**User Manual for you…..the Teacher (the Boss)**

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**Projects Tab**

**Set Up**

1. Create a project under the Projects tab.
   1. If you are not able to login, this means you are not a current teacher in Adit. You will need to get another teacher (who is able to login) to add you to Adit.
2. Only one teacher can create one active project for the entire semester, so either you or another teacher can create this project.
3. If there is not a current project, click on the link that says “Create a New Project.” If there is not an option to create a new project, another teacher beat you to the punch and has created the active project. In that case, you may bypass these instructions and go to the [Students section](#Students).
4. A form will appear for you to set up the active project for the semester.
5. Fill out the form to create a new active project.
   1. Determine if you want the project the current year or the following year, either the Fall or Spring semester, and either the Activities Calendar or Arrow.
   2. The “Client Restrictions” section:
      1. This is where you will determine the restrictions on how many of the high, medium, or low priority clients a student may select, or if you want a general maximum of any type of client for each student to select.
      2. The drop down boxes labeled “High, Medium, and Low” are the restrictions for a student:
         1. If you only want the student to select at most 2 high, 2 medium, and 0 low, then you will choose the number accordingly for each drop down box.
         2. If you have no preference about the restrictions for a high, medium, or low priority clients, you may choose the N/A option from the drop down box. This will allow students to choose how many clients they want.
      3. The drop down box labeled “Total” is the maximum amount of clients a student may select:
         1. If you want the student to only have a certain amount of active clients at a given time, then choose the number accordingly.
      4. A student will need at least one client to start selling ads. So help them out and give them at least one client. ☺
   3. The “Time Period When Students Can Choose Clients” section:
      1. This is where you will select the window of time for the students to select clients.
         1. For the Start Time, select the day and time you want to open the flood gates for the students to select their clients.
         2. For the End Time, select the day and time you want to close opportunity for the students to select clients. They will still keep their current clients and can work with them; however, they will not be able to select anymore clients to work with.
      2. You may either type in the date and time with the format YYYY/MM/DD 00:00 AM/PM or you can select a date from the calendar popup.
6. Click “Create Project” when you are finished. You have just created the project for the semester.
7. It will take some time for the project to be created, but you will then be redirected to the Students page under the Sections tab.

**Upkeep**

1. You can return to the Projects tab and make changes or view archived projects.
2. By default, the active project will be always on display for you to see the project’s settings.
3. If you want to edit the current project, you may click on the “Edit Active Project Settings” link.
   1. The active project will be in the same format as when you first set up the project, including the option to move the project to the archives.
      1. You will use this option at the end of the semester when you want to end the active project.
      2. This will prevent the students from making any changes to their clients and end their use of Adit.
      3. When you decide to archive the project, you will be given the option to export the project to an Excel spreadsheet as well as leave a comment.
   2. Other than the archive option, you may also change anything about the project.
      1. You may change the year, semester, project type, amount of clients a student may choose, start time, and end time.
      2. Typically, the only alterations you will make will be the restrictions you allow the students to choose from. If you started the project by letting students only have two clients from each priority (high, medium, and low), and you see they are doing well, you may decide that they may have whichever client they want (no matter the priority).
   3. If you alter the project in any way, select “Update Project.”
4. To view an archived project, if any available, select the project and click “View Selected Archived Project.”
   1. This will display what happened on this project, but you will not be able to edit any information.
5. You may change the project from archived to active changes need to be made.
   1. To do this, click “Details” beside the archived project.
   2. Click “Reactivate This Project” to make the project active again.

***Hint:*** This may only be done if there are no current active projects.

**Sections Tab**

**Students**

**Set Up**

1. Infiltrate all of your students. You can add, promote (become a student manager), demote (return the manager to a regular student), deactivate (a student drops the class or is sent home early), or activate (if the student needs to be an active student in the project again) any student. You may also add or remove the student(s) from a team as well as assign bonus points.
2. Create different sections.
   1. To create a new section for yourself or another teacher, click “Create a New Section” under the “Change Section” dropdown box. This will take you to a page where you can select whatever section number you want and the teacher that will be assigned to the section.
   2. If you are not for certain which teacher will have which section do not worry, because this can be altered at any time with the Teachers Page which will be discussed later.
   3. Determine the section number and the teacher, click “Create this section,” and you will be redirected a section where you can add students.
   4. If you need to view another section, click the “Change Section” dropdown box and select the section number you need. If you want a quick reference to know what section you are viewing, it will be at the top right corner.
3. Add students. You can either import from an Excel spreadsheet or you can add a single student at a time (for when you are bored or if you have a student add the class during drop/add).
   1. A section must be selected to add students. If you need to change a section or add a section, see [Step II](#Section) again.
   2. For the Excel spreadsheet:
      1. In order for it to work **properly**, please verify that the order (A-L) of the columns are as follows:

