USER MANUAL

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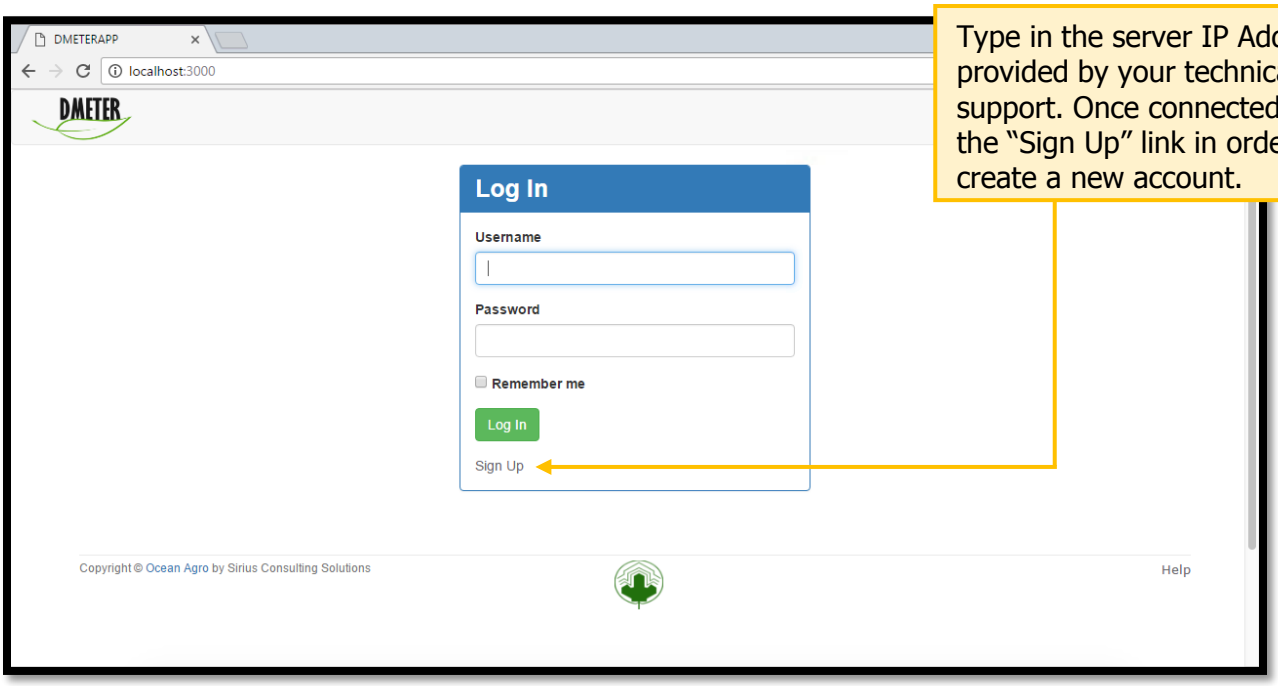
SIRIUS CONSULTING SOLUTIONS
A Brighter Solution for You

DMETER

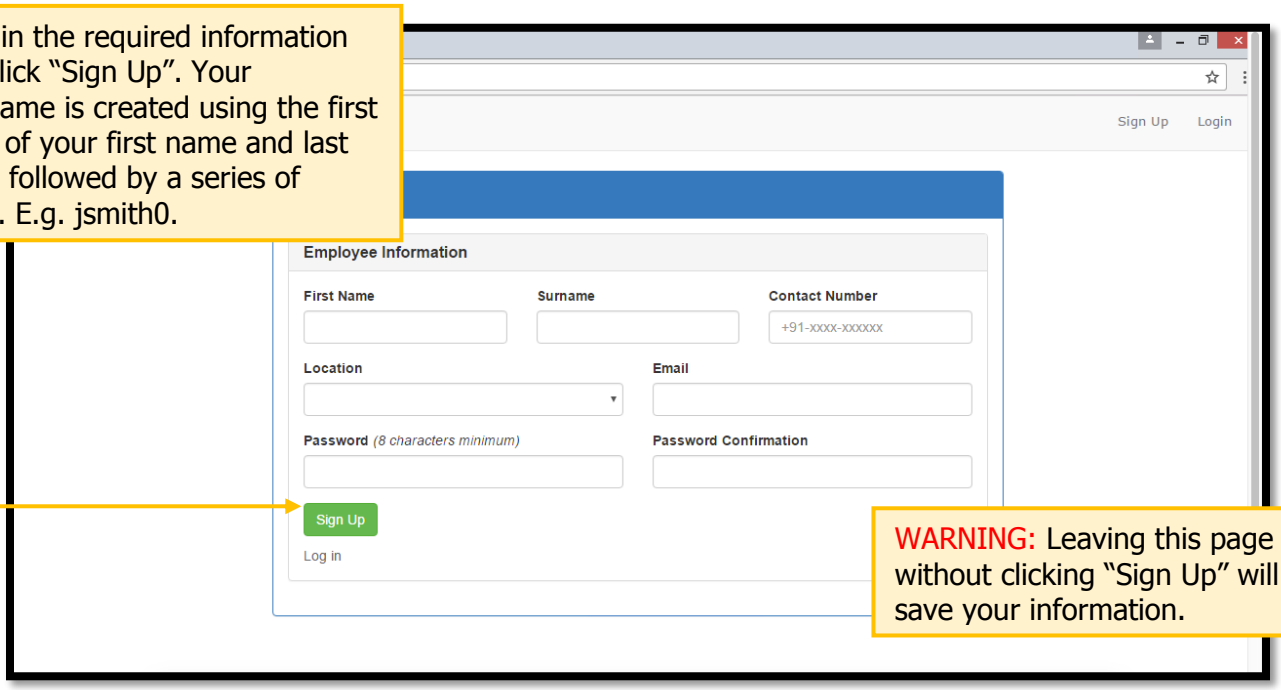
USER MANUAL

Getting Started



Type in the server IP Address provided by your technical support. Once connected, click on the "Sign Up" link in order to create a new account.

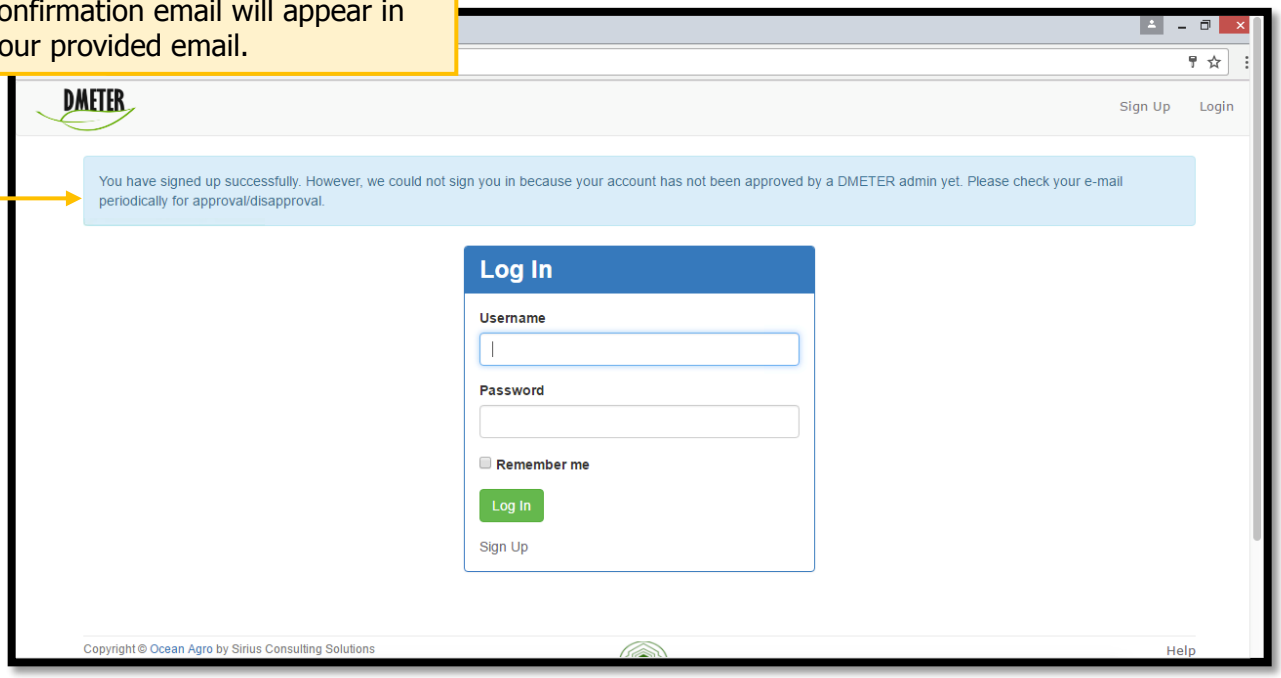
Type in the required information and click "Sign Up". Your username is created using the first letter of your first name and last name followed by a series of digits. E.g. jsmith0.

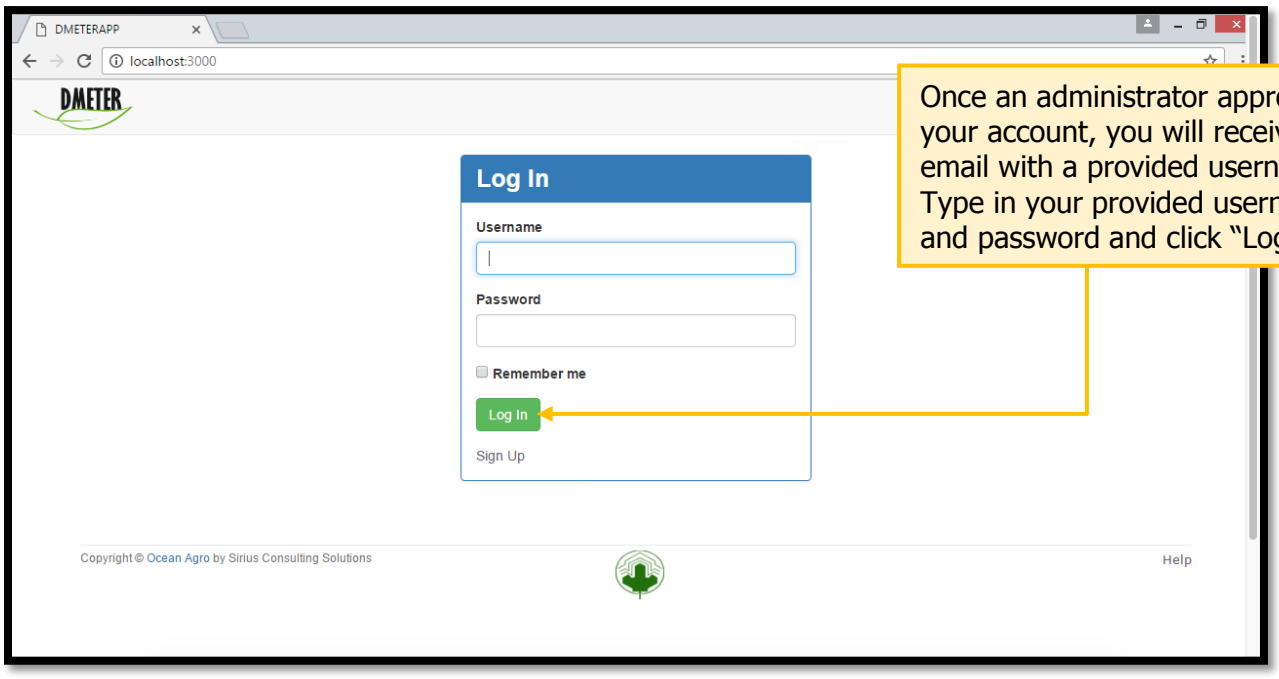


WARNING: Leaving this page without clicking "Sign Up" will not save your information.

Getting Started (cont.)

An administrative user must then approve the new account and a confirmation email will appear in your provided email.

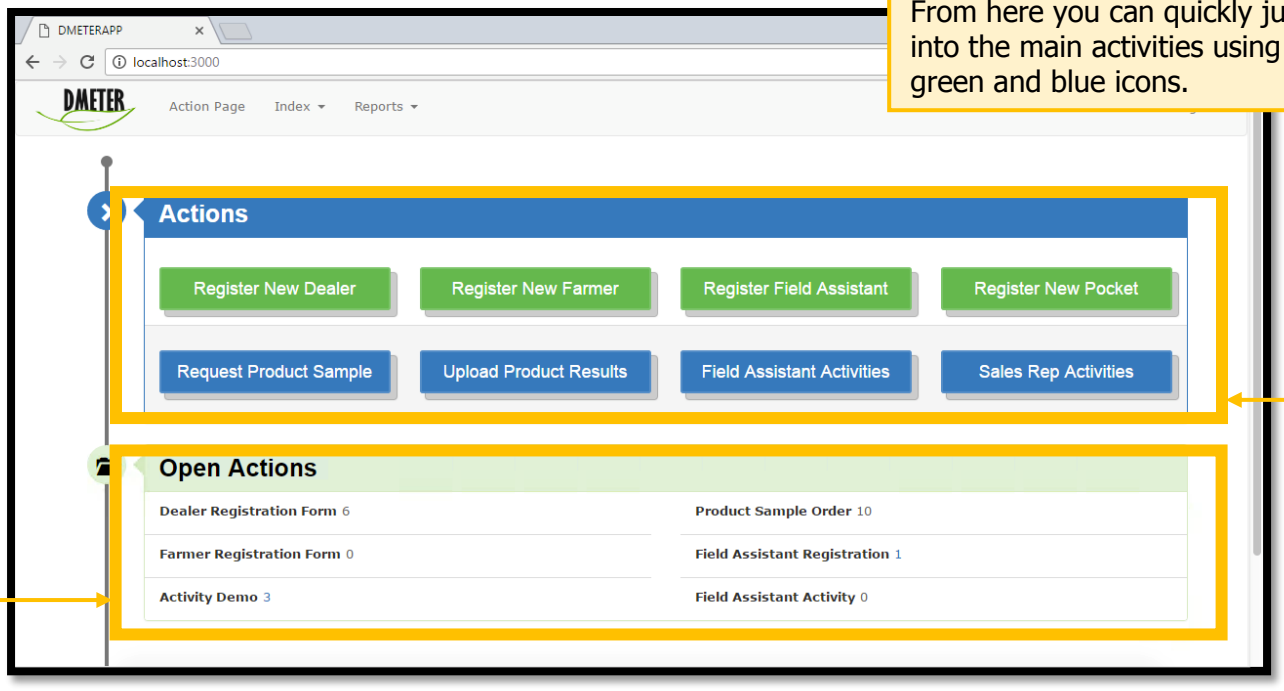




Once an administrator approves your account, you will receive an email with a provided username. Type in your provided username and password and click "Log In".

