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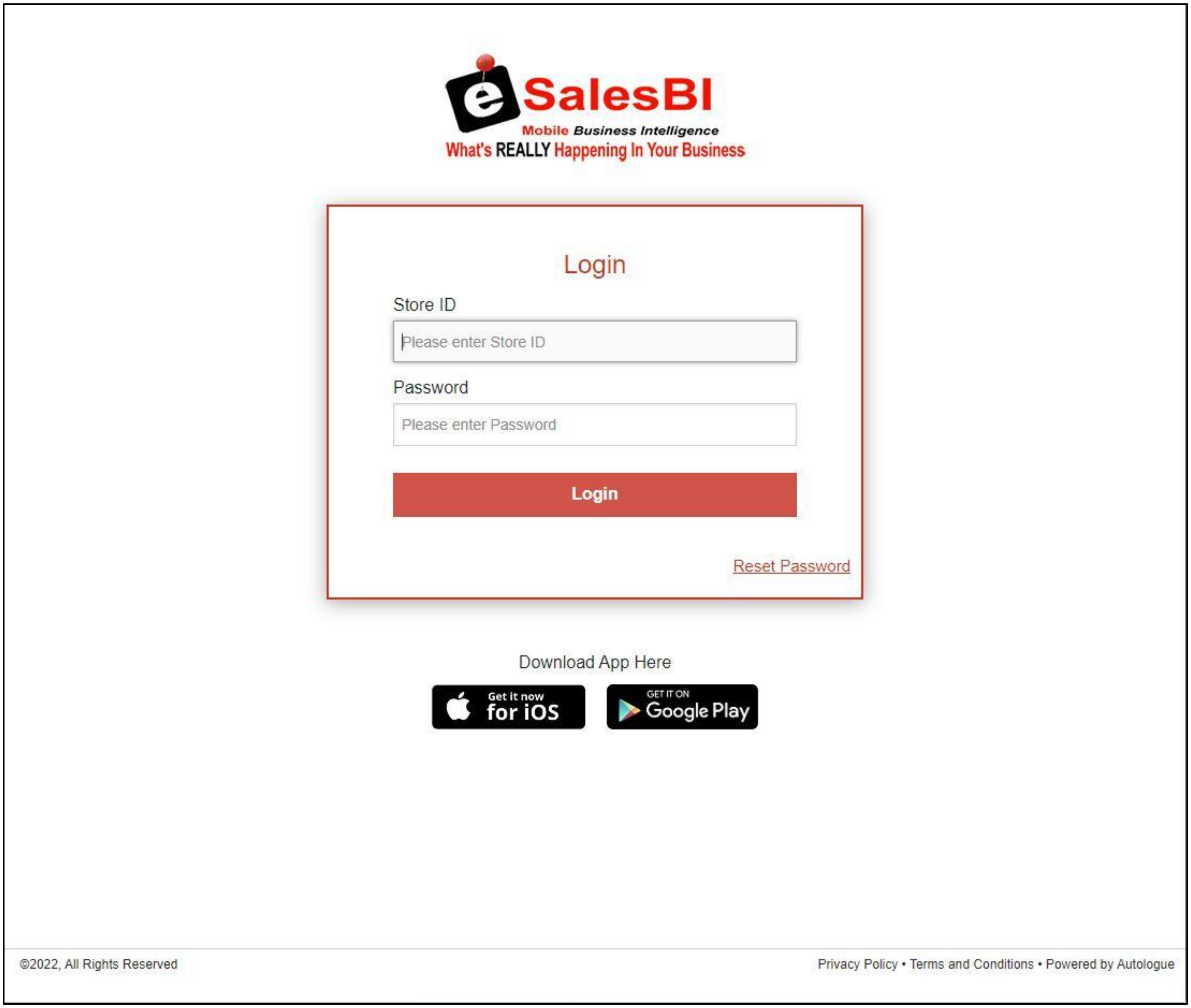
Overview

The Autologue eSales Business Intelligence (BI) Customer Relationship Management (CRM) website is fully responsive and mobile-friendly, working in any modern browser without the need to install a separate app. It is designed to display a variety of information based upon whether you are logged in as an owner/administration, sales manager, sales user, store manager, or counter user. Sales dashboards for customers by sales user as well as by counter user get shown from their login home pages. Alerts and notification parameters are setup by management to alert personnel when customers have stopped purchasing completely, increased/decreased in sales, or are returning merchandise more frequently. CRM about the customer information is readily available for viewing which builds and strengthens your customer relationship/loyalty by capturing their business and personal information.

Login To eSales BI/CRM

Begin by logging into the Autologue eSales BI/CRM website (https://www.esalesbi.com), using the Store ID and password assigned to you and then clicking on the `Login` button.



Administration Login Screen

When an administrator has logged in using their administration password, the following screen will be displayed:

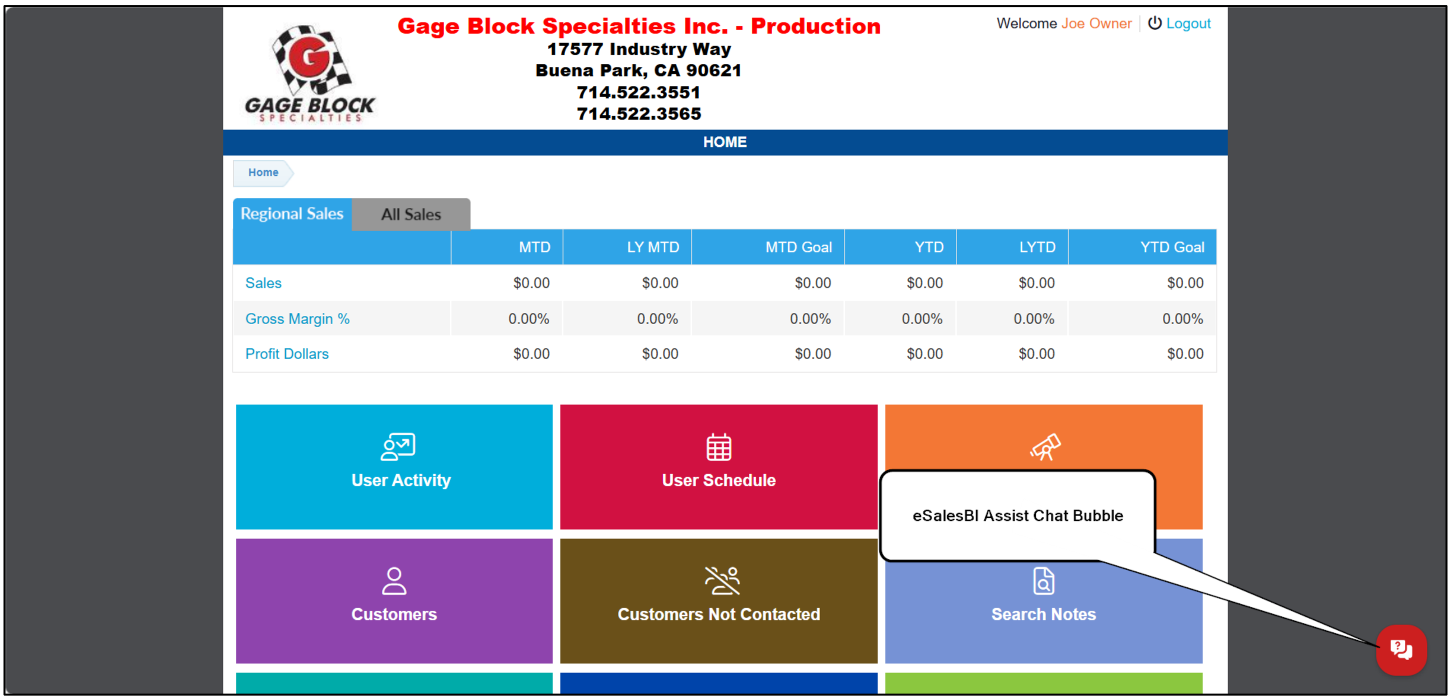
This is the administrator's home screen. Here the administrator can perform the following:

• User Activity – View a summary of user's scheduled calls/visits by date selection.	• User Schedule – View all users scheduled calls/visits on the calendar by date selection.
• Search CRM/View Changes – Identify specific customers using search criteria from CRM information and see what changes have been made.	• Customers – Display a list of all customers, unassigned or by specific salesperson.
• Customers Not Contacted – Display a list of customers by date range that are not on the schedule. The list can be filtered by salesperson(s) and/or ranking code(s).	• Search Notes – Search notes by user and/or date range. Optionally display in detail view and filter by tasks only.
• Map Appts/Workdays – View a map plotting the locations of the customers who have scheduled appointments for the day or are on a particular workday.	• Customer Visit Tracking – View user's in & out times for scheduled and non-scheduled appointments. View a map of the user's actual visits (check in/out times and locations) plotted on a map.
• Sales & Profit – See sales totals by store (if multi-location, and within region), by salesperson and by counterperson.	• Workdays – optional button that is used to view/setup workday information for users.
• Tasks – View assigned campaigns by salesperson.	• Search Tasks – View assigned campaigns for all or specific salesperson(s).
• Search Expense – View expenses by date range for all or specific user(s).	• Links – URL's to display in Administrator's screen.
• Settings – Store configuration, email notifications & business hours for scheduler – Create internal email recipient list, identify administrator users.	• Reports – if subscribed, the user will have direct access to AutoCube reports. If not subscribed, this button will not appear.

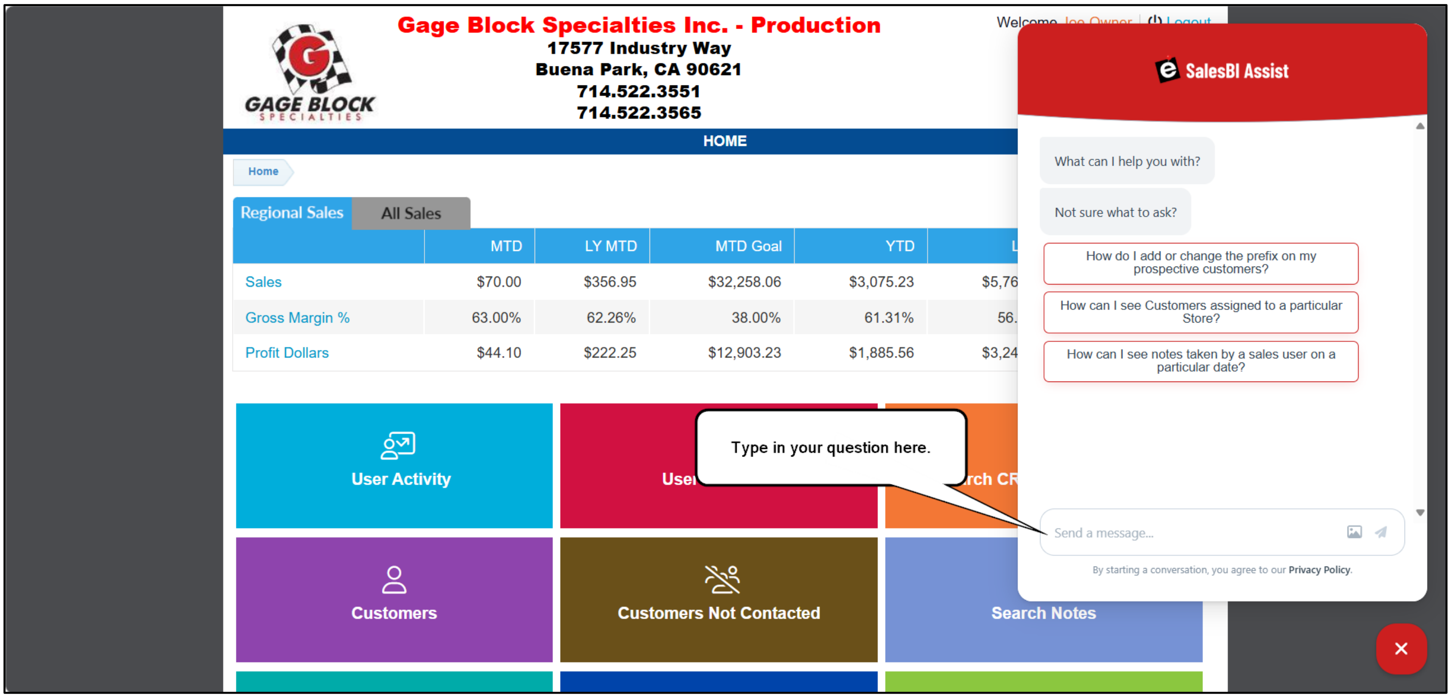
eSalesBI Assist Chat Bubble

The eSalesBI Assist chat bubble is an interactive help tool built into the application, designed to answer questions and provide guidance without leaving your workspace. A floating chat bubble appears in the right side of the screen and remains visible as you move through the application. You can expand or minimize it at any time, and your conversation will persist for the duration of your session. You can use it to ask questions such as *"add a note"* or *"reset password."* You can also ask follow-up questions or request clarification, just like you would when chatting with other AI programs such as ChatGPT. The chat bubble requires a modern browser (recent versions of Chrome, Edge, Firefox, or Safari) and may not appear in older or unsupported web browser versions.

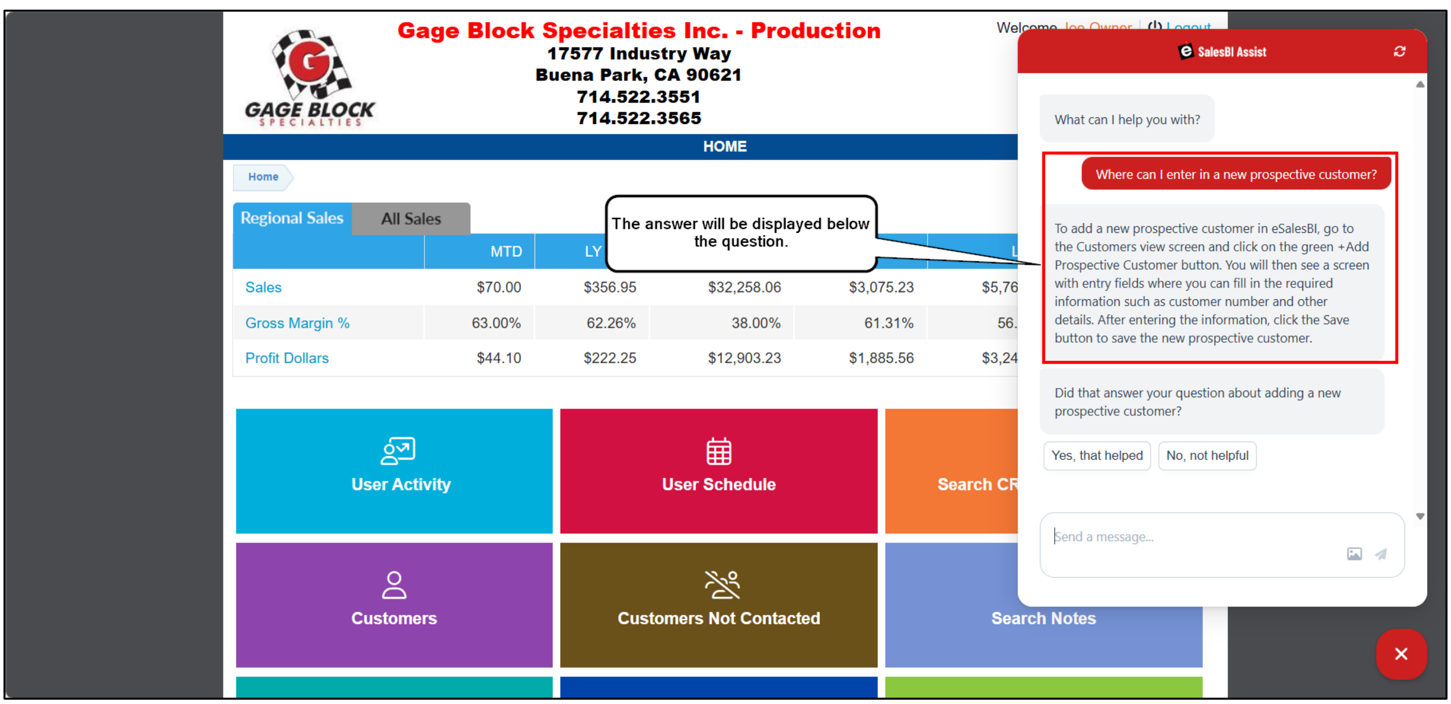
- To ask a question, click on the red eSalesBI Assist chat bubble as shown below:



The chat bubble will open as shown:



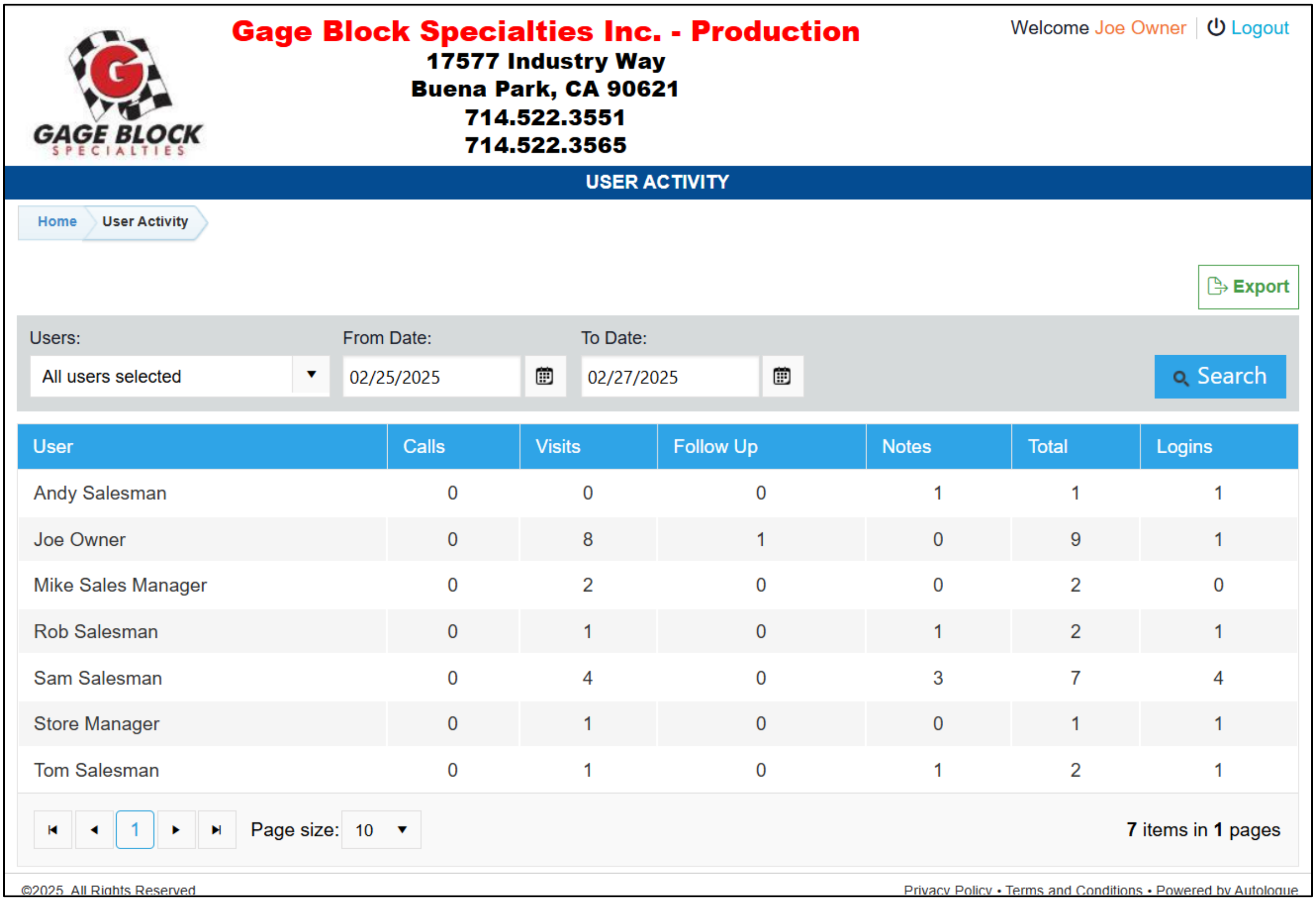
- Click within the *Send a message* field, type in a question, then click on the red arrow button to see the response to the question.



- Click on red x chat bubble to close the eSalesBI Assist pop-up window.

User Activity

- To view a user's activity (calls/visits/follow up/notes and logins), click on the `User Activity` button and the following screen will be displayed:



User	Calls	Visits	Follow Up	Notes	Total	Logins
Andy Salesman	0	0	0	1	1	1
Joe Owner	0	8	1	0	9	1
Mike Sales Manager	0	2	0	0	2	0
Rob Salesman	0	1	0	1	2	1
Sam Salesman	0	4	0	3	7	4
Store Manager	0	1	0	0	1	1
Tom Salesman	0	1	0	1	2	1

By default, all Users are selected and the From/To activity dates will be the current day. If there were any calls, visits, follow ups scheduled for users within the current day or notes created/modified, each user will be listed and as well as the number of calls, visits, follow ups, notes created/modified, or login entries they performed within the date period shown.

Changing The Search Criteria

- To report only on specific users within the *User Activity* screen, click on the down arrow button at the end of the `Users` field and check mark only the specific users you want to report on from the drop-down selection list.
- To change the date range to show activity for, click within the `From/To Date` fields and enter in the specific dates. Optionally you can click on the calendar icon buttons to the right of the `From/To Date` fields and then click on the specific dates to select the date.
- Now click on the `Search` button and the screen will then redraw the screen with the new user activity results.

Viewing Calls/Visits/Follow Up/Notes/Logins Details

- With the screen displaying the number of calls/visits/follow up/notes/logins for each user, you can "drill down" and view the details of each by clicking on the cell that shows the number of calls/visits/follow ups/notes or logins.

The screen will now show a list of the customers and the number of times they were called/visited/follow ups, had notes created/modified or logged in.

- To view the details of the call/visit/follow up/note for a customer, click on the cell that shows the number of calls/visits/follow ups/notes/logins.

The screen will now display the details of the visit/call/follow up/note along with any additional note that was created/modified and the date of the last note.

- Clicking on the number of logins will display the login time and the device used.

Exporting User Activity

- To export the user activity information currently being displayed on the screen, click on the `Export` button.

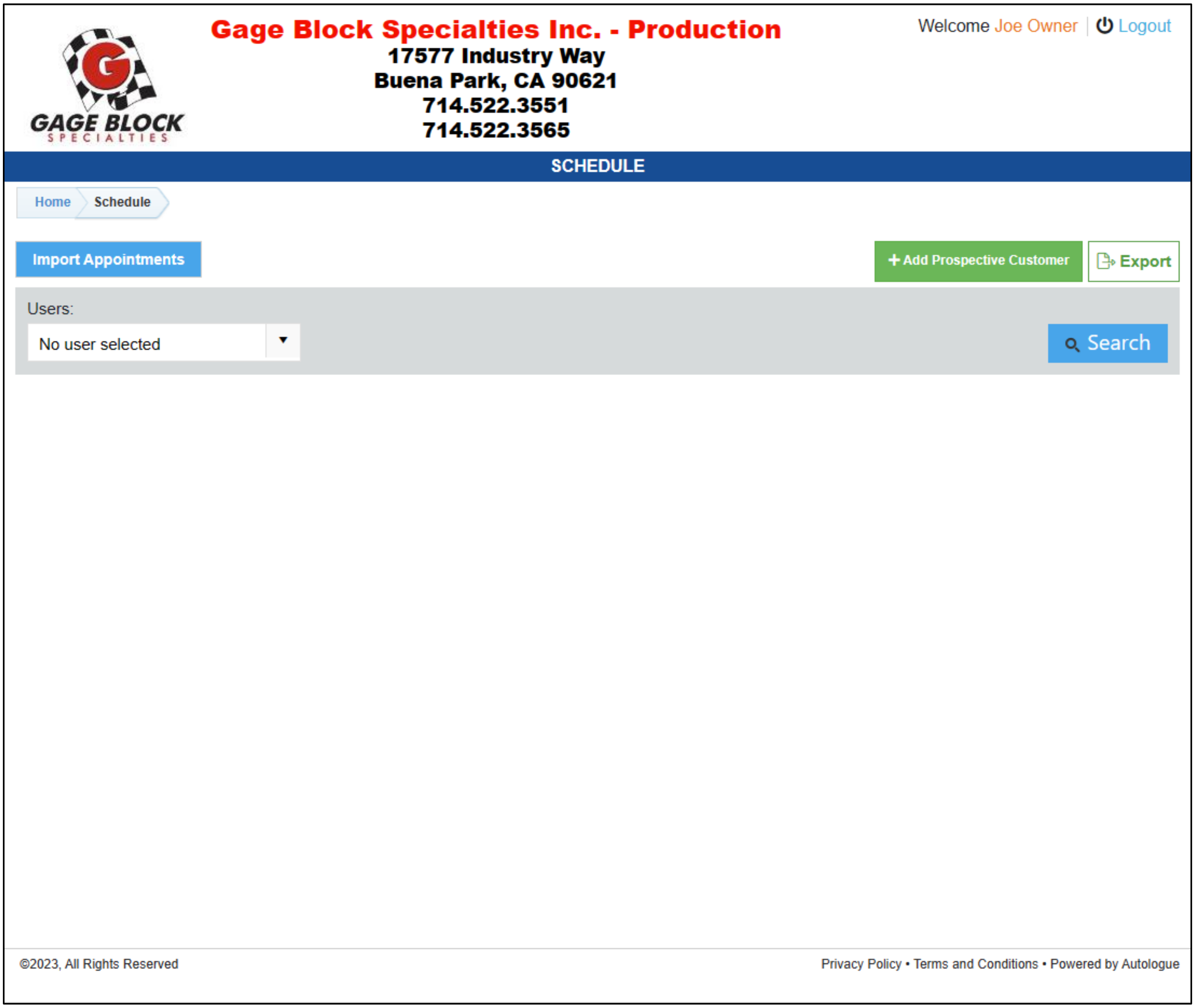
A *UserActivity_Export.xlsx* spreadsheet file will be saved.

A10

	A	B	C	D	E	F	G	H	I
1	User	Calls	Visits	FollowUp	Notes_Created	Notes_Modified	Total	Logins	
2	Bob Williams - Sales Manager	93	0	0	0	0	93	0	
3	Steve G	0	27	0	0	0	27	0	
4									
5									
6									
7									

User Schedule

- From the administrator's home screen, to view a schedule for a specific user, click on the `User Schedule` button and the following screen will be displayed:



By default, no users are selected and the schedule screen will therefore be blank.

Clicking on the `Import Appointments` button will allow the user to import schedules for one or more users.

Clicking on the `+Add Prospective Customers` button will allow the user to add a prospective customer and assign to a user.

