**User Manual for you…..the Student (the Professional Seller)**

**Brought to you by the SEI Project Team of:**

Noah Conrad – King Monarch III

James Mulvihill – Lowly Peasant

James Miyashita – Lowly Peasant

Zach Evans – Lowly Peasant

Stephen Chappell – Lowly Peasant

Jake Canipe – Foolproof Developer and Creator of this Magnificent Manual

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***Client List Tab***

1. This is where you will choose the all the clients you want to work on.
2. You will also be able to view the client’s information.
   1. The table itself will tell you the basics of that client:
      1. Type of priority (high, medium, or low)
      2. Business name
      3. Address
      4. Person to contact
      5. Phone number
      6. Any comment associated with it
   2. You can also view a little more detail about the client by clicking on the client’s business name. This will take you to another page and tell you the above information as well as:
      1. City
      2. State
      3. Zip code
3. To choose a client:
   1. In the far left column will be “Choose” buttons next to each client.
      1. These buttons are what you will use to choose a client and add them to your My Clients (explained on page ###).
         1. *Hint*: If you know the client you want and don’t feel like scrolling to find it, then you can use the search box to quickly find your client.
      2. You might notice that some clients do not have a “Choose” button next to them. This means that another student has chosen this client for their self.
      3. The colored bar next to the priority is a quick reference to what type of priority the client is.
         1. Green is a high priority client
         2. Yellow is a medium priority client
         3. White is a low priority client
      4. When you click on the “Choose” button, one of two messages will be shown:
         1. “You are now assigned to” the client
         2. “You already have the max number of” the type of priority client.
   2. However, before you start clicking away at any client, you will need to look at the top of the table for the red information strip.
      1. This will give you information as to how many clients, what type of priority of clients, and how long you have to select clients.
      2. The “High, Medium, and Low priority allowed” numbers are the amount of clients you are able to choose from that type of priority.
      3. The easiest way to view the “High, Medium, and Low priority allowed” numbers are as a restriction. Here is an example situation:
         1. Let’s say you have 2 for the “High priority allowed” number.
         2. Then you have 4 for both the “Medium and Low priority allowed” numbers.
         3. When you find a high priority client you want and click on the “Choose” button, a message will show up saying you either got it or not.
         4. Then the “High priority allowed” number will go to 1, while the “Medium and Low priority allowed” numbers will both go down to 3.
         5. Now let’s say that you choose another high priority client.
         6. The “High priority allowed” number will go to 0, and the “Medium and Low priority allowed” will both go to 2.
            1. The numbers for both medium and low priority clients will go down also, since you are only able to choose at most 1 more client.
         7. You now have a total left of 1, and the option to choose a medium or low priority client (you cannot choose a high since your number is 0).
         8. You then decide to choose a low priority client, and now all of the numbers are 0 since you have chosen the maximum number of clients you are able to have.
      4. The only thing left in the red information strip is the time you have left to choose clients.
         1. This will be labeled “You will be able to select clients until” and then followed by the month, day, year, and time.
         2. This time will let you know how long you have until you cannot choose any clients.
         3. Once you pass this time, you will still be able to work on your clients, but you will not be able to select any more.

***My Clients Tab***

1. This is where all of your clients will be located and where you will save any progress with them.
2. The page will be split into three main sections: Active Clients, Completed Clients, and Released Clients.

***Active Clients Section***

1. This section will show you information about your current and active clients that you are working on.
2. If you have any active clients, then they will be displayed in their own box.
3. Each of these boxes will be colored (to match the priority colors) in either:
   1. Green – The client is a high priority client (the client has been sold an ad within the past year).
   2. Yellow – The client is a medium priority client (the client has been sold an ad, but it has been a couple years).
   3. White – The client is a low priority client (the client has either not been sold an ad, a newly approved client, or has not been sold an ad in a very long time).
4. Each box will give the client’s business name and what you have accomplished with the client:
   1. At the top will be the client’s business name, and you can click anywhere in the box to be taken to the Client’s page.
   2. A “To Do:” list to show what the student has left with the client.
      1. First Contact – You have at least made contact with the client and have recorded it with adit. It will either have a checkmark or not to distinguish.
      2. Presentation – You have made a presentation to the client and have recorded it with adit. It will either have a checkmark or not to distinguish.
      3. Sale – You have made a sale to the client and have recorded it with adit. It will either have a checkmark or not to distinguish.
   3. Points – The amount of points the student has earned with this client.
5. Also, each box will have a small “x” in the top left corner will be a small “x” (you will have to hover the mouse over the box to see it).
   1. This “x” will release the client so it can be chosen from another student.
   2. To release a client:
      1. If you either attempted to make a sale and couldn’t or the client refused to buy an ad, then you have the option to release the client back to the Client List tab.
      2. Click on the small “x” in the top left corner to make a popup box appear.
         1. If you accidentally clicked the “x” and you don’t really want to release the client, then you can click the “Cancel” button.
      3. This popup box will ask you to leave a comment (optional) as to why you are releasing the client.
      4. Type in a comment if you want to and then click the button labeled “Release,” and that’s it.
      5. The client will now be removed from your Active Clients section and placed in your Released Clients section (explained under *Released Clients Section*).