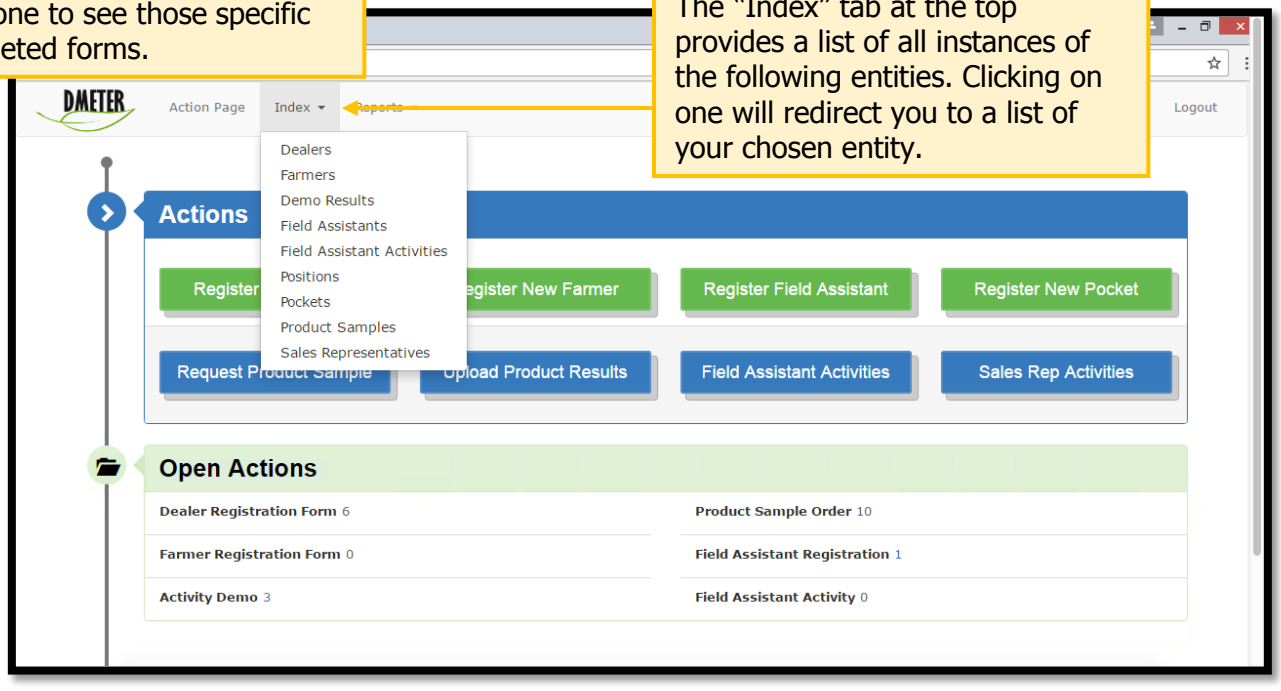
Navigating the Dashboard

Once you're logged in, you're sent directly to the Dashboard screen. From here you can quickly jump into the main activities using the green and blue icons.

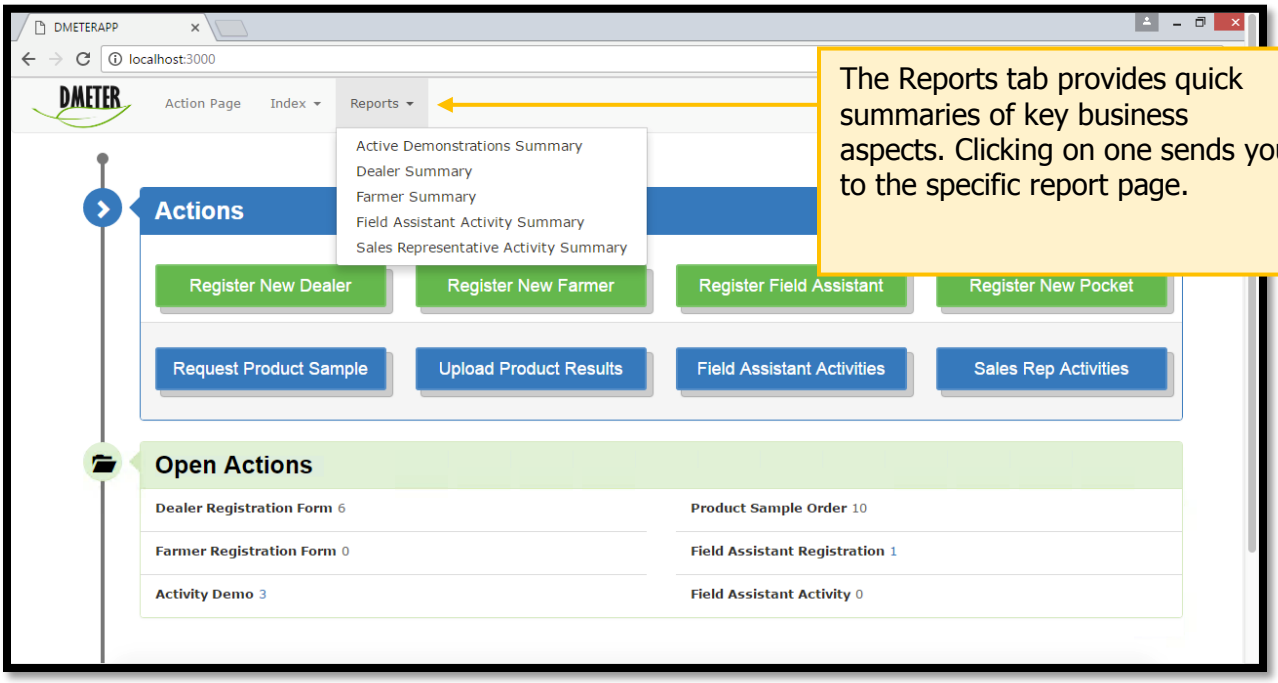


Open Action items provide a quick number of forms that are not completed. Click on the number next to one to see those specific uncompleted forms.

The "Index" tab at the top provides a list of all instances of the following entities. Clicking on one will redirect you to a list of your chosen entity.

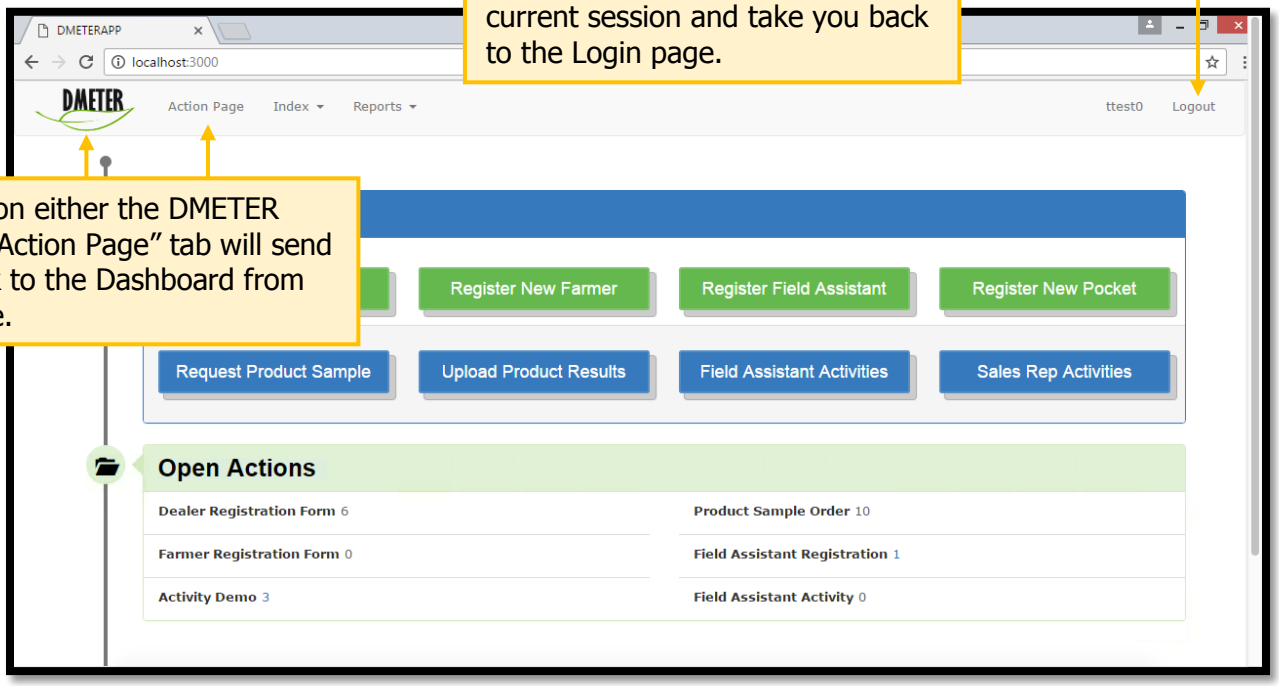


Navigating the Dashboard (cont.)



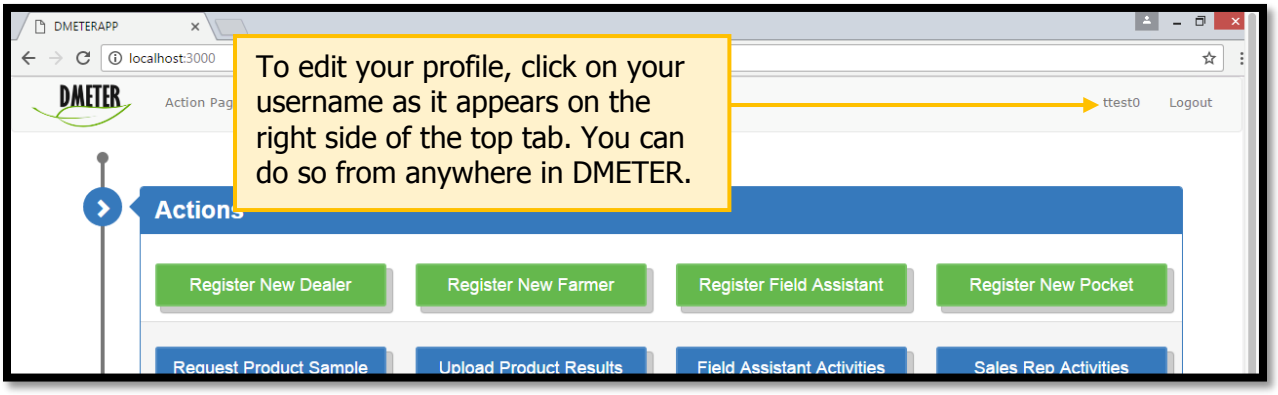
The Reports tab provides quick summaries of key business aspects. Clicking on one sends you to the specific report page.

Clicking on the "Logout" link from any page will log you out of your current session and take you back to the Login page.

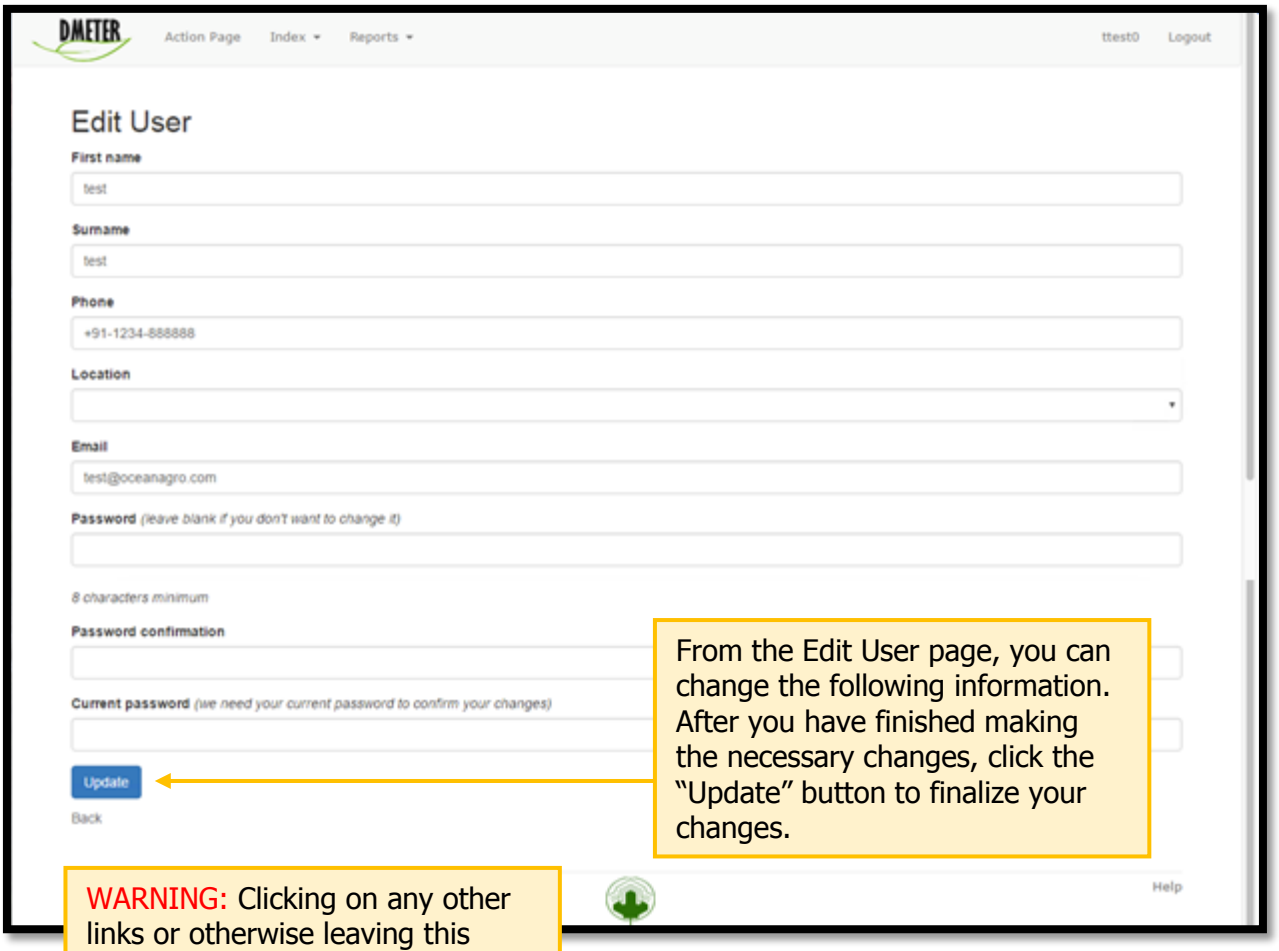


Clicking on either the DMETER logo or "Action Page" tab will send you back to the Dashboard from any page.