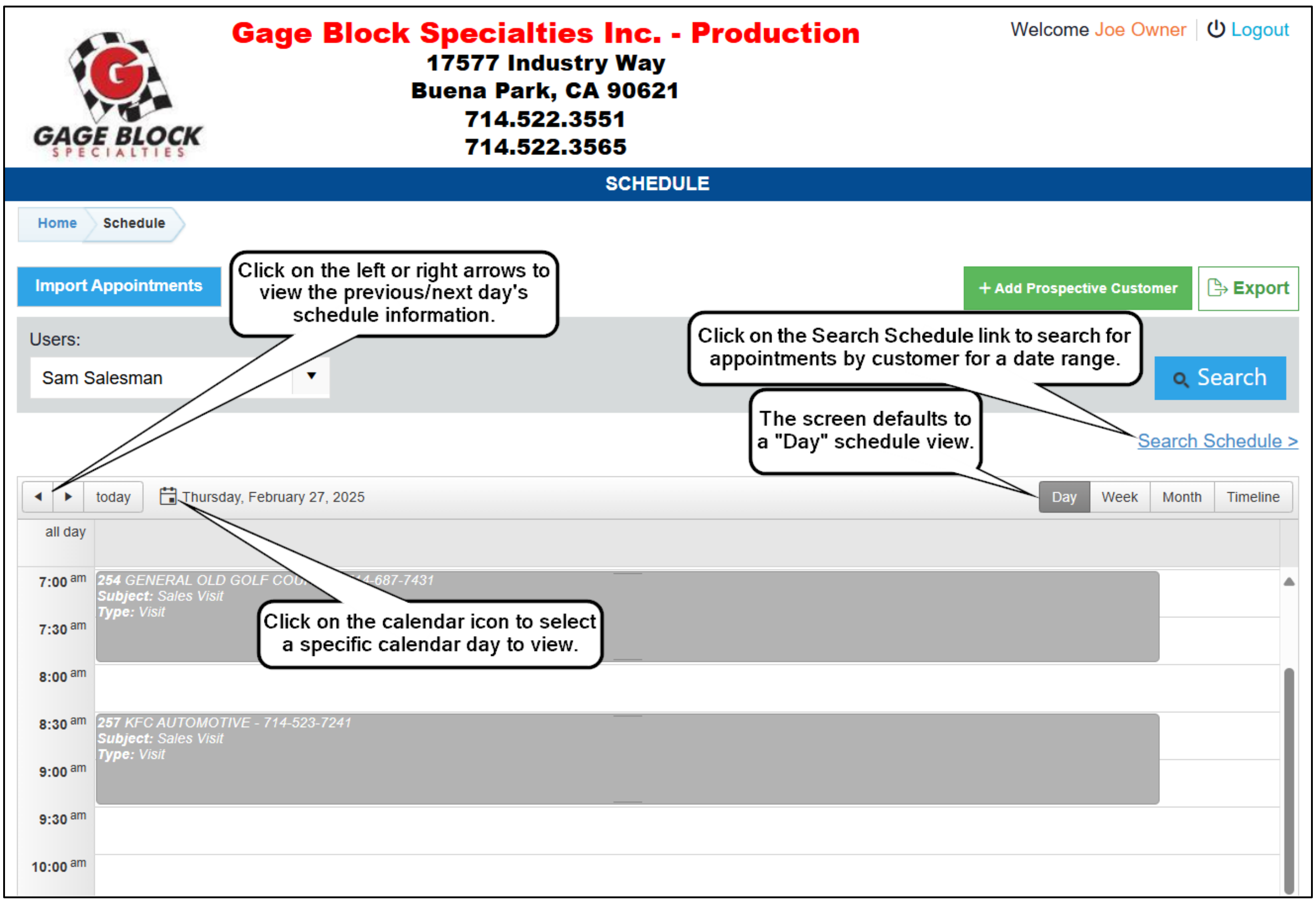
Clicking on the `Export` button will allow the user to export schedules for a selected user to an Excel spreadsheet or as an iCal formatted file to be imported into your calendar.

Selecting A User To View

- You can select a specific user to view schedule information for by clicking on the down arrow button at the end of the `Users` field and then clicking on the specific user you want to report on from the drop-down selection list.
- Now click on the `Search` button and the screen will then redraw the screen with the schedule information for the selected user.

Day Schedule View

By default, the screen will display a daily schedule view as shown:

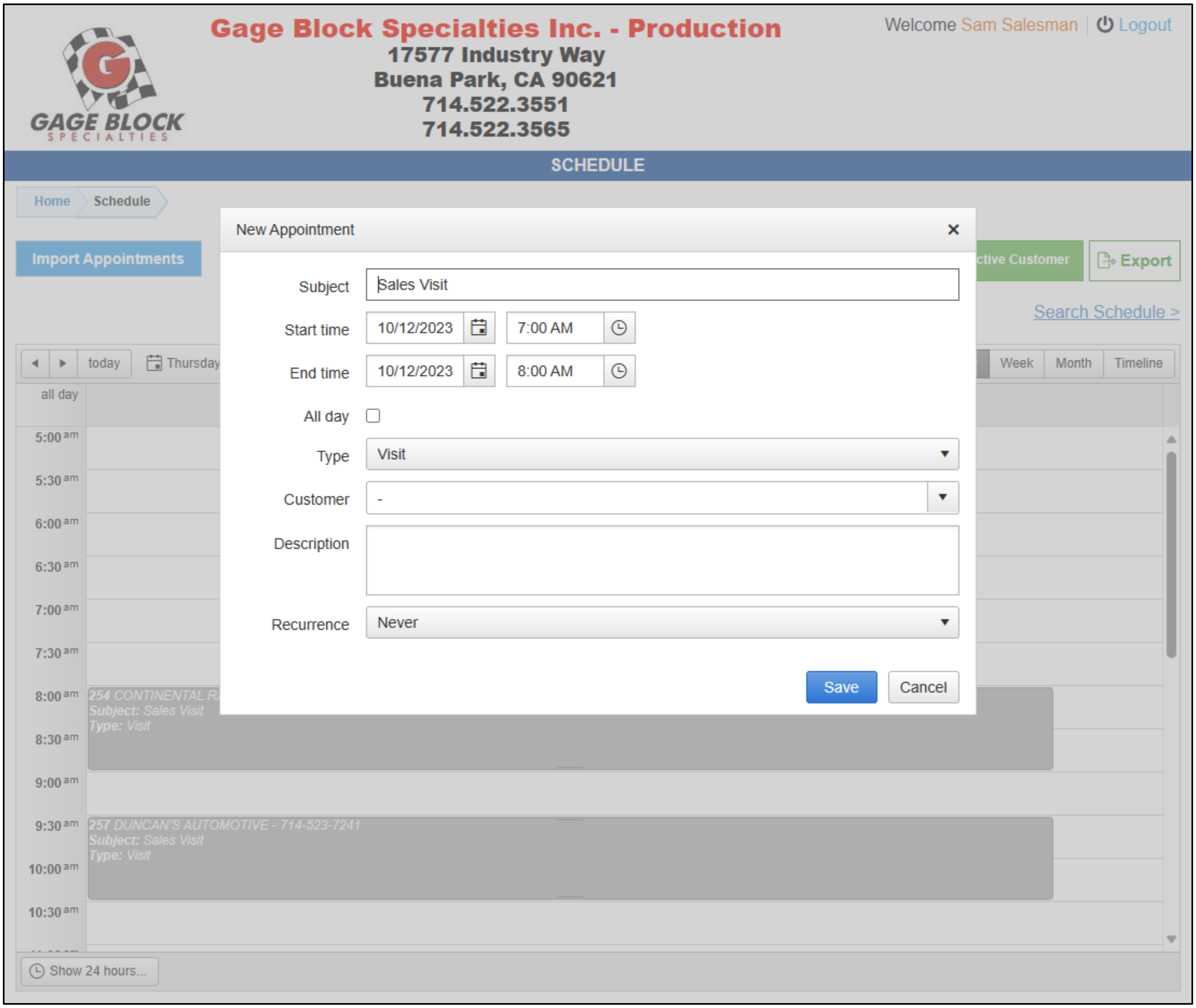


The day schedule view shows all appointments only for a specific day.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information. Click on the specific calendar day to view. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*) or iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*).

Scheduling A New Appointment

- To schedule a new appointment, double click on a specific time slot shown on the schedule and the following screen will be displayed:



The screen will now display a New Appointment pop-up window with the Subject field defaulted to *Sales Visit* and the appointment Type field defaulted to *Visit*.

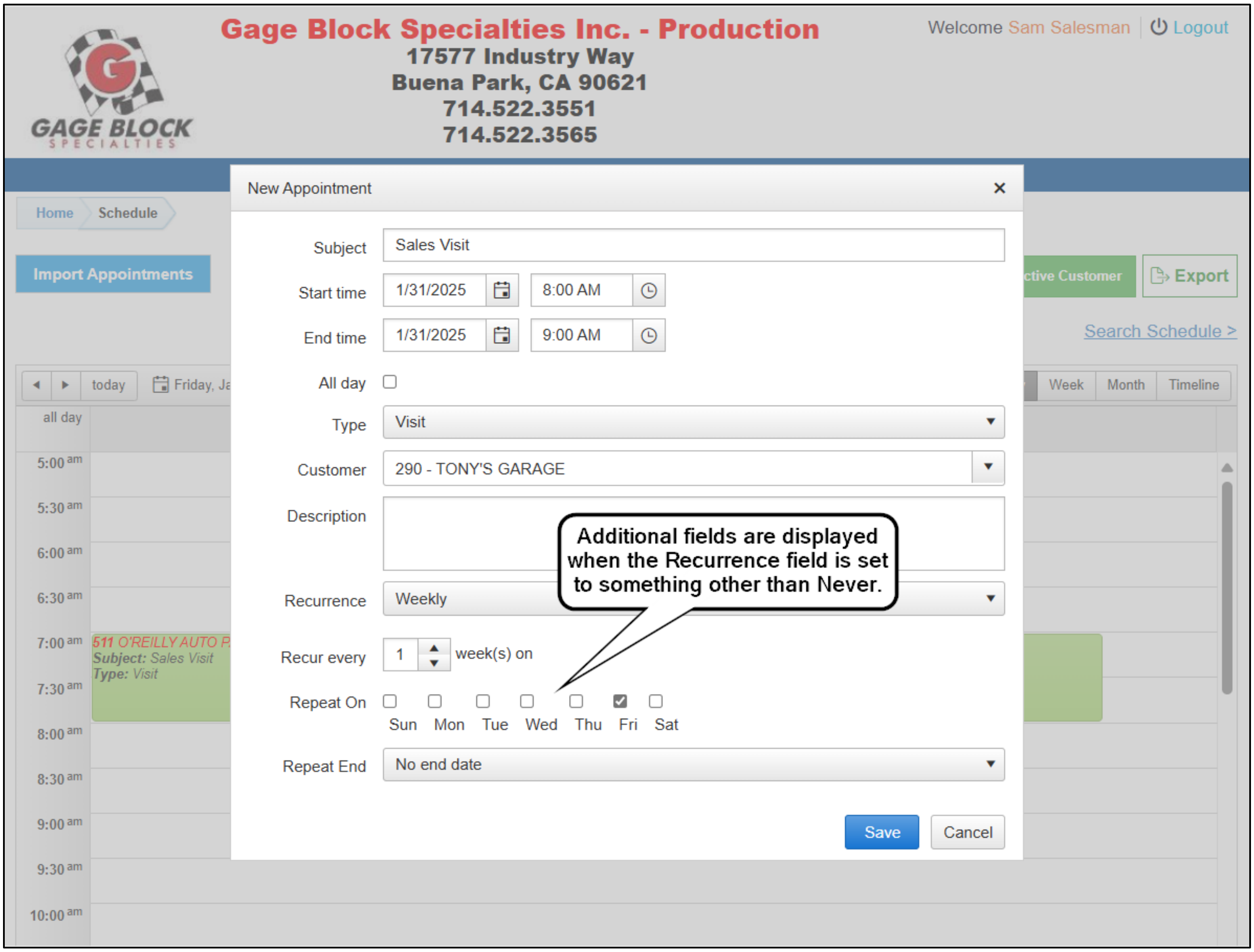
- With the cursor positioned within the Subject field, you have the option to change the default value of *Sales Visit* and press the <Tab> key.
- With the cursor positioned within the Start time field, you have the option to change the default date and time and value press the <Tab> key.

- With the cursor positioned within the `End time` field, you have the option to change the default date and time and value press the `<Tab>` key.
- If the appointment is going to be an all-day event, click on the `All day` check box field.
- With the cursor positioned within the `Type` field, you have the option to change the default value of *Visit* by clicking on the down arrow at the end of the field to view a drop-down selection list of *Visit*, *Follow Up* or *Call*. Click on the desired type and press the `<Tab>` key.
- With the cursor positioned within the `Customer` field, click on the down arrow at the end of the field to view a drop-down selection list of all the salespersons customers. Using the up/down arrows, highlight and click on the customer to set up an appointment for and press the `<Tab>` key.

☞ **<u>Note:</u> You can also start typing in a portion of the customer's name to limit the customer drop-down selection list.**

- With the cursor positioned within the `Description` field, you have the option to enter in a description and press the `<Tab>` key.
- If the appointment is going to be a recurring occurrence, you have the option to change the default value of *Never* by clicking on the down arrow at the end of the field to view a drop-down selection list of *Never, Hourly, Daily, Weekly, Monthly,* or *Yearly*. Click on the desired type and press the `<Tab>` key.

The bottom of the New Appointment pop-up window will display additional fields in regards to the selected recurrence as shown:

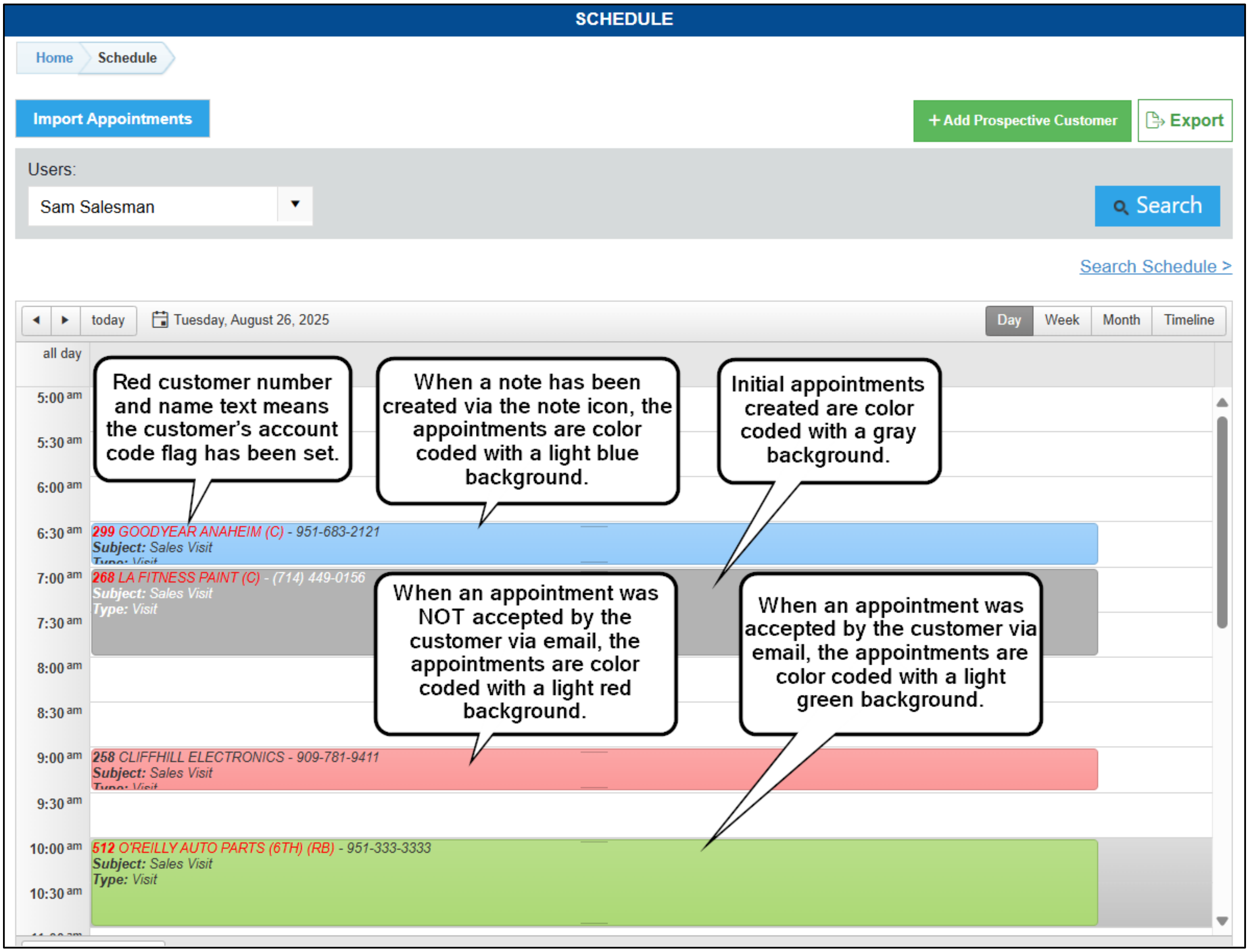


When the Recurrence field is set to anything other than *Never*, set the additional recurrence specific fields accordingly. You have the option to change any of the default values to match the frequency of your recurring appointment.

- Once all your fields have been setup, click on the Save button.

The appointment will now be displayed within the time slot setup within the schedule screen.

Appointment Background Colors



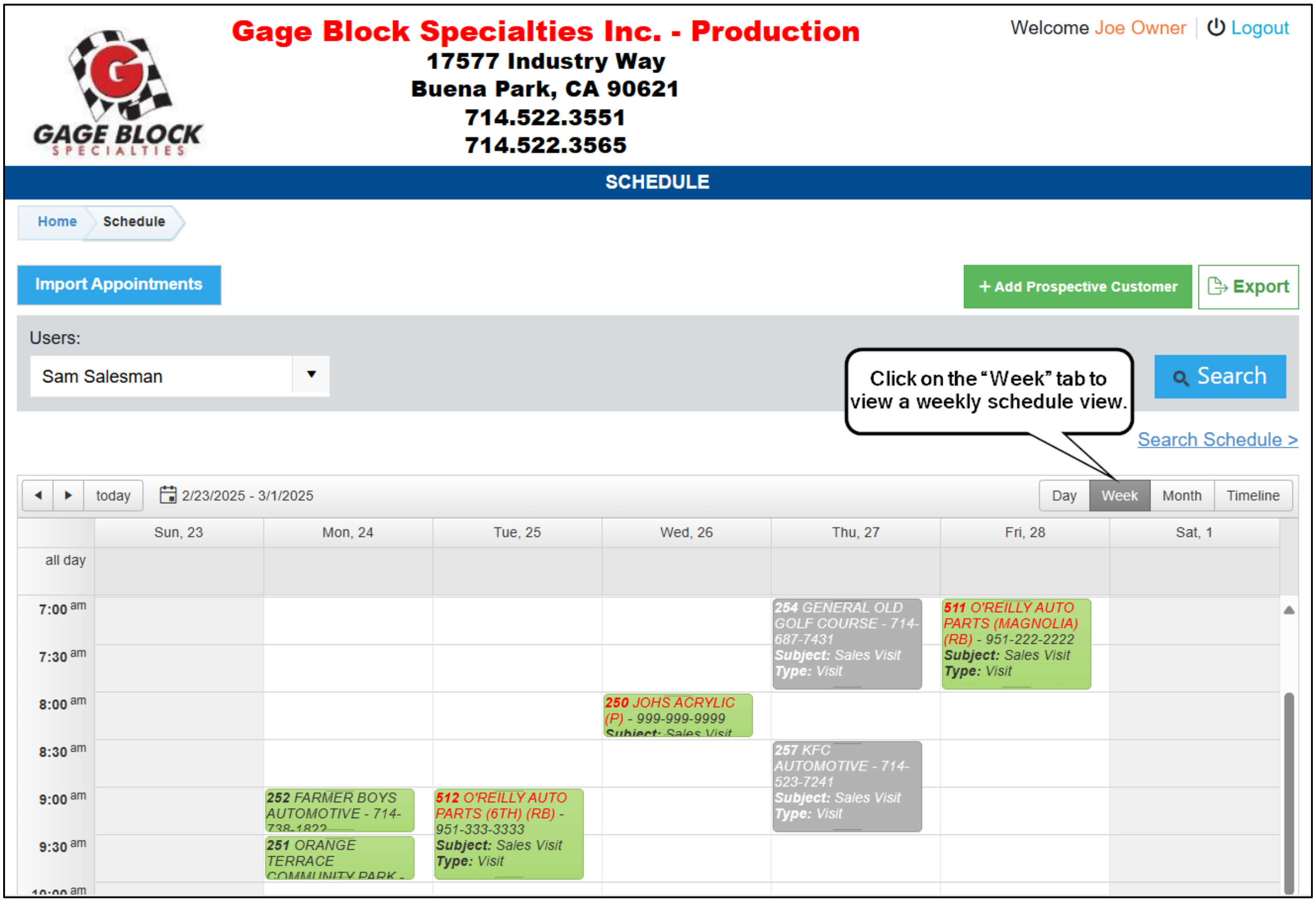
Background Color	Description
Light Gray	When appointments are initially created, it will have a light gray background.
Light Blue	When a note has been created via the note icon displayed within the appointment pop-up window, the appointments will have a light blue background.
Light Red	When an appointment was NOT accepted by the customer via email, the appointments are color coded with a light red background. This requires the *Appointment Email Functionality* option to be enabled within the Admin users Settings tile.
Light Green	When an appointment was accepted by the customer via email, the appointments are color coded with a light green background. This requires the *Appointment Email Functionality* option to be enabled within the Admin users Settings tile.

If the customer number and name are displayed in red text, this means the customer's account code flag has been set. This information is setup within the *Customer Options/Favorites* section of the *Setup ePartConnection* webpage.

Week Schedule View

- To have the screen display a weekly schedule view, position the cursor over the `Week` column tab, and click on it.

The screen will be redrawn as shown:



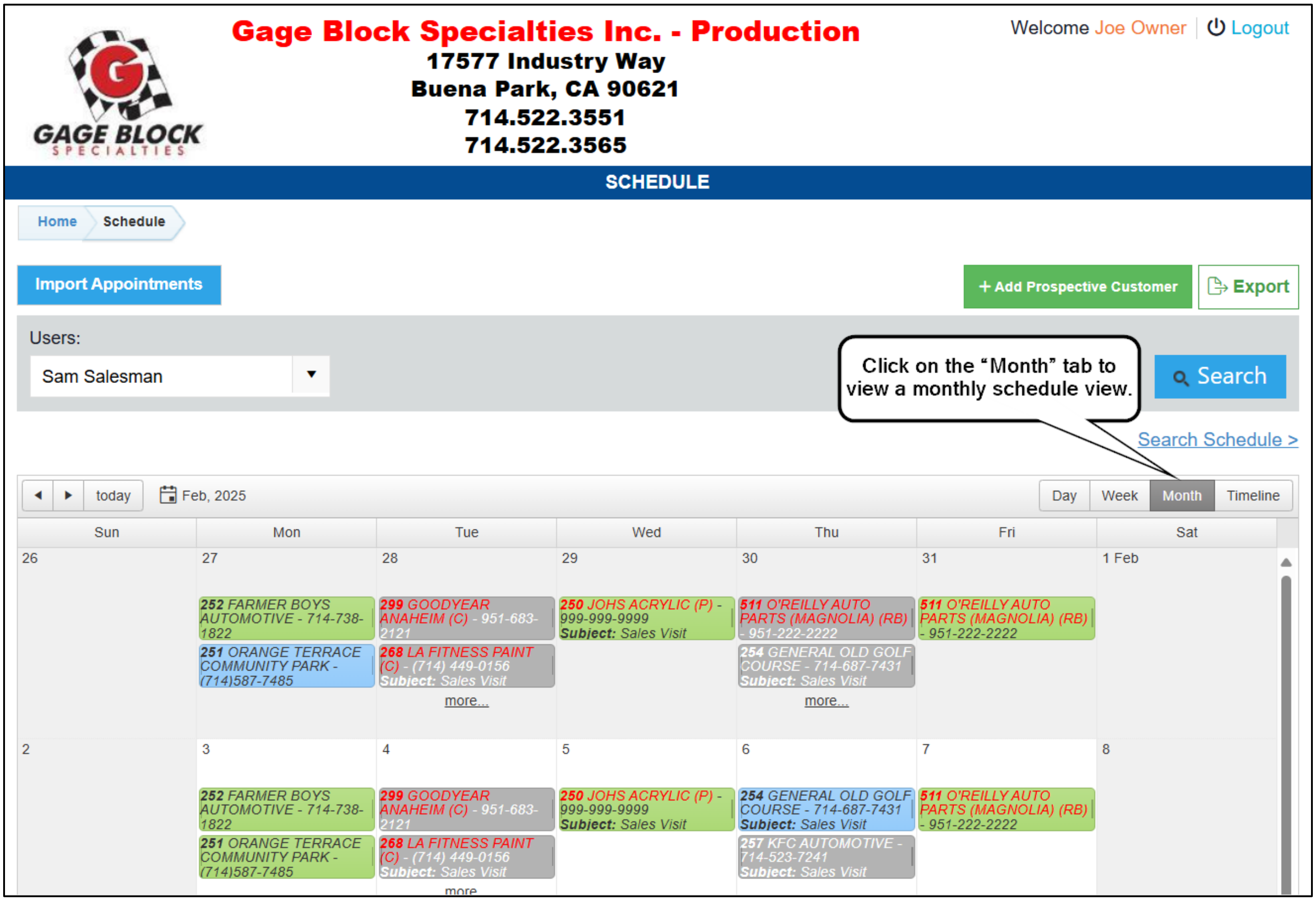
The weekly schedule view shows all appointments only for the current week.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next week's schedule information. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*) or iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*).

Month Schedule View

- To have the screen display a monthly schedule view, position the cursor over the `Month` column tab and click on it.

The screen will be redrawn as shown:



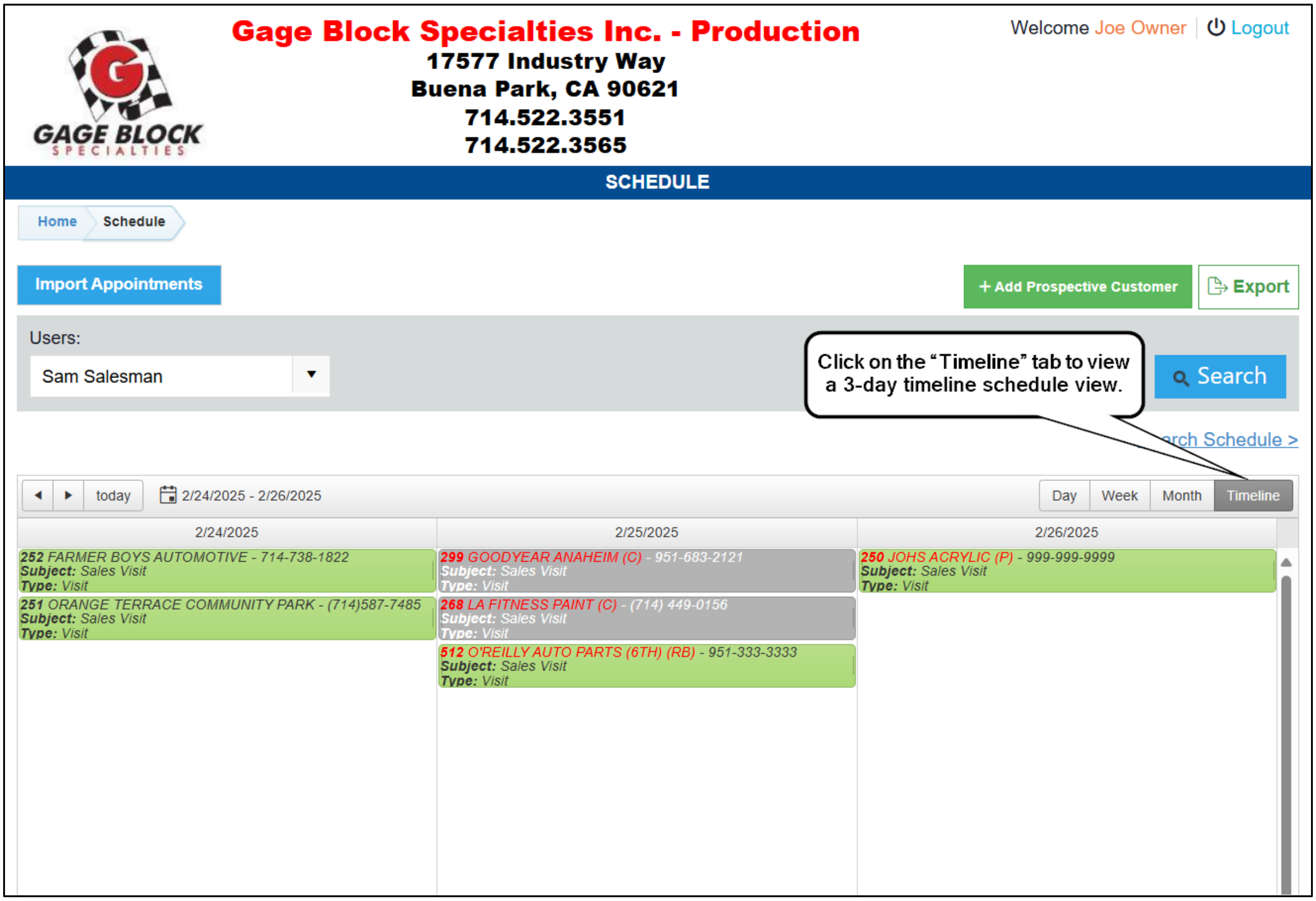
The monthly schedule view shows all appointments only for the current month.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next month's schedule information. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*) or iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*).

Timeline Schedule View

- To have the screen display a three-day timeline schedule view, position the cursor over the `Timeline` column tab and click on it.