***Course - ID - Name - Class - Grad Term - Box - Phone - E-mail - Major Minor - Work - RA***

* + 1. If a column is missing, add the column with the title, but you may leave the rows empty.
    2. Open your spreadsheet.
    3. Select everything. Yes, everything. You do not have to worry about if you selected the headings or anything else. The easiest way to select and copy everything is to just click once in the spreadsheet, press Ctrl + A (to select all) on your keyboard, and then press Ctrl + C (to copy) on your keyboard.
    4. Go back to Adit.
    5. Make sure you are in the correct section, then click “Add Students.”
    6. Click the “Copy and Paste your Excel spreadsheet of students here” link.
    7. A large text box will appear where you can paste everything from your spreadsheet into the box by pressing Ctrl + V (to paste) on your keyboard.
    8. Click “Add Students to Section.”
    9. You have just created all of your students for that selected section.
  1. Entering students one at a time:
     1. Click “Add Students.”
     2. Fill out the form for the student and click “Add to Project” to add the student to the selected section.

1. For promoting, demoting, deactivating, or reactivating the student or adding or removing the student(s) to a team or assigning bonus points:
   1. Select the section.
   2. Select the student(s) that you want to change by checking the box next to the student(s).
   3. Find the dropdown box labeled “Choose Action” (at the top of the page) select the option you want (explained below from **a** to **e**), and click “Submit” which will appear when an action is selected.
      1. Promote Student – set a student as a student manager.
      2. Demote Student – set a student manager back to a regular student.
      3. Add to Team – set students to a specific student manager. To assign a team:
         1. Select all of the students that you want in a team.
         2. After you have checked all of the students, choose the “Assign Team” option.
         3. Another dropdown box will appear with a list of all the student managers for the selected section.
         4. Then select the student manager to which you want to assign the students.
         5. To create a team, you will need at least one student manager in the selected section. (This needs to be done beforehand.)
      4. Remove from Team – remove the student(s) from a current team.
      5. Assign Bonus Points – give the student bonus points for different reasons which you can set up on the [Bonuses](#Bonus) tab.
      6. Activate Student – join the student back to the project, making the student able to use Adit again.
      7. Deactivate Student – remove the student from the project, making the student unable to use Adit. However, they will still be tied to the section and can always be reactivated.
2. To edit the student once they have been entered into a section, simply click the “Edit” link beside the student.
   1. This displays a form that is set up like the “Add Students” form.
   2. Change any information then click “Update Student.”

**Upkeep**

1. When you come back to this “Students” page, you can change or reassign teams and managers and redo anything that was previously mentioned in the Set up section.
2. You may also view the clients of any particular student.
   1. To do this, click on the student’s name (first or last, it does not matter).
   2. It will take you to that Student’s clients page, where you can see or edit his Active and Completed clients as well as see which clients he has Released.
   3. For more information, go to the [Student’s Clients](#StudentsClients) page.

