SNAPP

ITRM
Doing IT Differently

SNAPP CRM [GDC]

CRM User Guide

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SNAPP CRM

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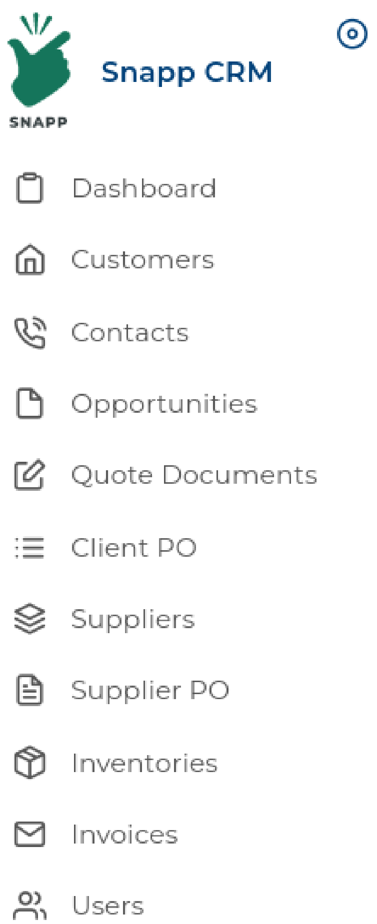
System wide features

In this section we cover a list of features or controls that are either consistent, or work in similar ways across the system.

Main navigation menu

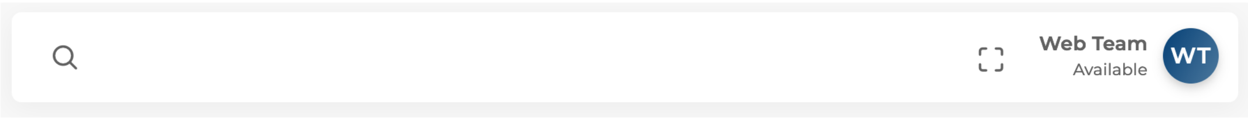


From anywhere in the system, the main navigation menu is on the left, offering a convenient way to switch to different areas in the system.

If you need more screen space horizontally, click on the double circle icon at the top right corner of the menu to collapse it, the menu will expand when you hover over it , clicking the same icon again will pin the menu back to how it was.

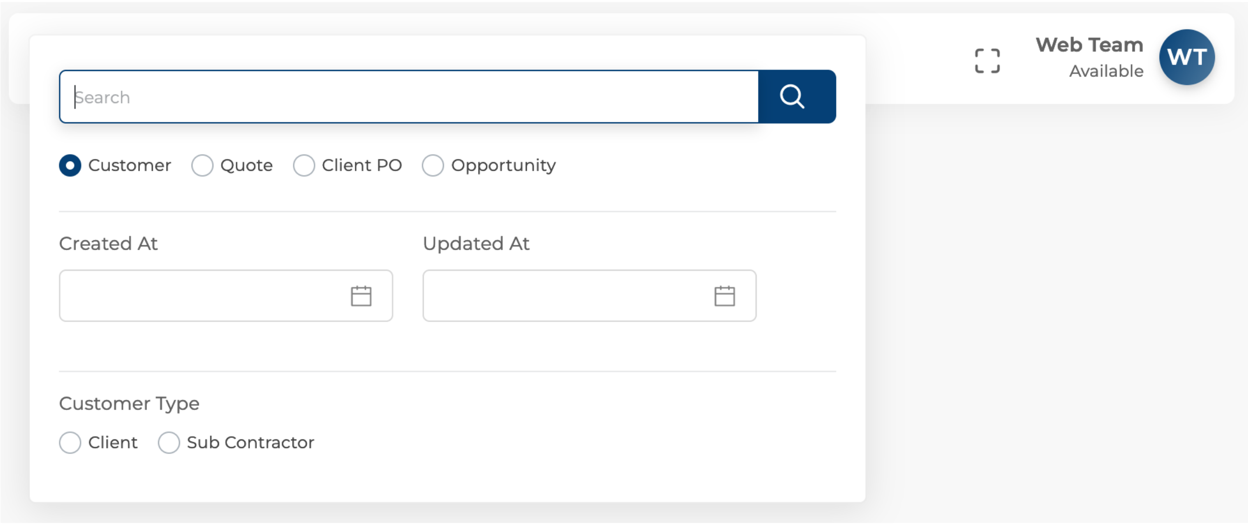
Super search

From anywhere in the system, the super search is available at the top bar by clicking on the magnifying glass icon.