Edit Your Profile



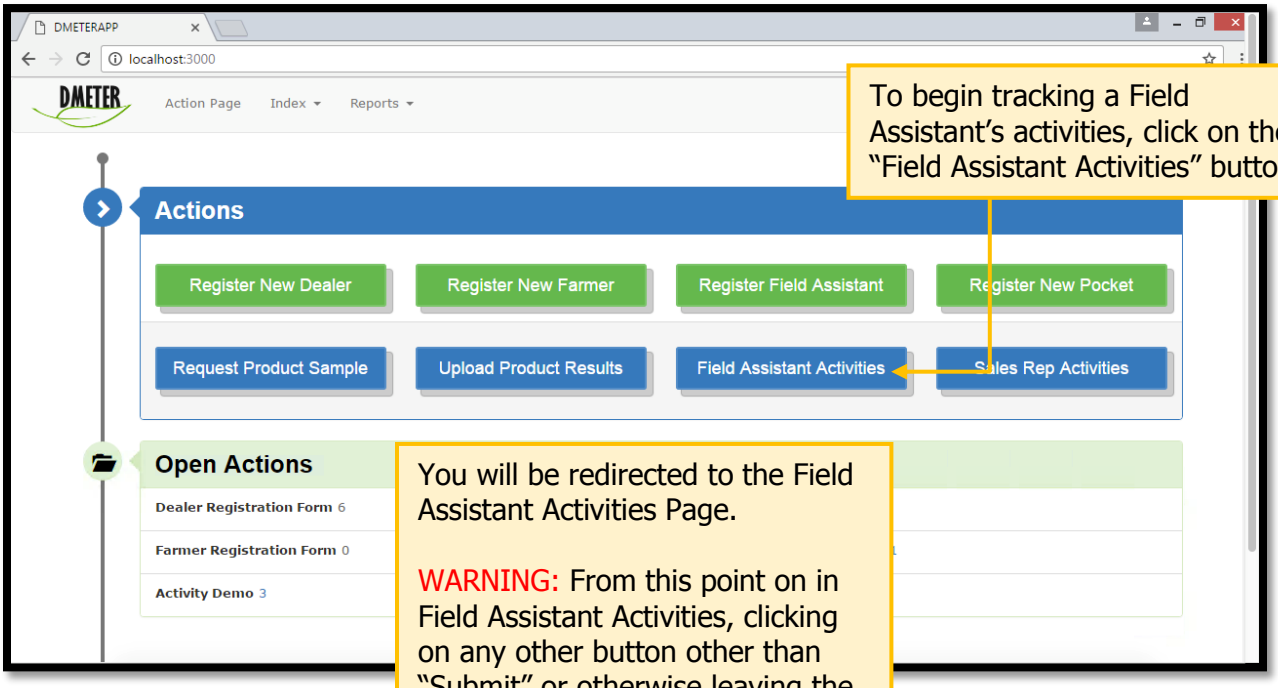
To edit your profile, click on your username as it appears on the right side of the top tab. You can do so from anywhere in DMETER.



From the Edit User page, you can change the following information. After you have finished making the necessary changes, click the "Update" button to finalize your changes.

WARNING: Clicking on any other links or otherwise leaving this page without clicking "Update" will not save any changes.

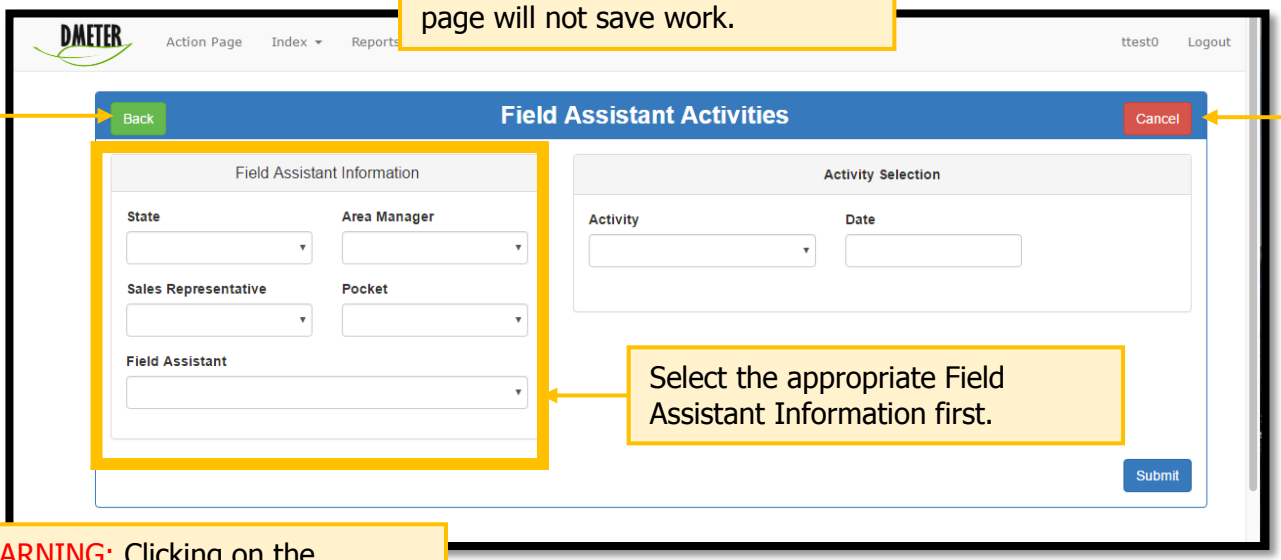
Field Assistant Activities



To begin tracking a Field Assistant's activities, click on the "Field Assistant Activities" button.

You will be redirected to the Field Assistant Activities Page.

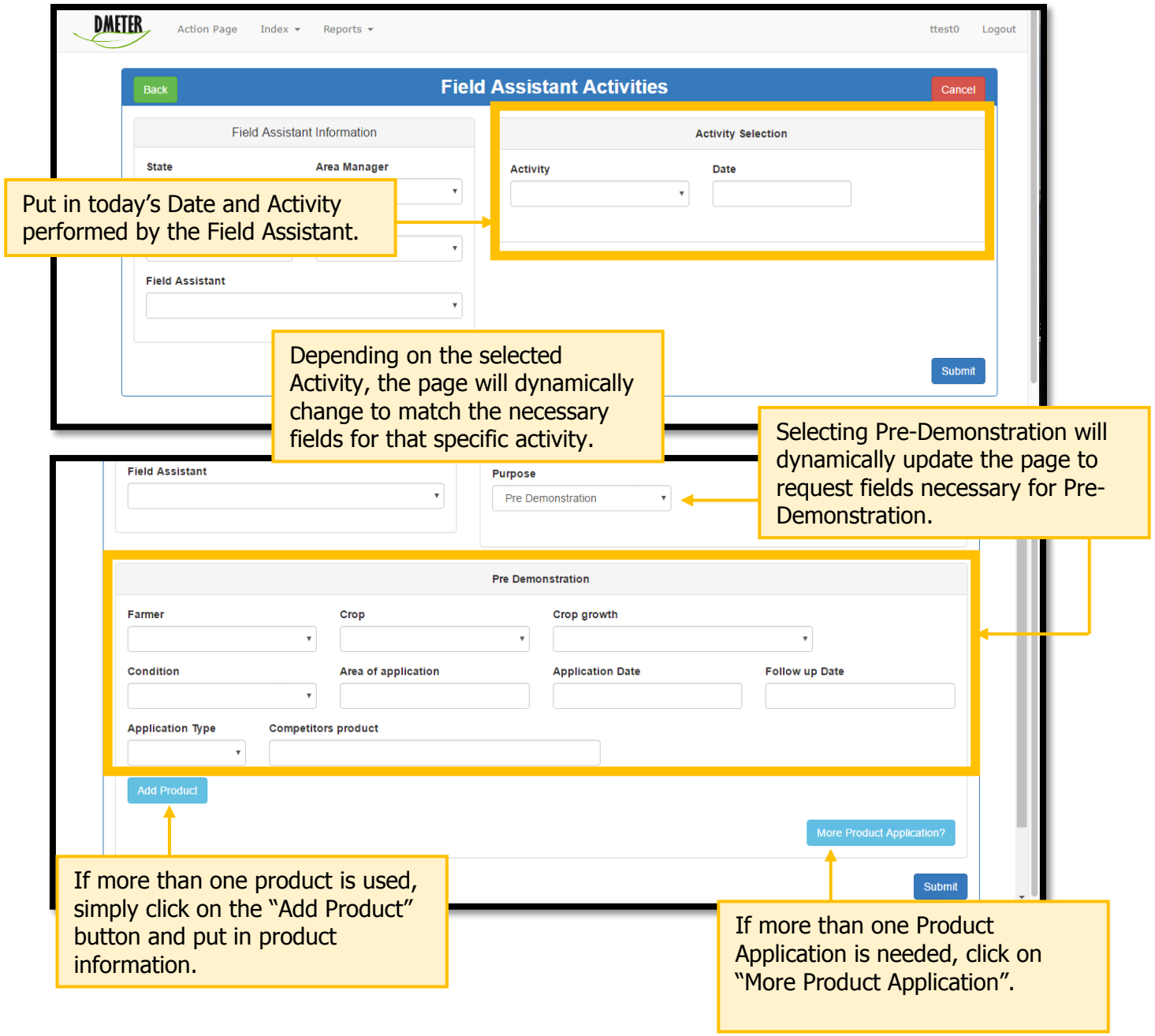
WARNING: From this point on in Field Assistant Activities, clicking on any other button other than "Submit" or otherwise leaving the page will not save work.



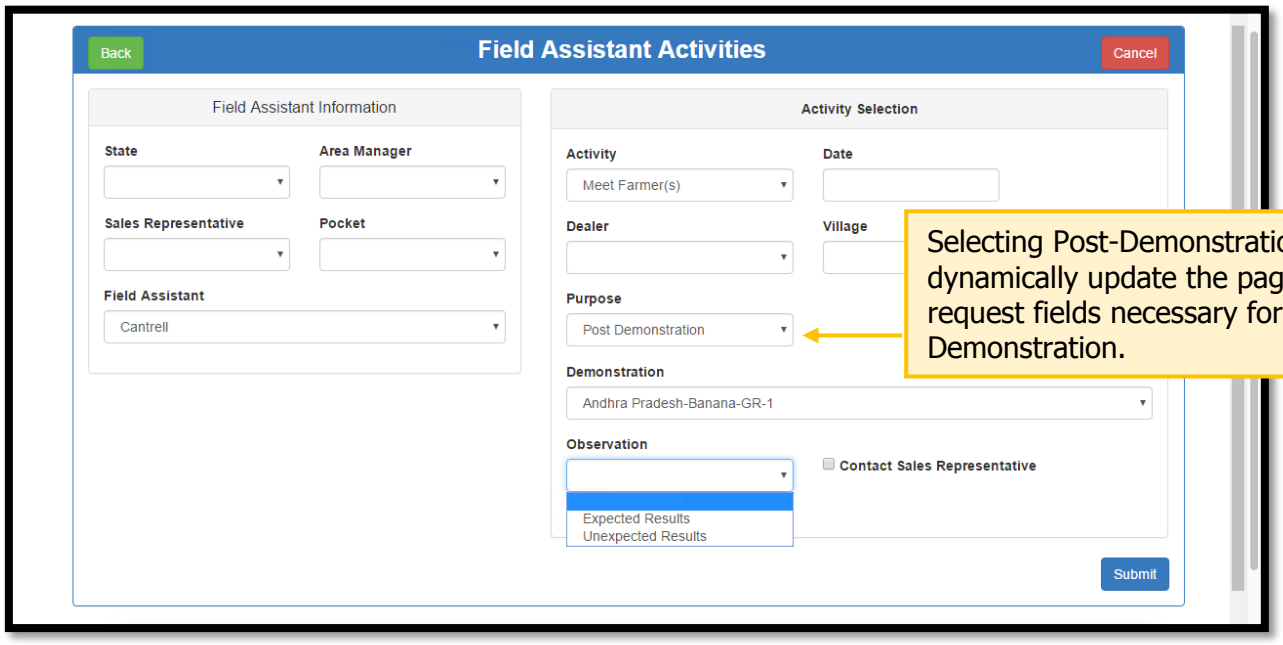
Select the appropriate Field Assistant Information first.

WARNING: Clicking on the "Cancel" button at any point in time will take you to the Dashboard and "Back" will take you to the list of Field Assistant activities. There is no warning pop-up and no work will be saved.

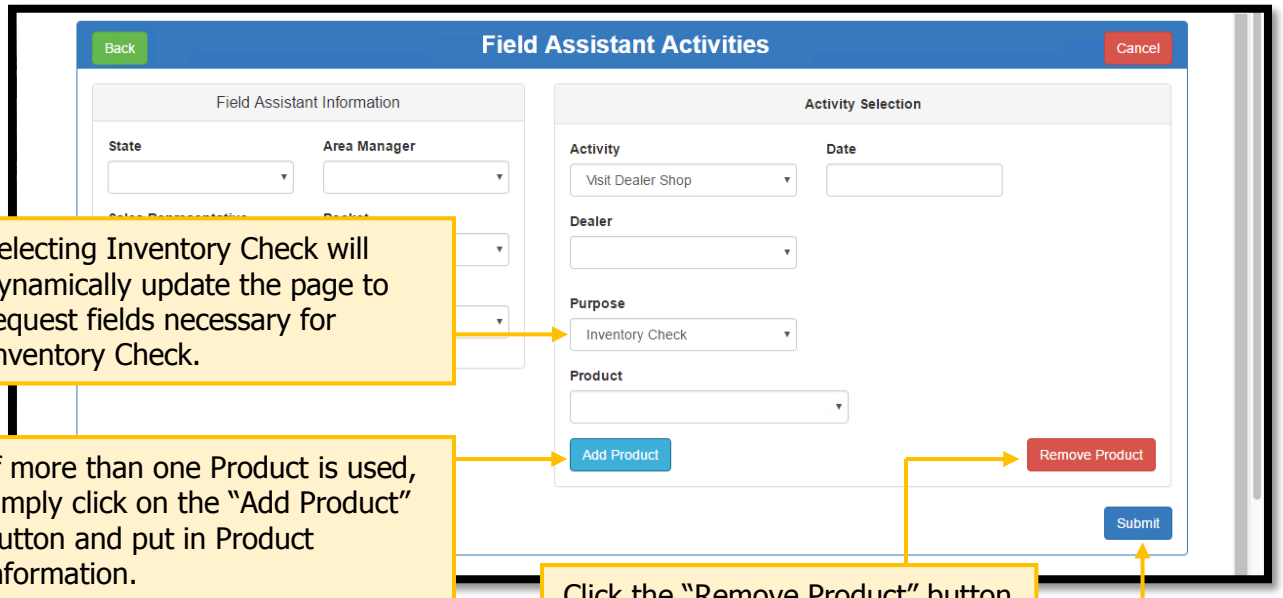
Field Assistant Activities (cont.)



Field Assistant Activities (cont.)



Selecting Post-Demonstration will dynamically update the page to request fields necessary for Post-Demonstration.



Selecting Inventory Check will dynamically update the page to request fields necessary for Inventory Check.