***Completed Clients Section***

1. This section will show you information about your completed or sold clients that you have finished.
2. If you have any completed clients, then they will be displayed in their own small box (similar to the Active Clients section).
3. Each of these boxes will be colored in either:
   1. Green – The client is a high priority client (the client has been sold an ad within the past year).
   2. Yellow – The client is a medium priority client (the client has been sold an ad, but it has been a couple years).
   3. White – The client is a low priority client (the client has either not been sold an ad, a newly approved client, or has not been sold an ad in a very long time).
4. Each box will give the client’s business name and how many points you have earned with the client:
   1. At the top will be the client’s business name.
   2. Points earned – The amount of points you have earned with this client.

***Released Clients Section***

1. This section will show you information about your released clients that you has sent back to the Choose Clients Page so another student can select the client.
2. If you have any released clients, then they will be displayed in their own small box.
3. All of these boxes will be colored grey to show that they have been released.
4. Each box will give the client’s business name and how many points the student has earned with the client:
   1. At the top will be the client’s business name.
   2. Points earned – The amount of points you have earned with this client.

***Accessing a Client’s Page***

1. This page will show you all the information about the client, as well as your sale progress with the client.
2. The page will be split into three main sections:
   1. Client information - This section will give you all the necessary information about a client so you can go and make a contact, presentation, or sale. You may also edit the client’s information.
   2. Sale Progress – This will allow you to record an action to your sale progress.
   3. Accomplished Section – This section will let you see all of the actions that you have done with the client.
3. All three types of clients (Active, Completed, and Released) will be able to access the Client’s Page, with some types of clients not having access to certain sections.
   1. Active Clients – Full access to anything on the Client’s page.
   2. Completed Clients – Full access to anything on the Client’s page.
   3. Released Clients – Access to Client Information and Accomplished Section on the Client’s page.

***Client Information***

1. This section of the Client’s Page will let you edit the client’s information.
2. The client’s basic information (address, contact person, and phone number) will always be on display, but for a more detailed version of the client’s information, then you can click on the “Show client details” link.
3. To edit a client’s information:
   1. Click on the link labeled “Edit this client.”
   2. The form will already be filled out with the current information, but you will be able to edit any field that needs to be edited.
   3. Once you have edited the clients business information, you may click the button labeled “Update Client.”

***Sale Progress***

1. This section of the Client’s Page will let you update your Sale Progress.
2. Keep in mind: Only Active or Completed Clients will be able to make changes to the Sale Progress.
3. Your Sale Progress order will be:
   1. First Contact
   2. Presentation
   3. Sale
4. To record a First Contact:
   1. Check the checkbox next to “I contact my client!”
   2. Add a comment if you want to add one.
   3. Underneath the comment will be an area to put in the time when you made a First Contact.
   4. Finally, select the button labeled “Save” to record the action.
5. To record a Presentation:
   1. Check the checkbox next to “I made a presentation!”
   2. Add a comment if you want to add one.
   3. Underneath the comment will be an area to put in the time when you made a Presentation.
   4. Finally, select the button labeled “Save” to record the action.
6. To record a Sale:
   1. Check the checkbox next to “I made a sale!”
   2. You will need to record the necessary information with a sale:
      1. Sale Amount – The amount of money the client paid for the ad.
      2. Page Size – The page size that the client has bought, and it will either be Planner, Quarter, Half, Whole, Double, or Other page.
         1. The Other page option will allow you to enter a custom page size if it is not currently an option. Also, it can only be a fraction or decimal number.
      3. Payment Type – This is the type of payment option the client used, and will either be Cash, Credit, Invoice, Check, or Departmental Transaction.
   3. Add a comment if you want to add one.
   4. Underneath the comment will be an area to put in the time when you made a Sale.
   5. Finally, select the button labeled “Save” to record the action.
7. You will also have the ability to record multiple actions at the same time.
   1. This can be done if you have made a First Contact and Presentation at the same time, or if you have done all three options at the same time.
   2. Keep in mind: The order of activities will still apply here, in which you have to make at first a First Contact, then a Presentation, and then finally a Sale.
   3. How this will work (it can be explained better with an example):
      1. You have made a clean sweep where you have made a First Contact, Presentation, and Sale all at one time, and need to record it in adit.
      2. When you check the “I contacted my client!” checkbox, the “I made a presentation!” checkbox will pop up.
      3. Select this option to add the action Presentation with First Contact.
      4. Now another checkbox will pop up with the label “I made a sale!”
      5. Select this option to add the action Sale along with Presentation and First Contact.
      6. The necessary sale information will also need to be recorded.
      7. Add a comment, if you want to add one, to be used for all three.
      8. Enter in the date and time to be used for all three.
      9. Then finally click on the button labeled “Save” to record all three actions.
   4. Now this can also be applied in other variations:
      1. Add just Presentation to First Contact.
      2. Add just Sale to Presentation.
   5. If you accidentally select an option that you have not yet performed, simply unselect it to not record it.
8. To record just a comment:
   1. Just type your comment into the Comment box and click the “Save” button.