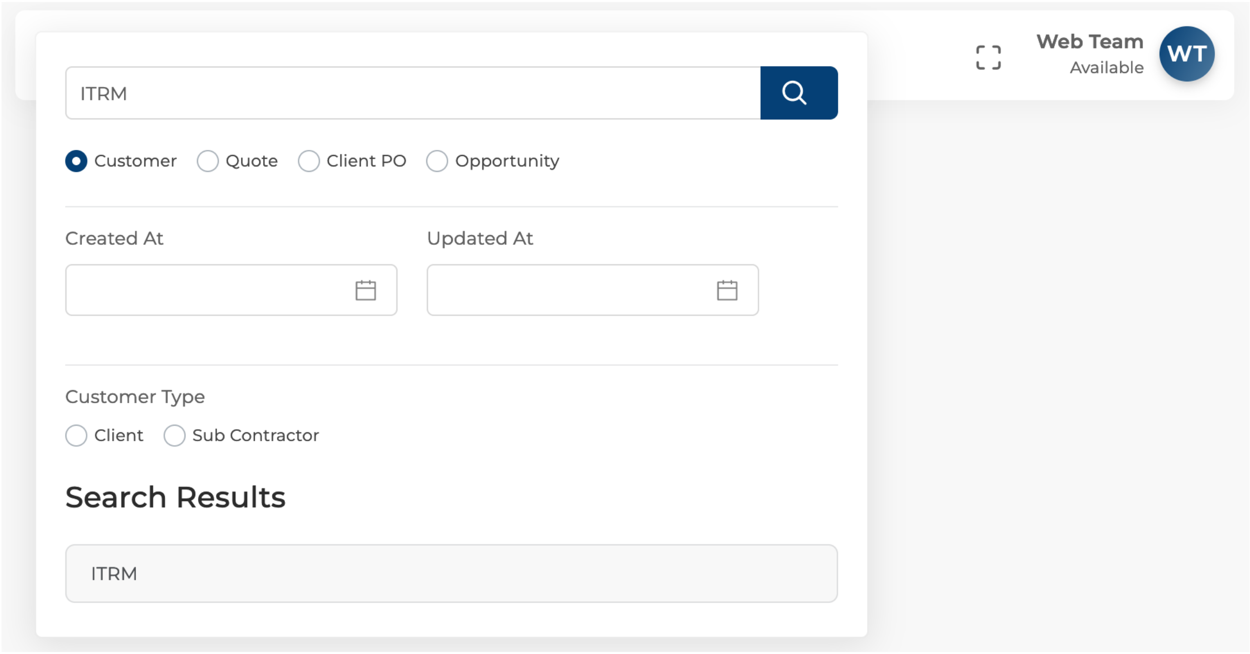
It offers a quick way to find records, To use the super search, you start by selecting the type of records you want to search for:

- Customers
- Quotes
- Client purchase orders
- Opportunities



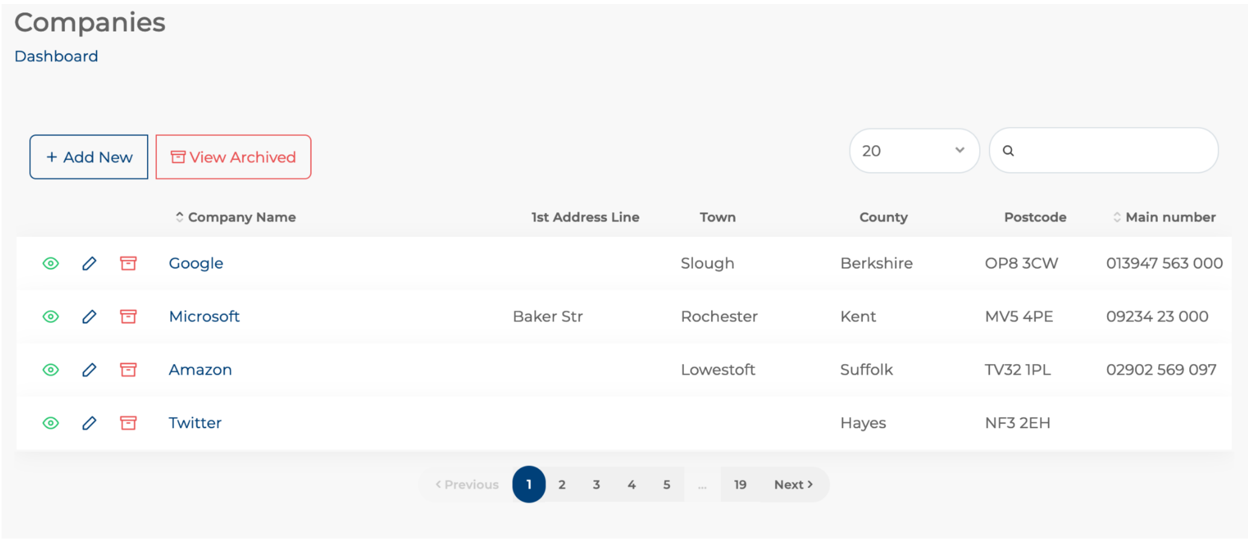
Once selected you will see additional filtering options that are specific to the type of records you selected, for example under “Customer” you can filter the result by “Customer type” and for “Opportunity” you can filter by the status.

