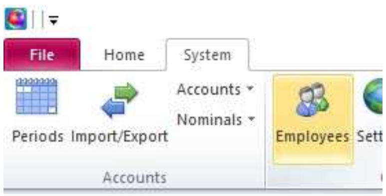
Sales Mobile Application User Guide

Contents:

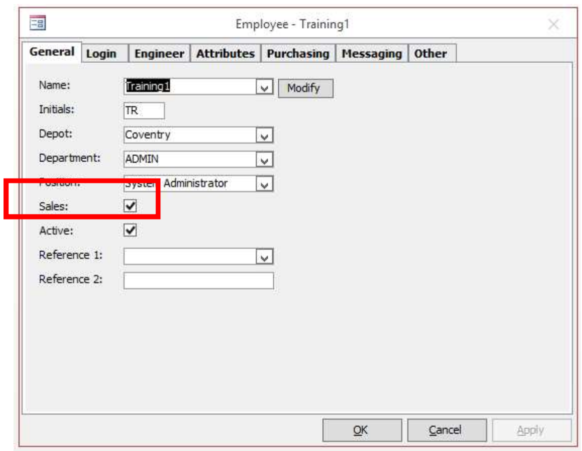
Setup:

Before using the Protean Mobile Application, each user will need to be correctly setup in the Protean office system.

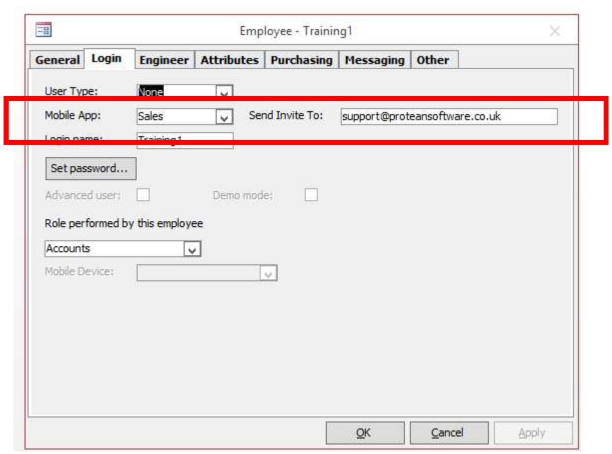
To do this, login into the Protean office system and then click on the **System Tab,** shown in the top left hand corner of the scree and then on the **Employees Icon**:



On the **General Tab**, make sure that the Sales field is ticked:

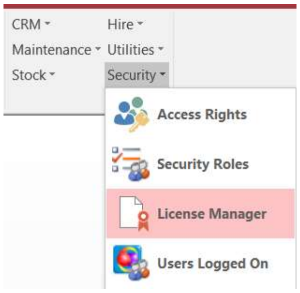


Then on the **Login Tab**, make sure that the **Mobile App** field is set to **Sales** and that a valid email address is entered in the **Send Invite To** field:

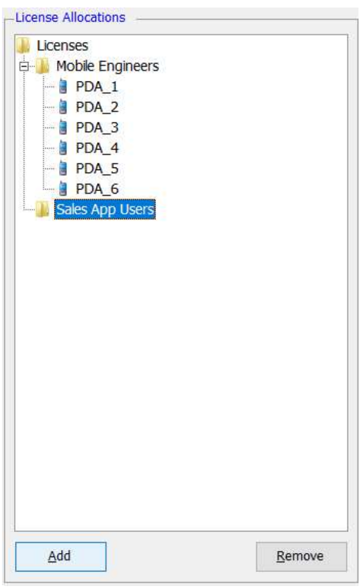


Once the above information has been entered, click on the **Apply** button shown in the bottom right hand corner of the screen.

Now you will need to go to the **System tab** then **Security** and **License manager**.



Then click and highlight the 'Sales app users' folder on the right hand pane and click 'Add' at the bottom.

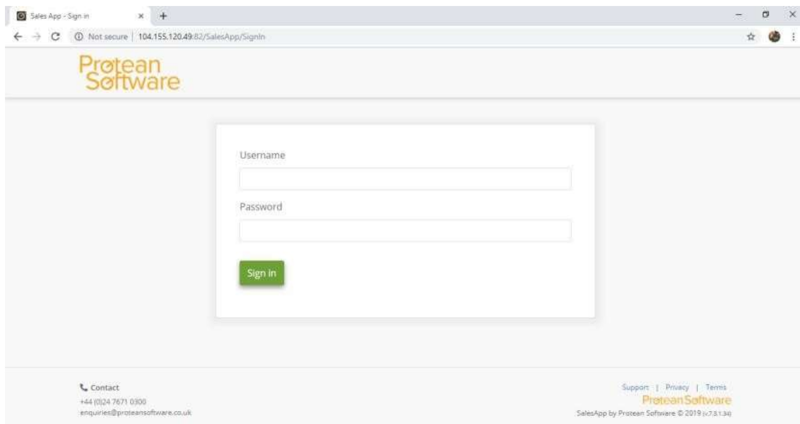


This will then present a dropdown box where you can then select the employee you wish to grant access and the system will then send an automated email to the user, with details of how to connect to the Mobile Sales Application and the URL that should be used.