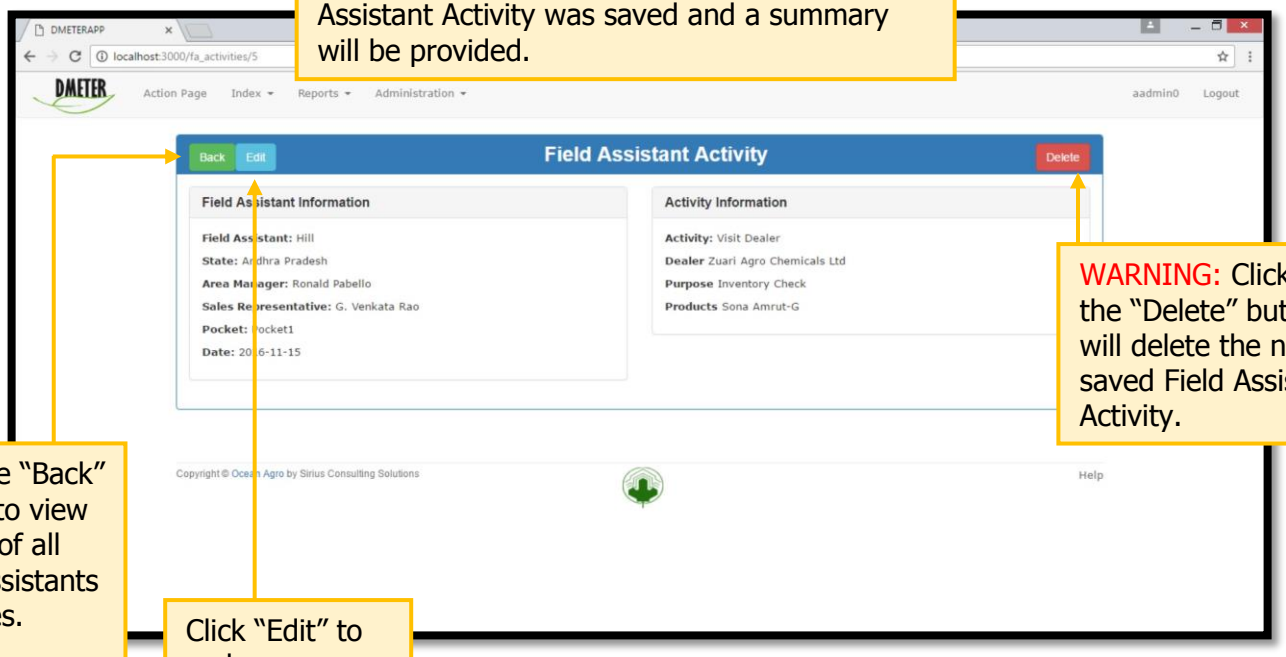
If more than one Product is used, simply click on the "Add Product" button and put in Product information.

Click the "Remove Product" button if a Product was added in error.

Once you have filled in the required information necessary regardless of the Activity selected, click "Submit" to save.

Field Assistant Activities (cont.)

You will then be given confirmation the Field Assistant Activity was saved and a summary will be provided.

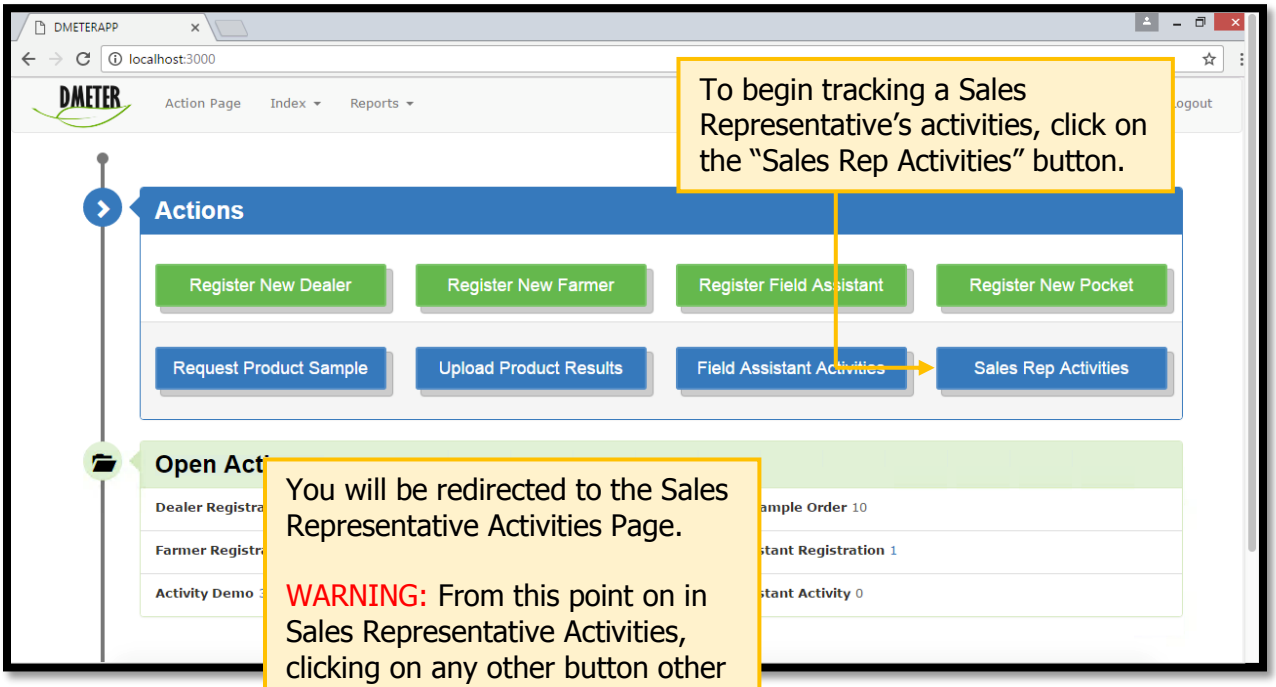


Click the "Back" button to view the list of all Field Assistants Activities.

Click "Edit" to make any changes to the current Field Assistant Activity.

WARNING: Clicking the "Delete" button will delete the newly saved Field Assistant Activity.

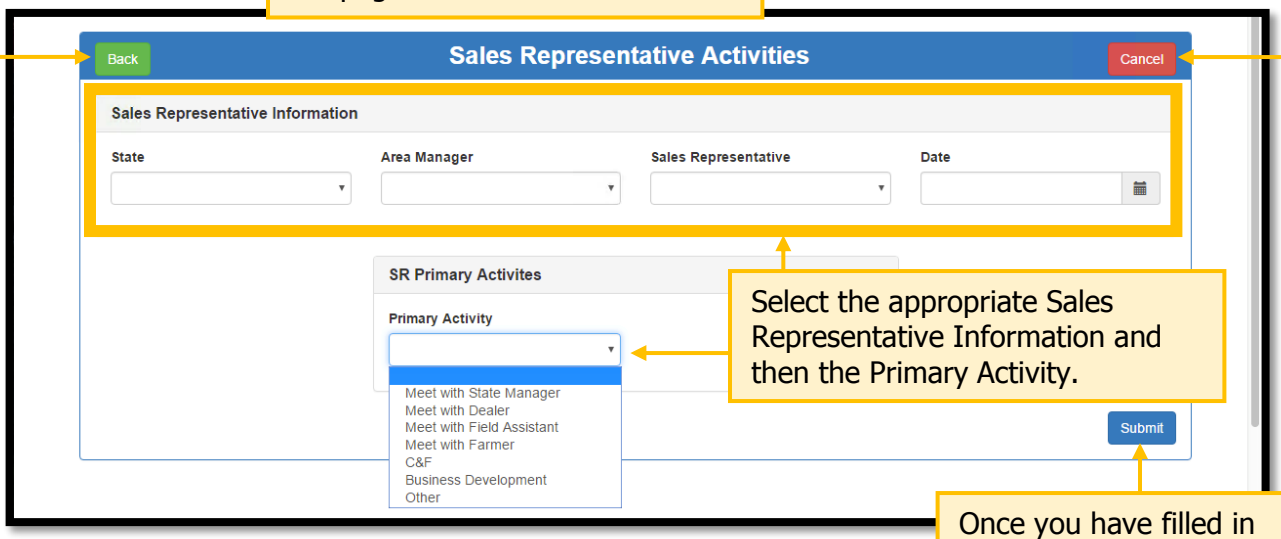
Sales Representative Activities



To begin tracking a Sales Representative's activities, click on the "Sales Rep Activities" button.

You will be redirected to the Sales Representative Activities Page.

WARNING: From this point on in Sales Representative Activities, clicking on any other button other than "Submit" or otherwise leaving the page will not save work.



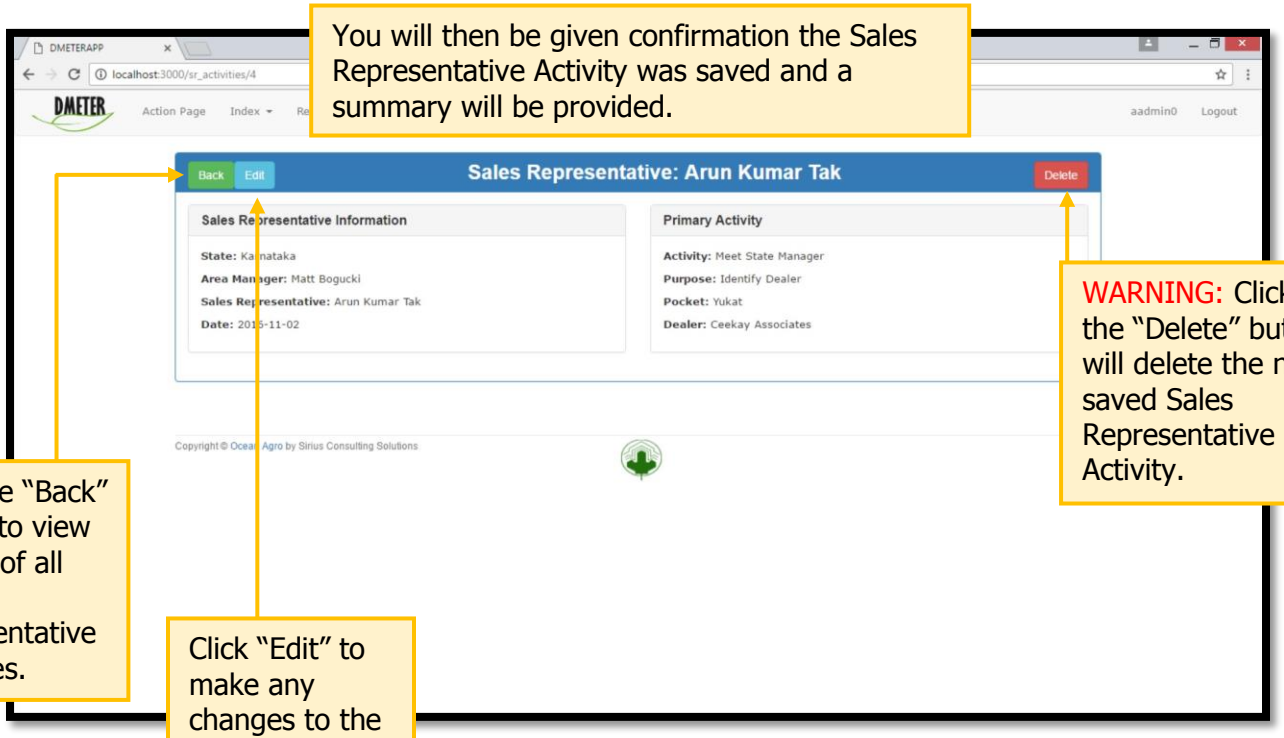
Select the appropriate Sales Representative Information and then the Primary Activity.

Once you have filled in the required information, click "Submit" to save.

WARNING: Clicking on the "Cancel" button at any point in time will take you to the Dashboard and "Back" will take you to the list of Sales Representative activities. There is no warning pop-up and no work

Sales Representative Activities (cont.)

You will then be given confirmation the Sales Representative Activity was saved and a summary will be provided.

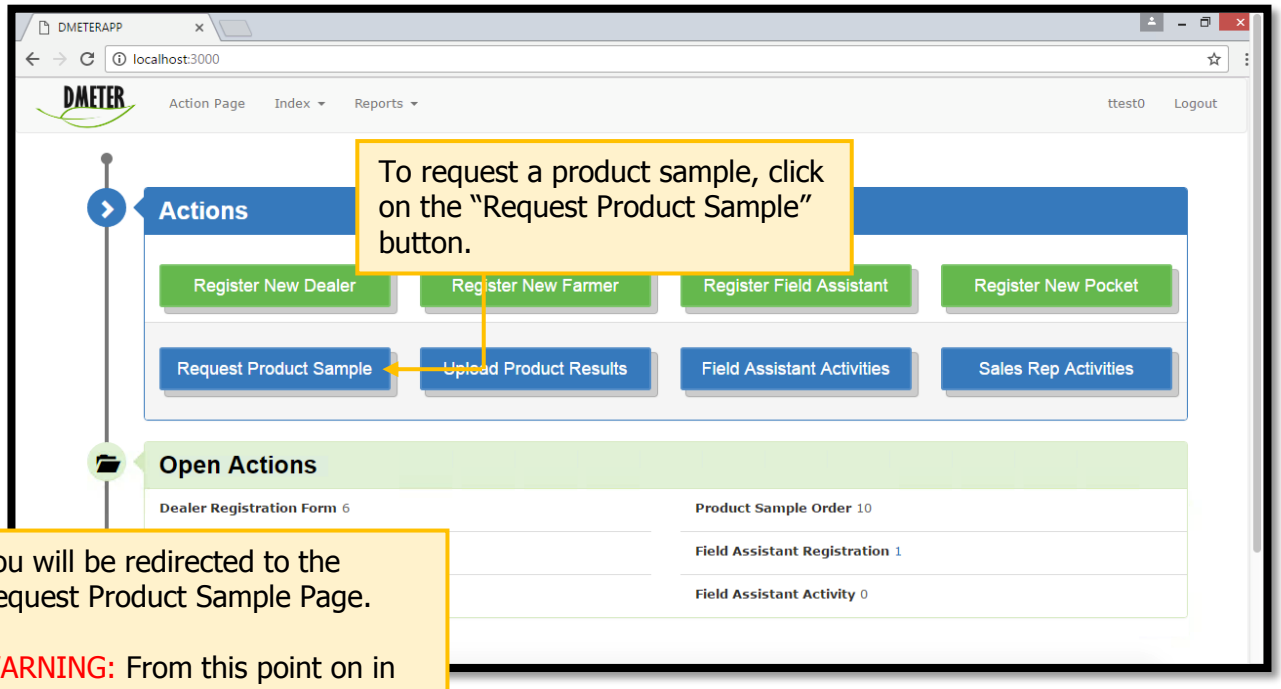


Click the "Back" button to view the list of all Sales Representative Activities.

Click "Edit" to make any changes to the current Sales Representative Activity.

WARNING: Clicking the "Delete" button will delete the newly saved Sales Representative Activity.