**Teachers**

**Set Up and Upkeep**

1. The Set Up and Upkeep for the Teachers page will be the same.
2. The page is displayed in two tables. The first table has all of the current teachers assigned to a section in the project, and the second table has all of the teachers that can use Adit.
3. This page is where you will be able to either add a new teacher, edit an existing teacher, add another teacher to a section, change the section under a teacher, or remove a teacher from a section.
4. To add a new teacher:
   1. Click “Add New Teacher,” which will go to a form where you can enter the basic information for a teacher.
   2. Once you are finished entering all of the information, click “Create Teacher.” This teacher can now use Adit!
5. To edit an existing teacher:
   1. Click the “Edit” link that is on the teacher’s row you want to edit.
   2. You will be directed to a form that is set up like the “Add New Teacher” form in the previous step ([Step IV](#Step4)).
   3. Change the desired information and click “Update Teacher” to save changes.
6. To add *another* teacher to a section:
   1. There needs to be one teacher already assigned to the section. If there is no section, please go to the [Students](#Section) page to create a section.
   2. Click the “Add Another Teacher to this Section” link to have a dropdown option appear.
   3. Choose the desired teacher and click “Add Teacher to Section.”
7. To change the section to which a teacher is assigned:
   1. Click the “Change Teacher” link for that section and a dropdown option will appear.
   2. The current teacher that is assigned to that section as well as a dropdown of all of the other teachers from the Teacher Roster table will display.
   3. Choose the desired teacher from the dropdown and click “Change the Teacher” to change the teacher that is assigned to that section.
8. To remove a teacher from a section:
   1. This option will not be available unless there are at least two teachers assigned to a section.
   2. Click the “Remove” link next to the teacher you wish to remove. A box will appear asking if you are sure you want to remove the teacher from the section.
   3. Click “OK,” and the teacher will be removed from the section.

**Clients Tab**

**Assign**

1. Here you will see a list of all of the clients in Adit.
2. While viewing the list of clients, there will be two options associated to each one.
   1. One will be a button labeled “Assign,” and the other will be the name of a student and the student’s ID number.
   2. The “Assign” button will be used for assigning a client to a student (the main reason for this page).
   3. If you assign a client to a student or if a student has chosen a client on their own, their name and ID will be displayed instead of the “Assign” button.
3. To assign a client to a student:
   1. Find the client you wish to assign.
   2. Click “Assign” to be directed to another page.
   3. This page will be split into two sections. The left section will have the client’s basic contact information as well as what priority it is (high, medium, or low). The right section will consist of all the students in your currently selected section.
   4. Click on the student (highlighting them) then click “Assign,” which will assign the client to that student.

**Approve**

1. This is the other page under the Clients Tab and where you will be able to approve or disapprove a newly submitted client, an edited client, or submit a client.
2. The Approve Clients page is split into three main sections: Pending Clients, Edited Clients, and Unapproved Clients.
3. There are commonalities between the Pending Clients section and the Edited Clients section, one of which is that they will have three options to choose from: Approve, Approve All, or Disapprove.
   1. Approve:
      1. This option will approve the client and allow it to be used in Adit and will be available for anyone to select in future projects.
      2. Approving the client will also automatically assign that new or edited client to the student who submitted it for approval.
   2. Approve All:
      1. This is the previous option (Approve) applied to all of the pending or edited clients
      2. As with Approve, the client will be permanently inserted into Adit along with the student being assigned the client.
      3. If the list of pending clients or edited clients is twenty long and one or two clients will not get approved, then you can disapprove just those one or two clients then select Approve All. This way you do not have to approve each client individually.
   3. Disapprove:
      1. This option will prevent the client from being used in Adit and will be placed in the Unapproved Clients section.
4. Another commonality is editing the pending or edited client yourself.
   1. To do this, select the “Edit” button that is on the same row as the client you wish to edit.
   2. A form will appear, allowing you to make any changes before approving the client.
   3. If you make any changes and submit it, you will automatically approve the client as well. So if the client was pending, it will get assigned to the student who submitted it. The same with the edited client; it will go back to the student who submitted it.
5. Pending Clients:
   1. If there are any newly submitted clients from a student, they will be on display in this section.
   2. There are three options to choose from for a pending client: Approve, Approve All, or Disapprove (as explained in [step III](#StepIII) above).
   3. To use one of these options, select the box next to each pending client then click the option you want.
6. Edited Clients:
   1. If there are any clients that need to be updated or changed, as submitted by a student, they will appear here.
   2. There are three options to choose from for a pending client: Approve, Approve All, or Disapprove (as explained in [step III](#StepIII) above).
   3. To use one of these options, select the box next to each pending client then click the option you want.
7. Unapproved Clients:
   1. All of the unapproved clients that a student cannot use in Adit will be displayed here.
   2. This section is for reference, and you will not be able to alter any of this information.