The screen will be redrawn as shown:



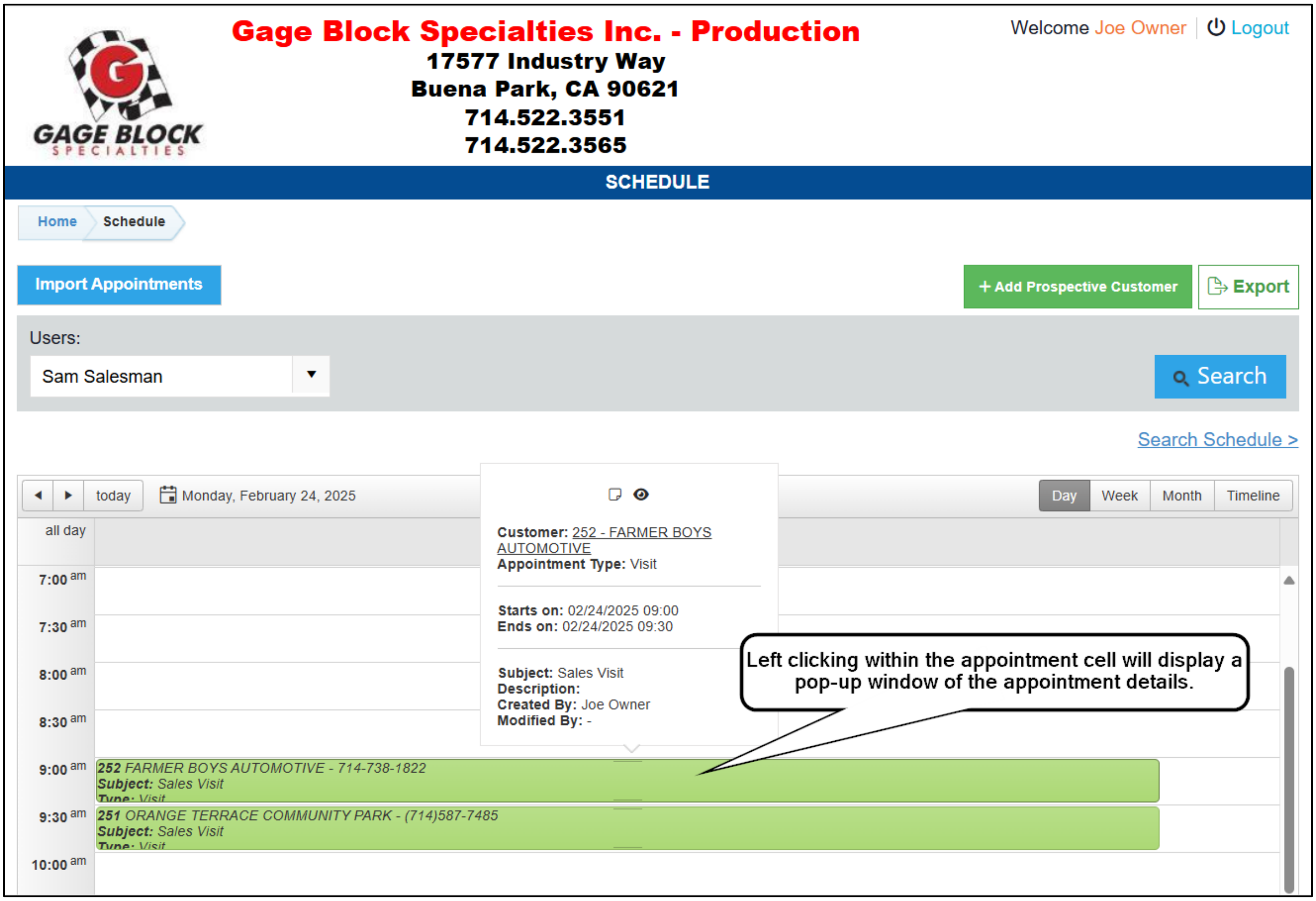
The timeline schedule view shows all appointments only for a 3-day period.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*) or iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*).

Viewing Appointment Details

- With the schedule screen displaying appointments in any of the four different views (day, week, month, timeline), you can view the appointment details by placing the mouse pointer over the appointment cell and left clicking on it.

The appointment details will pop-up on the screen as shown:

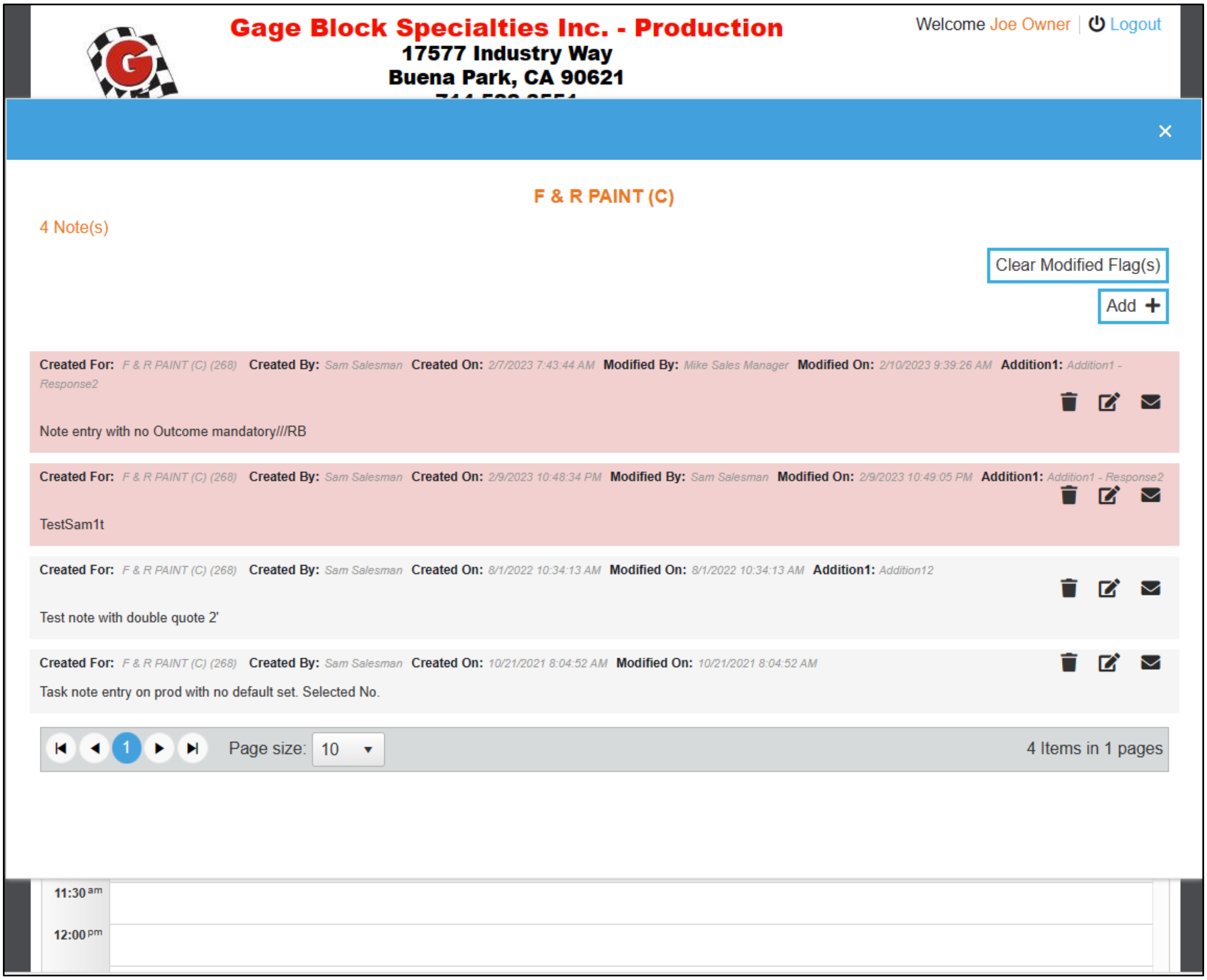


- To remove the appointment details pop-up window, click anywhere else on the screen.

Entering A Customer Note From An Appointment

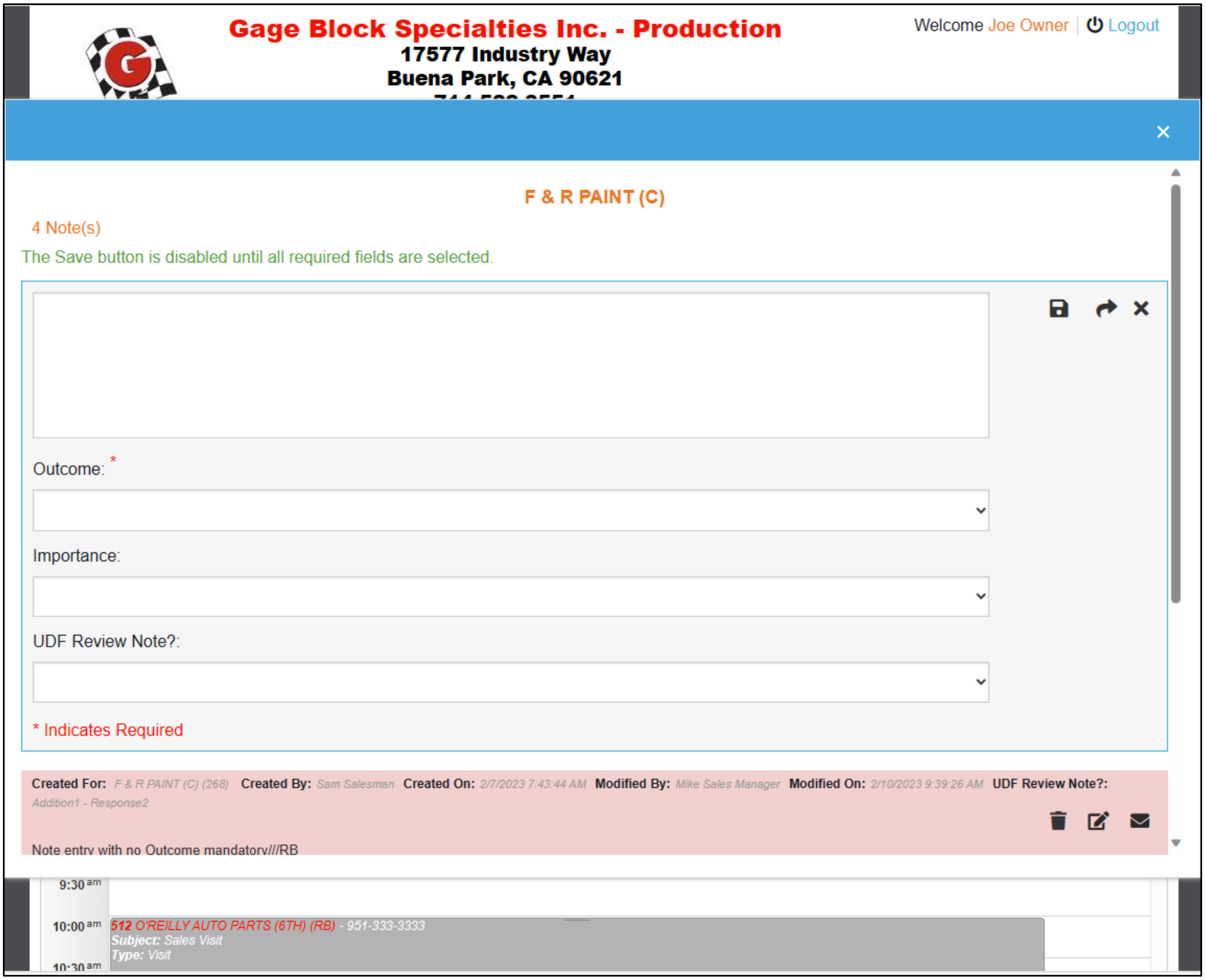
- With the schedule screen displaying appointments in the day view, left click within an appointment cell to view the appointment details (anywhere except the customer's name). You can enter a customer note by left clicking on the customer notes icon (🗋).

A customer note pop-up window will now be displayed on the screen and will display any note entry information for the customer as shown:



- To add a note, click on the (Add ✚) button.

The following note entry pop-up screen will be displayed:



- Click within the blank field and enter in the new note information.
- If "Outcome" or "Importance" options have been activated, select an Outcome or Importance from the drop-down below the note text box before saving/emailing.

☞ **Note: Fields that have a red asterisk displayed (*) indicates it is a required field and must have an entry selected before the note can be saved.**

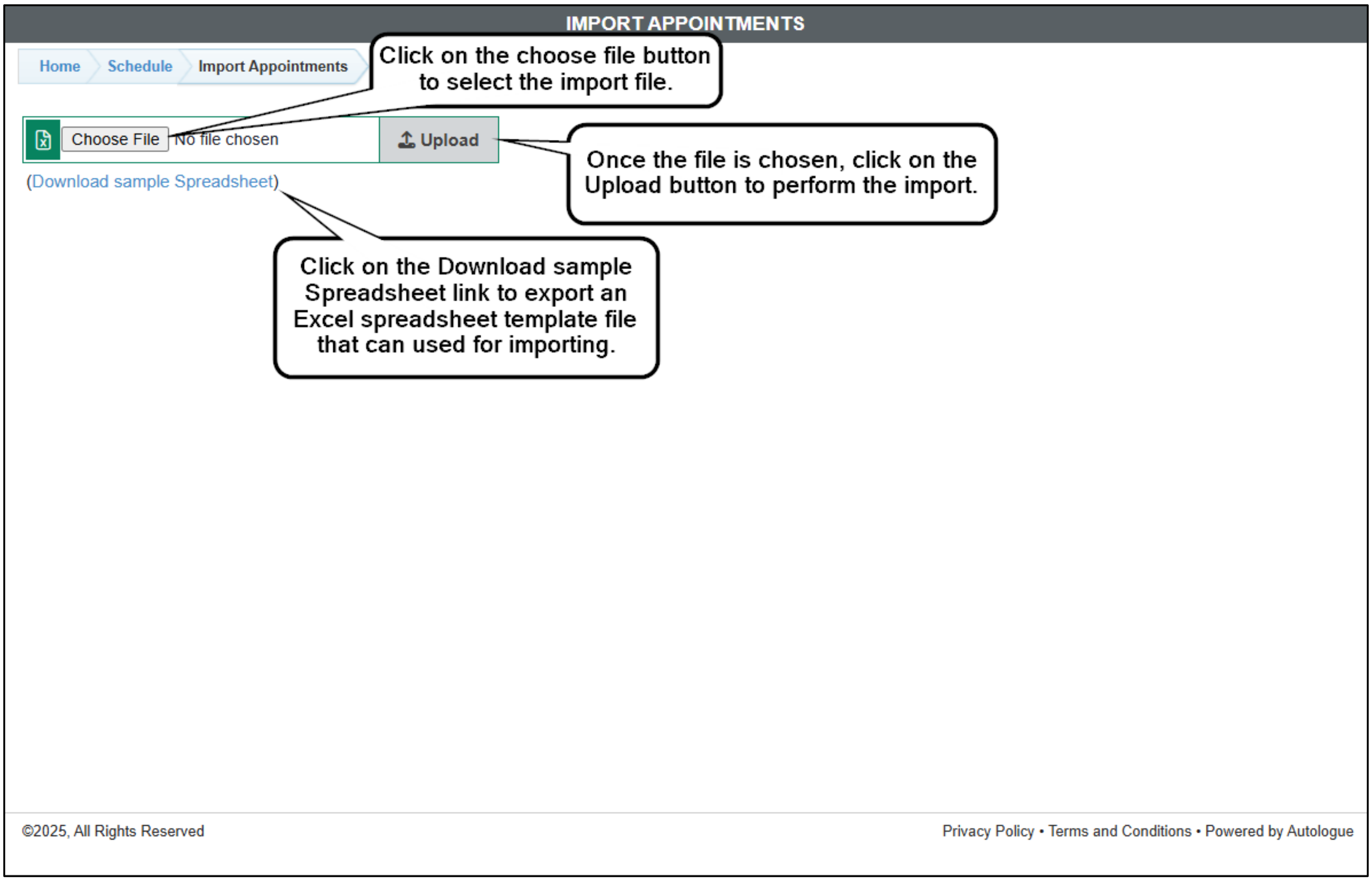
- Once the note has been entered and the optional fields have been selected, click on the Save (🖫) icon to save the entered note. You also have the option to both save the entered note and have it emailed by clicking on the Save and Email (➦) icon.

  Existing note entries display the previous notes completed, who it was created by, the created date and time, and the date and time last modified, if it was modified after the initial note was written.

- An existing note entry can be modified by clicking on the edit note (✐) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry.
- Click on the cancel (✕) icon to close the customer notes pop-up window and you will be returned to the schedule screen.

Importing Appointments

- To import appointments, click on the blue `Import Appointments` button and following screen will be displayed:

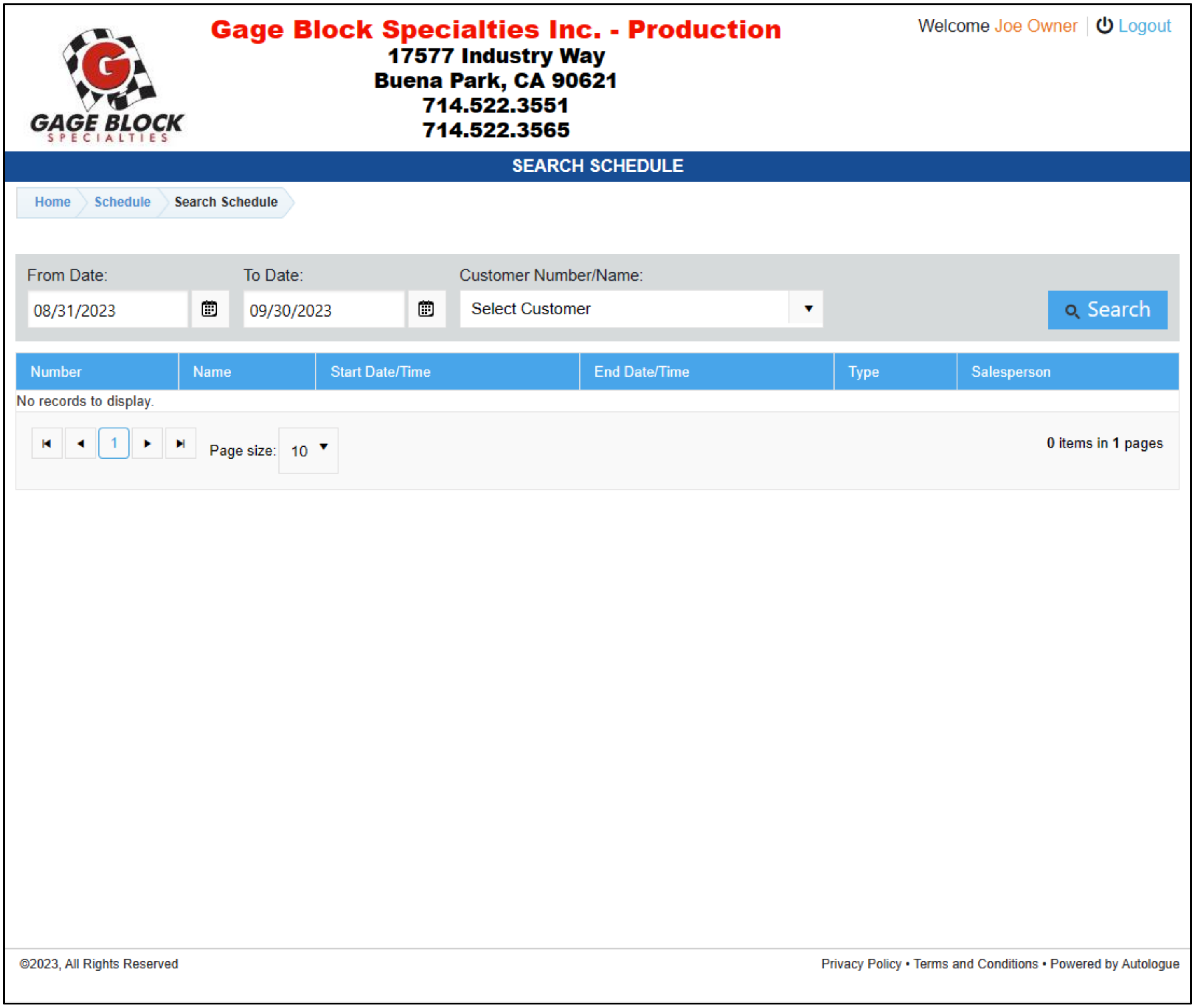


- Click on the `Download sample Spreadsheet` view and/or download a sample Excel spreadsheet file (*Appointments.xlsx*). This file contains an *Instructions* tab describing the various fields that must be filled in within the *Data* tab. It can be modified and used as an import file.
- Click on the `Choose File` button and select the Excel spreadsheet file to use to import. Click on the ↑`Upload` button to import the selected file.

Search Schedule

- To search for scheduled appointments for a specific customer, click on the blue `Search Schedule >` link within the schedule screen.

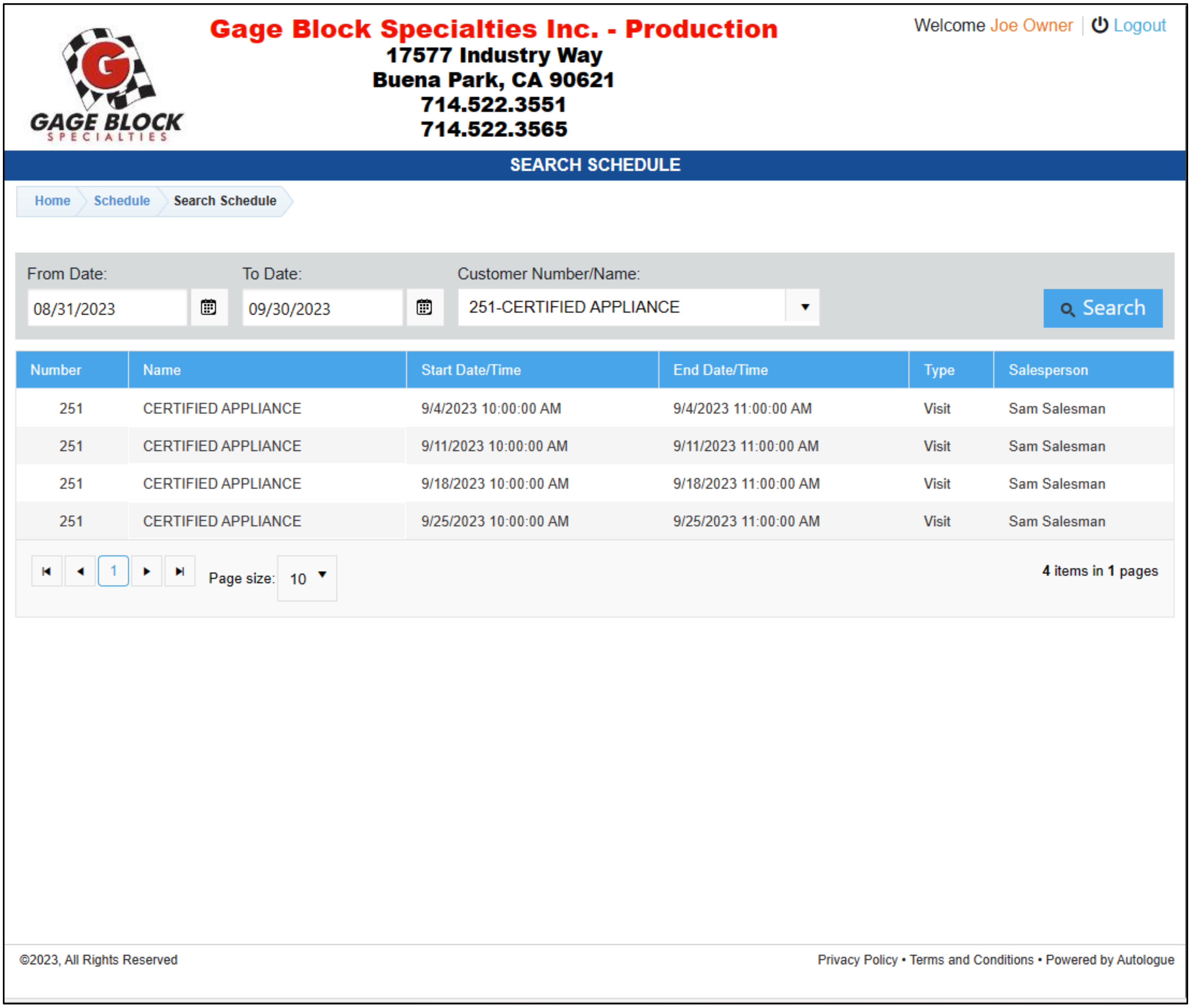
The *Search Schedule* screen will be displayed:



By default, the `From/To` dates will be from the current date up through the next 30 days.

- To change a `From/To` date, click on the calendar icon and select a new date.
- Click within the `Customer Number/Name:` drop-down field and select a customer to search appointments for.

- Click on the `Search` button to display the upcoming scheduled appointments for the customer and date range selected as shown:

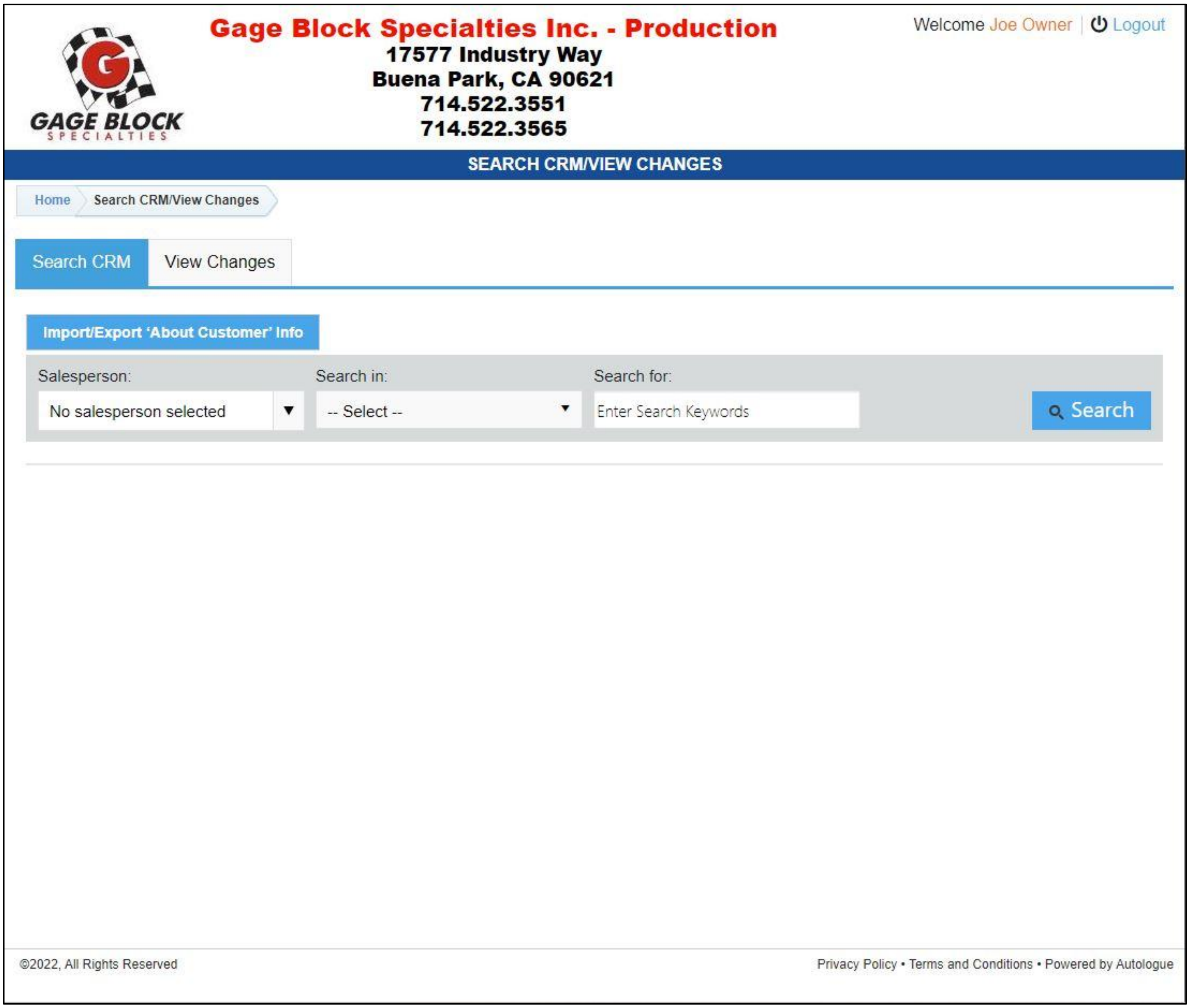


The search results will display the customer number, name, appointment start/end date and time, appointment type, and salesperson the appointment is with.