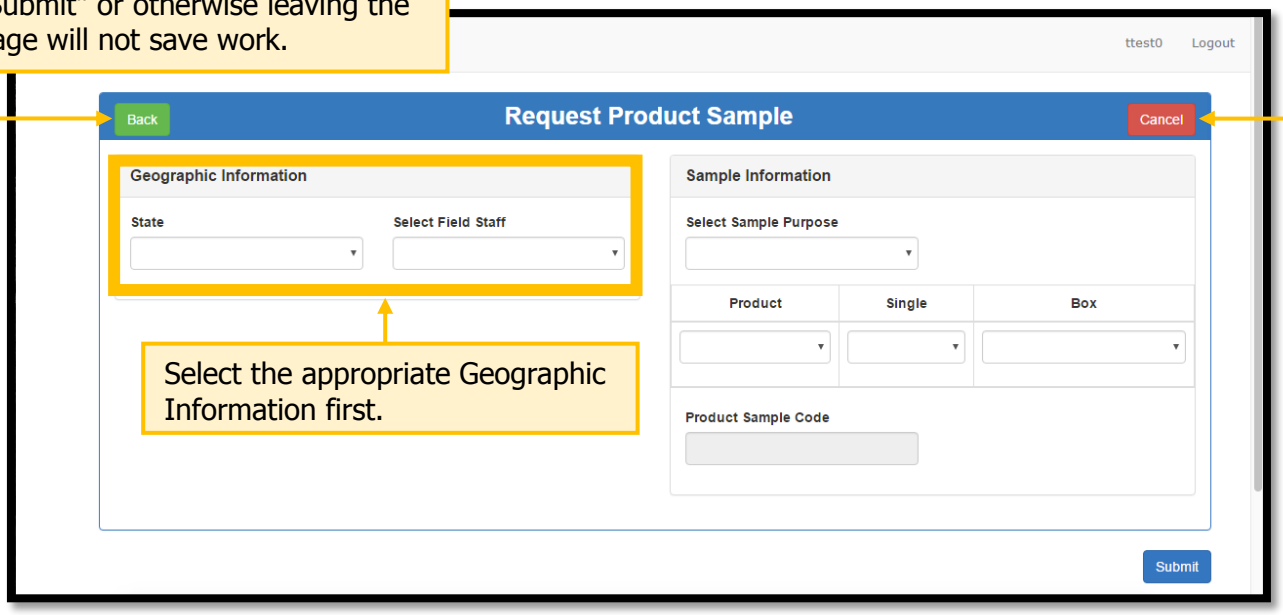
Request Product Sample



To request a product sample, click on the "Request Product Sample" button.

You will be redirected to the Request Product Sample Page.

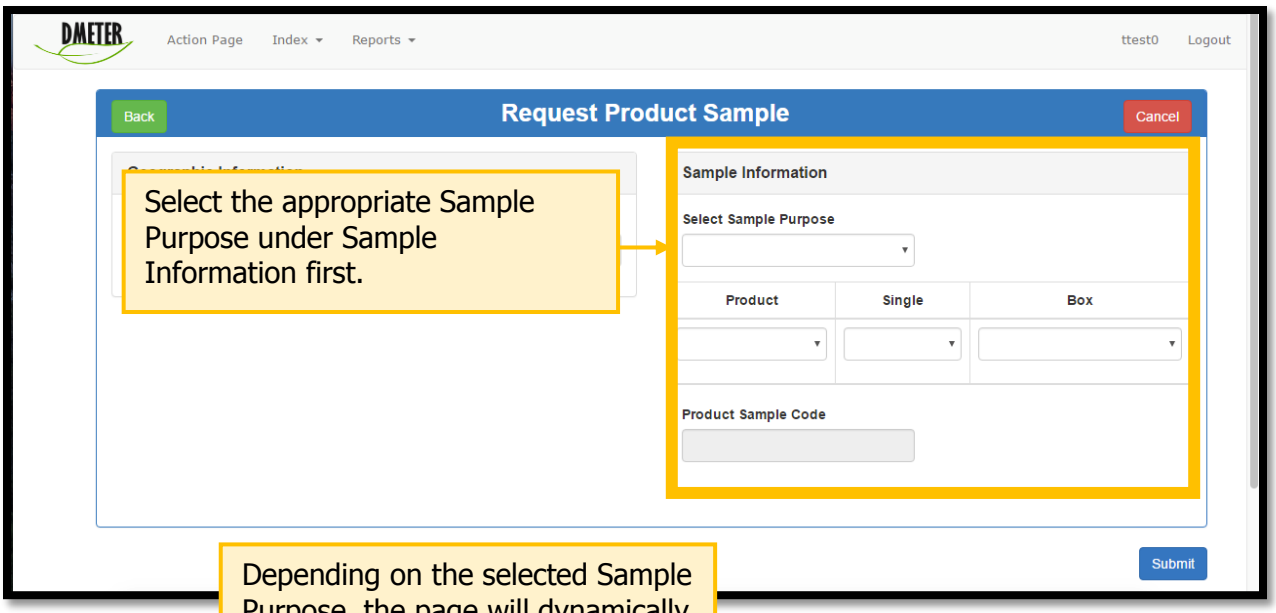
WARNING: From this point on in Request Product Sample, clicking on any other button other than "Submit" or otherwise leaving the page will not save work.



Select the appropriate Geographic Information first.

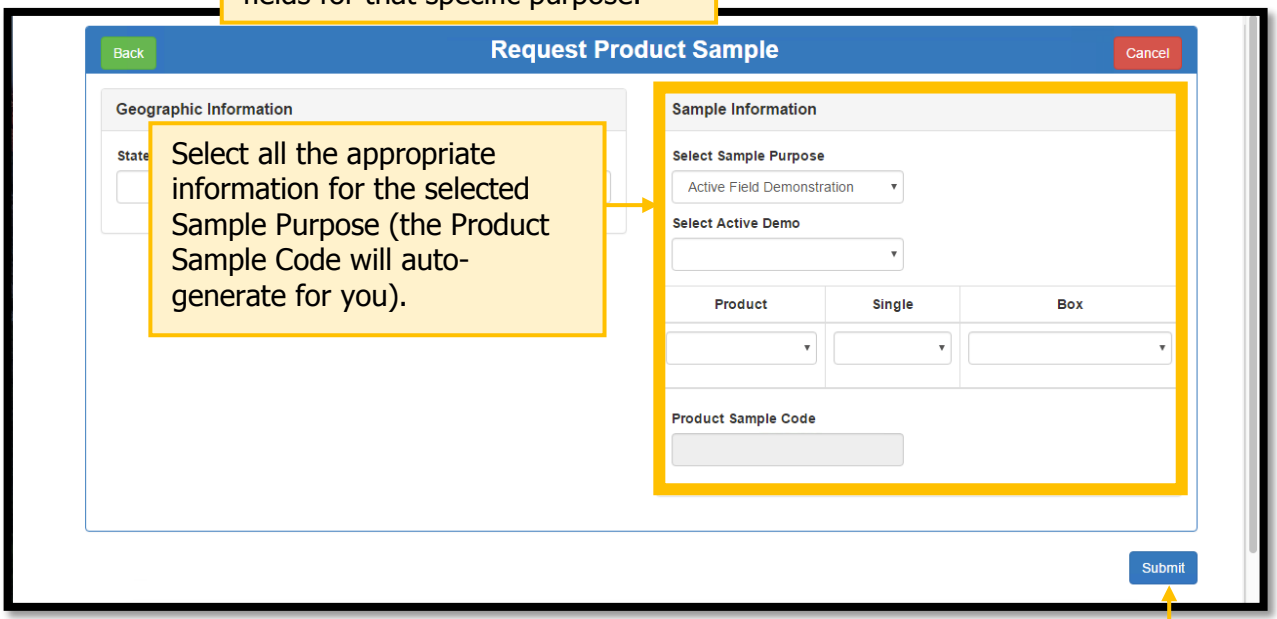
WARNING: Clicking on the "Cancel" button at any point in time will take you to the Dashboard and "Back" will take you to the list of Product Samples. There is no warning pop-up and no work will be saved.

Request Product Sample (cont.)



Select the appropriate Sample Purpose under Sample Information first.

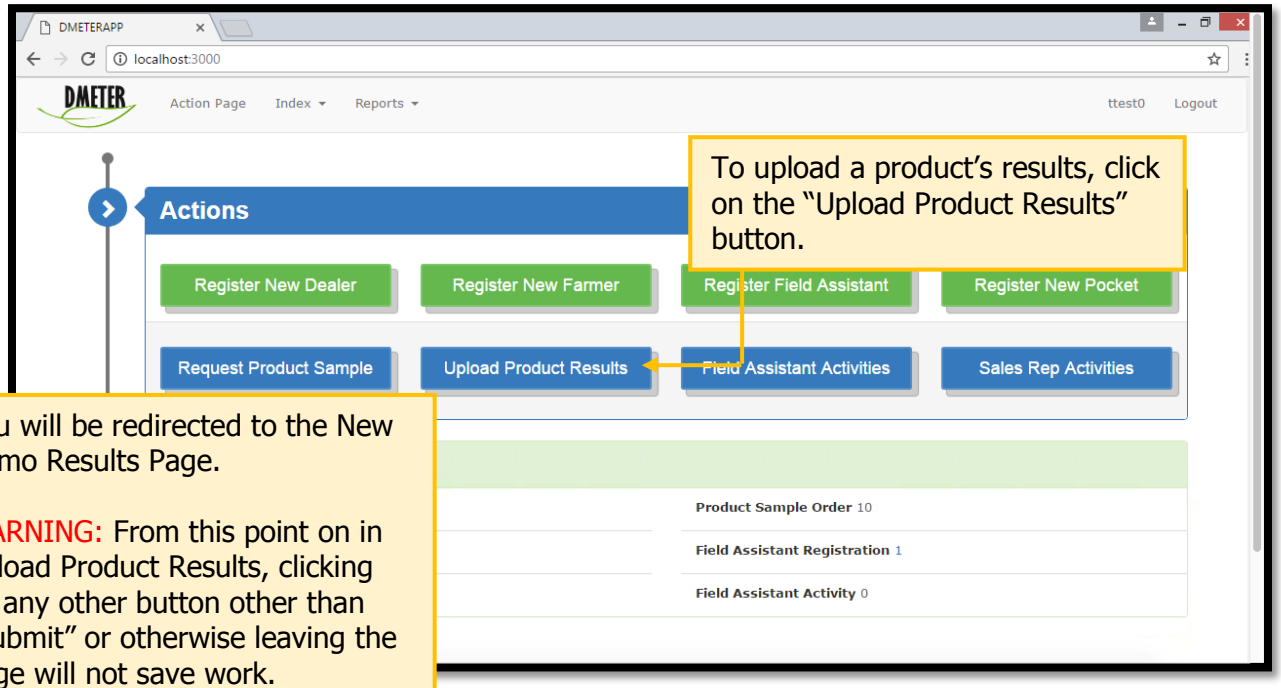
Depending on the selected Sample Purpose, the page will dynamically change to match the necessary fields for that specific purpose.



Select all the appropriate information for the selected Sample Purpose (the Product Sample Code will auto-generate for you).

Once you have filled in the required information necessary regardless of the purpose selected, click "Submit" to save.

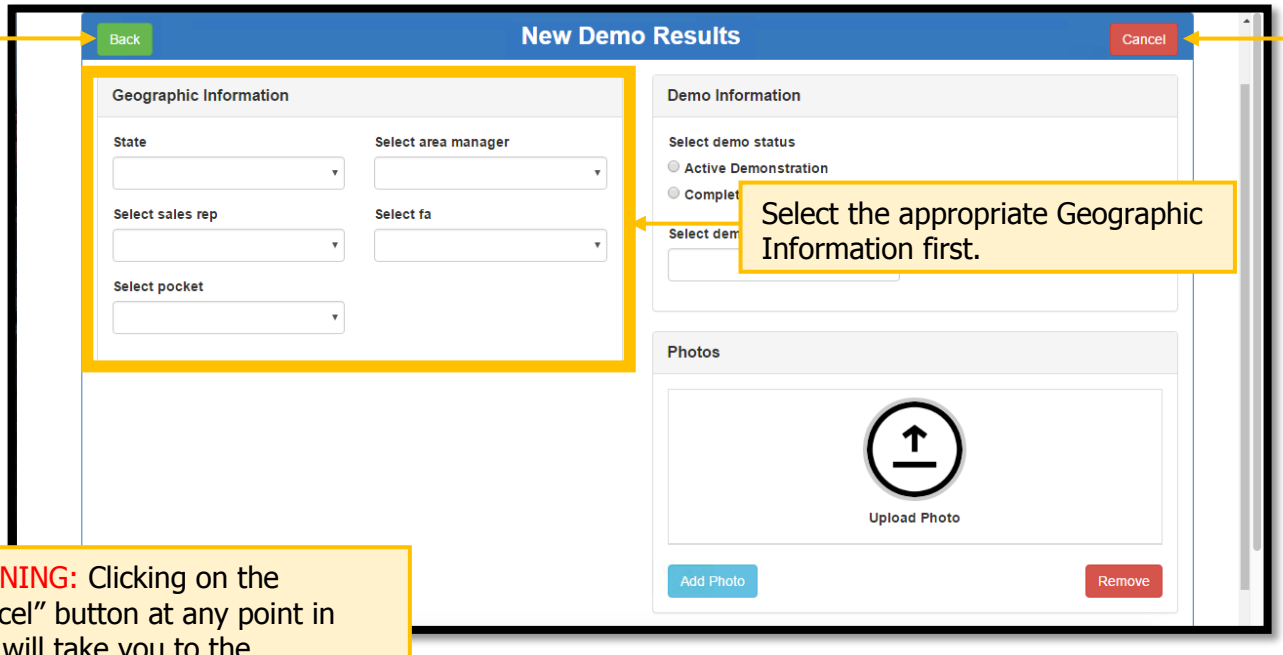
Upload Product Results



To upload a product's results, click on the "Upload Product Results" button.

You will be redirected to the New Demo Results Page.

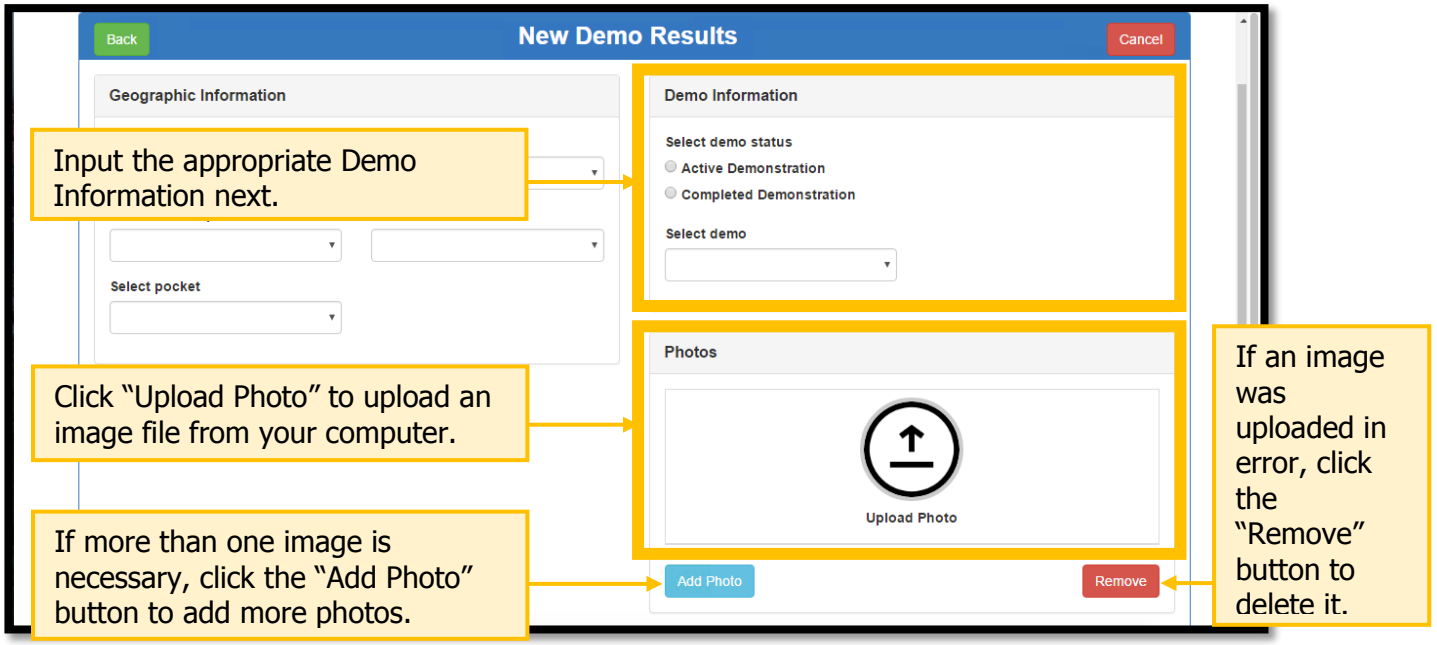
WARNING: From this point on in Upload Product Results, clicking on any other button other than "Submit" or otherwise leaving the page will not save work.



