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

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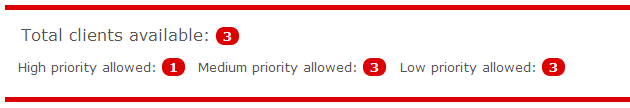
**Client List Tab**

*This is where you will choose all the clients with which to work.*

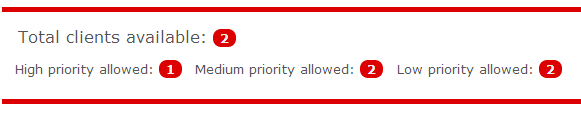
1. To view a client’s Information:
   1. The client’s table will show the following:
      1. Type of priority (high, medium, or low)
      2. Business name
      3. Address
      4. Person to contact
      5. Phone number
      6. Any comments
   2. More details about the business can be seen by clicking on the business name, such as:
      1. City
      2. State
      3. Zip code
2. To choose a client:
   1. “Choose” buttons are located at the left of each client.
      1. By clicking a client’s button, it will send that client to your “My Clients” page.

***Hint***: The search bar eliminated time if you know what you are searching for.

* + 1. If a client does not have a “Choose” button, they have already been selected by another student.
    2. The colored bar to the right of the “Choose” button shows the business’s priority level.
       1. Green for high priority
       2. Yellow for medium priority
       3. White for low priority
    3. By clicking 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].”
  1. Before clicking on clients, look at the red information strip above the table.
     1. This provides information on how many clients you may select, what priority you may select, and how much time you have to select clients.
     2. The amount of High, Medium, and Low priority clients you may select are chosen by your teacher.
     3. The “Total Clients Available” indicates how many clients you may choose, beneath the High, Medium, and Low priorities are set to your teacher’s restrictions.



In the picture above, the student has a total of 3 clients that he may choose. However, below the Total are the categories of priority from which he can choose. According to the picture, he can choose up to 1 High Priority, 3 Medium Priorities, or 3 Low Priorities. As the student chooses clients, his total number of clients will go down as well as the category of priority from which he chose the client.



If the student were to choose a low priority client, his Total Clients Available will lower as well as the “Low priority allowed” from which he chose it. Notice, the Medium priority also went down to 2. This is because the student only has 2 clients available, and 3 medium priorities will no longer be available for him to choose.

* + 1. The remaining information in the red strip is the time remaining to choose clients.
       1. This displays the date and time for the last opportunity to select clients
       2. Once this time passes, you may continue to work on your clients, but will longer be able to select new clients.

**My Clients Tab**

*This is where all of your clients will be located and where you will save any progress.*

The page will be split into three main sections: Active Clients, Completed Clients, and Released Clients.

**Active Clients Section**

1. This shows information on the 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 displaying the color of the priority level that they are.
   1. Green – The client is a high priority client
      * + - The client has been sold an ad within the last 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 yet been sold an ad, is a newly approved client, or has not been sold an ad in a very long time.
3. The client’s box will display the business’ name.
   1. A “To Do” list within the box will show what the student still needs to accomplish with the client. When the task is completed, a checkmark will appear next to the item in the list.
      1. First Contact – You have at least made contact with the client and have recorded it with Adit.
      2. Presentation – You have made a presentation to the client and have recorded it with Adit.
      3. Sale – You have made a sale to the client and have recorded it with Adit.
   2. By clicking anywhere in the box, it will take you to the client’s page.
   3. Points – The amount of points the student has earned with this client.
4. The client’s box will also contain a small “x” in the top left corner (you will see this when hovering) that will let you release your client that another student may select them.
   1. Releasing a client:
      1. By attempting to make a sale you weren’t able to sell an ad or the client refused to buy an ad, then you have the option to remove them from your list of clients.
      2. By clicking on the small “x” in the top left corner a popup box will 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 in the popup box.
      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 (optional), then click the button labeled “Release.”
      5. The client will be removed from your Active Clients section and placed in your Released Clients section (explained under *Released Clients Section*).

**Completed Clients Section**

1. This shows information about completed clients that you have sold to and completed.
2. Completed clients will be displayed in their own box, similar to the box in the Active Clients section. Each of these boxes will display the color of the priority level that they are.
   1. Green – The client is a high priority client
      * The client has been sold an ad within the last 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 yet been sold an ad, is a newly approved client, or has not been sold an ad in a very long time.
3. The client’s box will display the business’ name and how many points earned with the client

**Released Clients Section**

1. This section displays information about released clients that were sent back to the Choose Clients Page for another student to select.
2. Released clients will be displayed in their own boxes.
   1. The boxes will be gray to show that they have been released.
   2. The client’s box will display the business’ name and how many points the student has earned with the client.