Once you've made the selection and filter settings, type in the input box at the type for the record you are looking for, the search is not case sensitive, once you hit enter or clicked on the magnify glass icon, the system will perform the search and results will be displayed, clicking on the results will open the view dashboard for that record in a new tab.



Record Listing view

All records in the system will have a listing view which have a similar layout and functionalities, you can get to the listing page from the main menu, or as a side panel triggered by a button on view dashboards



The listing view will appear in a table format, with the following features:

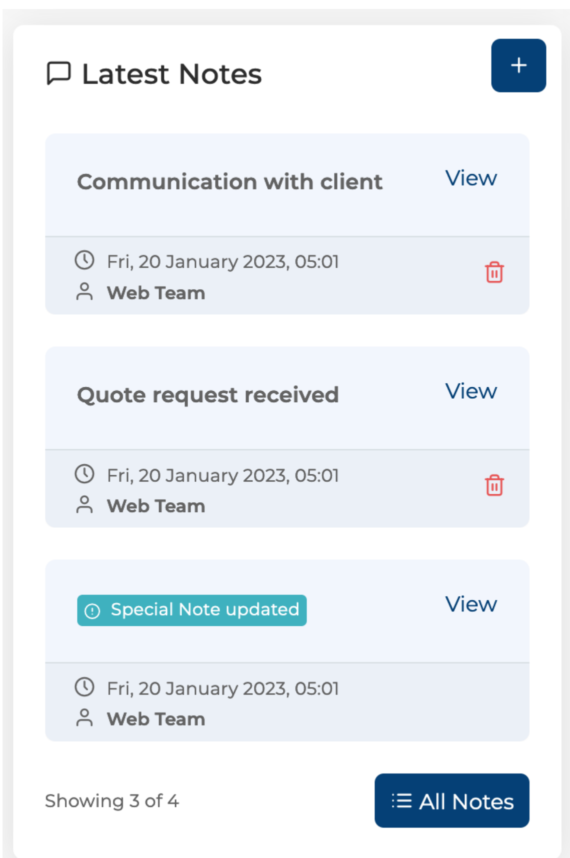
- Each row represent a record
- “Add New” button at the top left corner
- “View Archived” button next to the “Add New” button, when clicked will loads and only show archived records, this button will change to “Hide Archived” button which will switch back to only show active records
- Control to change how many records to show per page at the top right corner, you can change it to show 20, 50 or 100 records per page
- A quick search box on the top right corner to search records within the listing only
- Sortable columns will have little arrows to indicate that clicking on this column, the data will be sorted by the selected column, clicking once to sort by ascending order, twice by descending order
- Pagination controls at the bottom of the table to display more records

View, edit, archive & restore a record

On the listing view of any type if records

- To view a record, click on the green eye icon, or click on data cell that is a link (dark blue colour text)
- To edit a record, click the blue pen icon
- To archive a record, click the red box icon
- To restore a record, click on the “View Archived” icon on the top right corner, then find the record you wish to restore and click on the green refresh icon

Notes



You can add notes to any records within the system. From the view page of the record, there is a notes component on the left column, click on the + icon towards the top right corner of the component to add a new note.

Click the “View” link to bring in a side panel to see the full content of the note.

Once there are more than 3 notes attached to the record, there will be a button “All Notes”, which will bring out a side panel to see a list of all the notes attached to the record

Click on the red bin icon to delete a note

Special notes

“Special notes” is a component used to display important notes about the record it is attached to, for info such as “Always apply 20% discount when quoting for this company” etc.