Search CRM/View Changes By Field

Search CRM

- From the administrator's home screen, to access customer reports for all or just a specific salesperson, click on the `Search CRM/View Changes` button and the following screen will be displayed:



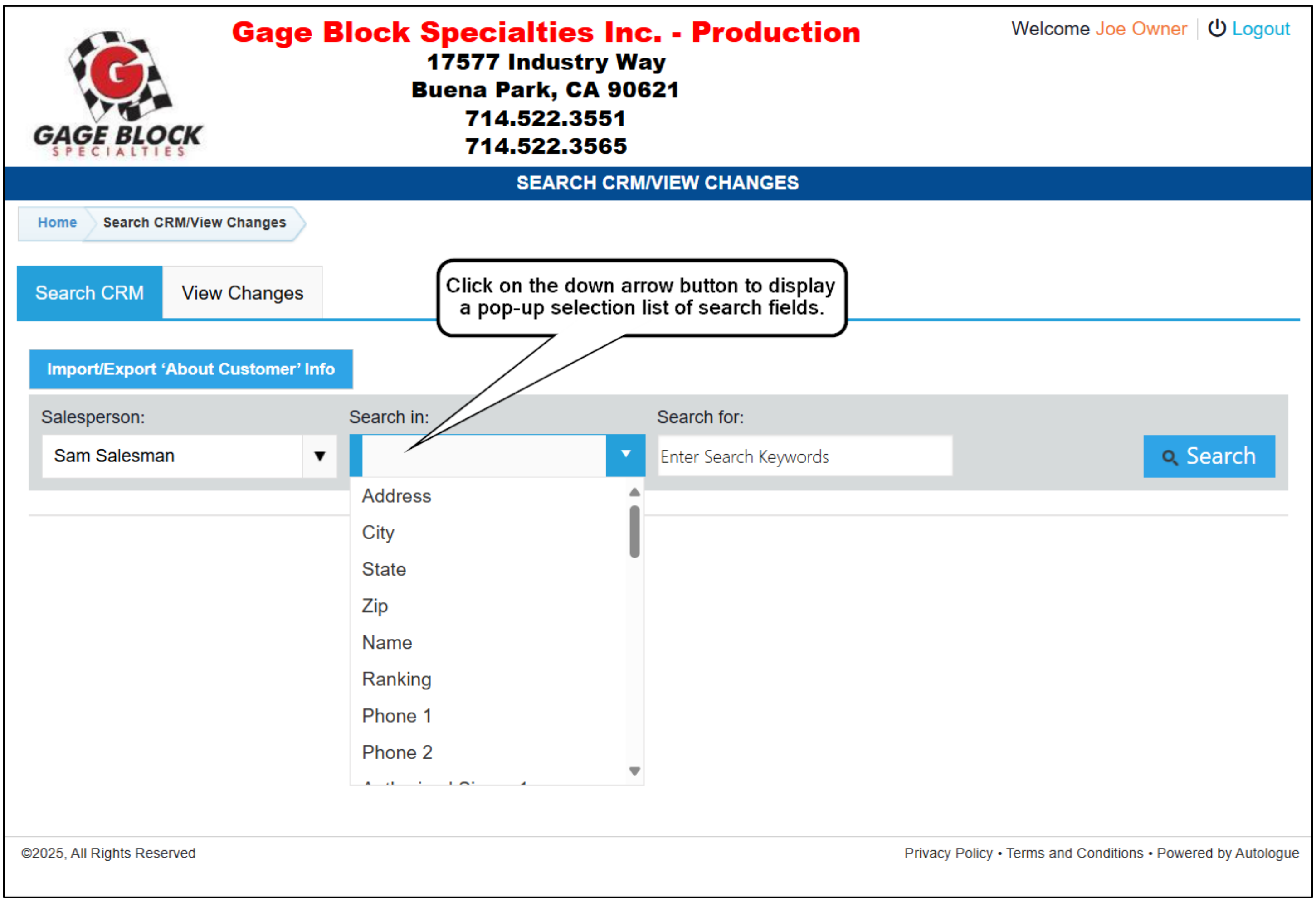
By default, no salespersons are selected and the *Search CRM* tab is selected. The *Search CRM* screen allows you to search for customers (which includes the owners/employees and family) by a single field entry such as favorite sport/car, birthday, hobbies, state, etc. for salesperson(s).

Selecting Salespersons To View

- You can select one or more salespersons to search only their customers' information for by clicking on the down arrow button at the end of the `Salesperson:` field and check mark only the specific salesperson(s) you want to report on from the drop-down selection list.

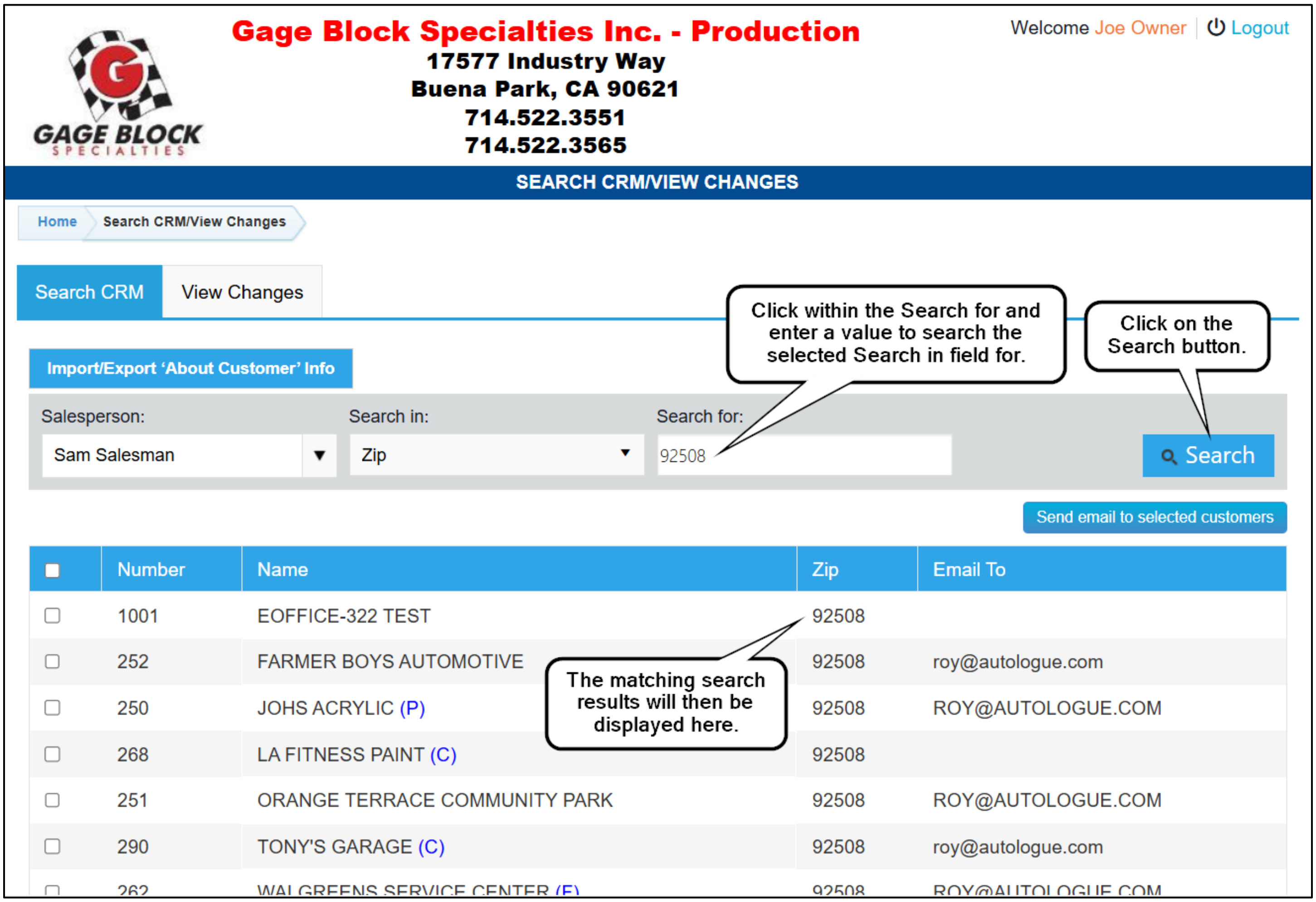
Selecting A Search Field & What To Search For

- You can select one customer record field to search customer information for by clicking on the down arrow button at the end of the `Search in:` field, then click on any one of the fields available from the drop-down selection list that you want the search based upon.



- Once a `Search in` field has been selected, click within the `Search for:` field and enter in a specific value to be searched for and then click on the `Search` button and the screen will then redraw the screen with the matching customers that have matching data.

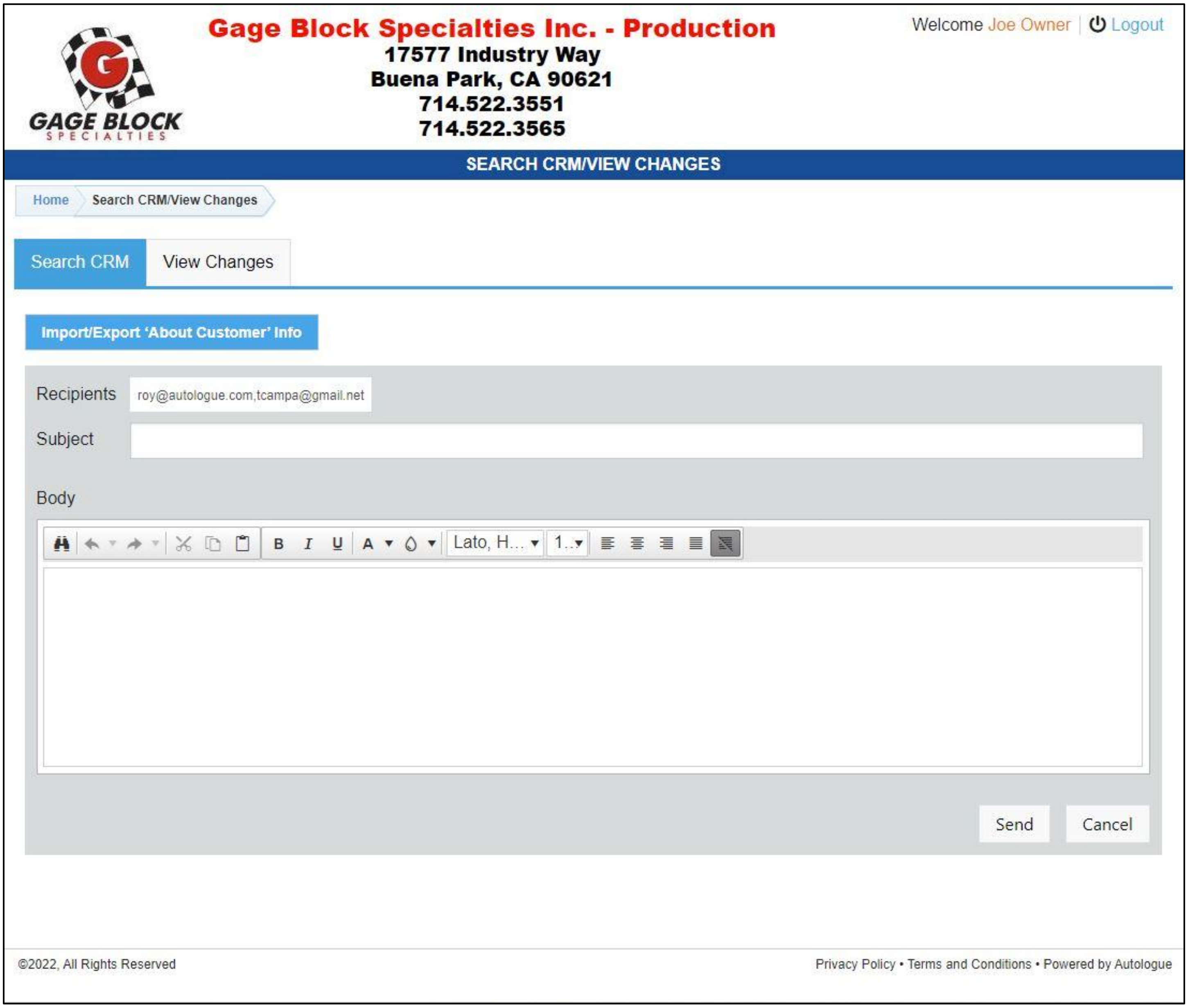
☞ **<u>Note:</u> The search value is not case sensitive and can be a substring of a field value. Example, entering "full" will match the city of "Fullerton". It searches all CRM information for customers, which includes the owners/employees and family fields.**



The screen will display a matching list of customer numbers, names and the field being searched for. An `Email To` column will also be displayed showing the customers email address information if set up.

- To send an email to selected customers, check mark the box to the left of the customer number and then click on the blue `Send email to selected customers` button.

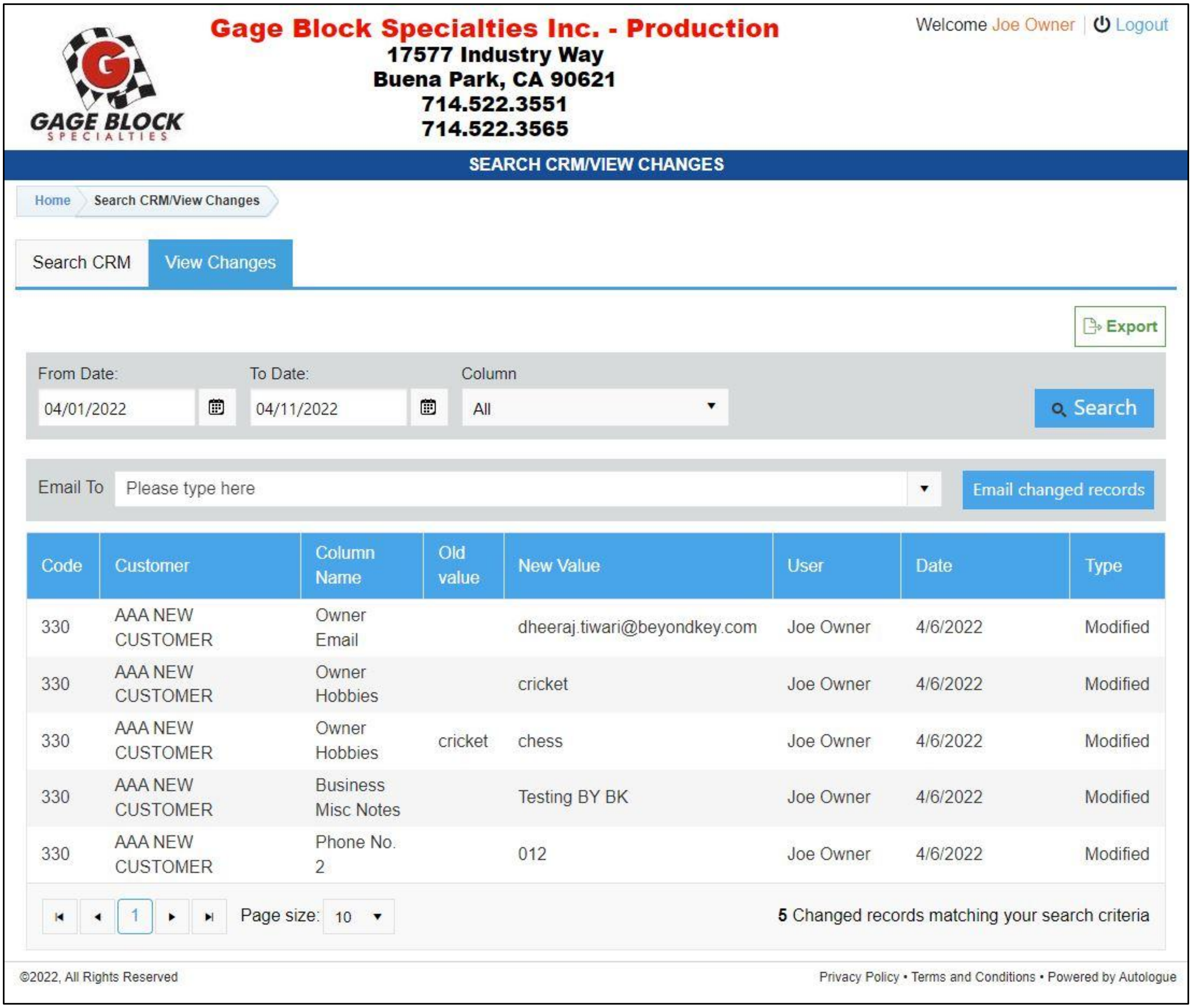
An email screen will now be displayed with the selected email to recipients:



- Click within the *Subject* and *Body* sections of the screen and enter in the email information you want to send and then click on the `Send` button.

View Changes

When clicking on the `Search CRM/View Changes` button the following screen will be displayed, once the *View Changes* tab is selected.



The `From/To` dates will default show the last 3 days from the current date.

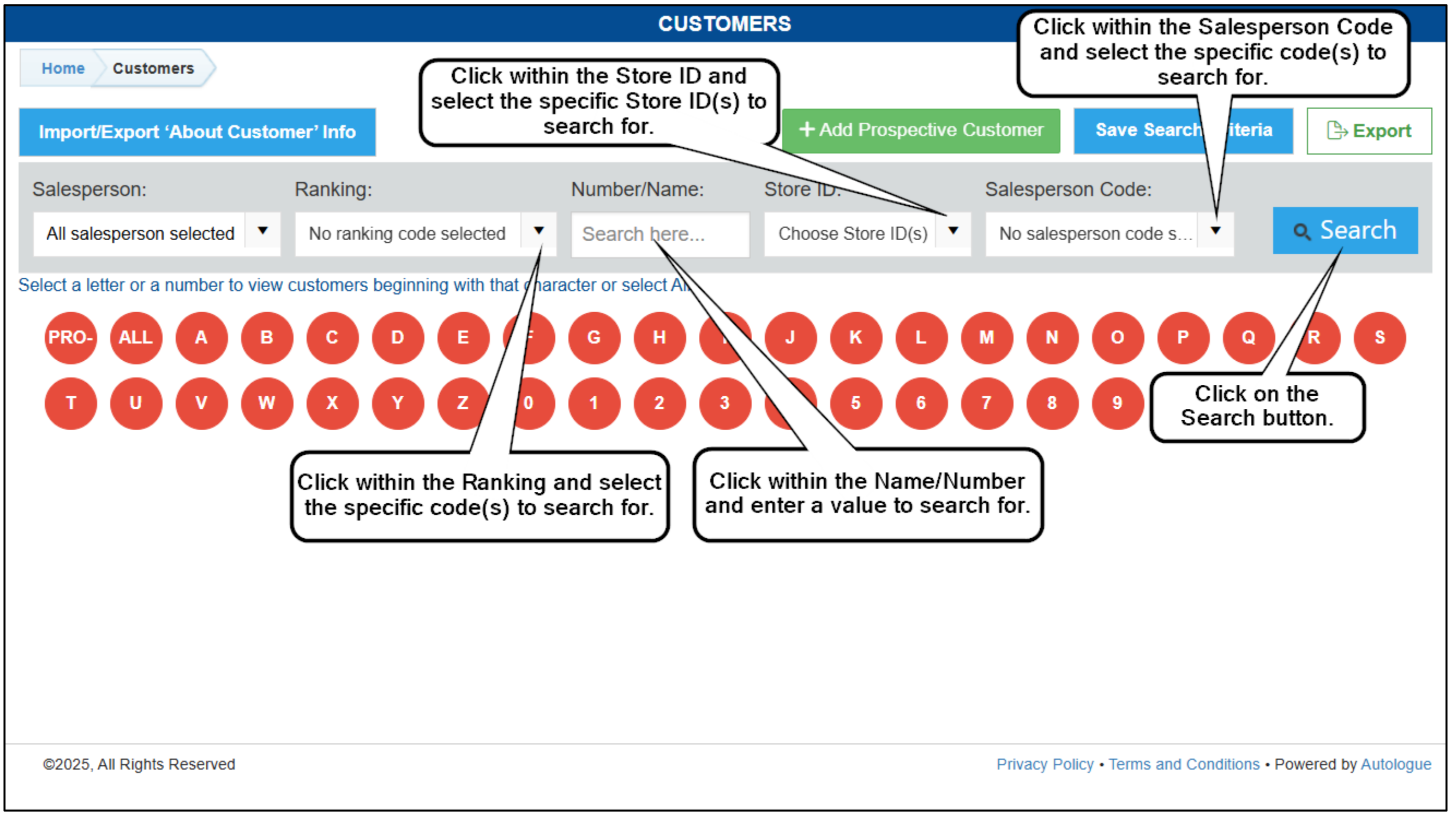
- Click on either date field to select a different date.

The `Column` field will default to ALL (meaning show all changes to any field).

- Click on this field to select from a drop-down list of specific fields to see changes for.
- Click on the blue `Search` button and the screen will display all or specific field changes during the specified date range.

Customers

- From the administrator's home screen, to access all customers or just customers for selected salespersons, click on the `Customers` button and the following screen will be displayed:

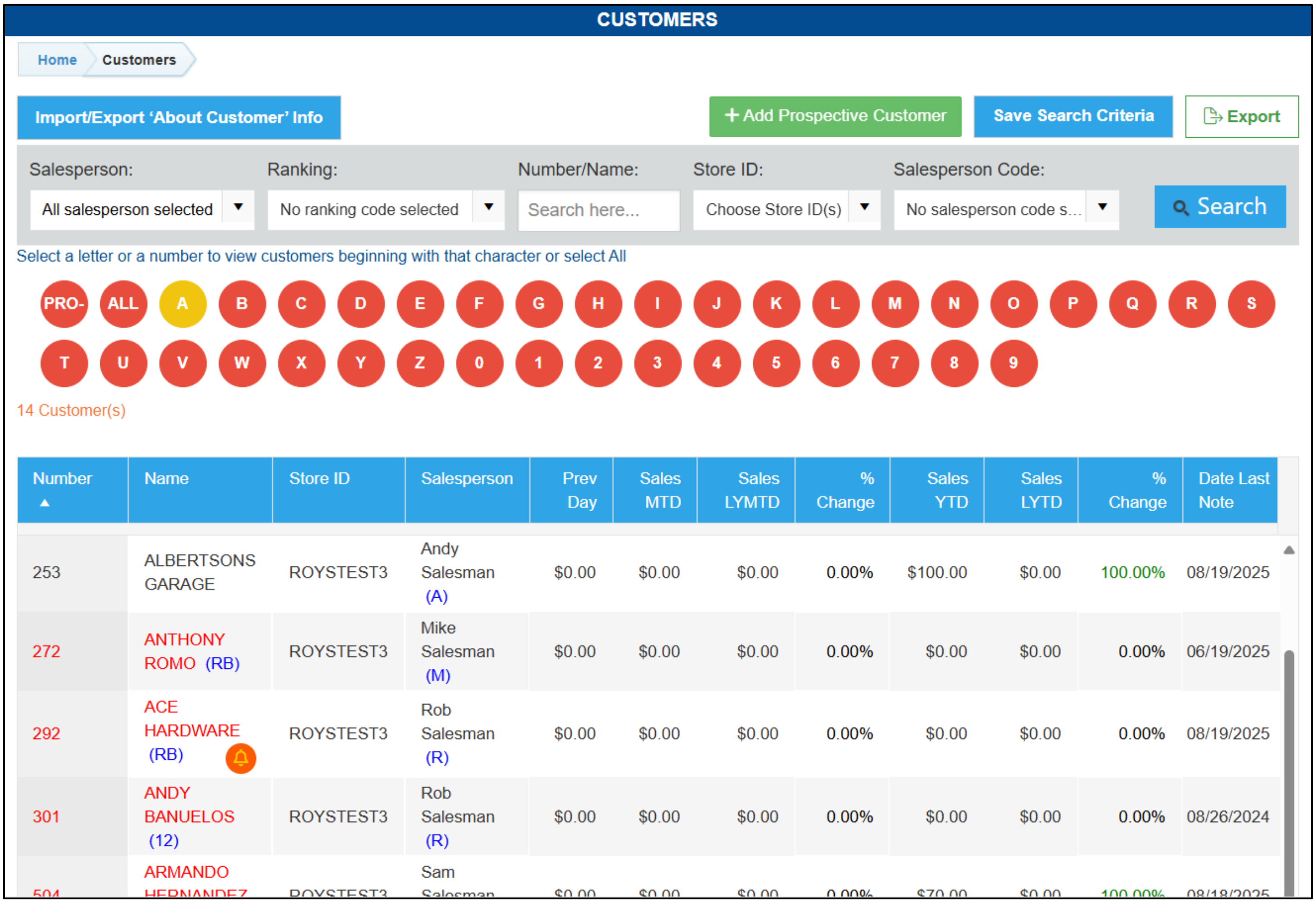


By default, no customers are displayed on the screen.

Viewing Customers

- Click on a red letter or a number to view customers whose name begins with that letter, or click on the `ALL` button to see a complete list of all customers.

The button to the left of the `ALL` button, in this case (`PRO-`), is used to view all prospective customers assigned to your store. These prospects would have been added by an administrator, store manager, or a sales manager/representative.



If the customer number and name are displayed in red text, this means the customer's account code flag has been set.

If an orange bell icon is displayed beside the customer's name, this denotes an existing note has been modified for them.

Beside each customer name that is listed will be their assigned ranking code (shown in blue parenthesis), assigned store ID, assigned salesperson (salesperson's code shown in blue parenthesis), as well as each customer's sales totals for the previous day, month to date, last year month to date, year to date, last year to date with the % of change for each period over the same period last year, and the date of the last note taken.

- Clicking on a column header will sort the list by that column in either ascending or descending order.
- Prospective customers are created by clicking the green `+Add Prospective Customer` button.

Selecting Salespersons To View

- You can view either unassigned customers, all customers assigned to a salesperson or only customers assigned to one or more specific salespersons by clicking on the down arrow button below the `Salesperson` field and check marking the Unassigned, All Salespersons or the specific Salesperson's names you want to report on from the drop-down selection list.

Search By Ranking

Within the *Customers* screen, you can search for customers by a specific ranking code.

- Click within the `Ranking` search field, select from a drop-down list of ranking codes to be search by and then click on the blue `Search` button. The screen will then display only the customers with a matching ranking code(s).

Search By Name/Number

- Click within the `Name/Number` search field and enter a customer number or any portion of the customer's name to search by and then click on the blue `Search` button. The screen will then display only the customers with matching data.

Search by Store ID

Within the *Customers* screen, you can search for customers by a specific store ID.

- Click within the `Store ID` search field, select from a drop-down list of store ID's to be search by and then click on the blue `Search` button. The screen will then display only the customers with a matching assigned store ID(s).

Search by Salesperson Code

Within the *Customers* screen, you can search for customers by a specific salesperson code.

- Click within the `Salesperson Code` search field, select from a drop-down list of salesperson codes to be search by and then click on the blue `Search` button. The screen will then display only the customers with a matching salesperson code(s).

Saving Search Criteria

- To save the current search criteria, click on the blue `Save Search Criteria` button. The button text will change (or toggle) to display `Clear Search Criteria` and this indicates that there is a saved search.