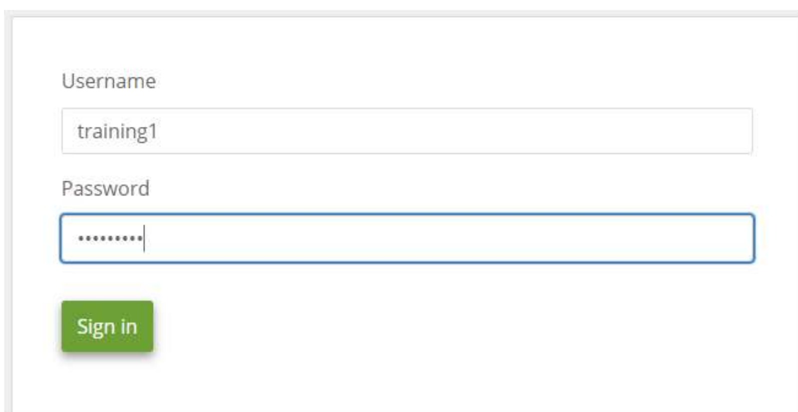
Logging into the App:

To log into the Protean Mobile Application, you need to firstly to open the Internet Browser on your Mobile device and then enter the appropriate URL or Web address:

Once the device has successfully connected, you will then be presented with the Mobile Sales App login screen:



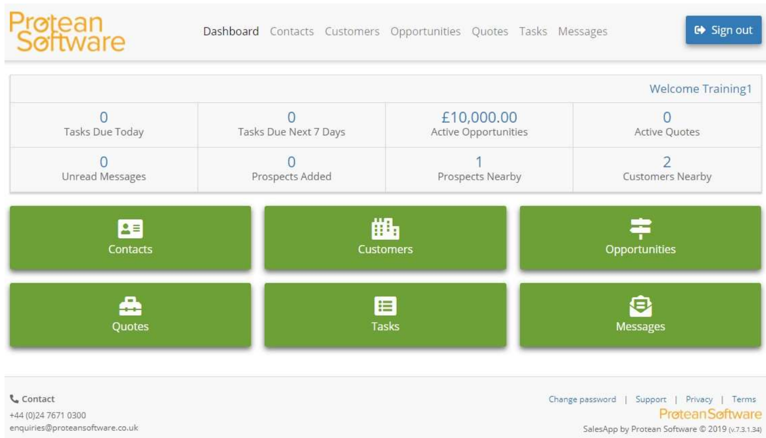
Then enter the **Username** and **Password** as required (Please note that in the same way as the office system is setup, the Password is case sensitive):



Then click on the **Sign In** button to access the system.

General Navigation (Desktop):

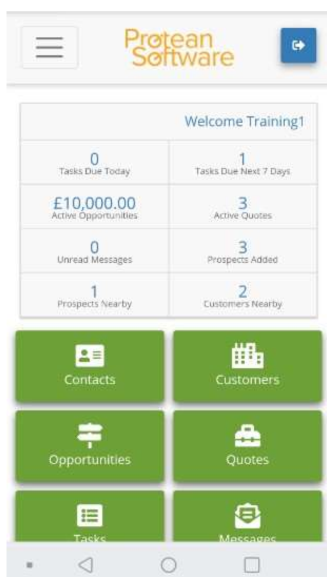
Once you are logged onto the Mobile Sale App on a Desktop, you are then presented with the Home screen:



Whilst using the system, you can always return to this Home screen, by either clicking on the **Dashboard button** shown in the Menu bar, or by clicking on the Protean Software logo, shown in the top left hand corner of the screen:

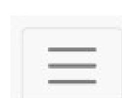
General Navigation (Mobile Device):

Once you are logged onto the Mobile Sale App on a Mobile device, you are then presented with the Home screen:



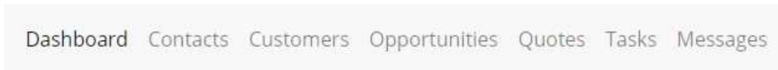
Menu Bar:

All of the main areas of the system are accessible, by tapping on the Menu icon, shown in the top left hand corner of the screen:



<u>Menu Bar:</u>

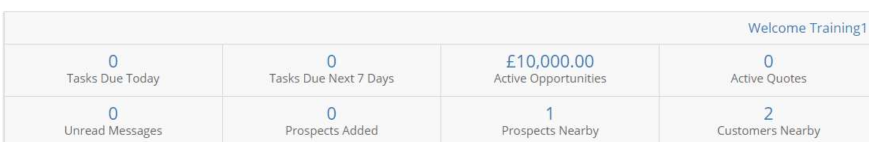
All of the main areas of the system are accessible, by clicking on the **Menu bar** options, shown along the top of the screen:



- **Dashboard:** If this is selected, the system will return the user back to the main Home screen.
- **Contacts:** If this is selected, the system will then display a list of Contacts that are linked to Customers & Prospect records, that are either currently assigned to the Salesperson logged in, or aren't currently assigned to any Salesperson.
- **Customers:** If this is selected, the system will then display a list of active Customers, Sites & Prospect records, that are either currently assigned to the Salesperson logged in or aren't currently assigned to any Salesperson.
- **Opportunities:** If this is selected, the system will then display a list of Sales Opportunities that are currently linked to Customers that are assigned to the salesperson who is logged in.
- **Quotes:** If this is selected, the system will then display a list of Quotations that have been created or requested for a Customer, that is currently assigned to the salesperson who is logged in.
- **Tasks:** If this is selected, the system will then display a list of Tasks that are currently allocated to the salesperson who is logged in.
- **Messages:** If this is selected, the system will then display a list of internal messages that have been sent to the salesperson who is logged in.