**Reports Tab**

1. The Report pages will be split into seven separate pages:
   1. Student Summary
   2. Team Summary
   3. Clients
   4. Activities
   5. Sales
   6. Bonus Summary
   7. End of Semester
2. You may change the current section within all of these pages.
   1. To do this, find the dropdown box labeled “Change Section” located in the top right.
   2. Select whichever section that you want to see from the dropdown choices. You may also see all of the sections combined by choosing “all.”
3. With every page, excluding the “Team Summary,” “Clients,” and “End of Semester” pages, you will have the option of viewing clients of a particular student.
   1. To do this, click on the student’s name (first or last, it does not matter).
   2. It will take you to that Student’s Clients page, where you can see or edit his Active or Completed clients, as well as see which clients he has released.
   3. For more information, go to the [Student’s Clients](#StudentsClients) page.

**Student Summary**

1. This page will be used to display an overview summary of each student in a section.
2. The table used for this page will also include information on:
   1. Open Clients – The amount of unsold clients a student currently has.
   2. Sold Clients – The amount of sold clients a student has made.
   3. Released Clients – The amount of clients a student has released.
   4. Sales Total – The total amount of money for all of the sold clients a student has earned.
   5. Points – The total amount of points a student has earned.
   6. Last Student Action – When the student’s last action was made.
3. At the bottom of the table, there is a totals row that will display the total information for:
   1. Open Clients – The amount of unsold clients the section currently has.
   2. Sold Clients – The amount of sold clients the section has made.
   3. Released Clients – The amount of clients the section has released or made available.
   4. Sales Total – The grand total amount of money the section has earned.
   5. Points – The grand total amount of points the section has made.

**Team Summary**

1. This page will be used to display a general summary of all of the teams, if teams have been set up.
2. This is also a reference to see how a team is doing, the table displays:
   1. Open Clients – The amount of unsold clients the team currently has.
   2. Sold Clients – The amount of sold clients the team has made.
   3. Released Clients – The amount of clients the team has released or made available.
   4. Sales Total – The grand total amount of money the team has earned.
   5. Points – The grand total amount of points the team has made.

**Clients**

1. This page is the master client list of all the clients in Adit (approved and unapproved).
2. The clients will have:
   1. Contact information (address, phone, and contact person).
   2. The sold years for either the Arrow or Activities Calendar.
   3. The status of the client (whether approved or unapproved).
   4. Any comment associated with the client.

**Activities**

1. This page is a more detailed version than the Student Summary page.
2. The table will give more specifics of each student and what action they did by displaying:
   1. Date/Time– When the last action was recorded by a student.
   2. Client – The client that the student performed the action on.
   3. Action – The action the student used for that client. It will be one of three choices:
      1. First Contact – The student has at least contacted the client.
      2. Presentation – The student has pitched and made a presentation to the client.
      3. New Sale – This is either a first time client or a client who has not been sold to in a while (a low priority client).
      4. Old Sale – This is a returning client who has bought recently (a high priority client).
      5. Comment – The student has only submitted a comment about the client.
   4. Points Received – The total amount of points a student has made for that action.
   5. Cumulative Points on Client – The total amount of point a student has earned for that client.
   6. Comments – The comment a student has submitted for that action.
3. At the bottom of the table, there will be a totals row that will give information about:
   1. Points Received – The grand total amount of points that all of the students have earned in that section.

**Sales**

1. This page is specifically set to show which client has purchased an ad.
2. The table on this page will give information on:
   1. Date/Time – The day and time that a student went and made a sale to a client.
   2. Company – The client to which it was sold.
   3. Page Size – The size of ad the client purchased.
   4. Sales – The amount of money received for the client’s ad purchase.
   5. Payment – The type of payment the client used.
   6. Ad/Status – The type of sale that was made:
      1. New Sale – This is either a first time client or a client who has not been sold to in a while (a low priority client).
      2. Old Sale – This is a returning client who has purchased recently (a high priority client).
3. At the bottom of the table, there will be a totals row that will give information about Sales, which will be the grand total amount of all the money received for all the client’s ad purchases.