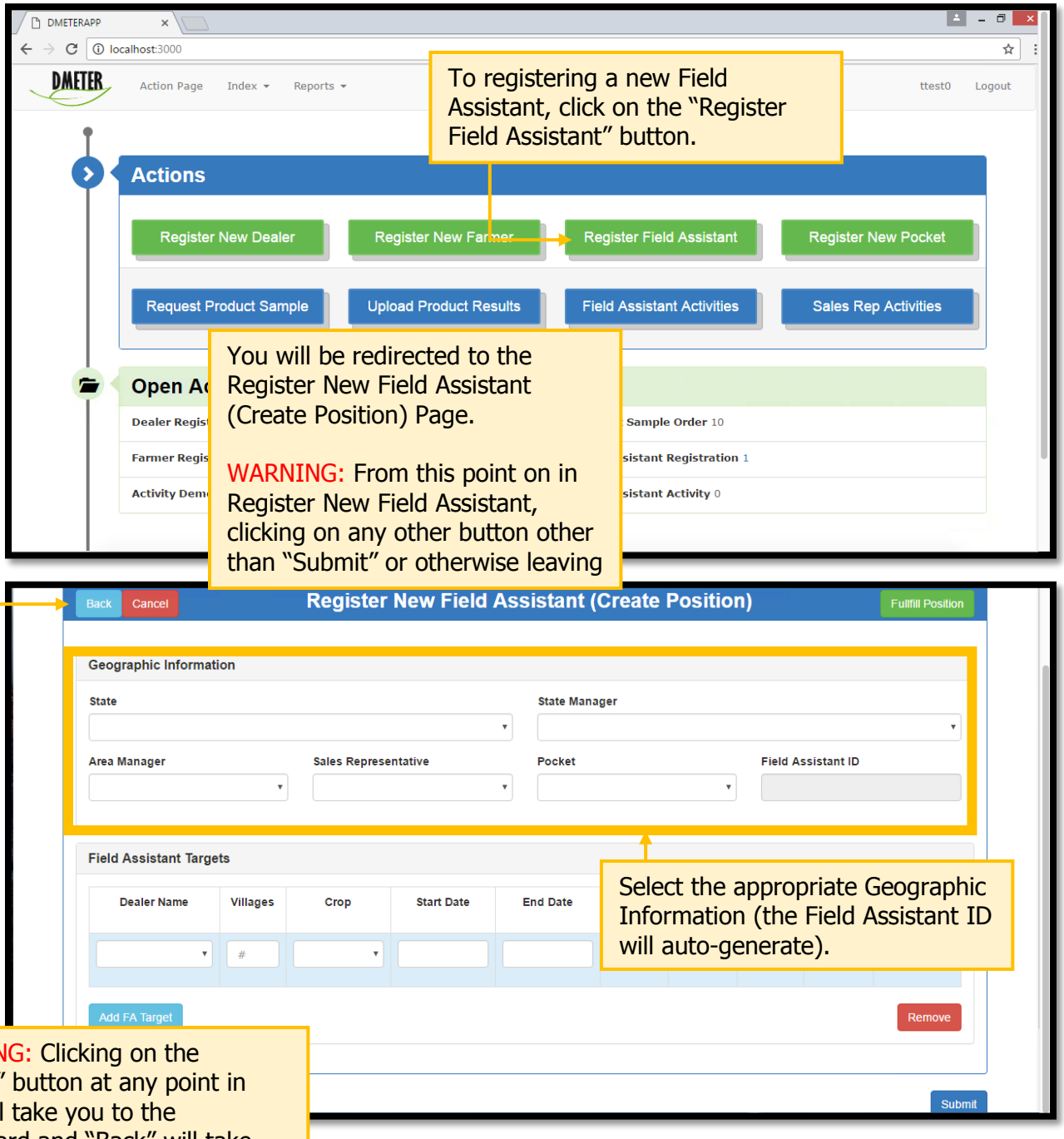
Select the appropriate Geographic Information first.

WARNING: Clicking on the "Cancel" button at any point in time will take you to the Dashboard and "Back" will take you to the list of Demo Results. There is no warning pop-up and no work will be saved.

Upload Product Results (cont.)



Register New Field Assistant



To registering a new Field Assistant, click on the "Register Field Assistant" button.

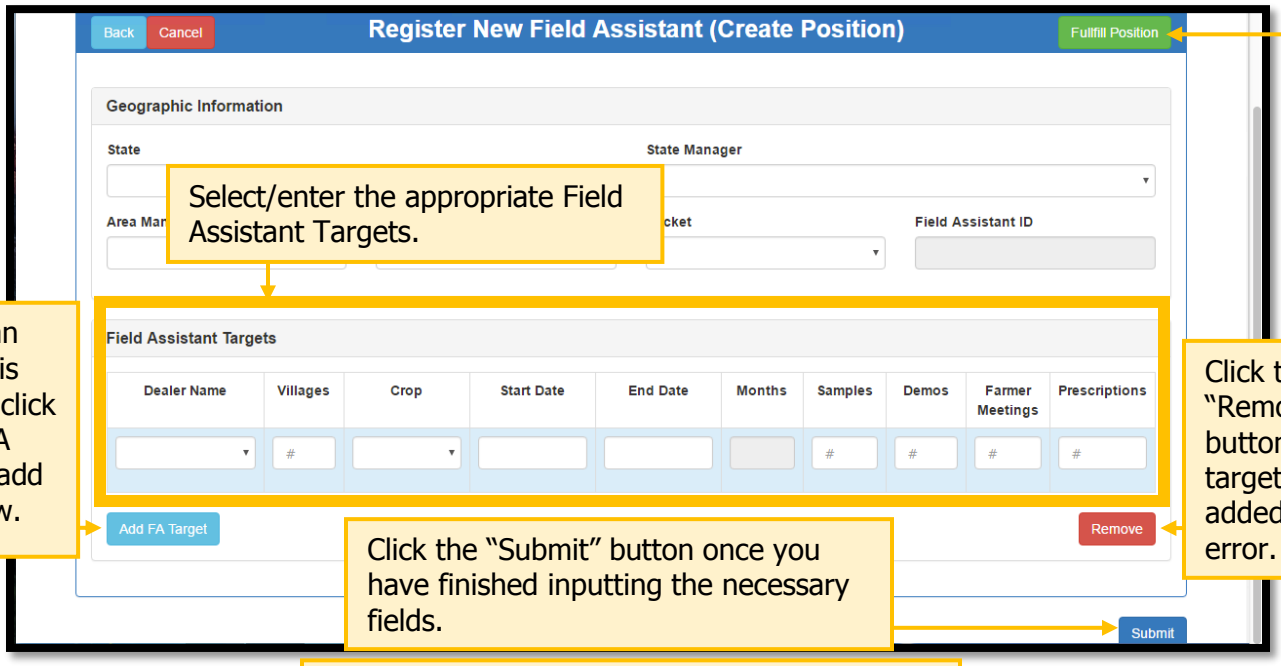
You will be redirected to the Register New Field Assistant (Create Position) Page.

WARNING: From this point on in Register New Field Assistant, clicking on any other button other than "Submit" or otherwise leaving

Select the appropriate Geographic Information (the Field Assistant ID will auto-generate).

WARNING: Clicking on the "Cancel" button at any point in time will take you to the Dashboard and "Back" will take you to the list of Field Assistant Positions. There is no warning pop-up and no work will be saved.

Register New Field Assistant (Cont.)



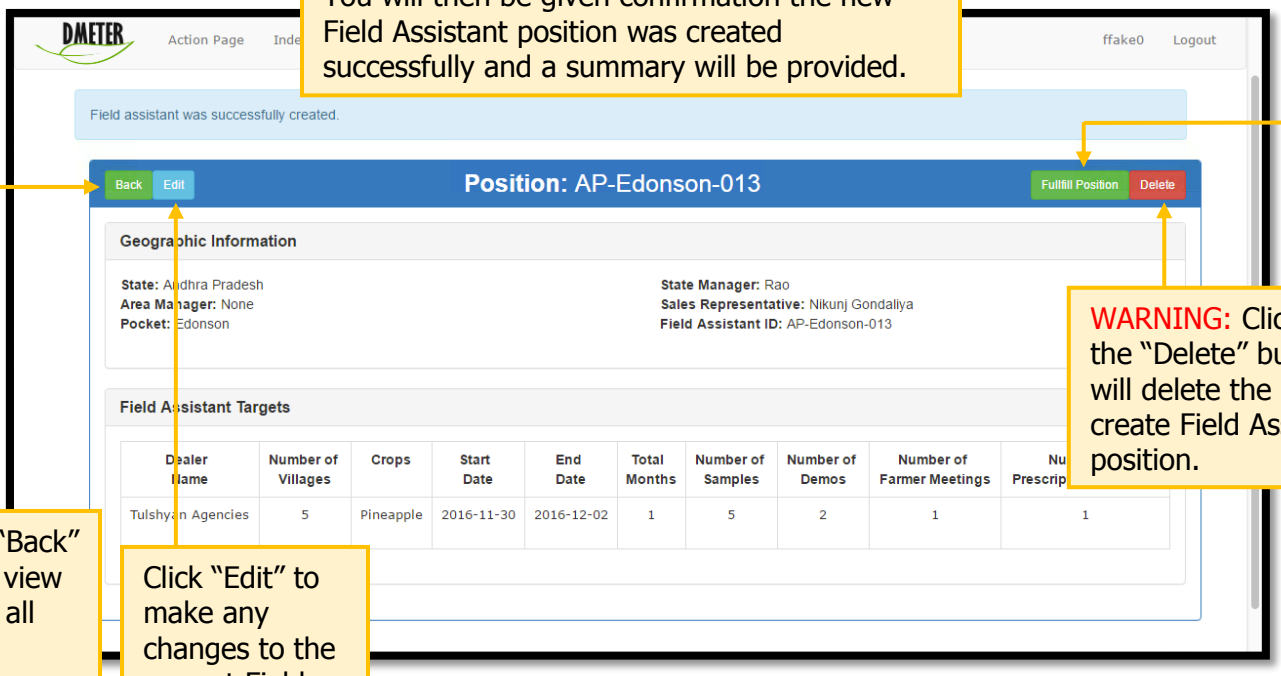
Select/enter the appropriate Field Assistant Targets.

If more than one target is necessary, click the "Add FA Target" to add another row.

Click the "Remove" button if a target was added in error.

Click the "Submit" button once you have finished inputting the necessary fields.

You will then be given confirmation the new Field Assistant position was created successfully and a summary will be provided.



WARNING: Clicking the "Delete" button will delete the newly create Field Assistant position.

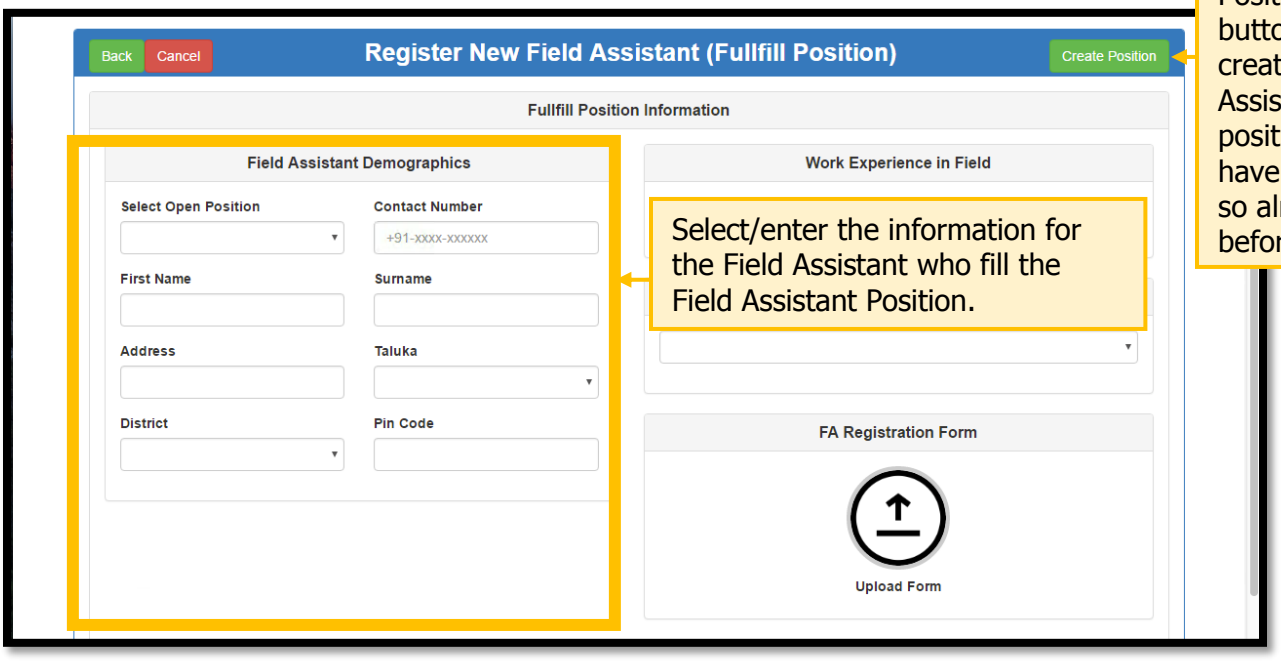
Click the "Back" button to view the list of all Field Assistants.

Click "Edit" to make any changes to the current Field Assistant position.

Click the "Fulfill Position" button to add an employee to the position.