<u>Icons:</u>

Below the Menu bar options mentioned previously, there are a set of icons which if clicked upon, will take the user to specific useful enquiries, with pre-populated criteria already loaded:

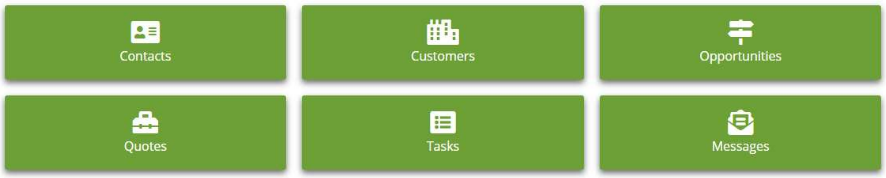


- **Tasks Due Today:** If this is selected, the system will then display a list of Tasks that have been assigned to the user, that are due to be actioned today.
- **Tasks Due Next 7 Days:** If this is selected, the system will then display a list of Tasks that have been assigned to the user, that are due to be actioned within the next 7 days.
- **Active Opportunities:** If this is selected, the system will then display a list of active Opportunities and their corresponding Estimated Sales Value if entered.
- **Active Quotes:** If this is selected, the system will then display a list of active quotes.
- **Unread Messages:** If this is selected, the system will then display a list of internal messages that have been sent to the user, that haven't been opened and read.
- **Prospects Added:** If this is selected, the system will then display a list of the most recently added prospects to the system.
- **Prospects Nearby:** If this is selected, the system will then display a list of Prospects that are near to the users current location.

- **Customers Nearby:** If this is selected, the system will then display a list of Customers that are near to the users current location.

Dashboard Icons:

All of the above areas of the system, can also be accessed by clicking on the various Green icons, shown in the middle of the dashboard screen:



Logging Out (Desk Top):

If you wish to log out of the application, then simply click on the **Sign Out** button, shown in the top right hand corner of the screen:

Logging Out (Mobile Device):

If you wish to log out of the application, then simply click on the **Sign Out** button, shown in the top right hand corner of the screen:

Quick Link Toolbar:

Whilst in certain records, a user can use the small toolbar shown in the top right hand corner of the appropriate screen:

Contacts:

Whilst in a Contact, a user can then quickly create a Task, Quote Request or Sales Opportunity:

Customers/Prospects:

Whilst in a Customer / Prospect, a user can quickly create a Contact, Task, Quote Request, Sales Opportunity or Message:

Opportunities:

Whilst in an Sales Opportunity, a user can quickly create a Task or Quote Request:

Quotes:

Not available.

Tasks:

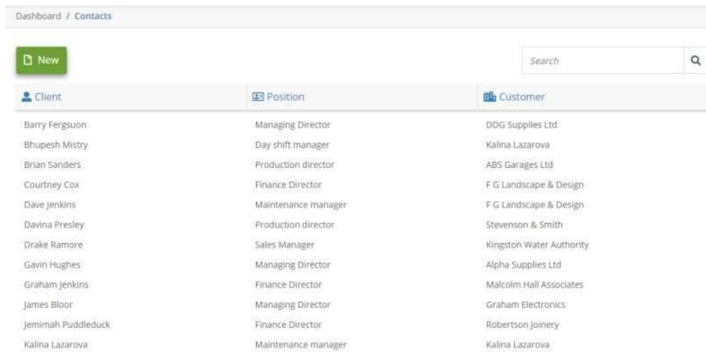
Not available.

Messages:

Not available.

Contacts:

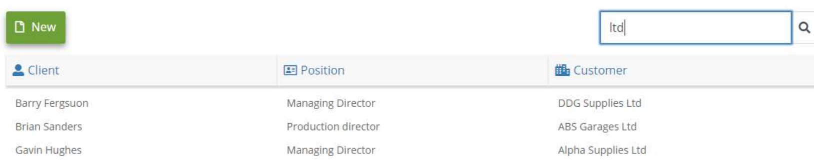
To add, view or amend a Contact on the system, click on the **Contacts button** shown in the Menu bar or on the green **Contacts icon** shown on the Dashboard. The system will then display the following screen:



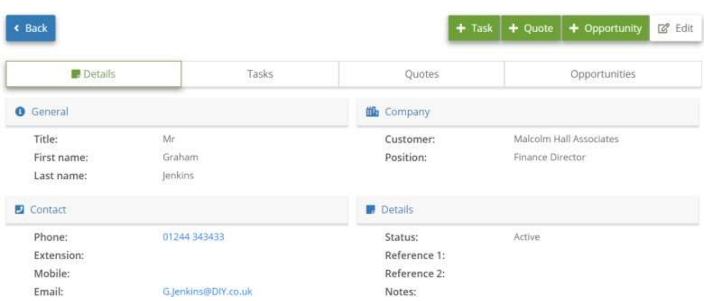
Searching:

You can use the Search field to select / view a particular contact that you require:

You can search by using either part of the Contacts Name, the Position / Job Role or the Customer record that they are currently allocated to. As you enter the text in the Search field, the system will automatically reduce the amount of results accordingly:

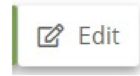


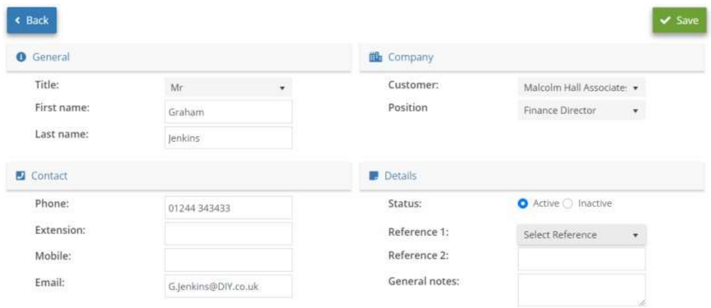
Once you have found the record required, simply click on it to select it. Once selected, the system will then display the details contained on the Contact record:



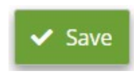
Editing Contact Details:

If you wish to edit any of the details shown in this screen, simply click on the **Edit Icon** shown in the toolbar in the top right hand corner of the screen:





Once you have entered any information, click on the Save icon, shown in the top right hand corner of the screen:



Quick Links:

Within the **Contact Section** of the Contacts screen, there are 2 quick links which will allow a user to call the Contact or Email the Contact quickly and easily:

Viewing Additional Information:

From this screen, a user can also use the small toolbar to view other information linked to the Contact selected:

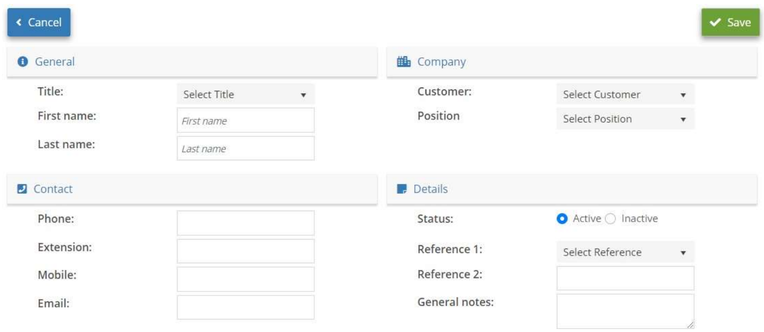
- **Tasks:** If selected, the system will then display a list of Tasks linked to the Contact selected.
- **Quotes:**If selected, the system will then display a list of Quotes that are have been created in the Protean Office system for the Contact selected.
- **Opportunities:** If selected, the system will then display a list of Sales Opportunities that are currently linked to the Contact selected.

To return to the main list of Contacts seen earlier, simply click on the Back Icon, shown in the top left hand corner of the screen:

Creating a Contact:

If you wish to create a new Contact, click on the **Contacts button** shown in the Menu bar and then on the **New button**, shown in the top left hand corner of the screen:

The system will then display a screen, where basic contact details of the new Contact can be entered by the user:



General:

- **Title:** Use the drop down arrow icon, to select the Title of the Contact.
- **First Name:** Enter the first name of the Contact.
- **Last Name:** Enter the last name of the Contact.

Company:

- **Customer:** Search for and select the Customer that the contact needs to be linked to.
- **Position:** Use the drop down arrow to select the Job Title or position of the Contact (These are setup in System ¦ CRM ¦ Job Titles).

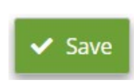
Contact:

- **Phone:** Enter the main contact number for the Contact.
- **Extension:** Enter the extension number for the Contact.
- **Mobile:** Enter the mobile telephone number for the Contact.
- **Email:** Enter the email address for the Contact.

Details:

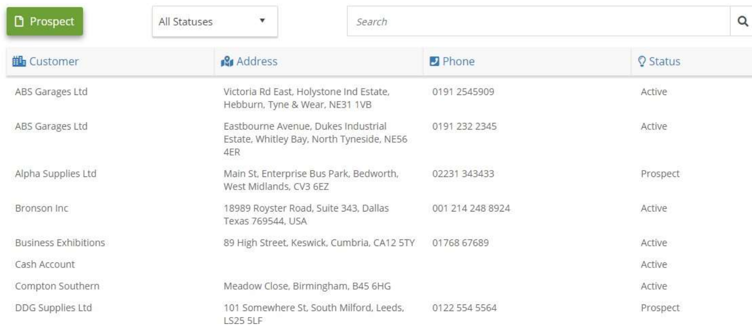
- **Status:** Accept the default setting of Active in order to create the contact. This can always be changed to Inactive at a later date if required.
- **Reference 1 / 2:** Enter any additional information as required (These are setup in System ¦ More ¦ User References – Contact).
- **General Notes:** Enter any additional notes about the contact, such as working hours etc.

Once you have entered the information, click on the **Save icon** shown in the top right hand corner of the screen:



Customers / Prospects:

To view a Customer / Prospect on the system, click on the **Customer button** shown in the Menu bar, or on the green **Customer icon** shown on the Dashboard. The system will then display the following screen:

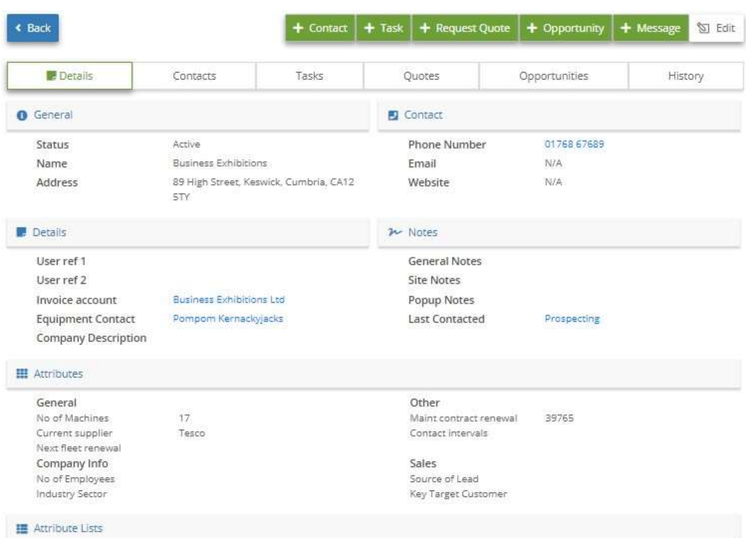


Searching:

You can use the Search field to select / view a particular Customer that you require:

You can search by using either part of the Customer / Prospect Name, Address, Phone number or Status. As you enter the text in the Search field, the system will automatically reduce the amount of results accordingly:

Once you have found the record required, simply click on it to select it. Once selected, the system will then display the details contained on the Customer / Prospect record:



Viewing Additional Information:

From this screen, a user can use the small toolbar to view other information linked to the Customer selected:

- **Details:** If selected, the system will then display details of the Customer selected.
- **Contacts:** If selected, the system will then display a list of Contacts currently linked to the Customer selected.
- **Tasks:** If selected, the system will then display a list of Tasks linked to the Customer selected.
- **Quotes:** If selected, the system will then display a list of Quotes that are have been created in the Protean Office system for the Customer selected.
- **Opportunities:** If selected, the system will then display a list of Sales Opportunities, that are currently linked to the Customer selected.
- **History:** If selected, the system will then display the CRM History of the Customer selected.