**Bonus Summary**

1. This page will show you all of the students who have received bonus points.
2. The table on this page will include information:
   1. The student’s information (name, ID, student manager, and section number).
   2. Bonus Name – A description of the bonus.
   3. Points Earned – The amount of points the student has received for that bonus.
3. At the bottom of the table, there will be a totals row that will have Points Earned, which is the grand total amount of points that all of the students have received.
4. To learn more about setting up bonuses, see the [Bonuses](#Bonus) tab.

**End of Semester**

1. This page will show all of the clients that purchased for this project and all of the information tied with that client. It is mainly for the end of the semester, but you can access this page anytime throughout the semester.
2. The information on this page will include:
   1. Date – The date and time a client was sold an ad.
   2. Company – The client to which it was sold.
   3. Sold Arrow Years – The previous years that a client was sold an ad for the PCA Arrow.
   4. Sold Calendar Years – The previous years that a client was sold an ad for the Activities Calendar.
   5. Page Size – The size of ad the client purchased.
   6. Sales – The amount of money received for the client’s ad purchase.
   7. First Name – The first name of the student who sold to the client.
   8. Last Name – The last name of the student who sold to the client.
   9. Team Leader – The student manager of the student.
   10. Payment – The type of payment the client used.
   11. Ad/Status – The type of sale that was made:
       1. New Sale – This is either a first time client or a client who has not been sold to in a while (a low priority client).
       2. Old Sale – This is a returning client who has bought recently (a high priority client).
3. At the bottom of the table, there will be a totals row that will give information about Sales, which is the grand total amount of all the money received for all the client’s ad purchase.

**Bonuses Tab**

1. This page will allow you to create, edit, or delete bonus options that can be used on the Students page to assign bonus points.
2. To create a new bonus:
   1. Click the “New Bonus” link to be directed to a form.
   2. Type in a bonus name (description) for the bonus and the amount of points it is worth.
   3. Click “Create Bonus” to add that bonus to the available options for the Student page.
3. To edit a bonus:
   1. Click the “Edit” link to be directed to the same form for a new bonus.
   2. Change any information then click “Update Bonus” to finish.
   3. Editing a bonus that has
   4. Editing a bonus will change for the entire Adit. If you assigned a bonus to a student and decide to edit either the point value or name, then it will be changed for that student.
4. To delete a bonus, click “Delete.” A box will appear to verify that you want to delete the bonus. Clicking “OK” will delete the bonus.

**Getting to a Student’s Clients page**

1. This option is used on the Students, Student Summary, Activities, Sales, and Bonus Summary pages.
2. To get to this page, click on either the student’s first name or last name (it does not matter which).
3. It will redirect to the Student’s Clients page where it will be set up as followed:
   1. The top of the page will display the student’s first name to help identify whose clients you are viewing (just in case you meant to click John and accidentally sneezed while clicking and ended up clicking Jane’s name instead).
   2. There will also be a “Back” button to take you back to the previous page (Students, Student Summary, Activities, or Sales pages).
   3. The main page will be split between three sections: Active Clients, Completed Clients, and Released Clients. These three sections will be discussed in further detail in the following Miscellaneous Notes sections.
4. To return to the previous page (either Manage Students or any of the Reports Page), click “Back to” in the top left corner.

**Active Clients Section of a Student’s Clients page**

1. This section will show information about a student’s current and active clients with which he is working.
2. If the student has active clients, they will be displayed in their own box.
3. Each of these boxes will be colored:
   1. Green – a high priority client (the client has been sold an ad within the past year).
   2. Yellow –a medium priority client (the client has been sold an ad, but it has been a couple years).
   3. White – 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 display the client’s business name and what the student has done with the client:
   1. At the top will be the client’s business name. Clicking anywhere in the box will take you to the Client’s page.
   2. A “To Do” list will show what the student has left with the client.
      1. First Contact – The student has made contact with the client and recorded it with Adit. It will display a green checkmark if the task is completed.
      2. Presentation – The student has made a presentation to the client and recorded it with Adit. It will display a green checkmark if the task is completed.
      3. Sale – The student has made a sale to the client and recorded it with Adit. It will display a green checkmark if the task is completed.
   3. Points – The amount of points the student has earned with this client.
5. Each box will have a small “x” in the top left corner (hover the mouse over the box to see it).
   1. This “x” will release the client so it can be chosen by another student.
   2. To release a client:
      1. If the student attempted to make a sale and could not or the client refused to buy an ad, there is the option to release the client back to the Client List tab.
      2. Click the small “x” in the top left corner to make a box appear.
         * If you accidentally clicked the “x” and you do not want to release the client, you can click “Cancel.”
      3. This box will ask you to leave a comment (optional) as to why you are releasing the client.
      4. Type in a comment (optional) and click “Release.”
      5. The client will be removed from the student’s Active Clients section and placed in the student’s Released Clients section (explained under [*Released Clients Section*](#Released)).