The special notes component is on the view dashboard of the following record types:

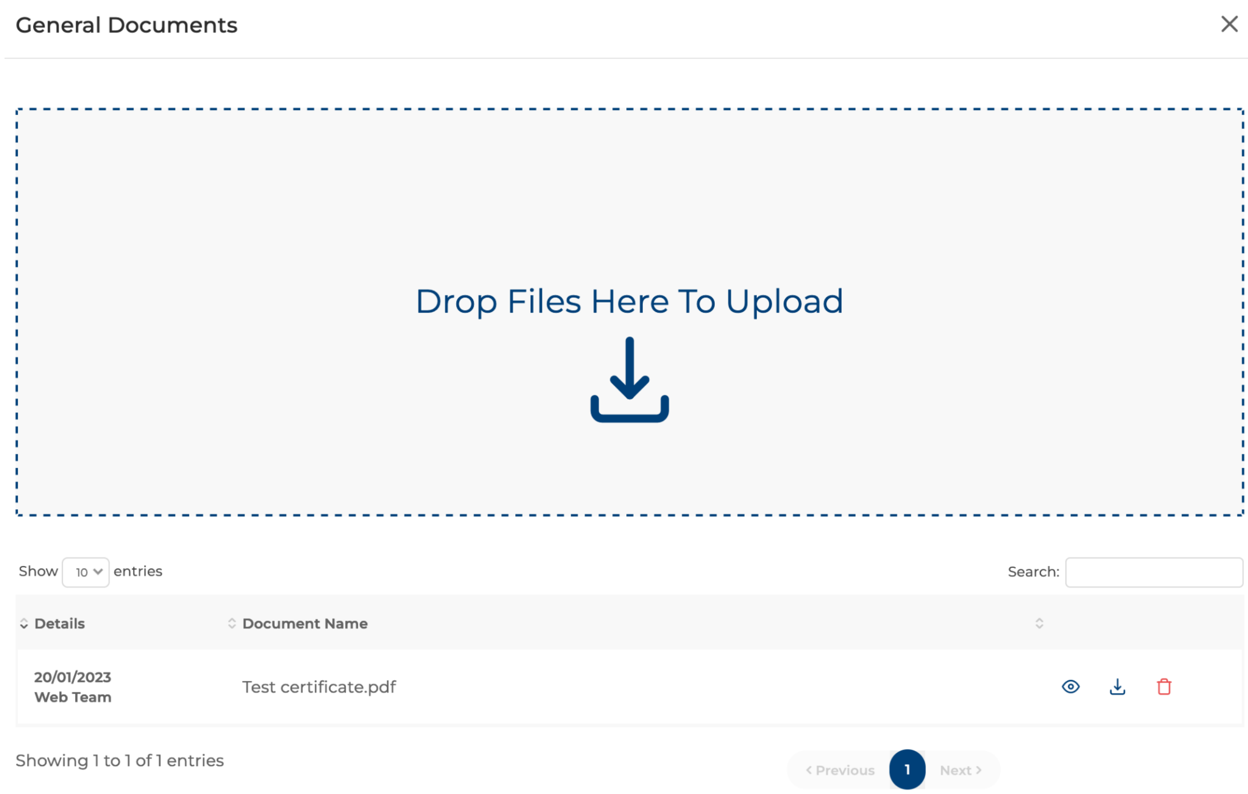
- Customer company
- Contacts

You can click into the component and start typing or modifying the note, when the data is changed, a blue save icon will appear at the top right corner, click it to save your changes.

At the bottom of the component, you will see the date and time when the note was last updated, and by whom.

Making changes to the special note section will create a log note on the record, so you will have a history of what has been changed, when and by whom.

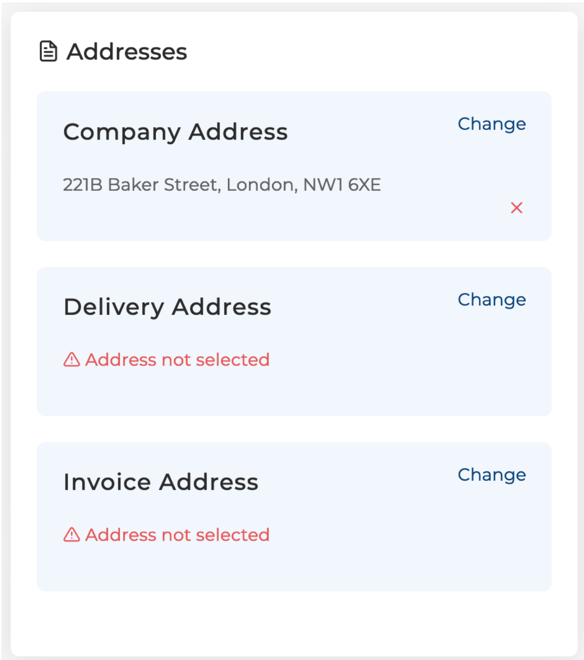
Documents



You can upload documents/images to any records within the system. From the view page of a record, there is a “Documents” button towards the top right corner, which will bring out a panel with a upload area, and a list of documents uploaded already for the record

You can drag and drop files to the upload area or click on the area to browse to a file on your device.