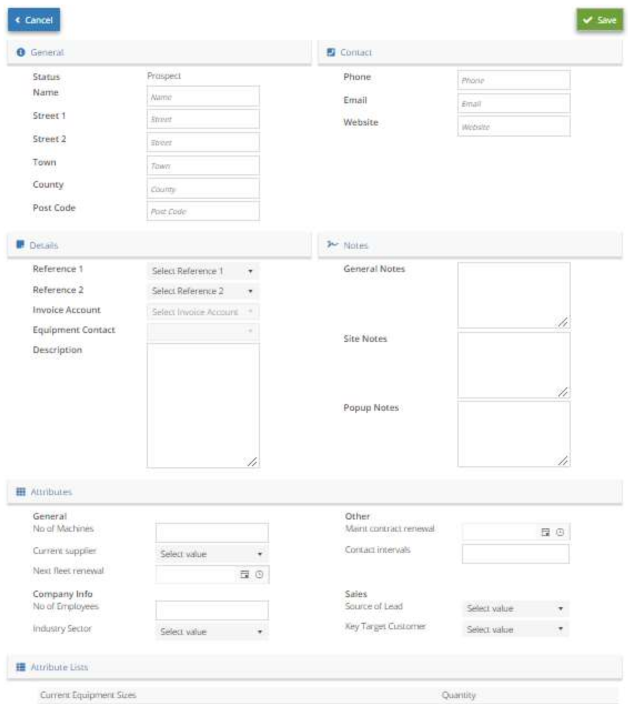
Editing Customer Details:

If you wish to edit any of the details shown in this screen, simply click on the **Edit Icon** shown in the toolbar in the top right hand corner of the screen:

Creating a Prospect:

If you wish to add a Prospect to the system, simply navigate to the Customer list and then click on the **Prospect button**, shown in the top left hand corner of the screen:

The system will then display a screen, where a user can then enter the details of the Prospect:



General Section:

- **Name:** Enter the name of the Customer.
- **Street 1:** Enter the first line of the address of the Customer.
- **Street 2:** Enter the second line of the address of the Customer.
- **Town:** Enter the Town details of the Customer.
- **County:** Enter the County details of the Customer.
- **Post Code:** Enter the Post Code of the Customer.

Contact Section:

- **Phone:** Enter the phone number of the Customer.
- **Email:** Enter the general email address for the Customer.
- **Website:** Enter the Website address for the Customer.

Details Section:

- **Reference 1/2:** Enter any additonal pre set user references to the Prospect (These are setup in System ¦ More ¦ User Defineable References - Customer).
- **Invoice Account:** Enter the Invoice Account that is linked to the Prospect.
- **Equipment Contact:** Enter the Contact record who is the main contact for Equipment records at the Customer / Prospect.
- **Description:** Enter any text to describe the Prospect.

Notes Section:

- **General Notes: Enter** Used to amend / enter any general notes regarding the Prospect.
- **Site Notes:** Used to amend / enter any notes reagarding the site. These can then eventually be viewed / amended by an Engineer if required.
- **Popup Notes:** Used to amend / enter any notes that you wish to automatically appear when a user accesses the record form within the Protean Office system.

Attributes Section:

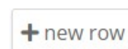
This section can be used to enter any Customer / Prospect Attributes to help analyse the prospective Prospect (These are setup in System ¦ CRM ¦ Customer Attributes).

The sections shown, will be based on the Category that was used when setting up the Attribute.

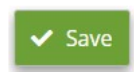
Attributes Lists Section:

This section can be used to enter any Customer / Prospect List Attributes, that have been setup in the Protean Office system. These can be used to store information about that Prospect where a list format is required.

If you wish to add a further Customer List Attribute, click on the New Row button:

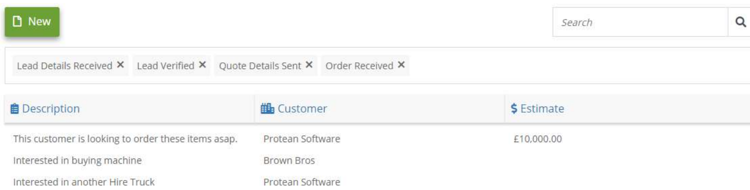


Once you have entered any information, click on the **Save icon** shown in the top right hand corner of the screen:



Sales Opportunties:

To add, view or amend a Sales Opportunity on the system, click on the **Opportunities button** shown in the Menu bar or on the green **Opportunities icon** shown on the Dashboard. The system will then display the following screen:



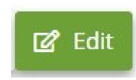
Searching:

A user can search by using either part of the Sales Opportunity Description, Customer Name or Sales Estimated Value. As you enter the text in the Search field, the system will automatically reduce the amount of results accordingly.