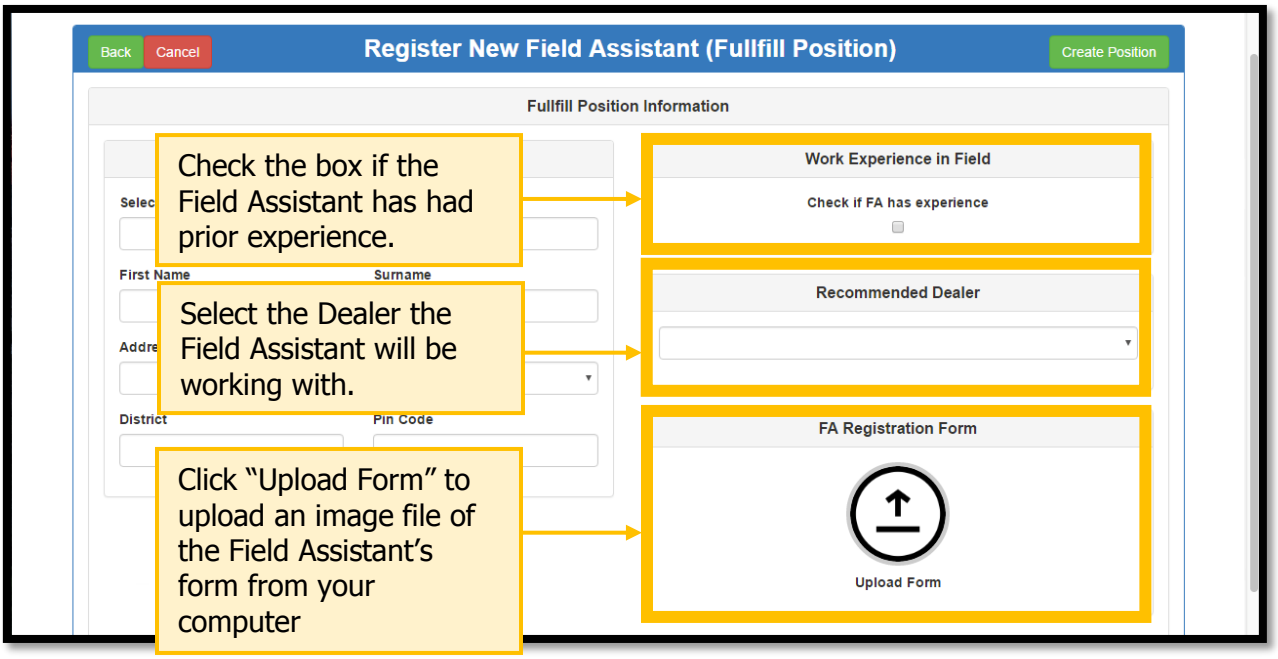
You will then be directed to the Register New Field Assistant (Fulfill Position Page).

Register New Field Assistant (cont.)



Click the "Create Position" button to create a Field Assistant position if you have not done so already from before.

Select/enter the information for the Field Assistant who fill the Field Assistant Position.

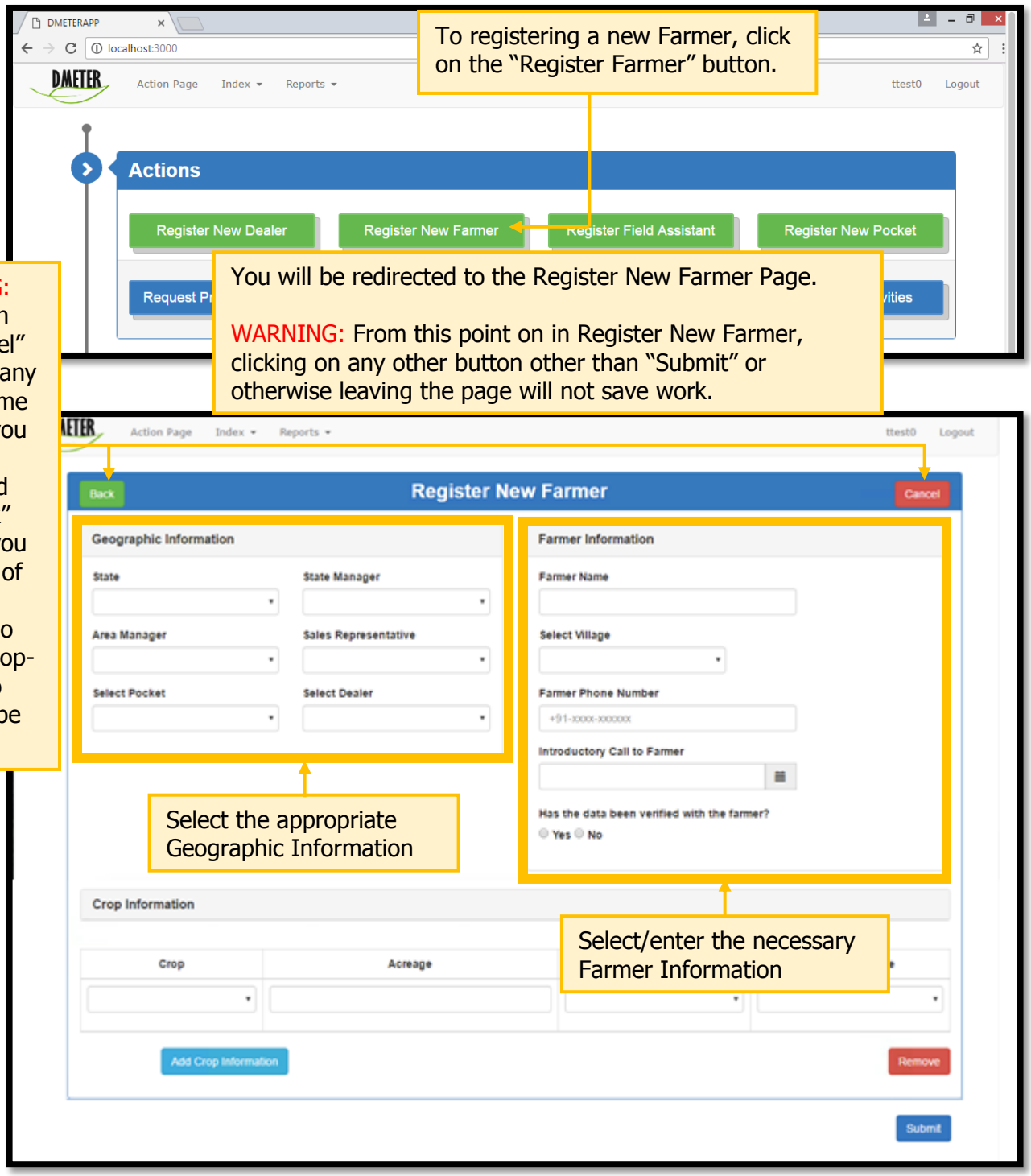


Check the box if the Field Assistant has had prior experience.

Select the Dealer the Field Assistant will be working with.

Click "Upload Form" to upload an image file of the Field Assistant's form from your computer

Register New Farmer



To registering a new Farmer, click on the "Register Farmer" button.

You will be redirected to the Register New Farmer Page.

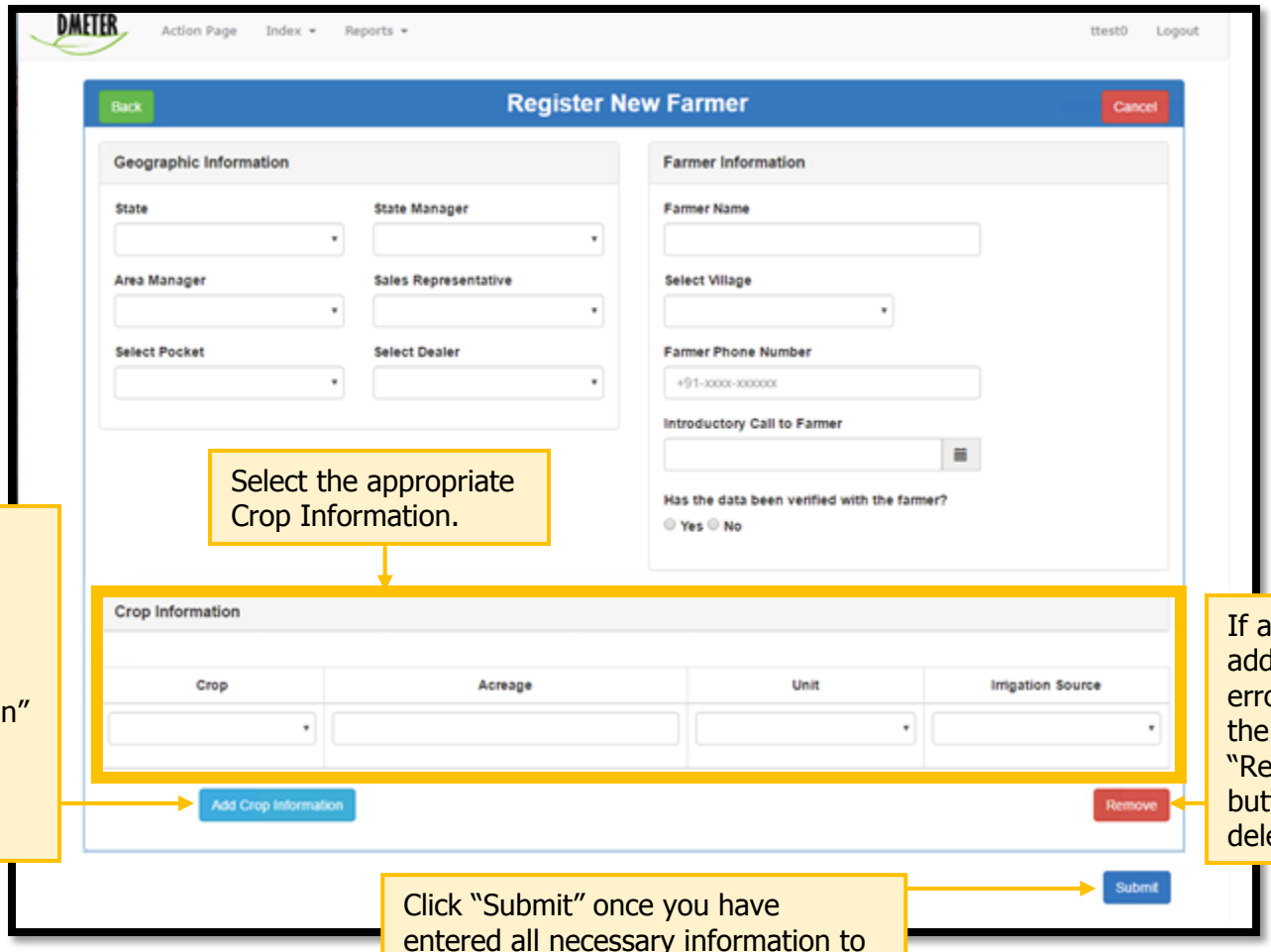
WARNING: From this point on in Register New Farmer, clicking on any other button other than "Submit" or otherwise leaving the page will not save work.

WARNING: Clicking on the "Cancel" button at any point in time will take you to the Dashboard and "Back" will take you to the list of Farmers. There is no warning pop-up and no work will be saved.

Select the appropriate Geographic Information

Select/enter the necessary Farmer Information

Register New Farmer (cont.)



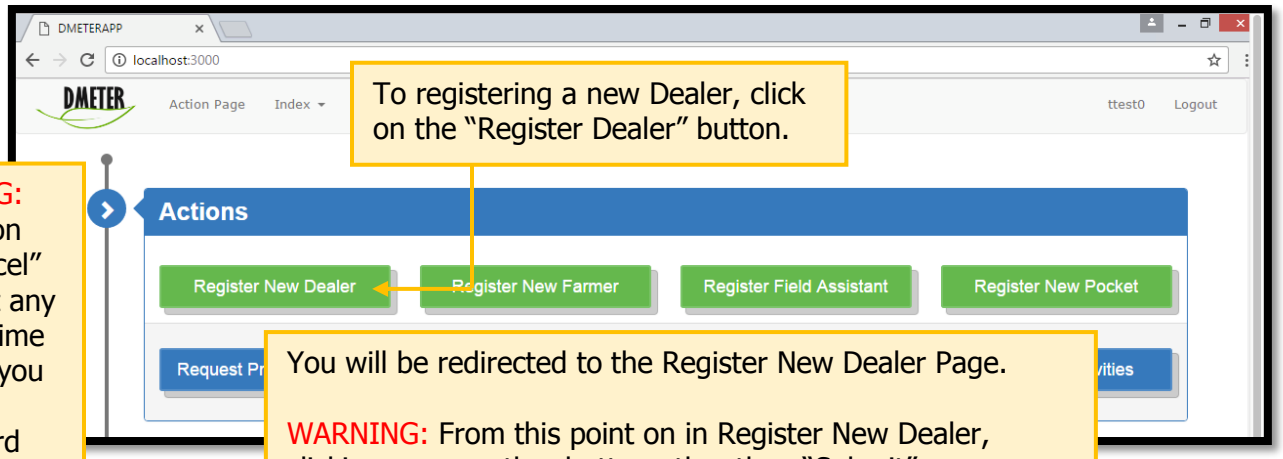
Select the appropriate Crop Information.

If more crops are necessary, click the "Add Crop Information" button to add more rows.

If a crop was added in error, click the "Remove" button to delete it.

Click "Submit" once you have entered all necessary information to save.

Register New Dealer

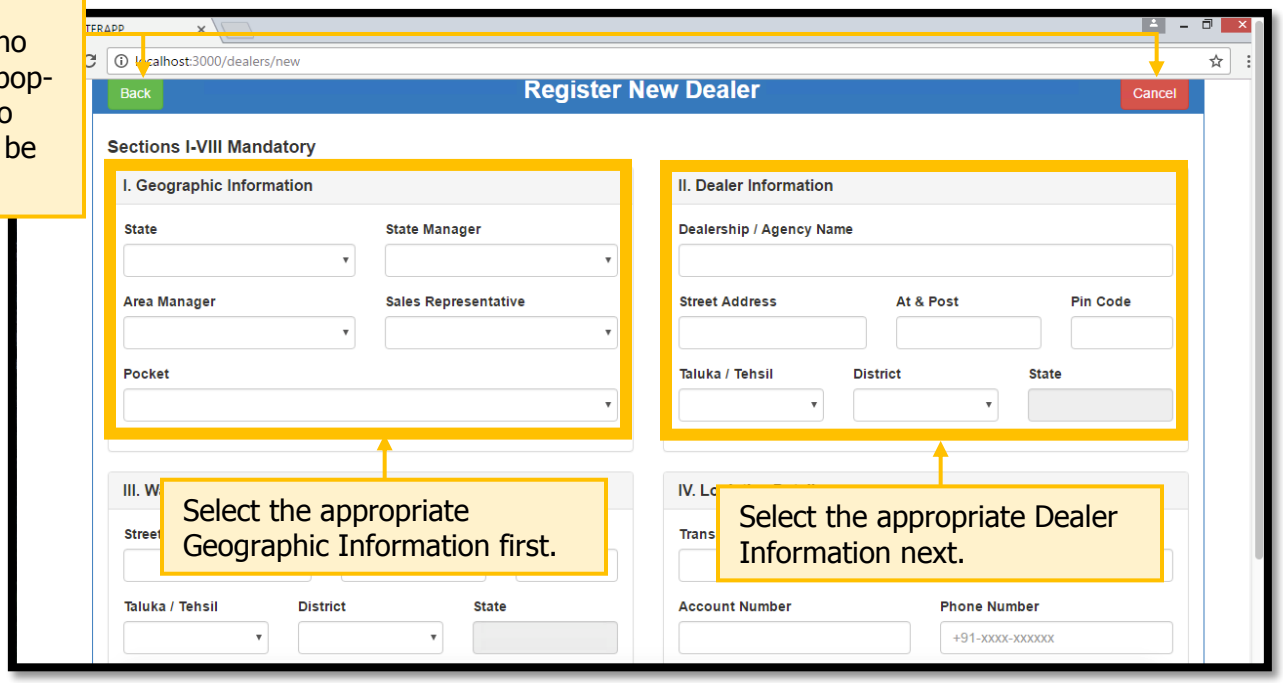


To registering a new Dealer, click on the "Register Dealer" button.