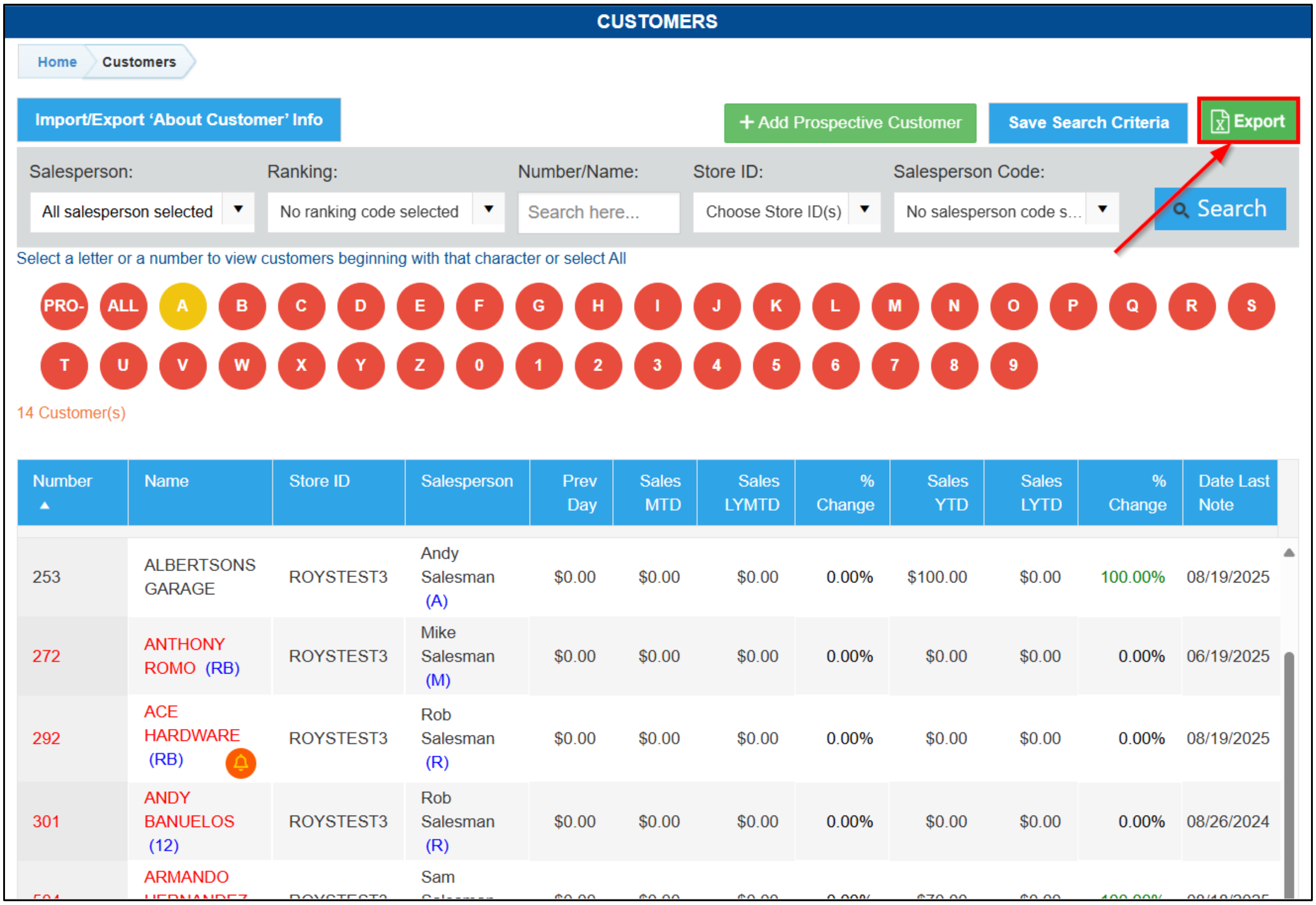
The current search criteria will automatically be displayed when clicking on the Customers tile from the home page. Logging out will not clear the saved search.

Clearing Search Criteria

- To clear the current search criteria, click on the blue `Clear Search Criteria` button. The button text will change (or toggle) to display `Save Search Criteria` and this indicates that there is not a saved search.

Exporting Customer List Results

- Click on the green `Export` button to export all the column information for the customer list currently being displayed on the screen to an Excel spreadsheet file (*CustomerList_Export.xlsx*).

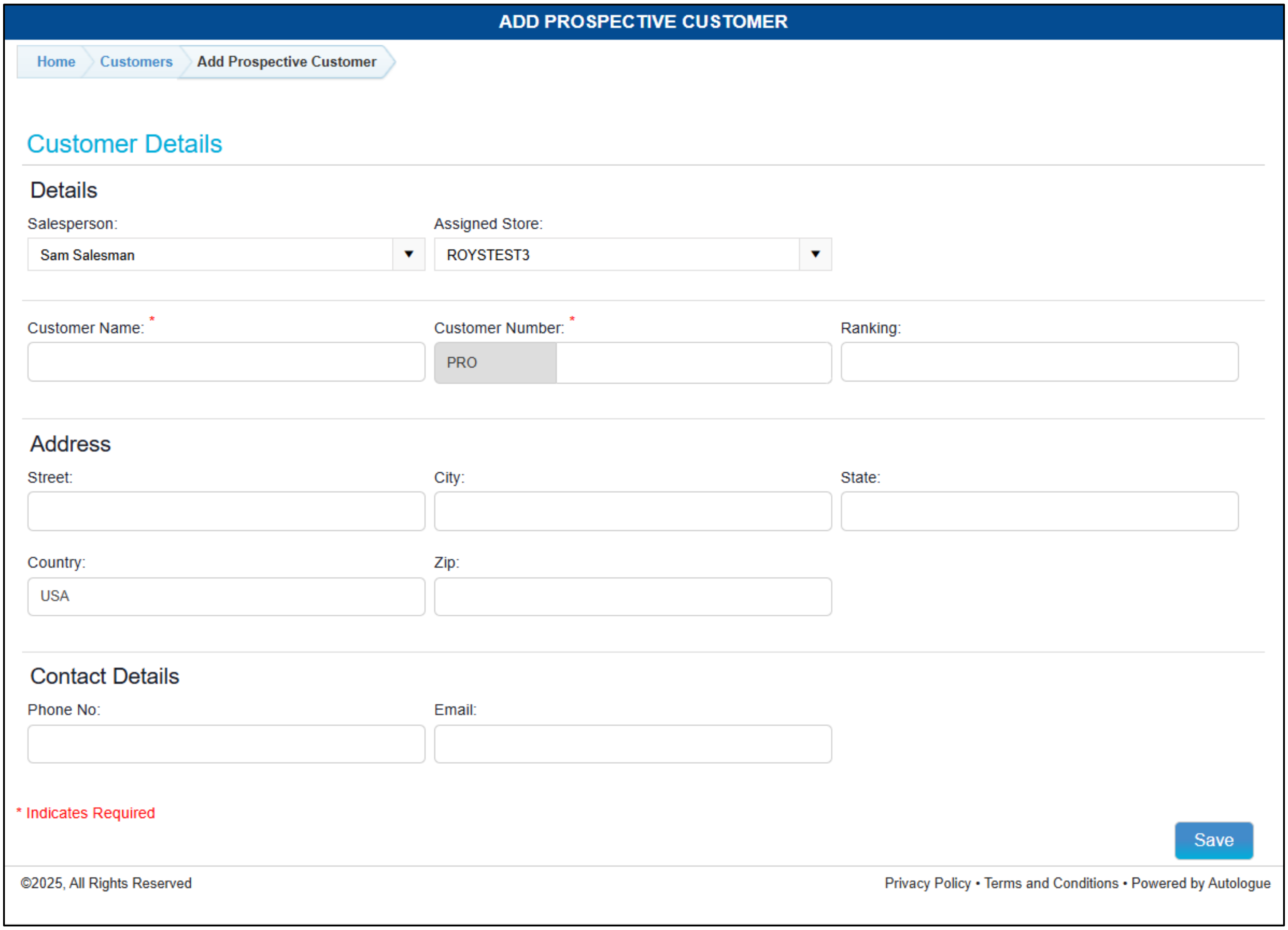


Shown below is example of the export file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Number	Name	Ranking	Store ID	Salesperson	Prev Day	Sales MTD	Sales LYMTD	% Change	Sales YTD	Sales LYTD	% Change (2)	Date Last Note
2	150	ABC WAREHOUSE INC.		ROYSTEST3		0.00	0.00	0.00	0.00	0.00	0.00	0.00	08/19/2025
3	249	ABC AUTO PARTS		ROYSTEST3	Mike Salesman	0.00	0.00	0.00	0.00	100.00	0.00	100.00	08/19/2025
4	253	ALBERTSONS GARAGE		ROYSTEST3	Andy Salesman	0.00	0.00	0.00	0.00	100.00	0.00	100.00	08/19/2025
5	272	ANTHONY ROMO	RB	ROYSTEST3	Mike Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	06/19/2025
6	292	ACE HARDWARE	RB	ROYSTEST3	Rob Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	08/19/2025
7	301	ANDY BANUELOS	12	ROYSTEST3	Rob Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	08/26/2024
8	504	ARMANDO HERNANDEZ	RB	ROYSTEST3	Sam Salesman	0.00	0.00	0.00	0.00	70.00	0.00	100.00	08/18/2025
9	510	AUTOZONE AUTO PARTS (CORONA)	RB	ROYSTEST3	Sam Salesman	0.00	0.00	0.00	0.00	0.00	245.00	-100.00	03/26/2025
10	520	AUTOZONE AUTO PARTS (VAN BUREN)	RB	ROYSTEST3	Rob Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	01/15/2024
11	PRO-344	AugBK2	P	ROYSTEST3	Mike Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
12	PRO-45	AndyAest	A	ROYSTEST3	Andy Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	06/19/2024
13	PRO-565	August1BK		ROYSTEST3	Andy Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
14	PRO-AAA	AAA Automotive		ROYSTEST3	Frank Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
15	PRO-AV	Art Valencia		ROYSTEST3	Sam Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
16													

Adding A Prospective Customer

- To add a new prospective customer, click on the green `+Add Prospective Customer` button and following screen will be displayed:

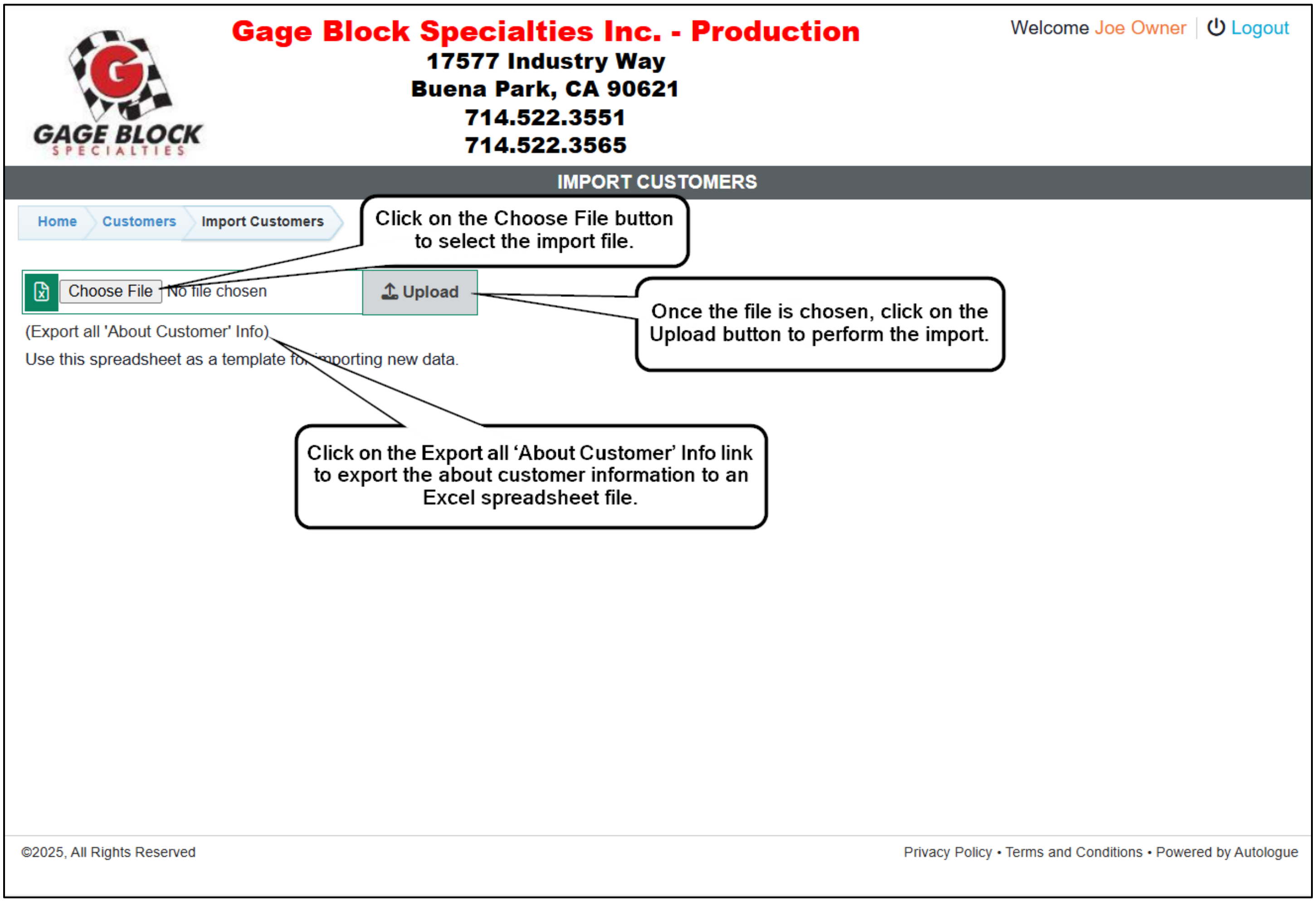


The screen will show all the entry fields and those that are required (* Indicates Required). When the REQUIRE EXTENDED PROSPECTIVE CUSTOMER INFORMATION setting option is **enabled**, all fields are required except for the Ranking. When the setting is **disabled**, only the Customer Name and Customer Number fields are required.

- Select and fill in information for all the required fields. The user will be required to choose a customer number (the program will not allow duplicates), and other pertinent information. Click on the `Save` button to save the information and return to the *Customers* view screen.

Import/Export 'About Customer' Info

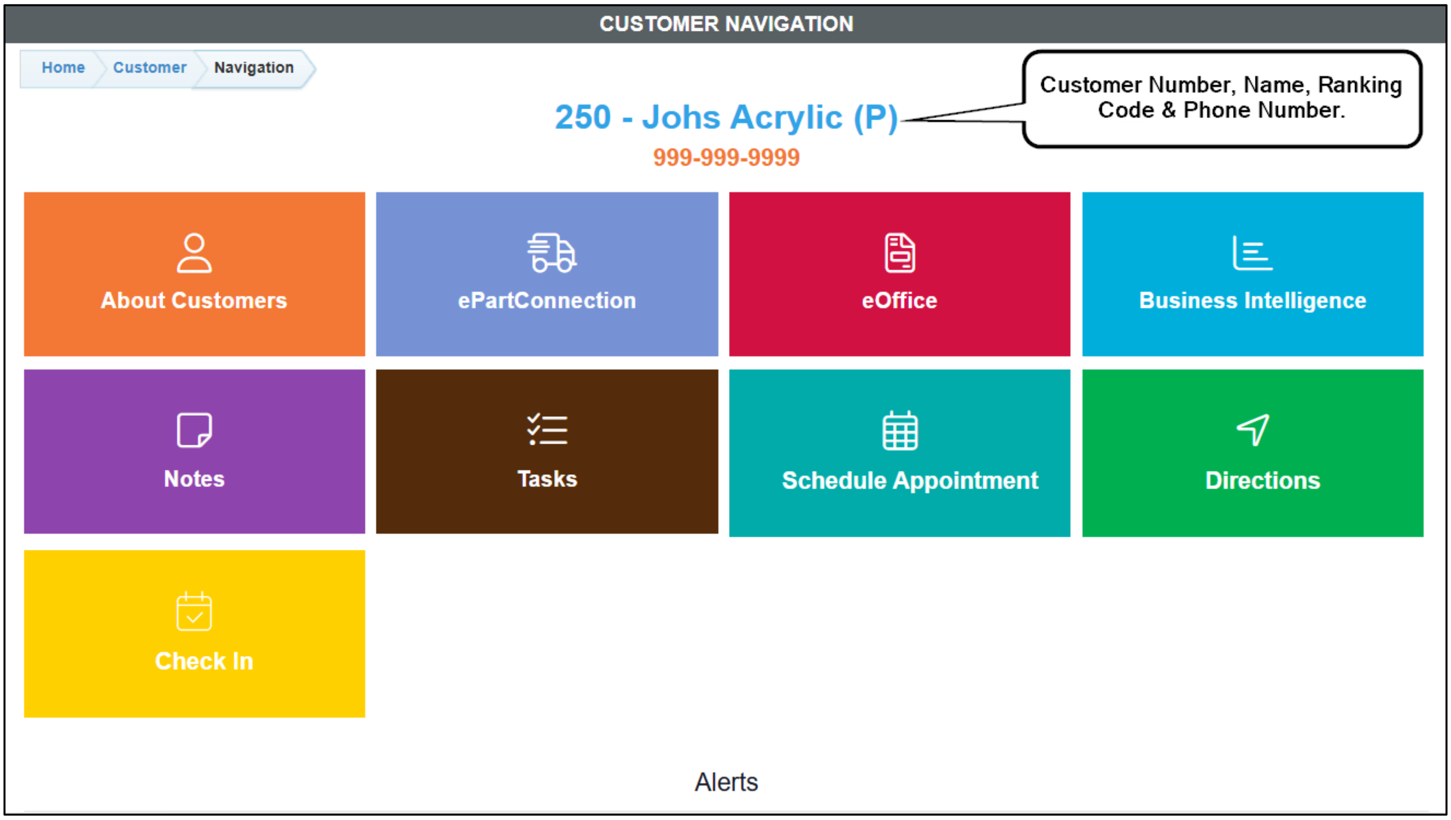
- To import/export the "About Customer" information for the customers being viewed, click on the blue `Import/Export 'About Customer' Info` button and following screen will be displayed:



- Click on the `(Export all 'About Customer' Info)` to export the about customer information to an Excel spreadsheet file (*Customer_Export.xlsx*). This file can be used as an import file.
- Click on the `Choose File` button and select the Excel spreadsheet file to use to import. Click on the ↑`Upload` button to import the selected file.

Customer Navigation

- From the *CUSTOMERS* home screen and the list of customers being displayed, click on the customer's name and the following screen will be displayed:



The *CUSTOMER NAVIGATION* screen will now be displayed for the selected customer (whose customer number, name and phone number are displayed above the colored tiles).

Displayed below the colored tiles, are specific sections that display alerts and upcoming appointments for the selected customer.

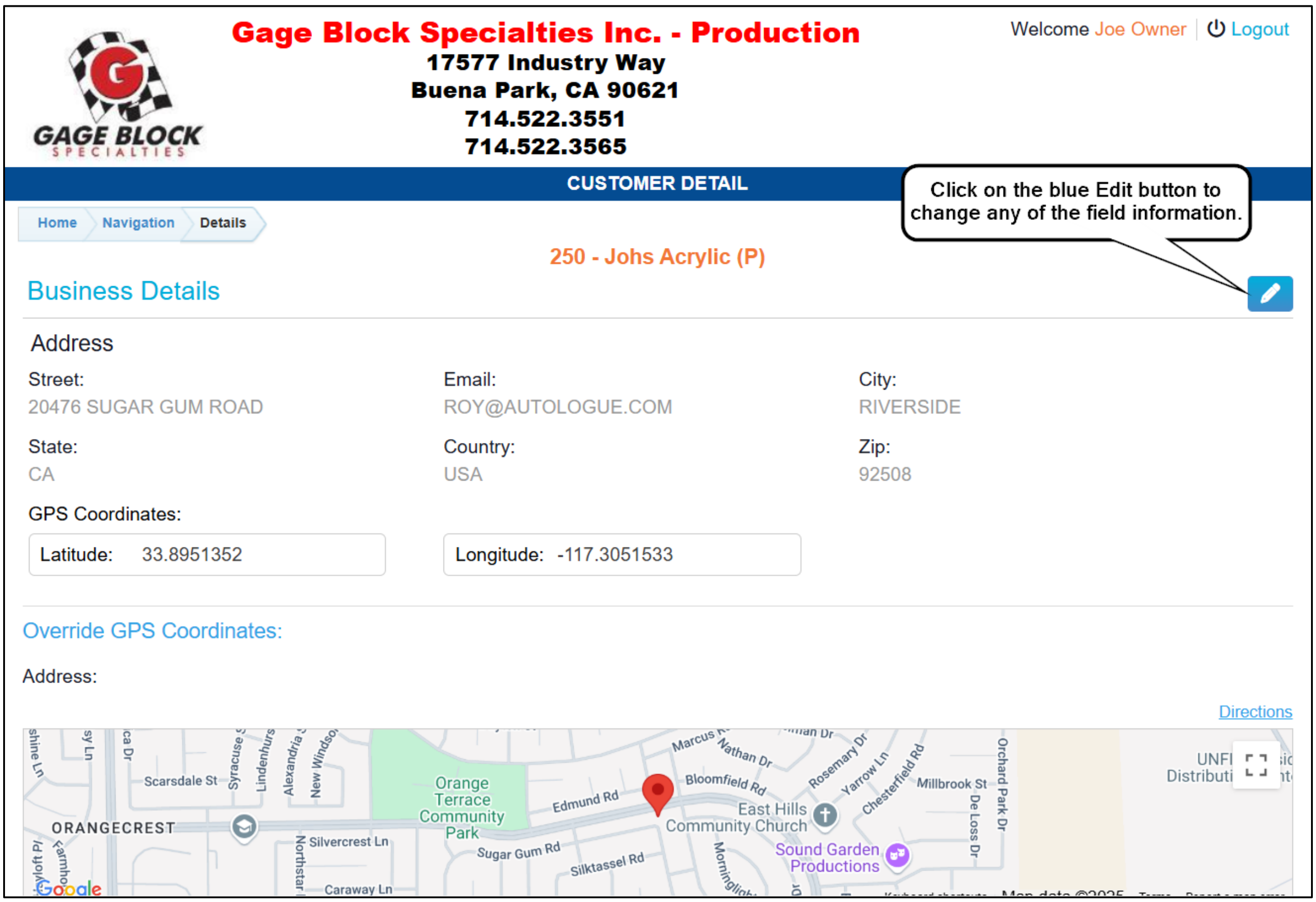
Here the user can click on a colored tile and perform the following for the selected customer:

• About Customers: View/Add additional business & personal information.	• ePartConnection: Automatically login to ePartConnection as the customer. This tile is only visible if your company subscribes to ePartConnection.
• eOffice: Automatically login to eOffice as the customer. This tile is only visible if your company subscribes to eOffice.	• Business Intelligence: View a sales dashboard.
• Notes: View/Add customer notes information.	• Tasks: View pending tasks for this customer.
• Schedule Appointment: Schedule an appointment for this customer.	• Directions: Displays a map with directions to the selected customer.

• Check In/Out: The check In/Out tiles are used to save the GPS coordinates when "checking in" and record the date/time for both checking in/out when visiting a customer (color and label change depending on whether a check in has been performed).	• Alerts: Displays specific alerts pertaining to the selected customer.
• Upcoming Appointments: Displays upcoming appointments within the scheduler for the next 30 days and the specific workday # the customer is currently on.	

About Customers

- From the *CUSTOMER NAVIGATION* screen, click on the `About Customers` tile and the following screen will be displayed:



The *CUSTOMER DETAIL* screen will be displayed and will be displaying the entered business information (address, contact details, business type/hours/size, authorized signers, other details, and notes) for the selected customer.

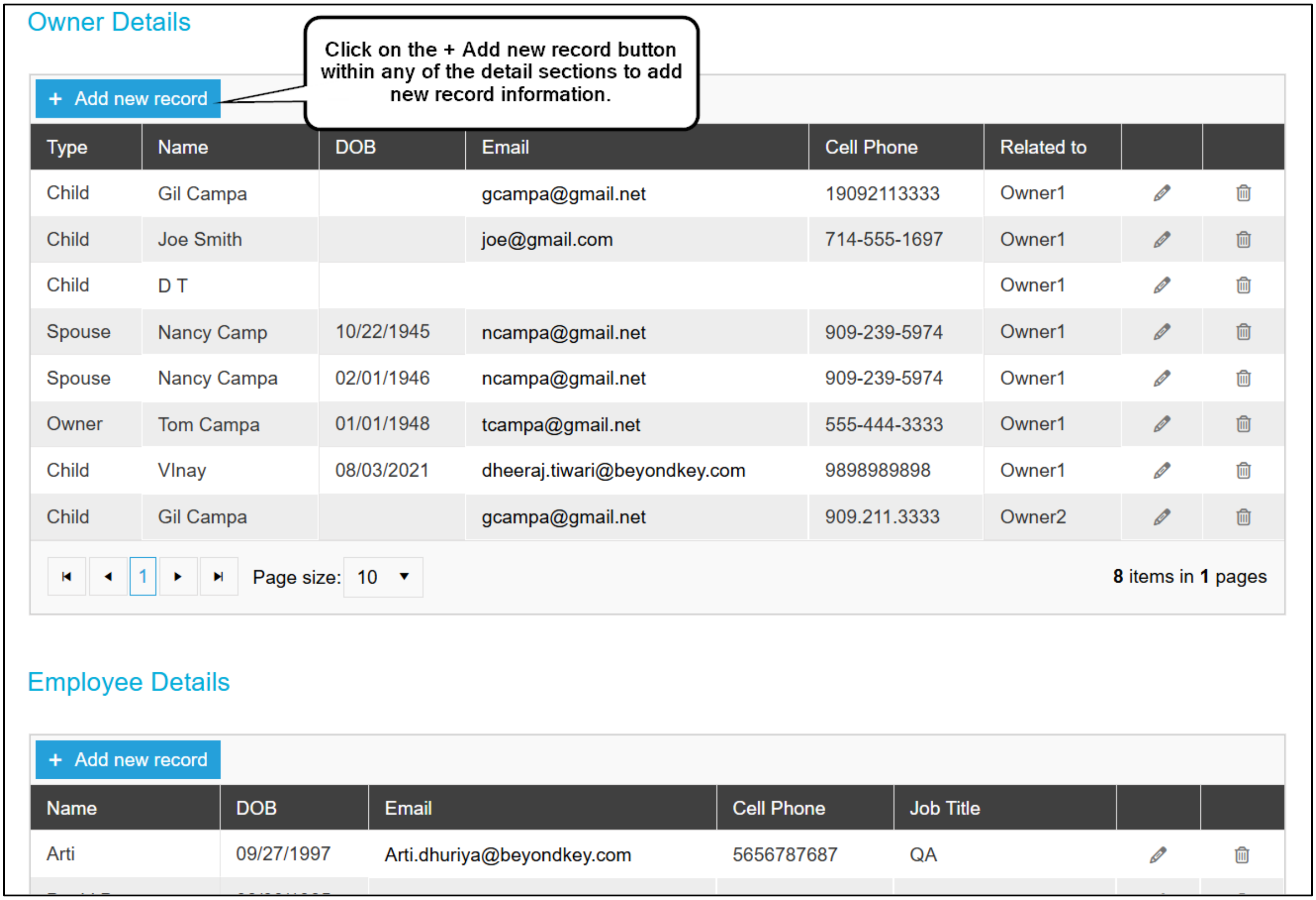
The `GPS Coordinates:` heading will display either `GPS Coordinates`, `Imported GPS Coordinates`, or `Overridden GPS Coordinates` depending on how the latitude/longitude coordinates were created. Shown below are how each is determined:

GPS Coordinates:	Uses the street address information that is entered within the *ePart Setup->Customer Options* screen and plots to valid latitude/longitude values.
GPS Coordinates:	Uses the street address information that is entered within the *ePart Setup->Customer Options* screen but is an invalid address and does NOT plot to valid latitude/longitude values.
Imported GPS Coordinates:	Uses the latitude and longitude values that are entered within the *ePart Setup->Customer Options* screen.
Overridden GPS Coordinates:	Uses the street address that is entered within the *Override GPS Coordinates->Address* field.

- To edit any of the existing business information, click on the blue edit (✐) icon, and then click within any of the fields within the *Override GPS Coordinates, Contact Details* & *Business* sections and make your changes and then click on the blue `Save` button.

