profile.

A notification will be shown below the welcome banner once a new proposal is sent to the client which can be viewed in the “My Proposals” or “Proposal History”.

The menu options for the Mayvis client dashboard are briefly explained here.

A screenshot of a web page

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### Proposal History

This section will show the user all the proposals that they approved, denied or pending approval.

### What’s New

Once you click this section, it will inform the user about changes made on the website.

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### Tutorial

Tutorial shows how the user can easily navigate through the website.

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Tutorial

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Tutorial

### My Proposals

My proposals page shows all the proposals that were sent to the client.

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Once you click the proposal title, you will be directed to a page where you will be able to view the proposal details and terms and conditions. After reviewing, you can affix your signature and write your comment regarding the proposal in the response box. If another signature is needed for approval of the proposal, click the checkbox for it to require a second signature. Once you click the decision drop box, you can either approve or deny the proposal.

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Once you click “Terms and Conditions”, you will be able to read the terms and conditions of service.

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The approval status will be updated and Keen creative staff will be able to see the comment.

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### Profile

Please see IV. Profile in page 11.