Add/edit/update address



The address component is the top component in the middle column when viewing a record that has addresses. For example, you can see 3 blue box areas for the 3 different address types for a customer company:

- Company address
- Delivery address
- Invoice address

An address will be displayed for there is one selected. The message “Address not selected” will be displayed if there isn’t an address set.

To set an address, for example the “Invoice address”, click on the word “Change” inside the invoice address blue box will bring in the address book side panel, which includes all the addresses created for the company, you can edit the address by clicking the blue pen icon. Clicking the “User this address” link on existing address records will set the address as the invoice address of the company, or click on the “+ Add a new address” link to create a new address record.

To detach the address, click on the red “x” icon inside the blue box, this will detach the address, but not delete it. You can delete an address from the address book side panel by clicking the red bin icon.

Addresses are used for the following record types:

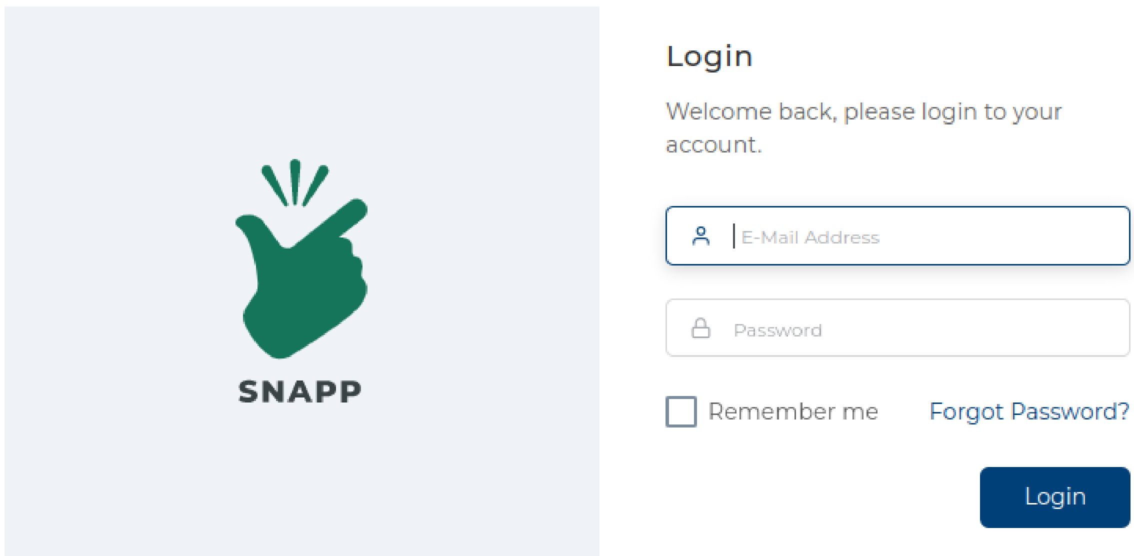
- Customer company
- Contact

Users & logging in

The area of the system represents internal staff that would use the system

Logging in

Accessing the system without logging in will take you to the login screen. From this screen (shown below), you can type in your email and password to log into the system.



Forgot password

If you forgot your password, there is a link above the login button "Forgot Password?" click on that, and follow the instructions to reset your password.

Managing user records

Once logged in, you'll arrive at the Dashboard or the previous page if you log back after a timeout. Then, from the navigation bar on the left, click on "Users" to reach the user records list in the system to manage users.

Activate / Deactivate an users

From the list of users page, find the user record you wish to activate/deactivate and click the red icon (above) to toggle the record.