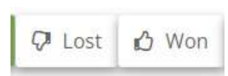
A user can also use the Status field to narrow down the list of Opportunities by their Status:

Editing a Sales Opportunity:

If you wish to edit any of the details shown in this screen, simply click on the **Edit Icon** shown in the toolbar in the top right hand corner of the screen:

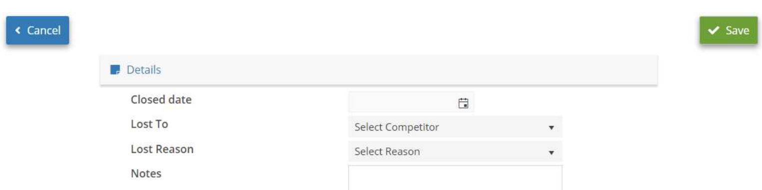


If you wish to update the Sales Opportunity as either a Lost Opportunity or a Won Opportunity, simply select one of the buttons shown in the toolbar in the top right hand corner of the screen:



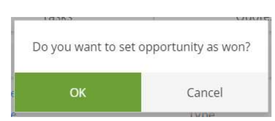
Lost:

If this is clicked on, the system will then display a screen where details of why the Sales Opportunity was lost can be entered. Once the Save button is clicked on, the Status of the Sales Opportunity will change to Lost:



Won:

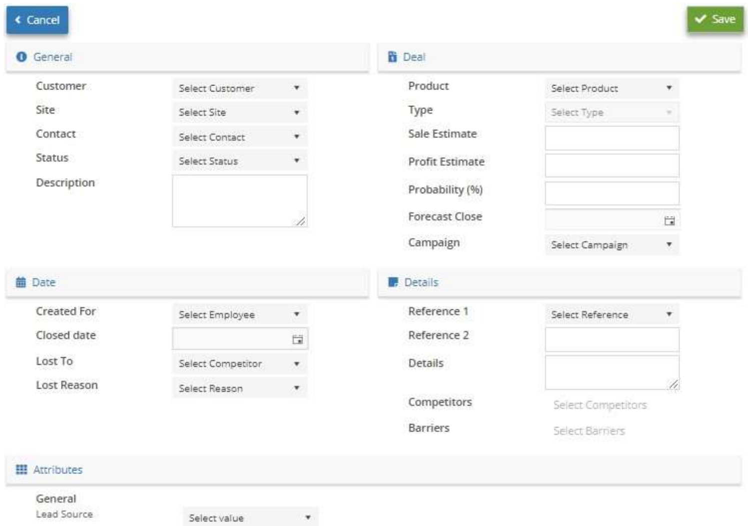
If this is selected, the system will prompt the user to set the Opportunity as won. If the Ok button is selected, the Status of the Sales Opportunity will change to Closed:



Creating a Sales Opportunty:

If you wish to create a new Sales Opportunity, click on the New button shown in the top left hand corner of the screen:

The system will then display a screen, where details of the Sales Opportunity can be entered by the user:



General Section:

- **Customer:** The system will display the Customer Name assocaited with the Contact selected.
- **Site:** The system will display the Site Name asscoiated with the Contact selected earlier.
- **Contact:** The system will dipsly the name of the Contact selected earlier.
- **Status:** Use the drop down arrow icon to select the appropriate status from the list, to reflect this Sales Opportunities current position.
- **Desciption:** Enter a description of the customer’s requirements i.e. Sale of a new truck or a maintenance contract, hire contract and so on.

Deal Section:

- **Product / Type:** Select the type of product/service the customer is interested in, i.e. Hire, Job, Maintenance, Sale. The options available in the second drop down box are determined by the selection made in the previous field.
- **Sales Estimate:** Enter the amount (in GBP), of business this opportunity may be worth. This can be used later for analysis purposes.
- **Profit Estimate:** Enter the estimated profit (in GBP), that might be achieved with this sale. This can be used later for analysis purposes.
- **Probability:** Enter the estimated probability of your Company getting this sale as a percentage. This can be used later for analysis purposes.
- **Forecast Close:** When does the salesmen expect the customer to make a decision on this opportunity?
- **Campaign:** Use the drop down arrow icon to link this Sales Opportunity to an existing Sales Campaign if required.

Date Section:

- **Created For:** Select the name of the Employee who the Opportunity is being created for.
- **Closed Date:** Enter the date on which the Sales Opportunity is closed.
- **Lost To:** Select from the drop down list, the Competitor who has secured the sale, which can be used for reporting purposes (These are setup in System ¦ CRM ¦ Competitors).
- **Lost Reason:** Select from the drop down list, the reason why the Sales Opportunity was lost, which can be used for reporting purposes (These are setup in System ¦ More ¦ Cancellation Reasons).

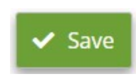
Details Section:

- **Reference 1 & Reference 2:** Add up to 2 additional fields of reference if required (These are setup in System ¦ More ¦ User References – Sales Opportunity).
- **Details:** Enter any additional information regarding the Sales Opportunity.
- **Competitors:** Select from the drop down arrow icon, select any Competitors that you may be up against (These are setup in System ¦ CRM ¦ Competitors).
- **Barriers:** Select from the drop down arrow icon, select any Barriers that you may be up against (These are setup in System ¦ CRM ¦ Sales Barriers).

Attributes Section:

- Using the drop down arrow icon, select any additional information regarding the Sales Opportunity, by using pre-set attributes e.g. current supplier, source of lead etc. (These are setup in System ¦ CRM ¦ Sales Opportunity Atttibutes).