**Accessing a Client’s Page**

*This shows information about the client and sales progress with the client.*

1. This page is split into three main sections:
   1. Client information
      1. This section displays the necessary information about a client needed to make a contact, presentation, or sale.
      2. This section allows editing to the client’s information.
   2. Sale Progress
      1. This will allow you to record an action to sales progress.
   3. Accomplished Section
      1. This section displays the actions done with the client.
2. Active, Completed, and Released clients can be accessed
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’s information and accomplishments on the client’s page.

**Client Information**

1. This section will allow editing to the client’s information.
2. The client’s basic information (address, contact person, and phone number) will display; however, for more detailed information, click on the “Show client details” link.
3. To edit client’s information:
   1. Click on the link labeled “Edit this client.”
   2. The form will be filled out with the client’s current information, but editing will be available.
   3. Once the information has been edited, click the “Update Client.”

**Sale Progress**

1. This section will allow updating of the Sale Progress.

***Hint:*** Sale Progress changes can only be made to active or completed clients.

1. The Sale Progress order will be:
   1. First Contact
   2. Presentation
   3. Sale
2. To record a First Contact:
   1. Check the box next to “I contact my client!”
   2. Add a comment (optional).
   3. Put in the time when First Contact was completed.
   4. Select “Save” to record the action.
3. To record a Presentation:
   1. Check the box next to “I made a presentation!”
   2. Add a comment (optional).
   3. Put in the time when a Presentation was made.
   4. Select “Save” to record the action.
4. To record a Sale:
   1. Check the box next to “I made a sale!”
   2. Record the necessary information with a sale:
      1. Sale Amount
         * The amount of money the client paid for the ad.
      2. Page Size
         * The size the client bought: Planner, Quarter, Half, Whole, Double, or Other page.
         * The Other page option is for a custom page size if it is not currently an option. It can only be a fraction or decimal number.
      3. Payment Type
         * The payment option the client used: Cash, Credit, Invoice, Check, or Departmental Transaction.
   3. Add a comment (optional).
   4. Put in the time when the Sale was made.
   5. Select “Save” to record the action.
5. To record multiple actions at the same time.
   1. This is available for when you complete two tasks at the same time.
   2. The order of activities apply.
      1. Check the “I contacted my client!” box, then the “I made a presentation!” box will appear.
      2. Click the “I made a presentation!” box, then the “I made a sale!” box will appear.
      3. The necessary sale information will need to be recorded.
      4. Add a comment that will apply to all three actions (optional).
      5. Enter the date and time to be used for all three actions.
      6. Click “Save” to record all three actions.
   3. This can be applied in other variations:
      1. Add only Presentation to First Contact.
      2. Add only Sale to Presentation.
   4. If you accidentally select an option that you have not yet performed, simply unselect it.
6. To record a comment:
   1. Type your comment into the Comment box and click “Save.”

**Accomplished Section**

1. This displays all recorded actions or activities in a table.
2. 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 that was recorded.
      1. Comment – only a comment was recorded.
      2. First Contact – only a first contact was recorded.
      3. Presentation – only a presentation was recorded.
      4. New/Old Sale – only a sale was recorded.
   2. Time – The recorded date and time of the action.
   3. Points – The amount of points earned for that action.
   4. Comment – The comment with the action if any.
4. Actions can be deleted.
   1. The order of actions will apply (First Contact, Presentation, and then Sale).
   2. Deleting will be in reverse order.
   3. A Comment itself can be deleted at any time.
   4. By clicking “Delete,” a box will appear asking “Are you sure?”
   5. Select “Yes” to delete the action.

**Important:** While adjusting a Completed Client, if a Sale action is deleted, the client will become an Active Client. Actions and comments for Released Clients may not be deleted.

**Tips and Helpful Hints**

**Navigation**

1. Throughout Adit, navigational buttons will be available as well as a permanent navigation bar at the top of every page (except the Sign In page).
2. The navigation bar will navigate to the main pages throughout Adit.
3. While navigating, an option to return to the previous page is displayed as “Back to [previous page].”

**How to Use a Table**

1. Tables displayed throughout Adit are similar, all will have:
   1. Search Bar:
      1. This is located in the top right corner of the table.
      2. Word matches will appear according to the search.
      3. If nothing matches, a notice saying “No matching records found” will display.
   2. Sortable Columns:
      1. The default sorting is alphabetical or numerical.
      2. Almost every column will have the option to sort.
      3. Columns can be sorted either alphabetically or numerically.
      4. Determine if the column will sort by looking for a double arrow symbol (clip below). The columns with this symbol will have the option to sort. 
      5. If only the top arrow is viewable, the table is currently sorted on that column alphabetically or numerically in ascending order. If only the bottom arrow is viewable, the table is currently sorted on that column alphabetically or numerically in descending order.
   3. Scroll Bar:

* Located at the bottom of the table.

***Hint:*** An easy and quick way to scroll horizontally is by clicking anywhere in the table, then using the directional arrows to move left and right.

* 1. Information Corner:
* 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.

**Welcome to Adit! Play around and test it out to get a feel of how it works.**