☞ **<u>Note:</u> The Phone No. 1 field cannot be edited; It can only be changed within the *ePart Setup–>Customer Options*.**

- At the bottom of the screen are *Owner/Employee/Personal Details* heading sections. These sections are used to enter in your customer's owners as well as their employees CRM information:



- To add CRM record information within any of the listed sections, click on the `+ Add new record` button within their respective detail sections and the screen will now display a new row of blank entry fields. Enter in the detail's information (type, name, date of birth, email, cell phone, job title, relationship, hobbies, favorite sport, favorite car) and then click on the (✓) symbol to save the entered information.
- To edit CRM record information within any of the listed sections, click on the (✐) symbol besides the row of fields information and the fields will now be shown as entry fields. Edit any of the details information and then click on the (✓) symbol to save the updated information.

ePartConnection

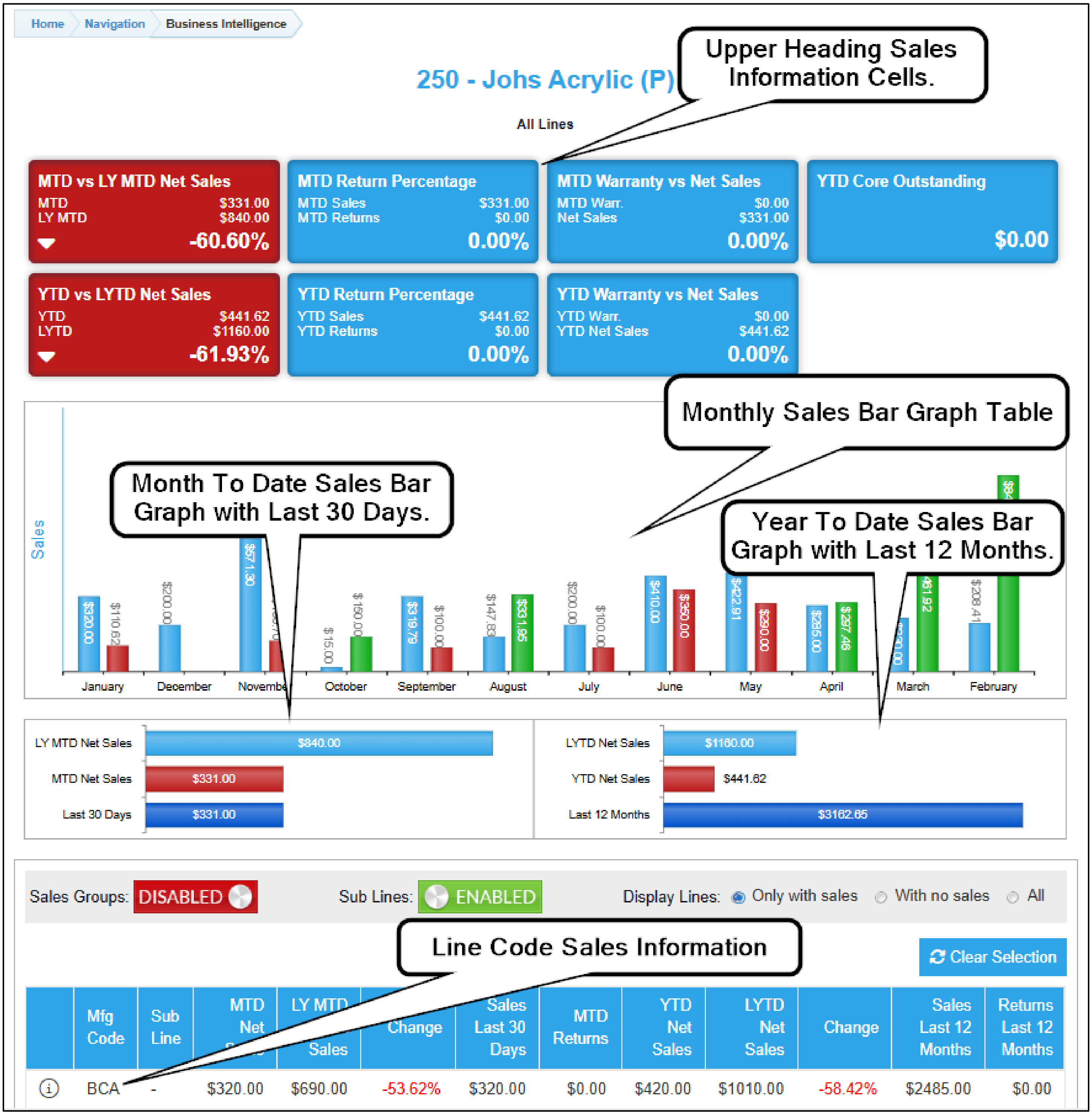
- From the *CUSTOMER NAVIGATION* screen, click on the `ePartConnection` colored menu tile and the ePart will be opened and you will be automatically logged into the customer's account within ePartConnection. Note: This tile is only visible if your company subscribes to ePartConnection.

eOffice

- From the *CUSTOMER NAVIGATION* screen, click on the `eOffice` colored menu tile and a new webpage tab will be opened and you will be automatically logged into the customer's account within eOffice. Note: This tile is only visible if your company subscribes to eOffice.

Business Intelligence

- From the *CUSTOMER NAVIGATION* screen, click on the `Business Intelligence` tile and the following screen will be displayed:



This screen is a graphical "sales dashboard" of the customers sales from the past year on up through the current date. It displays a variety of graphed sales figures as well as dollar values for the various types of returns (core/inventory/warranty). It also shows the percentage changes (positive/negative) based up comparisons from last year versus this year sales. The screen is broken up in 4 sections:

1. Upper Heading Sales Information Cells
2. Monthly Sales Bar Graph Table
3. Month/Year To Date Sales Bar Graphs
4. Line Code Sales Information

Upper Heading Sales Information Cells Section

Heading	Description
MTD vs LY MTD Sales	Shows the Month To Date (MTD) sales dollar amount and the percentage difference when compared to Last Year (LY) Month To Date (MTD) sales dollar amount. The small dollar amount displayed is the current month to date sales. The box will either show in red if the percentage is down (denoted by a down arrow) or in green if the percentage is up (denoted by an up arrow). To view the Last Year (LY) Month To Date (MTD) sales dollar amount, hover over either of the bar graphs within the Month To Date Sales Bar graph section of the screen.
MTD Returns vs Sales	Shows the Month To Date (MTD) inventory returns dollar amount and its percentage when compared to the Month To Date sales dollar amount. The small dollar amount displayed is the current month to date inventory returns sales. The large percentage figure is the return percentage (MTD Returns ÷ MTD Sales*100).
MTD Warranty vs Sales	Shows the Month To Date (MTD) warranty returns dollar amount and its percentage when compared to Month To Date sales dollar amount. The small dollar amount displayed is the current month to date warrant returns sales. The large percentage figure is the warranty return percentage (MTD Warranty ÷ MTD Sales*100).
YTD vs LYTD Sales	Shows the Year To Date (YTD) sales dollar amount and the percentage difference when compared to Last Year To Date (LYTD) sales dollar amount. The small dollar amount displayed is the current year to date sales. The box will either show in red if the percentage is down (denoted by a down arrow) or in green if the percentage is up (denoted by an up arrow). To view the Last Year To Date (LYTD) sales dollar amount, hover over either of the bar graphs within the Year To Date Sales Bar graph section of the screen.
YTD Returns vs Sales	Shows the Year To Date (YTD) inventory returns dollar amount and its percentage when compared to the Year To Date sales dollar amount. The small dollar amount displayed is the current year to date inventory returns sales. The large percentage figure is the return percentage (YTD Returns ÷ YTD Sales*100).
YTD Warranty vs Sales	Shows the Year To Date (YTD) warranty returns dollar amount and its percentage when compared to Year To Date sales dollar amount. The small dollar amount displayed is the current year to date warrant returns sales. The large percentage figure is the warranty return percentage (YTD Warranty ÷ YTD Sales*100).
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.

Monthly Sales Bar Graph Table Section

The second section of the screen, just below the upper heading cells section, displays the monthly sales bar graph data for current and last year's sales dollars.

- **<u>Note:</u> A pop-up window showing the exact dollar figures, month and year is automatically displayed whenever you "hover" the mouse pointer over any of bar code graphs.**

Month/Year To Date Sales Bar Graphs Section

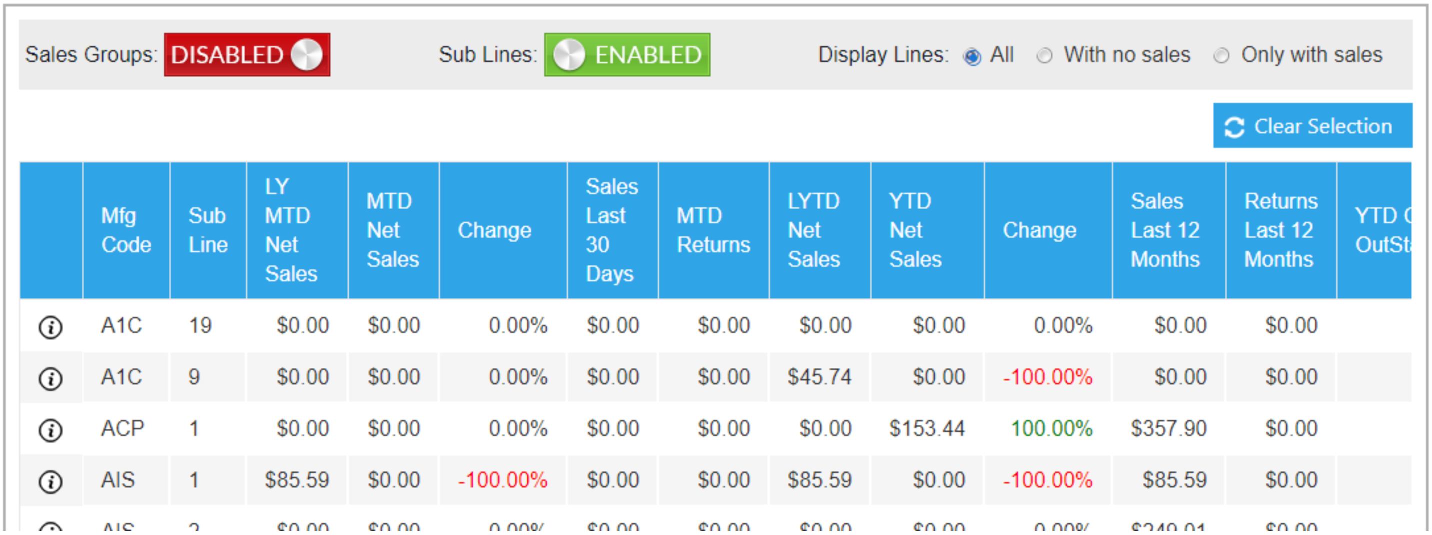
The third section of the screen, just below the monthly sales bar graph section, displays the month and year to date sales dollars versus last month and current sales dollars to date.

- **<u>Note:</u> These figures are based on "to date" which means if we are 15 days into the current month and 180 days into the current year, the LY (last year) MTD (month to date) and YTD (year to date) sales figures are based upon those day amounts. The graphs also show the Last 30 Days and Last 12 Months.**

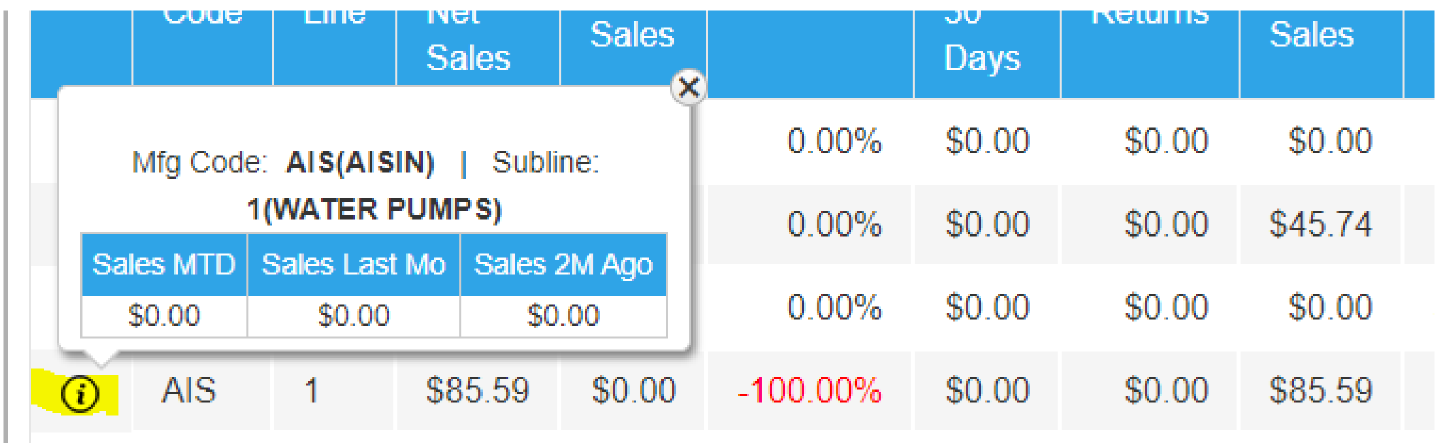
Line Code Sales Information Section

- **<u>Note:</u> Clicking on any line, sales group total line or line and sub line inside a sales group will change all graphs at the top to reflect only that choice. The header at the top of the page will reflect the graphs currently displaying. All columns are sortable by clicking the column header.**

Heading	Description
Line Code	The line code of the parts sold to the customer.
Sub Line	Sub Line for classifying certain parts in a Product Line, differentiating them from other parts in the Line.
LY MTD	Shows the Last Year (LY) Month To Date (MTD) sales dollar amount for the line code.
MTD	Shows the Month To Date (MTD) sales dollar amount for the line code.
Change	Shows the percentage difference when comparing the Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) sales dollar amounts.
Sales Last 30 Days	Last 30 calendar days sales. This is helpful during the first days of a new month or year.
MTD Returns	Shows the Month To Date (MTD) inventory returns dollar amount.
LYTD Net Sales	Shows the Last Year To Date (LYTD) sales dollar amount for the line code.
YTD Net Sales	Shows the Year To Date (LYTD) sales dollar amount for the line code.
Change	Shows the percentage difference when comparing the Year To Date (YTD) versus Last Year To Date (LYTD) sales dollar amounts.
Sales Last 12 Months	Last 12 calendar month's sales. This is helpful during the first days of a new month or year.
Returns Last 12 Months	Last 12 calendar month's returns dollar amount.
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.



- Clicking on the "i" icon displays Line and Sub Line descriptions as well as 3 months of sales as shown:



Sales Groups

By using the switch to "Enable" Sales Groups, the user will see a listing of pre-configured groups of Product Lines.

Sales Groups: ENABLED   Display Lines: All   With no sales   Only with sales

Clear Selection

Mfg Code	Subline	LY MTD Net Sales	MTD Net Sales	Change	Sales Last 30 Days	MTD Returns	LYTD Net Sales	YTD Net Sales	Change	Sales Last 12 Months	Ret Las Mor
Sales Group: Batteries											
Total		$378.80	$386.80	2.11%	$647.65	$0.00	$6955.00	$4885.35	-29.76%	$17667.95	$-1
Sales Group: Brake Pads											
Total		$739.30	$359.94	-51.31%	$483.90	$-27.99	$4663.01	$3169.73	-32.02%	$16740.30	$-1
Sales Group: Calipers											
Total		$837.53	$124.88	-85.09%	$271.76	$-146.88	$5578.77	$2900.53	-48.01%	$13848.83	$-1
Sales Group: Chassis											
Total		$106.13	$332.16	212.97%	$436.70	$0.00	$1183.49	$1630.78	37.79%	$5046.74	$-

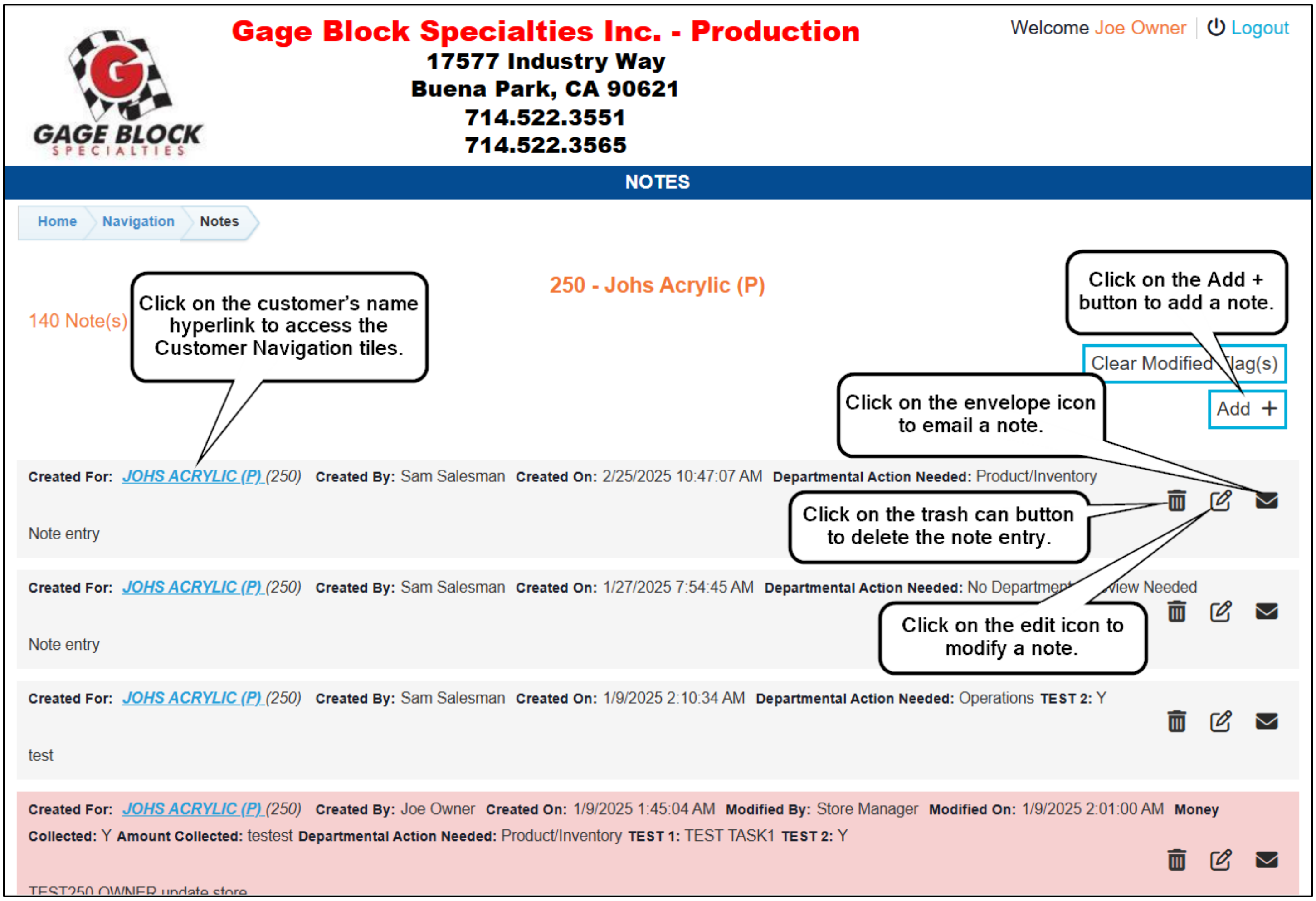
- The user has the option to see all lines (*All*), only lines with no sales (*With no sales*), or only lines with sales (*Only with sales*) by checking an option.
- Each group is expandable by clicking the arrow next to the name. This will display all Lines making up that group.

Sales Group: Brake Pads											
CEN	2	$0.00	$0.00	0.00%	$0.00	$0.00	$187.50	$47.97	-74.42%	$551.15	$
CEN	7	$0.00	$52.05	100.00%	$52.05	$0.00	$0.00	$52.05	100.00%	$99.13	
PSF	1	$662.92	$307.89	-53.56%	$363.87	$-27.99	$3828.57	$2865.77	-25.15%	$14638.79	$-
PWS	1	$76.38	$0.00	-100.00%	$67.98	$0.00	$646.94	$203.94	-68.48%	$1451.23	$-
USB	1	$0.00	$0.00	0.00%	$0.00	$0.00	$0.00	$0.00	0.00%	$0.00	
Total		$739.30	$359.94	-51.31%	$483.90	$-27.99	$4663.01	$3169.73	-32.02%	$16740.30	$-1

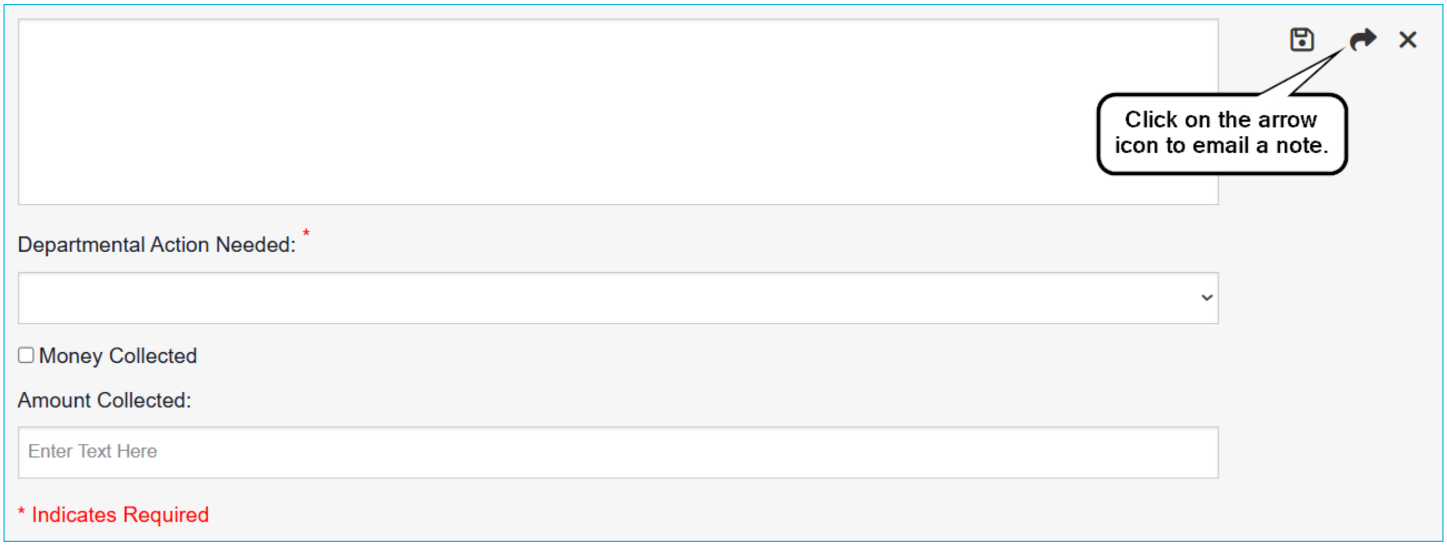
☞ **<u>Note:</u> Within the Customer's BI Graph, each user can now set the view they would like to see, as it "remembers" the filter settings for Sales Groups (enabled/disabled), Sub Lines (enabled/disabled), and Display Lines (All/With no sales/Only with sales) to be displayed as set in subsequent logins.**

Notes

- From the *CUSTOMER NAVIGATION* screen, click on the `Notes` colored menu tile and the screen will display any note entry information for the customer as shown:

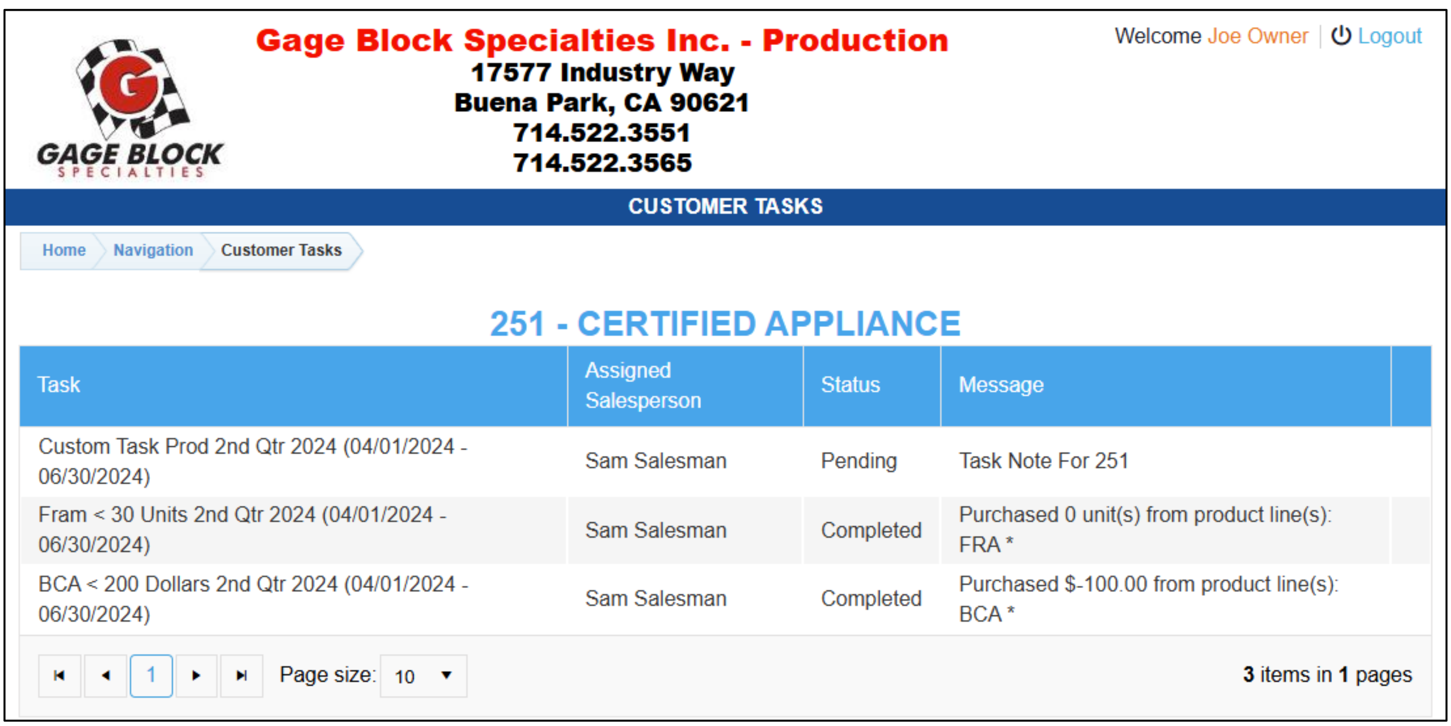


The note entry displays the actual note, the creation/last modification dates, and the names of who created/modified the note entry. A note can be added by clicking on the (Add ✚) button. The existing note entry can be modified by clicking on the edit note (✐) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry. If the Administrator has note "Outcome" enabled, you will be able to include an outcome. It may be mandatory to select before saving, if the Administrator set it that way. There are also note "Importance" and up to 10 user defined fields (UDF's) that can be setup and work the same as an outcome.



Tasks

- From the *CUSTOMER NAVIGATION* screen, click on the `Tasks` tile and the screen will display any pending tasks for the customer as shown:

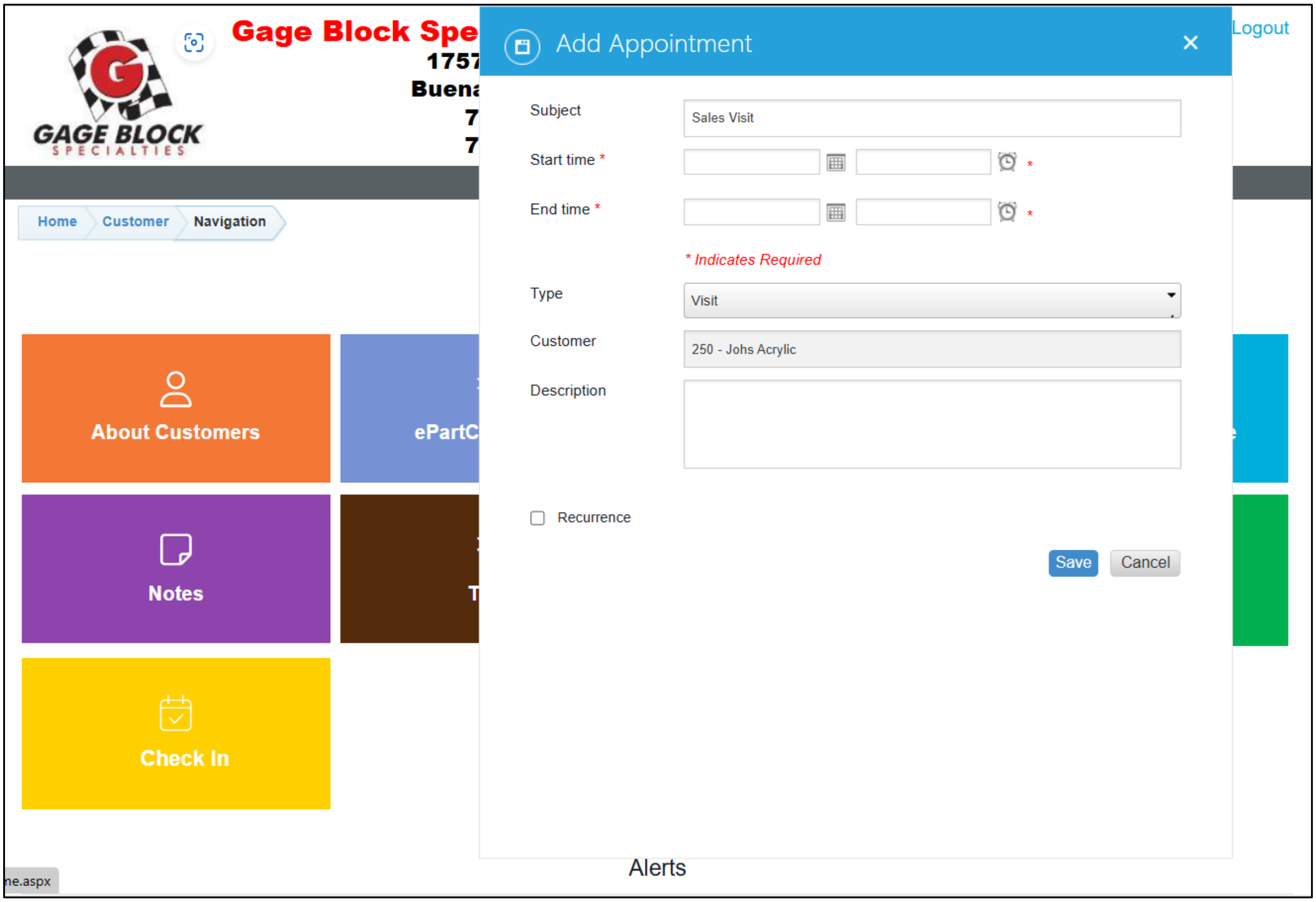


Task	Assigned Salesperson	Status	Message
Custom Task Prod 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	Sam Salesman	Pending	Task Note For 251
Fram < 30 Units 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	Sam Salesman	Completed	Purchased 0 unit(s) from product line(s): FRA *
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	Sam Salesman	Completed	Purchased $-100.00 from product line(s): BCA *

Each task will display the assigned salesperson, its status (*Completed*/*Pending*) and a message. If a note has already been entered for a specific task, the *Status* column will display *Completed*.