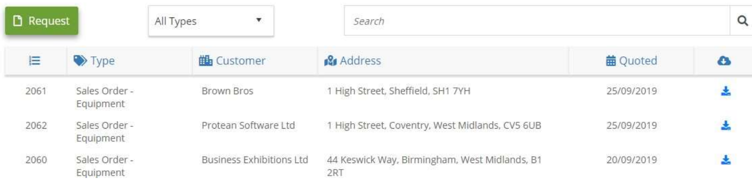
Once you have entered any information, click on the Save icon shown in the top right



Sales Mobile Application

Quote Requests:

To add, view or amend a Quote Request, click on the **Quotes button** shown in the Menu bar or on the green **Quotes icon** shown on the Dashboard. The system will then display the following screen:



	Type	Customer	Address	Quoted	
2061	Sales Order - Equipment	Brown Bros	1 High Street, Sheffield, SH1 7YH	25/09/2019	
2062	Sales Order - Equipment	Protean Software Ltd	1 High Street, Coventry, West Midlands, CV5 6UB	25/09/2019	
2060	Sales Order - Equipment	Business Exhibitions Ltd	44 Keswick Way, Birmingham, West Midlands, B1 2RT	20/09/2019	

Searching:

A user can search by using either part of the Customer / Prospect Name, Address or Quoted Date. As you enter the text in the Search field, the system will automatically reduce the amount of results accordingly.

A user can also use the Types search box, to narrow down the list of Quotes displayed by their type:

Downloading a Quote:

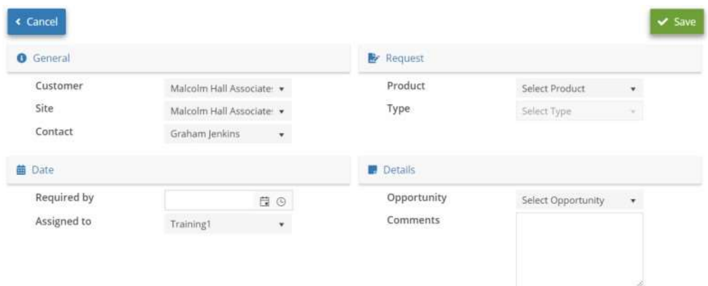
If the Quote that has been created by the office system is displayed in the screen displayed, a user can then click on the Download icon to view a copy of the Quote:

Sales Mobile Application

Creating a Quote Request:

To create a Quote request, simply click on the Request Button shown in the top left hand corner of the screen:

Once selected, the system will then display a screen where a user can then enter the details of a Quote that is required:



General:

- **Customer:** The system will display the Customer associated with the Contact selected earlier.
- **Site:** The system will display the Site Name associated with the Contact selected earlier.
- **Contact:** The system will display the name of Contact selected earlier.

Request:

- **Product:** Use the drop down arrow to select the Product that the Quote is for.
- **Type:** Based on the selection made in the Product field, use the drop down arrow to select the Type of Product the Quote is for.

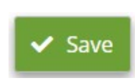
Date:

- **Required By:** Use the Date and Time selection icons, to enter the due date and time of when the Quote is required for.
- **Assigined To:** Select a member of staff to receive the Quotation request.

Details:

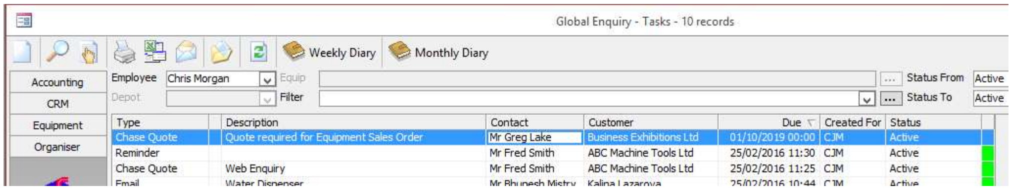
- **Opportunity:** Use this field to link this Quote request, to an existing Sales Opportunity for the Customer selected.
- **Comments:** Add any additonal information as required.

Once you have entered any information, click on the Save icon shown in the top right hand corner of the screen:



Notes:

Once this has been done, the request will then appear in the Protean Office system, as a Task for the Employee selected earlier:

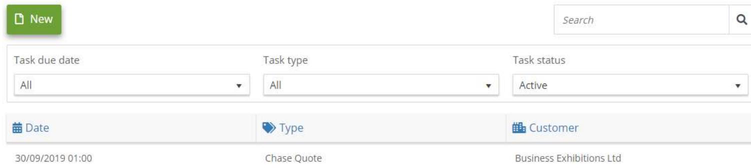


Once the Quote is created by the office user, the Mobile Application will then display the Quote as shown below:

A user can then view the quote, by clicking on the Download icon: 

Tasks:

To add, view or amend a Task, click on the **Tasks button** shown in the Menu bar or on the green **Tasks icon** shown on the Dashboard. The system will then display the following screen:



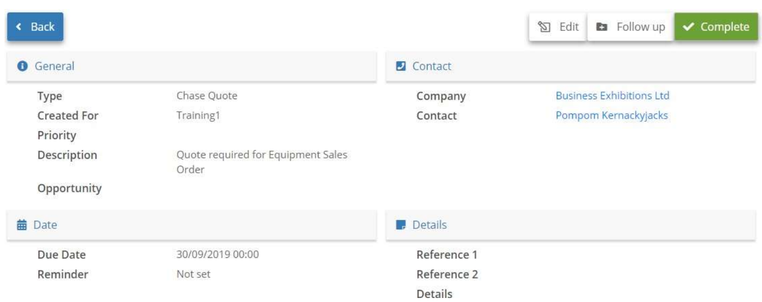
Searching:

A user can search by using either part of the Task Type or Customer Name. As a user enters the text in the Search field, the system will automatically reduce the amount of results accordingly.