WARNING: Clicking on the "Cancel" button at any point in time will take you to the Dashboard and "Back" will take you to the list of Dealers. There is no warning pop-up and no work will be saved.

You will be redirected to the Register New Dealer Page.

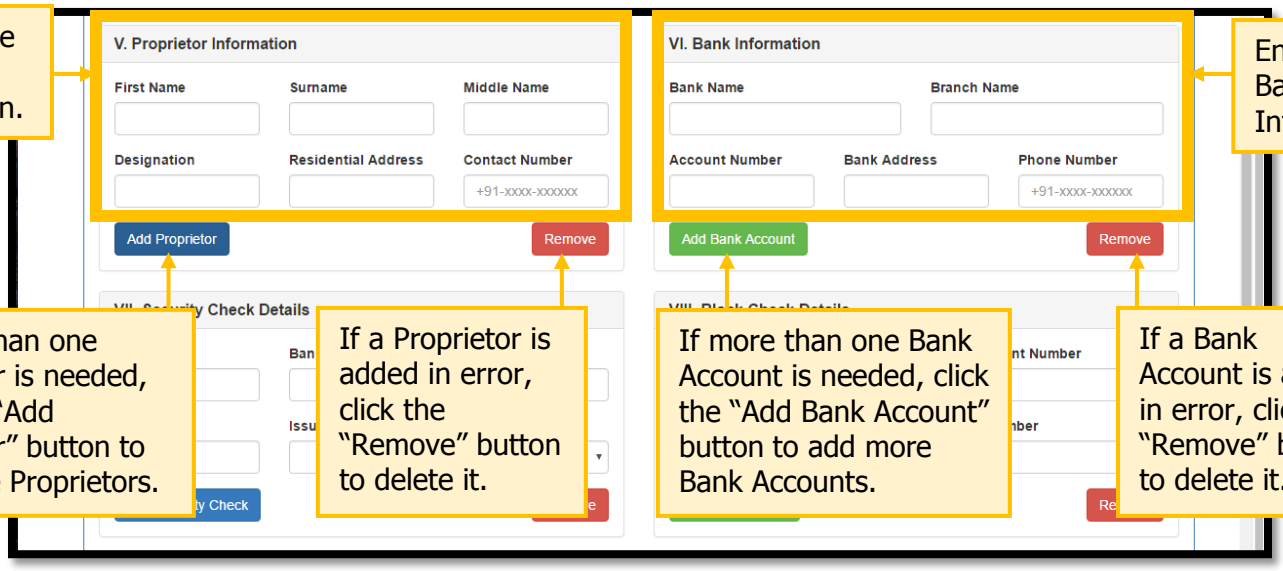
WARNING: From this point on in Register New Dealer, clicking on any other button other than "Submit" or otherwise leaving the page will not save work.



Select the appropriate Geographic Information first.

Select the appropriate Dealer Information next.

Register New Dealer (cont.)



Enter in the Proprietor Information.

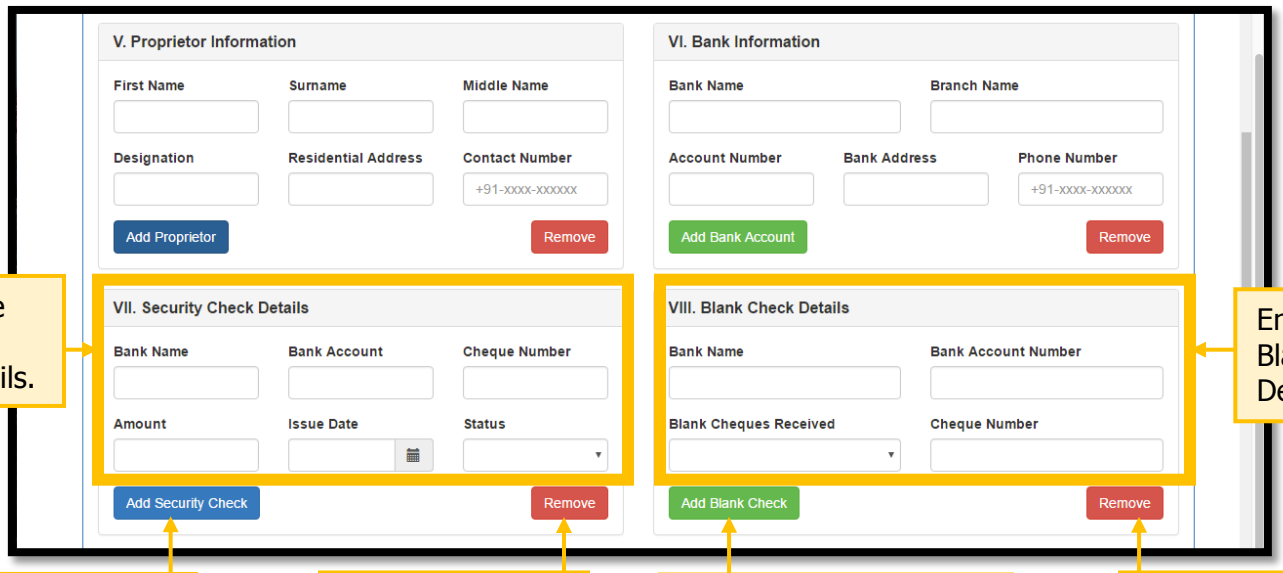
Enter in the Bank Information.

If more than one Proprietor is needed, click the "Add Proprietor" button to add more Proprietors.

If a Proprietor is added in error, click the "Remove" button to delete it.

If more than one Bank Account is needed, click the "Add Bank Account" button to add more Bank Accounts.

If a Bank Account is added in error, click the "Remove" button to delete it.



Enter in the Security Check Details.

Enter in the Blank Check Details.

If more than one Security Check is needed, click the "Add Security Check" button to add more Security Checks.

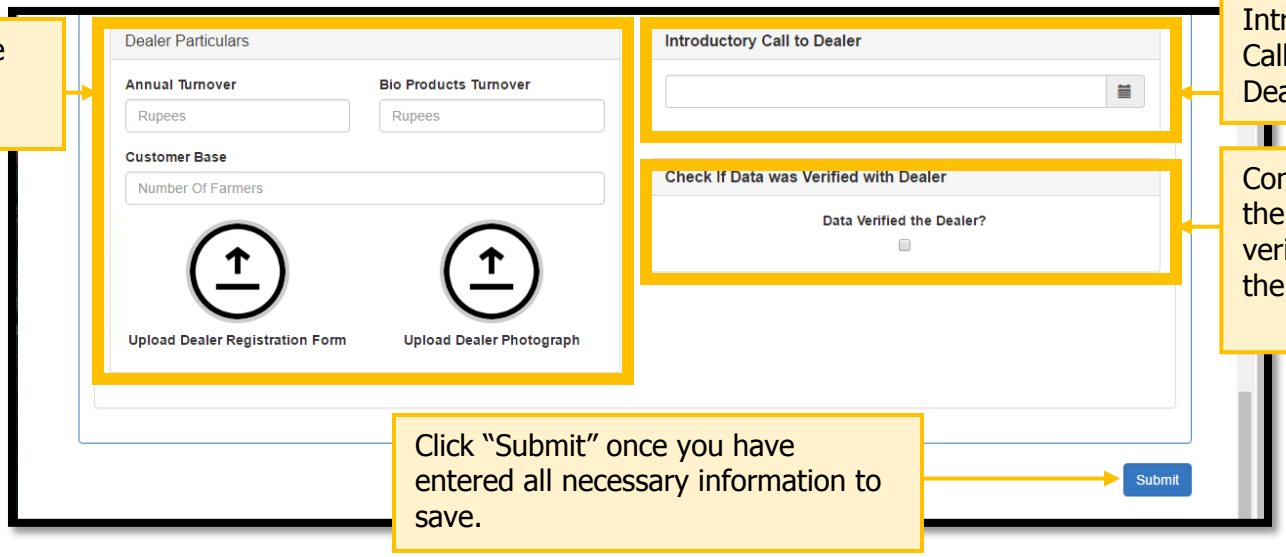
If a Security Check is added in error, click the "Remove" button to delete it.

If more than one Blank Check is needed, click the "Add Blank Check" button to add more Blank Checks.

If a Blank Check is added in error, click the "Remove" button to delete it.

Register New Dealer (cont.)

Enter in the Dealer Particulars.

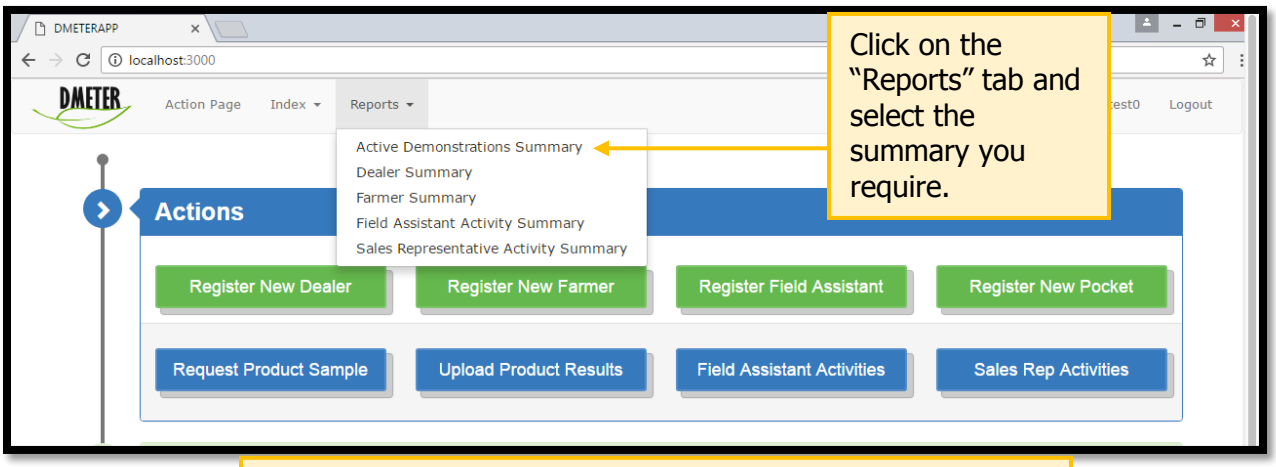


Enter in the date for the Introductory Call to Dealer.

Confirm if the data was verified with the Dealer.

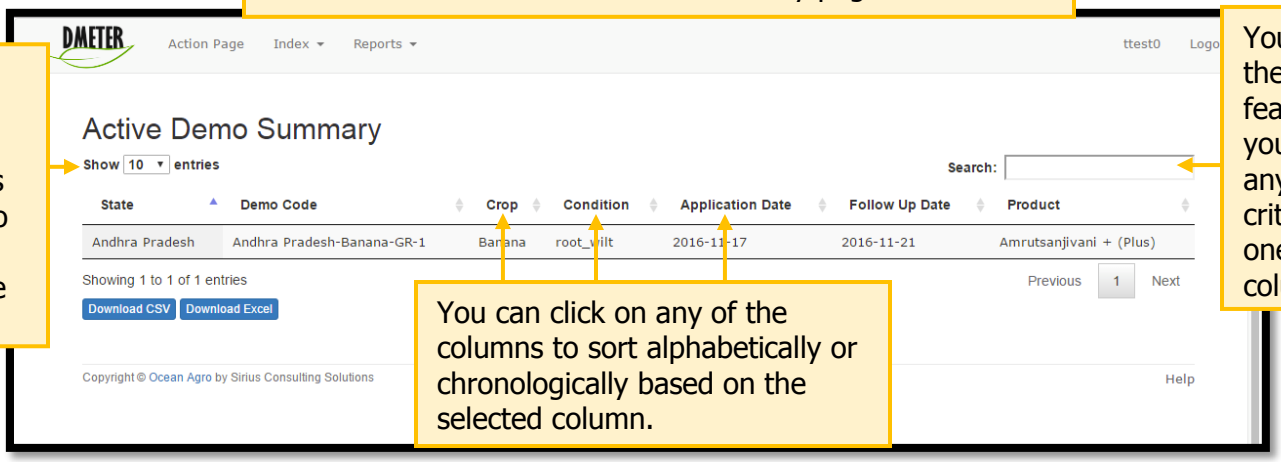
Click "Submit" once you have entered all necessary information to save.

Reports



Click on the "Reports" tab and select the summary you require.

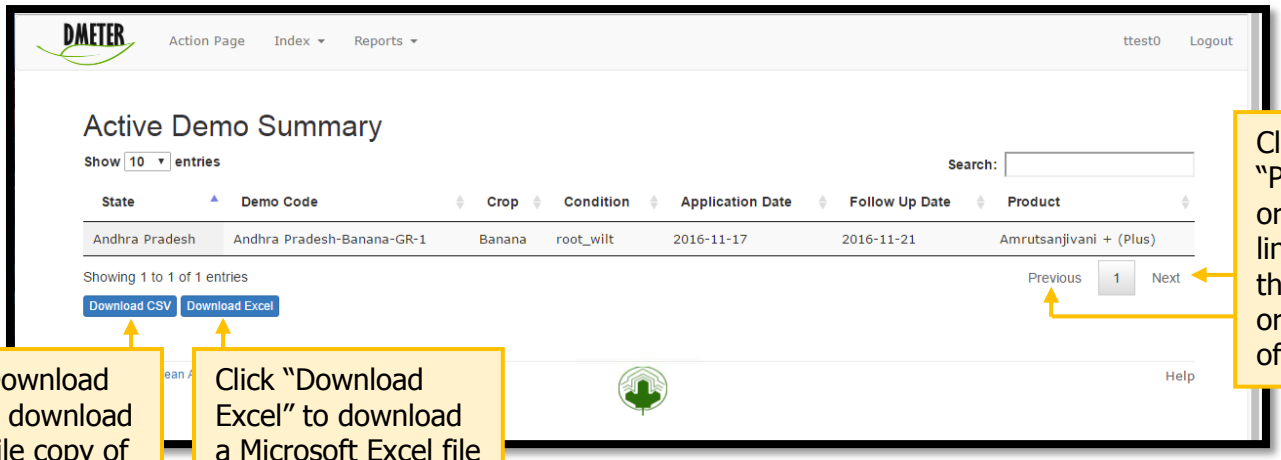
You will be redirected to chosen summary page.



You can select the amount of row entries you wish to view on a single page here.

You can use the Search feature if you know any of the criteria from one of the columns.

You can click on any of the columns to sort alphabetically or chronologically based on the selected column.



Click on the "Previous" or "Next" link to view the previous or next set of records.

Click "Download CSV" to download a CSV file copy of the records.

Click "Download Excel" to download a Microsoft Excel file copy of the records.