Schedule Appointment

- From the *CUSTOMER NAVIGATION* screen, click on the Schedule Appointment colored menu tile and the screen will display an *Add Appointment* pop-up window for the customer as shown:

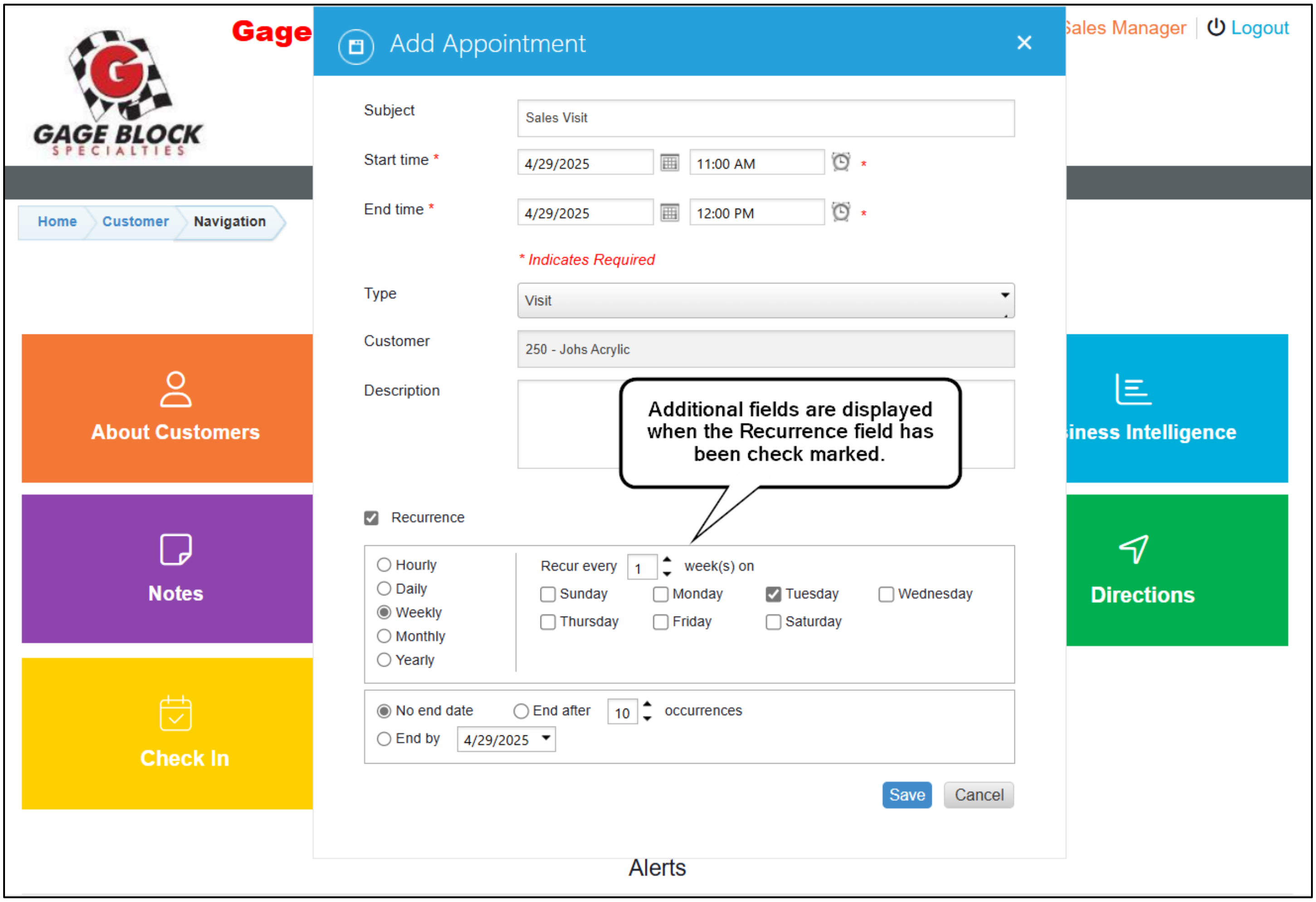


The screen will now display an Add Appointment pop-up window with the Subject field defaulted to *Sales Visit* and the appointment Type field defaulted to *Visit*.

- With the cursor positioned within the Subject field, you have the option to change the default value of *Sales Visit* and press the <Tab> key.
- With the cursor positioned within the Start on date field, you have the option to change the default date and time by clicking on the calendar ( )/clock ( ) icons to select a different date and/or start time and then press the <Tab> key.
- With the cursor positioned within the End on field, you have the option to change the default date and time by clicking on the calendar ( )/clock ( ) icons to select a different date and/or end time and then press the <Tab> key.
- With the cursor positioned within the Type field, you have the option to change the default value of *Visit* by clicking on the down arrow at the end of the field to view a drop-down selection list of *Visit*, *Follow Up* or *Call*. Click on the desired type and press the <Tab> key.

- With the cursor positioned within the Description field, you have the option to enter in a description and press the <Tab> key.
- If the appointment is going to be a recurring occurrence, click on the Recurrence check box field.

The bottom of the Add Appointment pop-up window will display additional fields in regards to setting up the recurrence as shown:



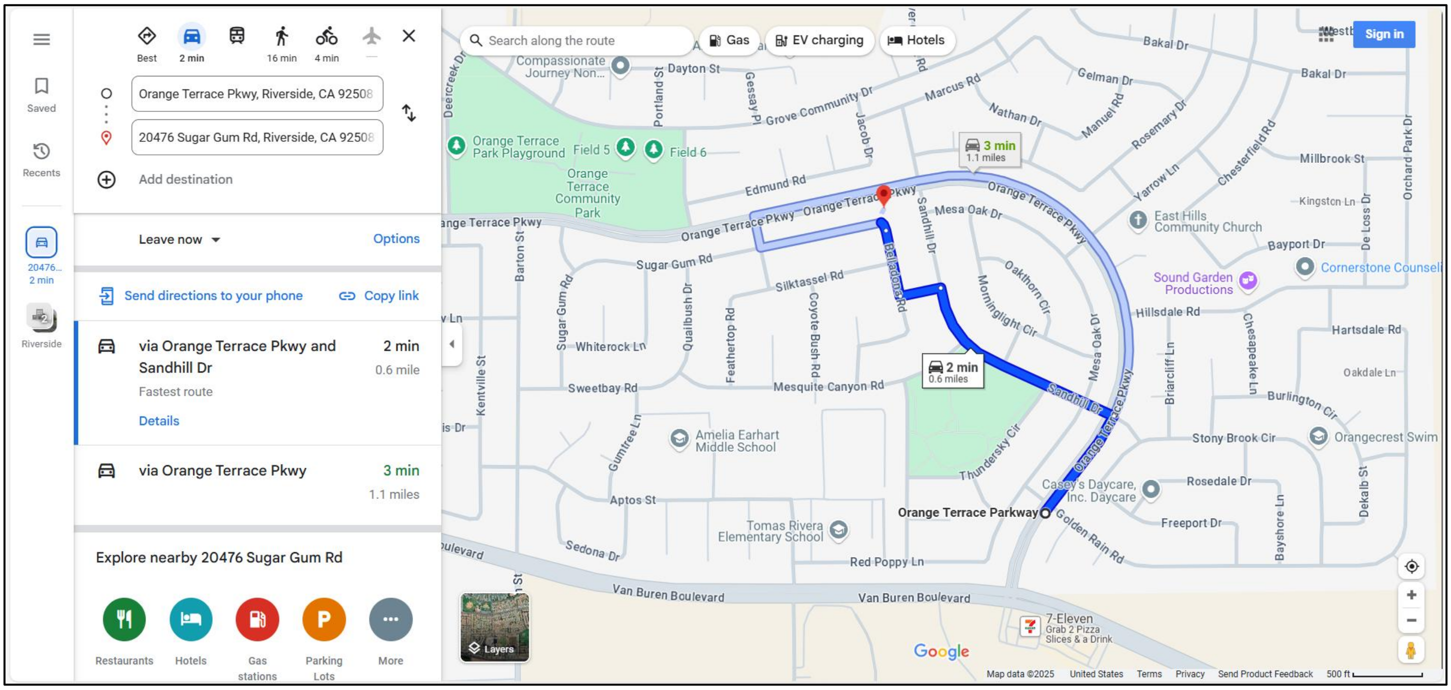
First select the type of recurrence (*Hourly, Daily, Weekly, Monthly, Yearly*) and then set the additional recurrence specific fields accordingly. You have the option to change any of the default values to match the frequency of your recurring appointment.

- Once all your fields have been setup, click on the Save button.

The appointment will now be displayed within the time slot setup within the SCHEDULE.

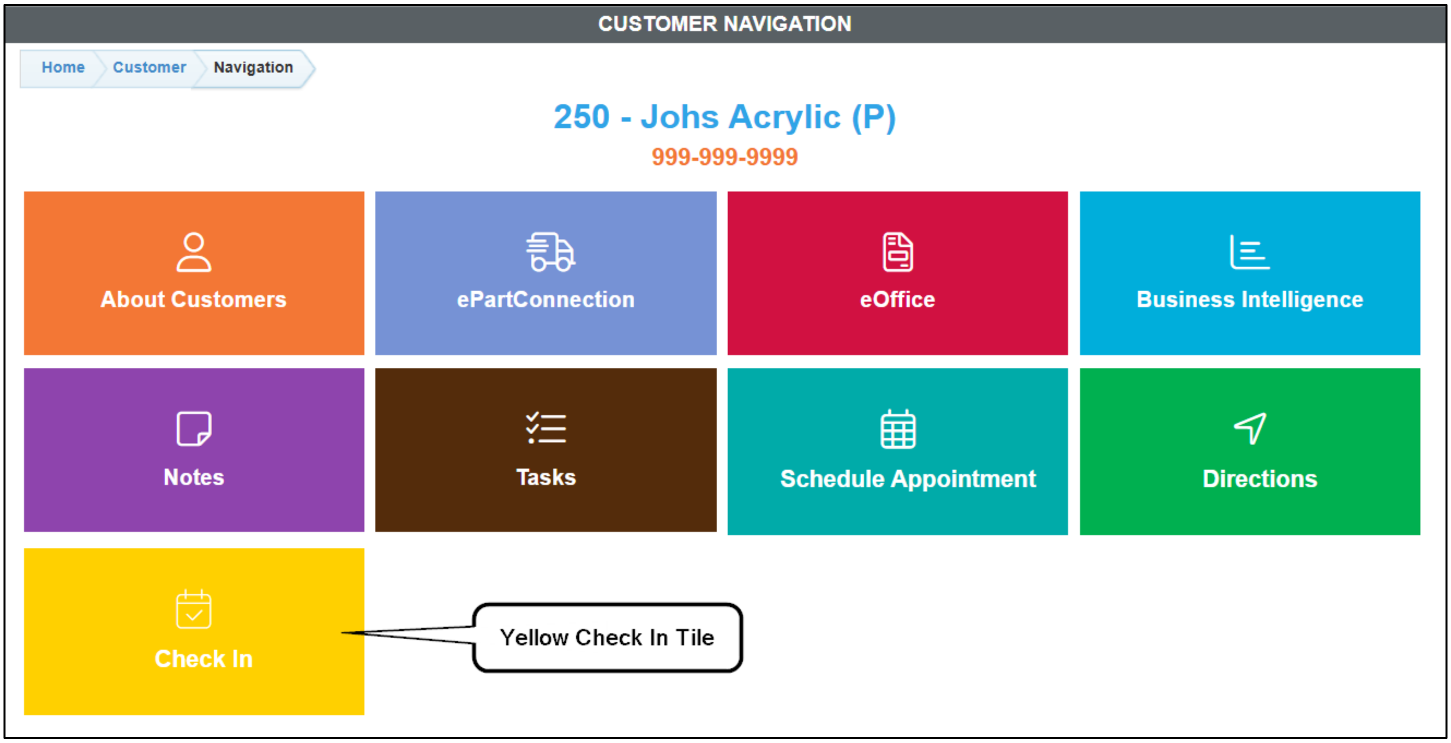
Directions

- From the *CUSTOMER NAVIGATION* screen, click on the `Directions` tile and the screen will open a new tab displaying directions from the current location to the customers address as shown:

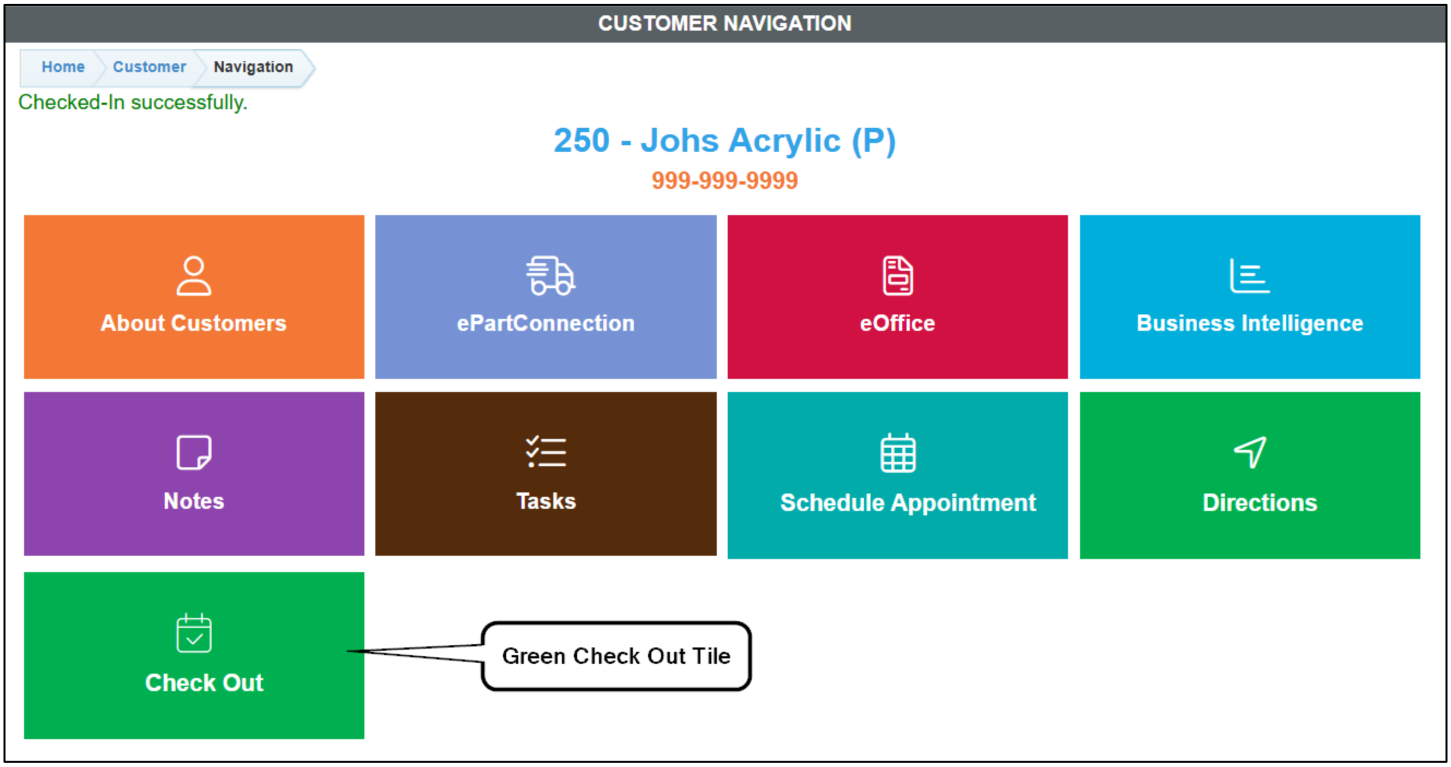


Check In/Check Out

The `Check In/Check Out` tiles are used for checking in and out when visiting a customer (color and label change depending on whether a check in has been done). Initially, a yellow `Check In` tile is displayed as shown:



- Once the user clicks on the yellow tile and "checks in," the screen will display "Checked-In successfully" in green text and the tile then changes to a green `Check Out` tile as shown:



- Once the user clicks on the green tile and "checks out," the tile will then change back to a yellow `Check In` tile again.

☞ **Note: The check in/out tiles are always visible and are not dependent on whether the customer has a scheduled appointment or is assigned to a workday.**

Yellow Check In

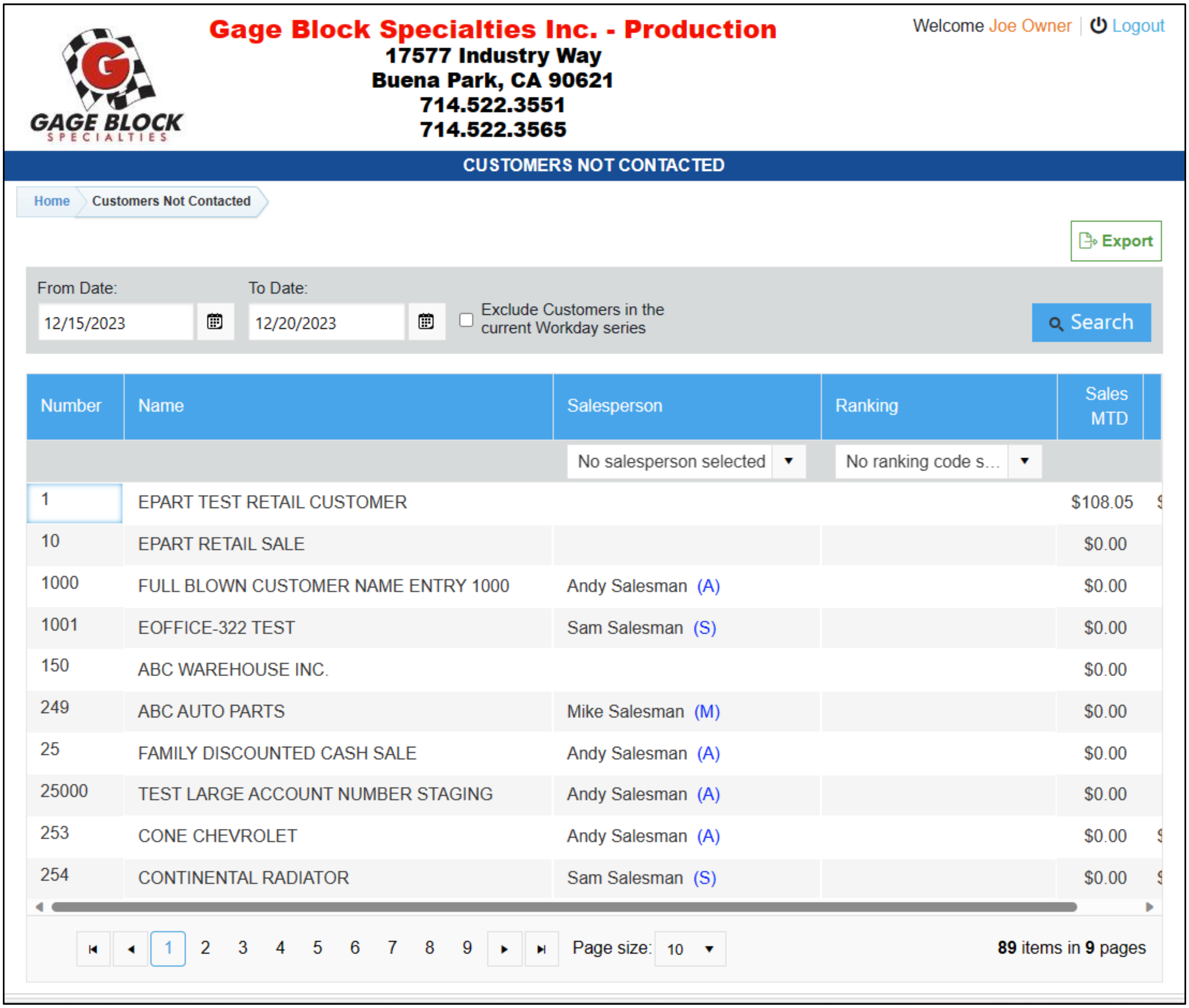
Upon clicking the yellow "Check In" tile, an entry will be made within the *Customer Visits->In-Out* tab screen showing a date/time entry under the "Check In" column and an orange (checked in within geofence) or a light purple (checked in outside geofence) pinpoint will be created on the *Map Visits* tab screen. The data that will be saved when the user clicks on the yellow "Check In" tile will be the customer's name and number, date, time, and device location coordinates. This will be used for plotting on the *Customer Visits->Map Visits* tab screen.

Green Check Out

Upon clicking the green "Check Out" tile, an entry will be made within the *Customer Visits->In-Out* tab screen showing a date/time entry under the "Check Out" column. The data that will be saved when the user clicks on the "Checking Out" tile will be the customer's name and number, date, and time. At this time the pinpoint color will be adjusted according to the criteria as described in the *Map Visits* tab section.

Customers Not Contacted

- From the Admin User's home screen, to view customers that have not been scheduled for appointments, click on the `Customers Not Contacted` button and the following screen will be displayed:



The screen will default to displaying all customers who have not been contacted for the last 5 days (up to the current date). Not contacted means no appointments were scheduled and optionally not in the current workday series.

Selecting From/To Dates To View

The `From/To Date:` fields will default to showing the last 5 days up to the current date.

- Click on either date field to select a different date range.

Excluding Customers In The Current Workday Series

The `Exclude Customers In The Current Workday Series` checkbox fields will default to not being selected.

- Click on the checkbox field to exclude all customers who are currently assigned to any workday within the current series.

Filtering By Salesperson

- You can to filter customers not contacted for one or more specific salespersons by clicking on the down arrow button below the `Salesperson` field and check marking the *All*, *(Unassigned)*, or the specific salespersons names you want to view from the drop-down selection list.

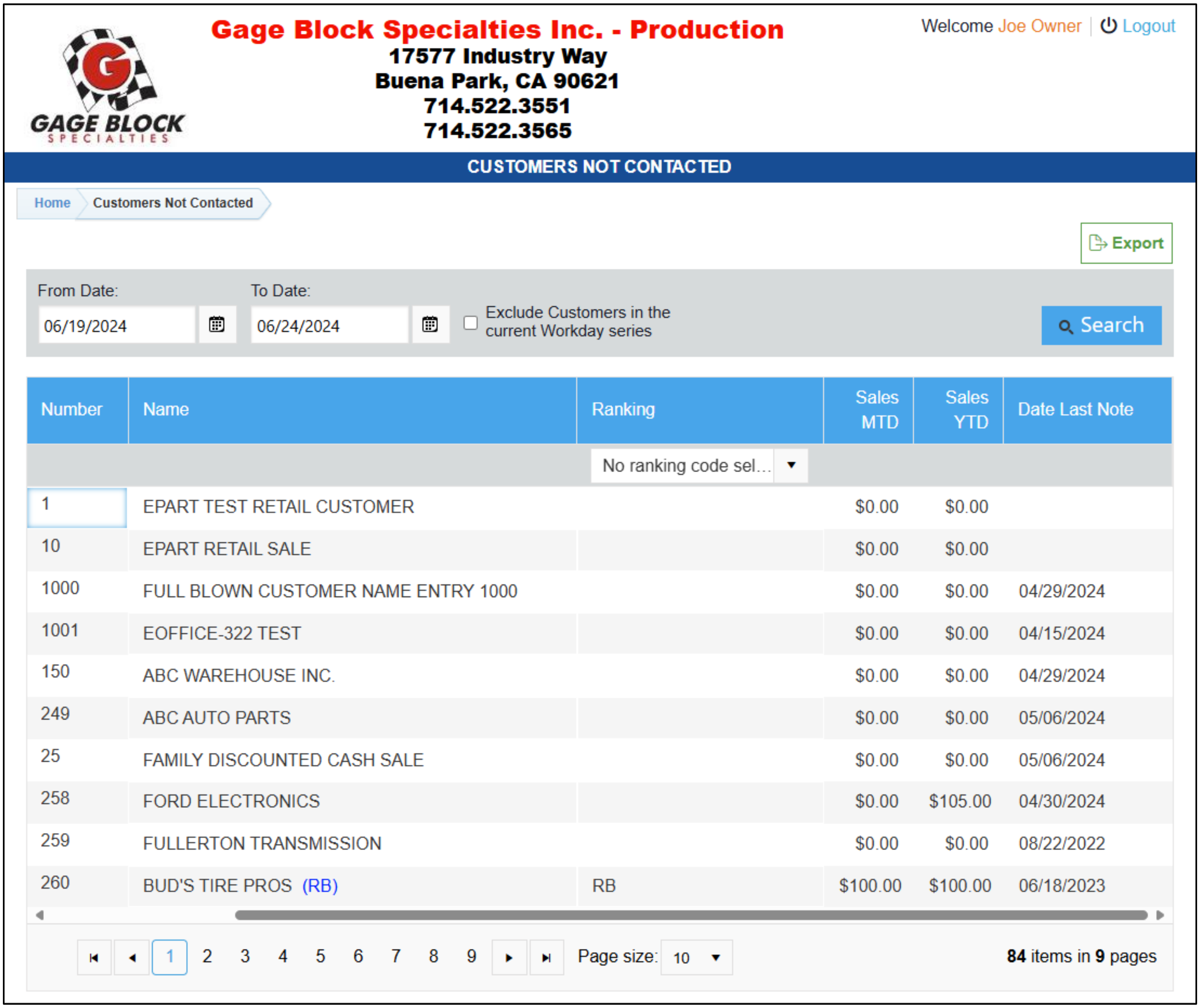
Select By Ranking

The `Ranking` field will default to no ranking codes selected.

- You can to filter customers not contacted for one or more specific ranking codes by clicking on the down arrow button below the `Ranking` field and check marking the *All*, *(blank)*, or the specific ranking codes you want to view from the drop-down selection list.

Displaying The Results

- Once the date ranges have been selected, click on the blue `Search` button and the screen will then display any customers not scheduled for an appointment or that has not had a note entered during the specified date range will be displayed. The month/year to date sales and date of last note will be listed for each customer displayed. The results can further be filtered by selecting specific salesperson(s) and/or ranking codes.