***Accomplished Section***

1. This will be consisted of a table of all the activities or actions you have recorded.
2. Keep in mind: Any type of client (Active, Completed, or Released) may view this information.
3. The table will be split up into four main columns:
   1. Action – The type of action the student has recorded. It will either be:
      1. Comment – You only recorded a comment with the client.
      2. First Contact – You recorded a first contact with the client.
      3. Presentation – You recorded a presentation with the client.
      4. New/Old Sale – You recorded a sale with the client.
   2. Time – The recorded date and time when you performed the action.
   3. Points – The amount of points you earned for that action.
   4. Comment – The comment with the action if you recorded one.
4. At the very end of a row will have the ability to delete the action.
   1. This is where the order in which you can record an action will come into play again (First Contact followed by Presentation and Sale at the end).
   2. However, you will be deleting in reverse order (you will need to delete Sale before Presentation, and delete Presentation before First Contact).
   3. A Comment by itself can be deleted at any time.
   4. When you click on the “Delete” link, a box will pop up asking “Are you sure?”
   5. Select “Yes” to delete the action.
   6. Important: If you are on a Completed Client and decide to delete the Sale action, then the client will then become an Active Client again for that student. Also, a Released Client will not have the option to delete any action, not even a comment.

***Miscellaneous Notes***

1. With adit, there are some areas that overlap or use the same features throughout all of the different pages.
2. Therefore, this section is to go over in more detail of previously mentioned topics of the Teacher User Manual.

***Navigation***

1. Throughout adit, there will be navigational buttons as well as a permanent navigation bar at the top of every page (except the Sign In page).
2. The navigation bar will be used for when you want to go to the main pages throughout adit.
3. If you click on a link within one of these main pages, you will have the option to always go back to the previous page. They will all begin with the words “Back to.”
4. We highly recommend using the navigation bar and “Back to” buttons to navigate between pages, but you can still of course use the back buttons provided through the Internet browser.

***How to Use a Table***

1. Every table is generally set up the same way throughout all of adit.
2. The similar features for every table include:
   1. Search Bar:
      1. This is located in the top right corner of a table and is used to search for anything in the entire table.
      2. Just start typing into the text box, and it will automatically display anything that matches what you type.
      3. If nothing matches, a notice saying “No matching records found” will display.
   2. Sortable Columns:
      1. The default sorting on every table is the first column is sorted in alphabetical or numerical order.
      2. Almost every column in a table will have the option to sort what order you want.
      3. You can sort in either alphabetical or numerical order.
      4. The easiest way to determine if the column will sort or not is to see if the column has a double triangle symbol. The columns that do have this symbol will have the option to sort.
      5. Also, if there is only the top triangle on the column, then the table is currently sorted on that column with the first alphabet letter or number at the top of the table. While on the other hand, if there is only the bottom triangle on the column, then the table is currently sorted on that column with the last alphabet letter or number at the top of the table.
   3. Scroll Bar:
      1. Located at the bottom of the table, this will allow you to scroll across the table and view the columns on the far right.
      2. Hint: Any easy and quick way to scroll horizontally is by clicking anywhere in the table, and then using the directional arrows to move left and right.
   4. Information Corner:
      1. This is located at the bottom left corner of a table and is used to display how many entries (rows) there are in the table.
3. As with anything with adit, play around and test it out to get a feel of how a table works.