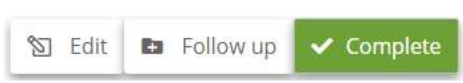
A user can also search by using the various additional search options shown:

Viewing a Task:

To view the details of a Task, simply click anywhere along the task line:



Once in the Task, a user can then carry out a number of actions using the options in the small Tool bar, shown in the top right hand corner of the screen:

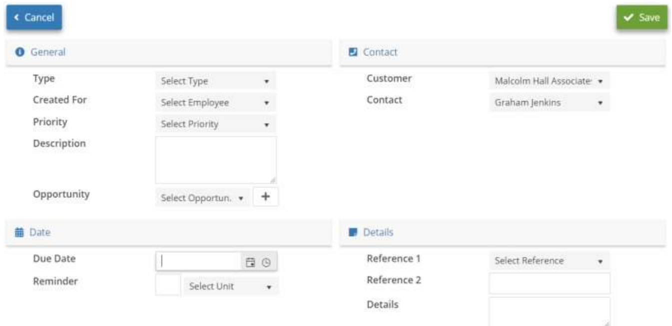


- **Edit:** If selected, this will allow a user to amend the details of the Task selected
- **Follow Up:** If selected, this will allow a user to Complete the current task and create a Follow Up task. Once the details of the Follow Up Task have been entered, a user will then need to click on the 

button.
- **Complete:** If selected, this will allow a user to Complete the Task with no follow up task.

Creating a Task:

If selected, the system will then display a screen where a user can then enter the details of the task required:



General:

- **Type (Required Field):** Use the drop down arrow to select the type of Task required (These are setup in System ¦ CRM ¦ Task Types).
- **Created For (Required Field):** Use the drop down arrow to select which Employee the Task is for.
- **Prioriy (Required Field):** Use the drop down arrow to select the level of priority for the Task.
- **Description (Required Field):** Enter some text to descripe the Task that needs carrying out.
- **Opportunity:** Either use the drop down arrow to select and link the task to an exiting Sales Opportunity, or use the + symbol icon to create a new Sales Opportunity to link the Taskto.

Contact:

- **Customer / Contact:** The system will display the name of the Customer & Contact that was selected earlier. This can be amended if required.

Date:

- **Due Date / Time:** Use the Date and Time selecttion icons, to enter the due date and time of when the Task should be carried out.
- **Reminder:** Use this field to setup a reminder for the task if required.

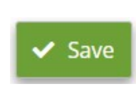
Details:

- **Reference 1 / Reference 2:** Enter details in this field if required (These are setup in System ¦ More ¦ User References – Tasks).
- **Details:** In this field, enter any further text for the Task as required.

Attachments:

- **Attaching Files:** To attach any required files, select the Type of File required (These are setup in System ¦ CRM ¦ Attachment Types), and then simply Drag & Drop the files or Browse for them using the options displayed.

Once you have entered any information, click on the Save icon shown in the top right hand corner of the screen:



Messages:

To add, view or amend an Internal Message, click on the **Messages button** shown in the Menu bar or on the green **Messages icon** shown on the Dashboard. The system will then display the following screen:

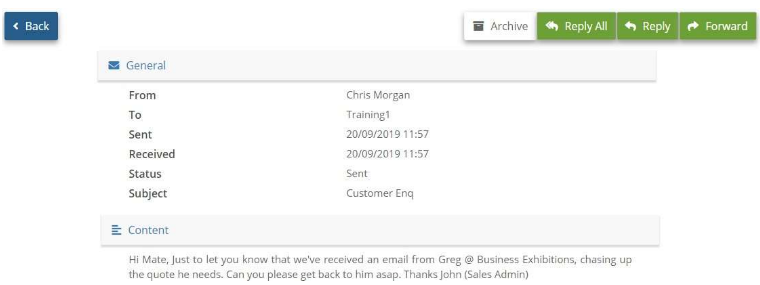
Searching:

A user can search by using either part of the Subject of the Message or who it was received from. As a user enters the text in the Search field, the system will automatically reduce the amount of results accordingly.

A user can also search in either their Inbox (Messages received) or their Outbox (Messages sent), using the 2 additional buttons shown:

Viewing a Message:

To view the details of a message, simply click onto the message line.



Actioning a Message:

When a message is received, a user can then action the message by using the options shown in the small Toolbar, shown in the top right hand corner of the screen:

- **Archive:** If selected, this will move the message to the Archive area of the system. The message would still be viewable in the Protean Office system.
- **Reply All:** If selected, this will allow the user to create a message that would then be sent to all users attached to the original message.
- **Reply:** If selected, this will allow the user to create a message that would then be sent to a specific user.
- **Forward:** If selected, this will allow the user to create a message that would then be forwarded to a different user (s).

Creating a Message:

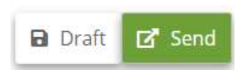
If selected, the system will then display a screen where a user can then enter the details of an Internal Message that they wish to send to a nother user that is required:

General Section:

- **To:** Click into this field to select the user, or users that you wish to send the internal message to.
- **Subject:** Click into this field to enter some text describing the subject of the message.
- **Delivery Receipt:** Click into this field if you wish to receive a receipt message, once the message has been delivered to the receipient.
- **Read Receipt:** Click into this field if you wish to receive a reciept message, once the message has been read by the receipient.

Content Section:

- Click into this box to enter the text on the message.
- A user can also use the Grey box shown at the bottom of this screen to attach any documents, pictures etc to the message.
- Once all of the above has been entered, simply click on either the Draft button to Save the message for sending later, or the Send button, to send the message straight away:



Version	Comments	User	Date	Approver
1.1	First draft	D Morris	13/09/19	
1.2	2nd Draft	D Morris	26/09/19	

Version Control