Employee Types & Access levels

- **Admin -** This type of user can access all the areas in the system with the following exceptions:
    - Unable to delete records.
    - Unable to approve customer PO that had a different cost to the opportunity (unless the user created the opportunity)
- **Super Admin** - This type of user can access all areas of the system and perform actions the admin user couldn't do.
- **Inventory Admin –** Only users with this employee type are able to create/edit inventory items

Customer records

This area of the system holds your customer company data. A company record is the starting point of the system, you can access all the other related features from the company view dashboards:

- Notes – A customer company record can have many notes added
- Documents – A customer company record can have many documents uploaded
- Addresses – A customer company record can have many addresses created, but you can only specify 3 type of addresses:
    - Company address
    - Delivery address
    - Invoice address
- Contacts – A customer company record can have many contact records
- Opportunities – A customer company record can have many opportunity records
- Quotes – A customer company record can have many quotes, quotes are related to companies via opportunities
- Client purchase orders – A customer company record can have many client purchase orders

Managing customer records

Accessing related records

From the customer company view dashboard, there are buttons that will trigger side panels to see a list of the following records:

- Contacts button – opens side panel to see all the contacts that belong to this customer company
- Opportunities button - opens side panel to see all the opportunities that belong to this customer company
- Quotes button - opens side panel to see all the quotes attached to opportunities that belong to this customer company
- PO Received component's "All Customer Purchase Orders" button - opens side panel to see all the purchase orders that belong to this customer company

Contact records

This area of the system holds customer company or supplier company contact records

Contacts are used by other features in the system:

- When creating an opportunity, a main contact should be provided. This main contact will then be used in the following cases:
    - When displaying contact information on the quote document

Opportunity records

This area of the system holds records that represent any opportunities of work for your company. (This was the "Jobs" section on the TinyCRM system)

Please note the following when managing an opportunity record:

- The main contact field is used in quote document if provided
- You can see a list of all quotes (drafted/finalized) created for the opportunity overtime.
- **Opportunity must have a finalized quote for the interface to send out quote to appear on the opportunity view dashboard**
- We strongly recommend that opportunity should have a finalized quote for you to create a PO against the opportunity
- The total cost field will be checked when a PO is received for the opportunity, if the PO total is different to the opportunity, the opportunity creator will be informed by email, and the opportunity creator or a super admin need to approve the PO
- When a PO is created for an opportunity, the system automatically update the opportunity's status to "Completed"
- Invoices on the opportunity view dashboard are for viewing and editing only, invoices can only be created for a client PO
- Any materials record created for an opportunity are "Price Only". Once a client PO is created, you can convert the "Price Only" record to "Order Materials"
- You can see quote numbers in small tags in the dashboard of an opportunity, the quote number in green tag is the selected finalised quote for the opportunity

Quote records

This area of the system holds records that represent a quote document.

Please note the following when managing a quote document record:

- You can change the following on a quote document:
  - Quote date
  - Author info
  - Company and Main contact, with the open to show the company name on PDF document or not
  - Site Address
  - Location reference
  - Project
  - Scope of work
  - Total cost
- Quotes have 2 statuses:
  - Draft
    - When previewed/downloaded, the document will have a watermark
    - Can be modified
    - Can’t be set as finalized quote for an opportunity
    - You can save progress of a draft document and come back to finish it later
  - Finalized
    - Watermark removed when previewing and downloaded
    - Cannot be changed
    - Should a change needs to be made, you will need to create a copy of the finalized quote, make the change, and finalized the new quote
    - When a quote is finalized the system automatically set it as the finalized quote of the opportunity, and if the quote have a total value, it will be set to the opportunity as well

Client purchase order records

This area of the system holds record that represent a PO received from clients

Please note the following when managing a client purchase order record:

- Client PO number needs to be unique for a given client company
- If the PO's net amount value is not same to the opportunity total value, the system will flag the PO for approval, only super admin and the user created the opportunity will be able to approve the PO
- When a valid PO is created, the system automatically update the opportunity status to completed
- You can see quote numbers in small tags in the dashboard of an client PO, the quote number in green tag is the selected finalised quote for the opportunity related to the client PO

Material request records

This area of the system holds records that represent a request to get a cost/place an order for materials.

Please note the following when managing a material request record:

- Material requests have a type field to set it to "Pricing Only" or "Order Materials"
- Use the supply list component to add items to be costed/ordered, adjust internal and external costs
- You can send the material requst internally to any user of the system, they will received an email with the list of items to be ordered/costed in a pdf, as well as a link to the order on the CRM system to update the costing

Suppliers

This area of the system holds records that represent a supplier company, it operates the same way as a customer company record

Invoices

This area for the system holds records that represent an invoice

ℹ️*Invoice records can only be created against client PO records*

Inventories

You can use this area of the system to manage stocks of items used within the company, keeping track of how many units of an item you have in total, and how many currently available etc