**Completed Clients Section of a Student’s Clients Page**

1. This section will show you information about a student’s completed or sold clients that he has finished.
2. If the student has any completed clients, then they will be displayed in their own small box.
3. Each of these boxes will be colored:
   1. Green – a high priority client (the client has been sold an ad within the past year).
   2. Yellow –a medium priority client (the client has been sold an ad, but it has been a couple years).
   3. White –considered 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 display 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. Clicking anywhere in the box will direct you to the Client’s page.
   2. Points – The amount of points the student has earned with this client.

**Released Clients Section of a Student’s Clients Page**

1. This section will show you information about a student’s released clients so another student can try and sell an ad to the client.
2. If the student has any released clients, 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 display 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. Clicking anywhere in the box will redirect you to the Client’s page.
   2. Points – The amount of points the student has earned with this client.

**Accessing a Client’s Page**

1. This page will show you all the information about the client, as well as the sale progress the student has done to this 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 for a student to go and make a contact, presentation, or sale. You may also edit the client’s information.
   2. Sale Progress – This will allow the student to record an action to the student’s sale progress.
   3. Accomplished Section– This section will let you see all of the actions that the student has 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 view or 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, you can click the “Show client details” link.
3. To edit a client’s information:
   1. Click “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 client’s business information, you may click “Update Client.”
4. Since you have the ability to approve a client, when you edit the client’s information, it will be automatically updated.

**Sale Progress**

1. This section of the Client’s Page will let you update the student’s Sale Progress.
2. Changes to the Sale Progress can only be made to Active or Completed Clients.
3. The student’s Sale Progress is ordered:
   1. First Contact
   2. Presentation
   3. Sale
4. To record a First Contact:
   1. Check the box next to “I contact my client!”
   2. Add a comment (optional).
   3. Underneath the comment will be an area to put in the time when the student made a First Contact.
   4. Select “Save” to record the action.
5. To record a Presentation:
   1. Check the box next to “I made a presentation!”
   2. Add a comment (optional).
   3. Underneath the comment will be an area to put in the time when the student made a Presentation.
   4. Select “Save” to record the action.
6. To record a Sale:
   1. Check the box 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.
         * 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 (optional).
   4. Underneath the comment will be an area to put in the time when the student made a Sale.
   5. Select “Save” to record the action.
7. You may record multiple actions at the same time.
   1. This can be done if the student has made a First Contact and Presentation at the same time, or if the student has done all three options 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. If you accidentally select an option that a student has not yet performed, simply unselect it to not record it.
8. To record a comment:
   1. Type your comment into the Comment box and click “Save.”

**Accomplished Section**

1. This consists of all the accomplished actions that a student has recorded in a table.
2. Any type of client (Active, Completed, or Released) may view this information.
3. The table will be split into four main columns:
   1. Action – The type of action the student has recorded. It will either be:
      1. Comment – The student only recorded a comment with the client.
      2. First Contact – The student recorded a first contact with the client.
      3. Presentation – The student recorded a presentation with the client.
      4. New/Old Sale – The student recorded a sale with the client.
   2. Time – The recorded date and time when the student performed the action.
   3. Points – The amount of points the student earned for that action.
   4. Comment – The comment with the action if the student recorded one.
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.

**Miscellaneous**

**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].”

**Information Box**

1. On every single page will be a box in the top right corner.
2. This box will give the following information:
   1. Project – The current project that you are using or viewing. Typically, it is the active project that you will be on and will tell the semester and year. To change the project, go to the Projects page.
   2. (Current) Section – This will let you know what section you are currently viewing. To change the section, go to the Students page under the [Sections](#Section) tab.
   3. Current User – This is you. It will tell you who is logged into Adit by displaying the last name.

**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.**