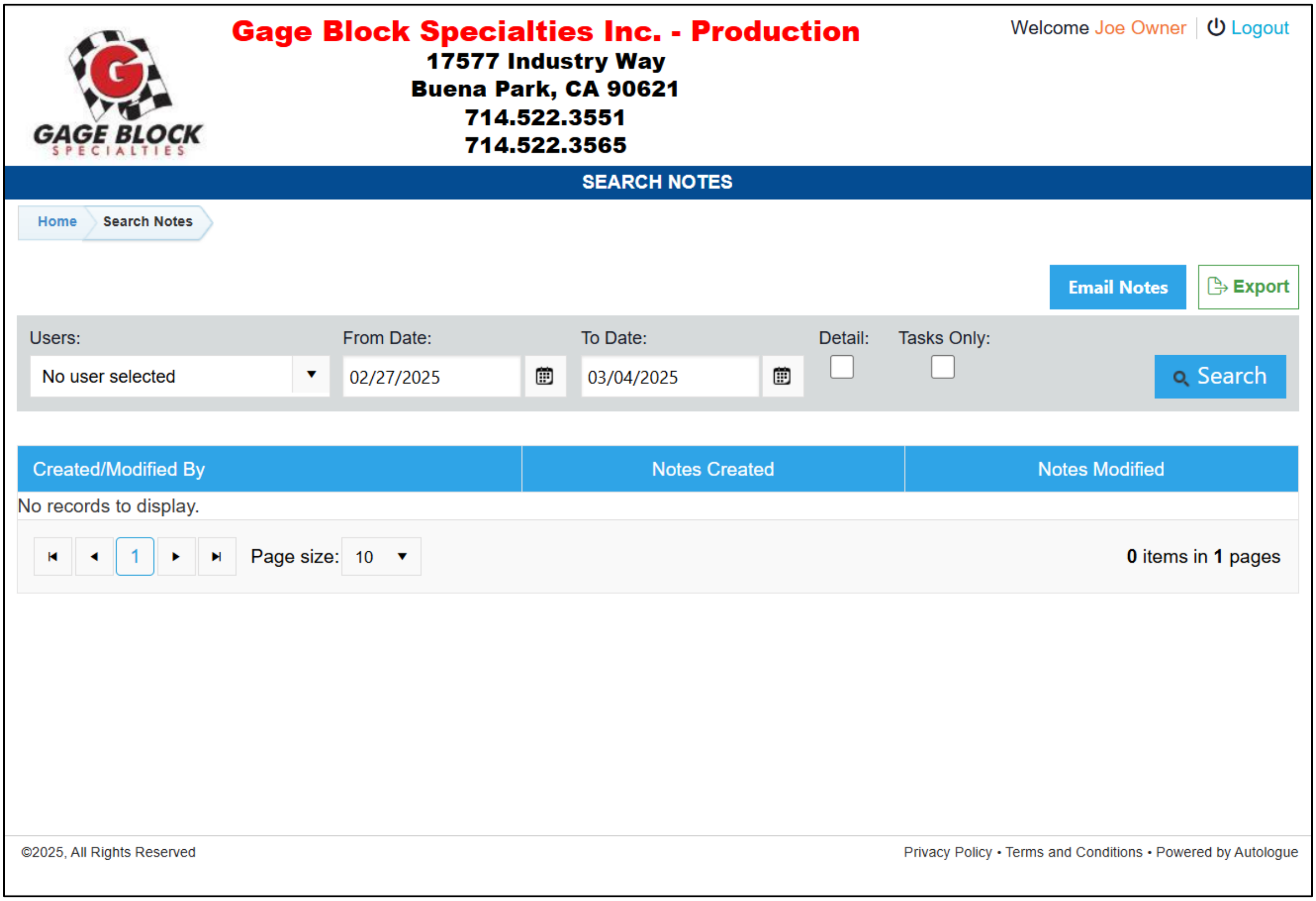
Number	Name	Ranking	Sales MTD	Sales YTD	Date Last Note
1	EPART TEST RETAIL CUSTOMER		$0.00	$0.00	
10	EPART RETAIL SALE		$0.00	$0.00	
1000	FULL BLOWN CUSTOMER NAME ENTRY 1000		$0.00	$0.00	04/29/2024
1001	EOFFICE-322 TEST		$0.00	$0.00	04/15/2024
150	ABC WAREHOUSE INC.		$0.00	$0.00	04/29/2024
249	ABC AUTO PARTS		$0.00	$0.00	05/06/2024
25	FAMILY DISCOUNTED CASH SALE		$0.00	$0.00	05/06/2024
258	FORD ELECTRONICS		$0.00	$105.00	04/30/2024
259	FULLERTON TRANSMISSION		$0.00	$0.00	08/22/2022
260	BUD'S TIRE PROS (RB)	RB	$100.00	$100.00	06/18/2023

Exporting The Results

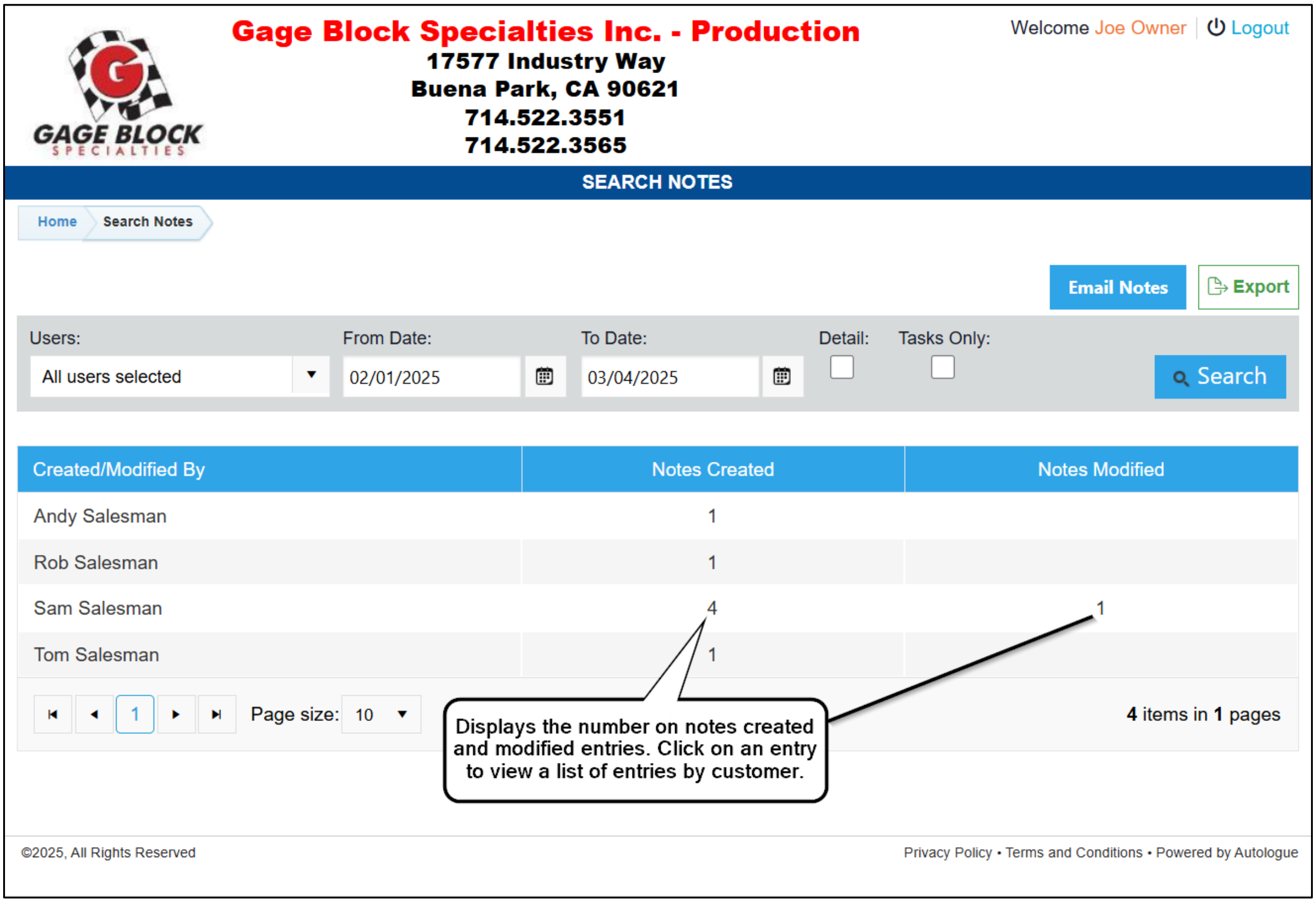
- Click on the `Export` button to save the customers not contacted information to an Excel formatted spreadsheet file (*CustomerNotContacted.xlsx*).

Search Notes

- From the administrator's home screen, to search for a note entry, click on the `Search Notes` tile and the following screen will be displayed:



By default, no users are selected and the `From/To` dates will be from 5 days prior to the current date. A user must be selected from the `Users` drop-down, then the `Detail` and/or `Tasks Only` can be checked to display all note detail. If neither box is checked, the screen will display as below. The screen only displays results when you click on the blue `Search` button.

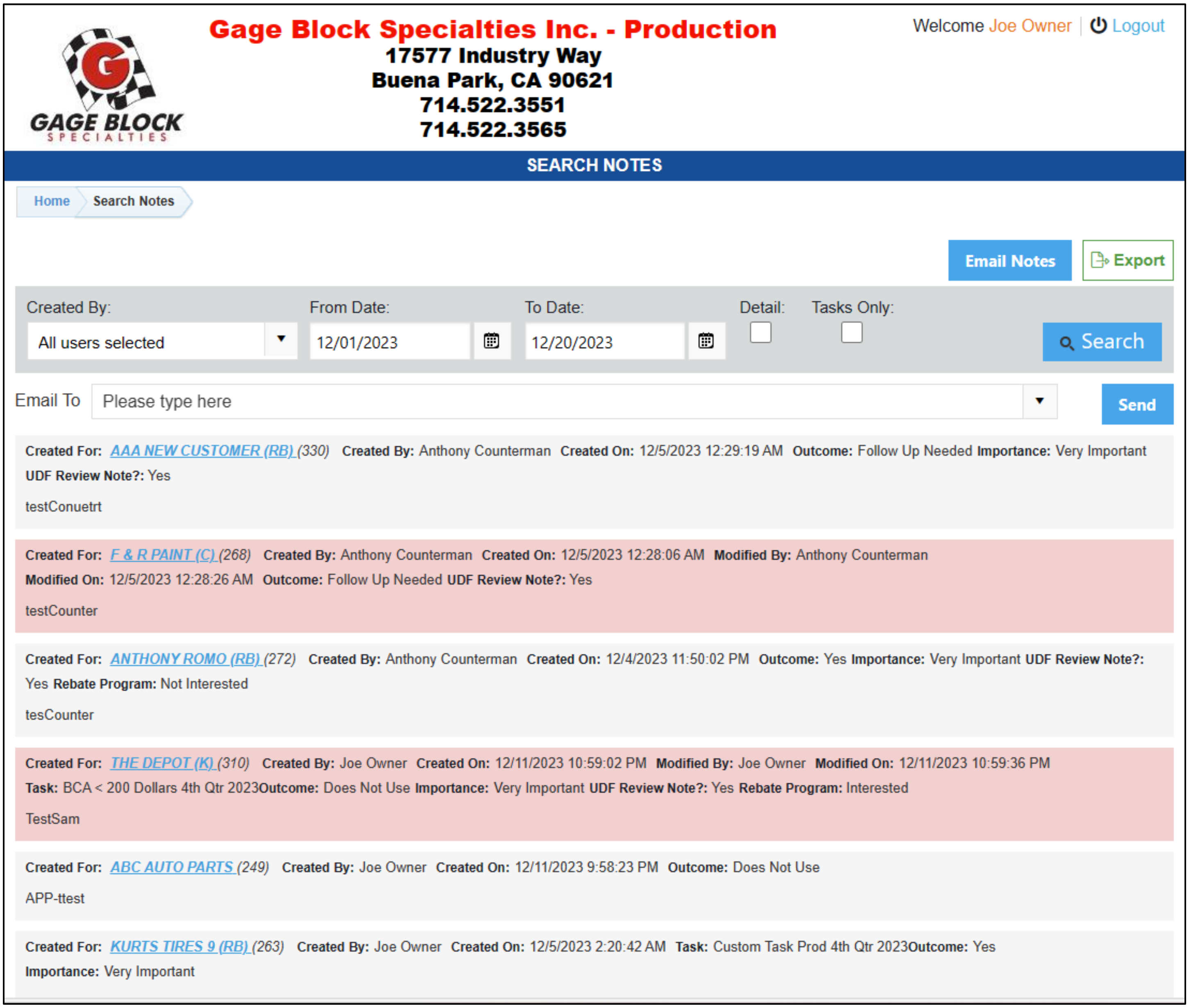


The screen will display a `Created/Modified By` column that lists the users and number of notes created/modified they have performed within the date range selected. To see note detail or only notes taken from the task screen, check the `Detail` and/or `Tasks Only` option(s) and click on the blue `Search` button.

- Click on the green `Export` button to save the notes information to an Excel spreadsheet file (*notes_export.xlsx*).

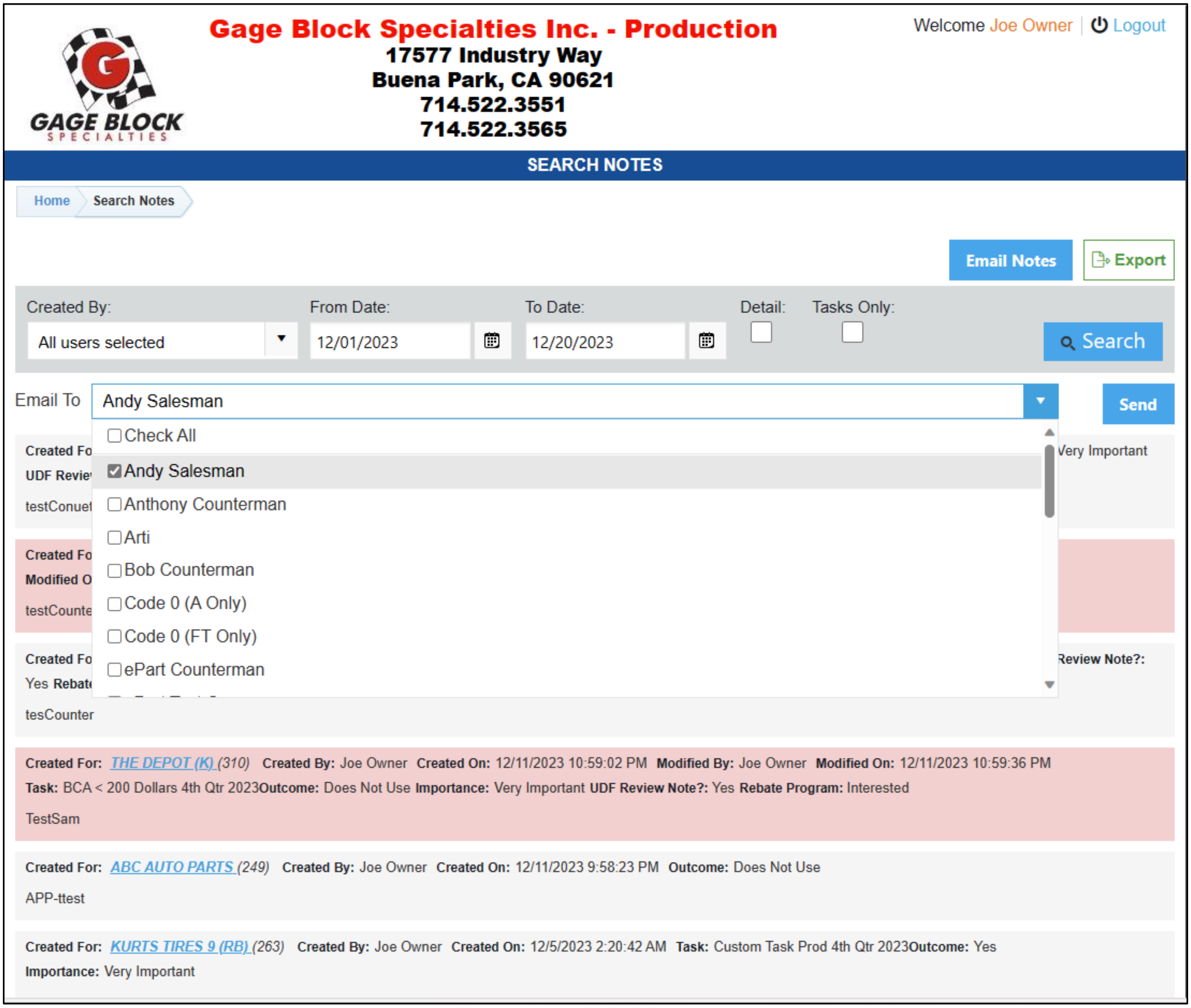
Emailing Search Notes Results

- To have the search note results emailed, click on the blue `Email Notes` button and the following screen will be displayed:

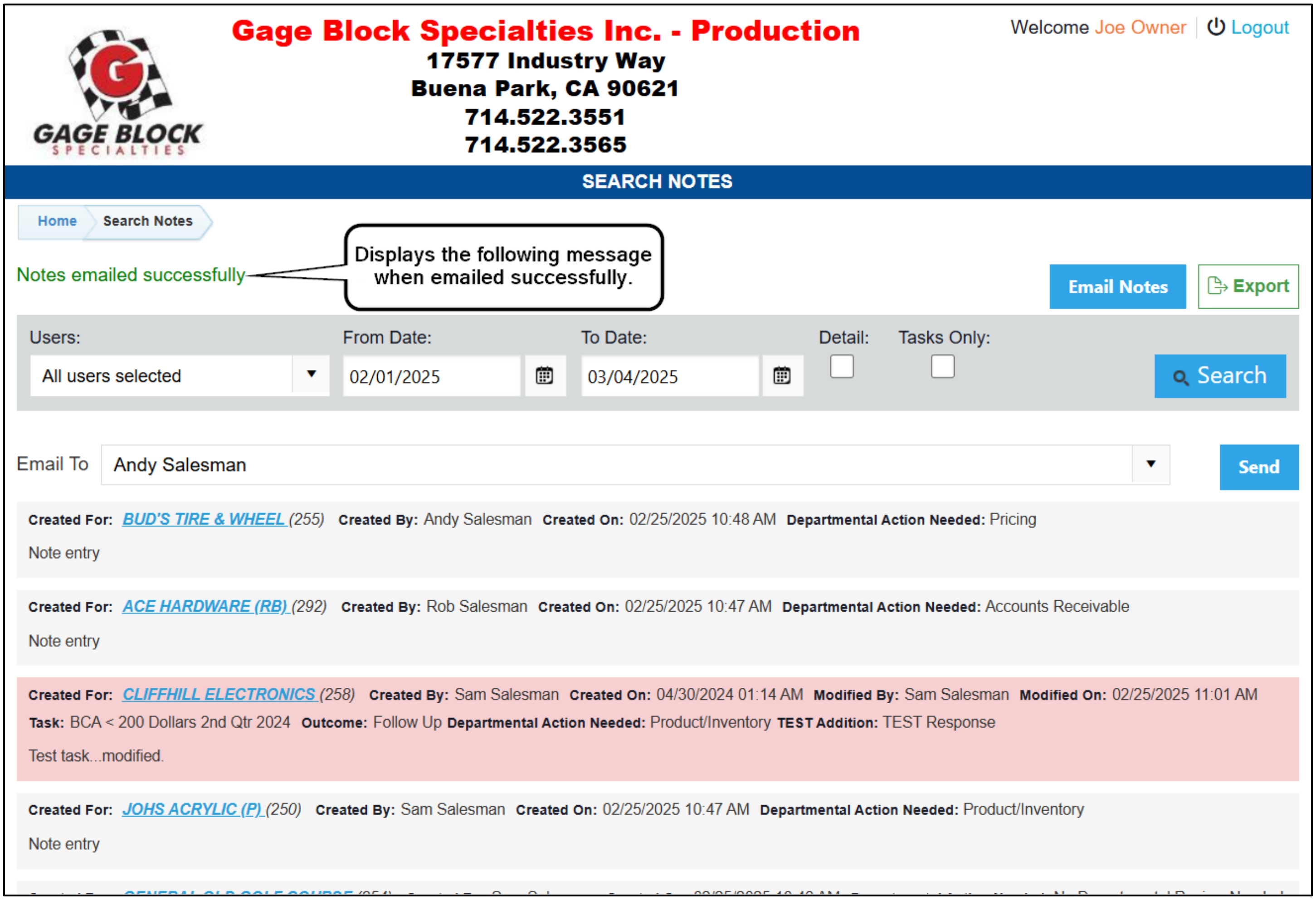


By default, the Email display option displays the notes information as the email would look.

- Click within the `Email To` field to view and select from a drop-down list of all the email recipients that have been setup:

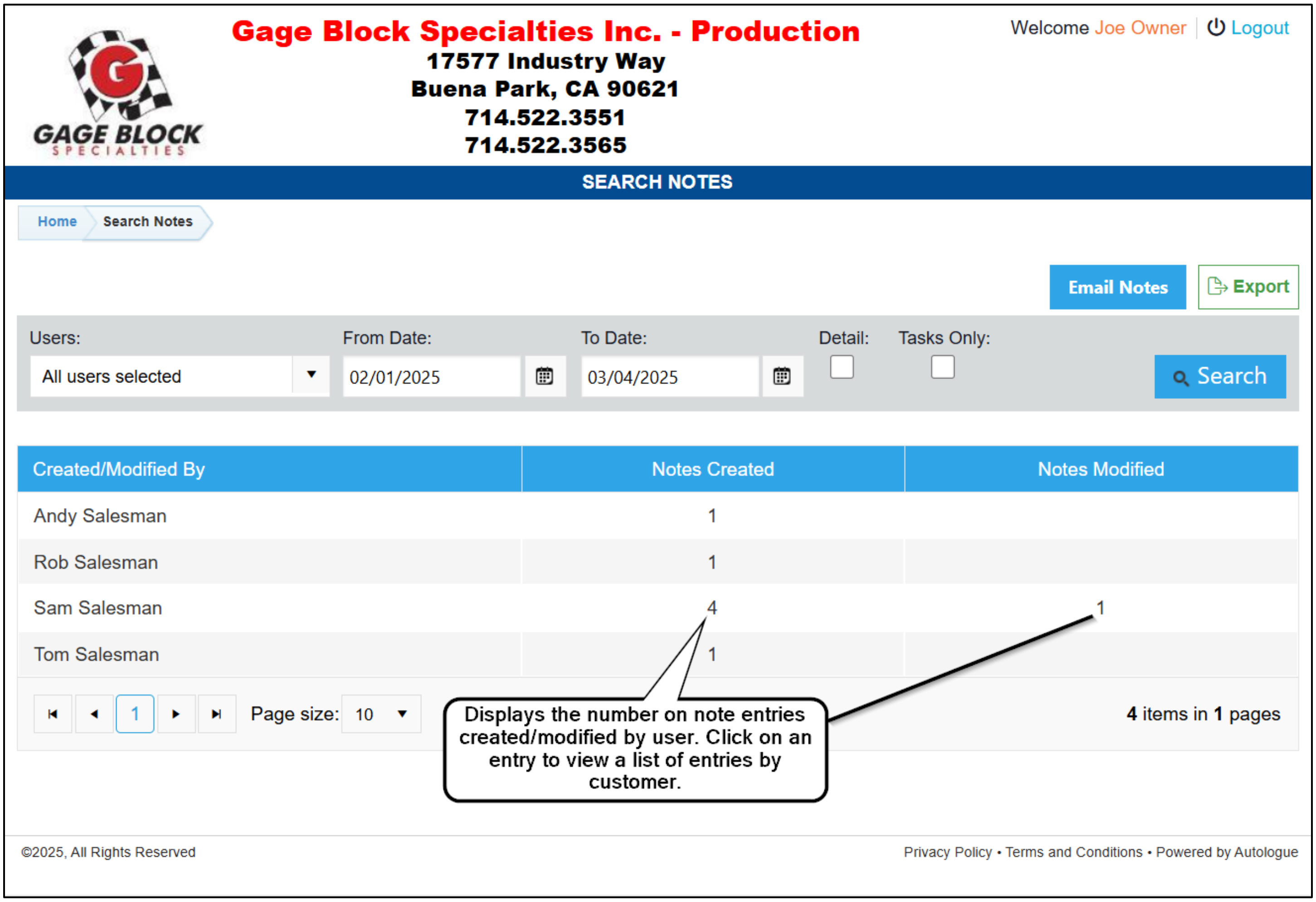


- Once users have been check marked for selection, click on the blue Send button, the screen should now display a green *Notes emailed successfully* message as shown:



Drilling Down Into Notes

You can view or "drill down" into each of the number of note entries (listed by user) by clicking on the number of notes column to the right of the user's name. (If the `Detail` field was checked, all note detail will already be on screen):



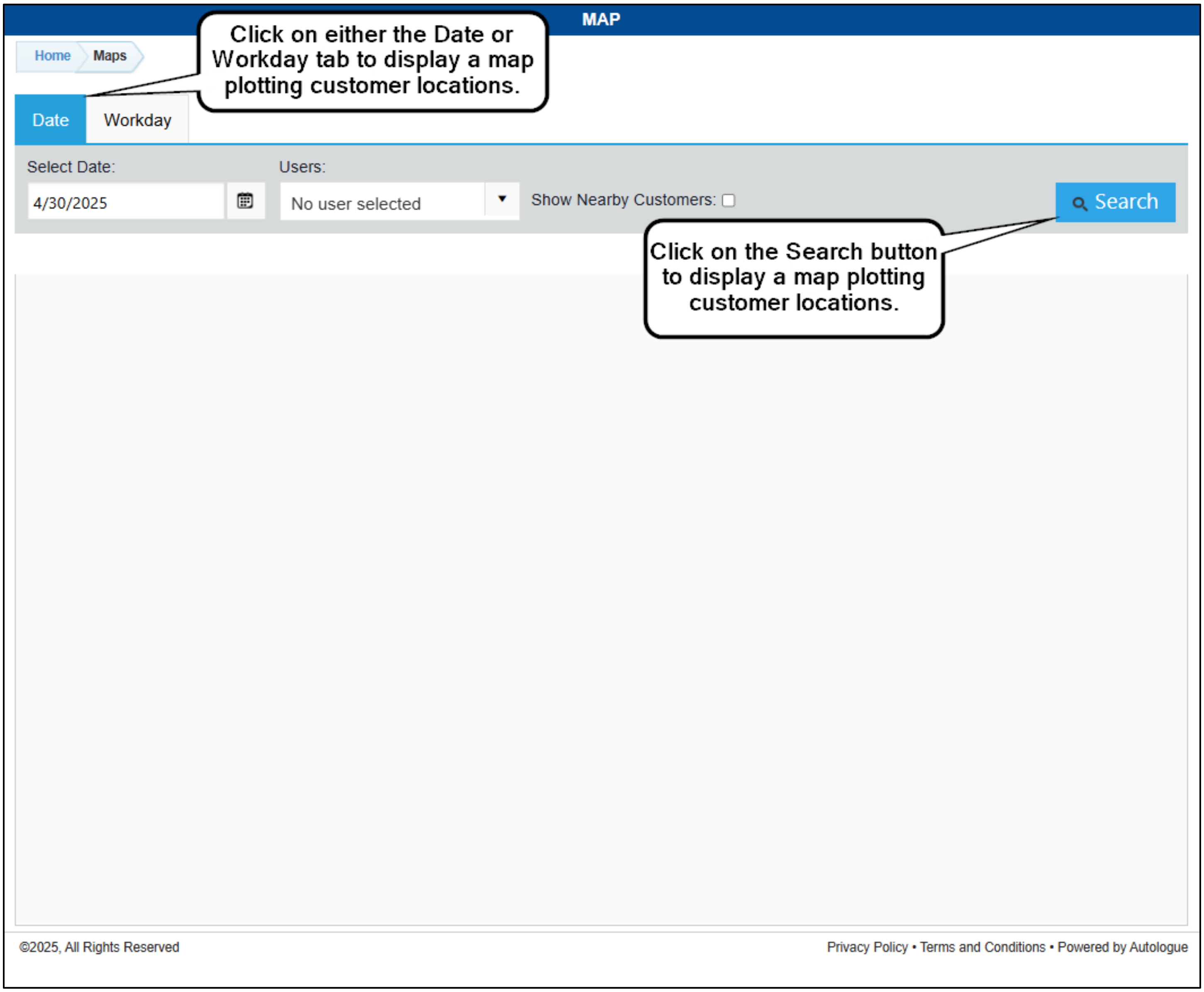
The screen will now display a list of customers along with the number of notes that were entered for the customer listed:

To view the note information for the customer, click on the number of notes column to the right of the customer's name. The screen will display the note entry information for each customer as shown:

The actual note, the creation/last modification dates, and the user names of who created/modified the note entry. A note can be emailed by clicking on the envelope (✉) icon. The existing note entry can be modified by clicking on the edit (✐) icon. Clicking on the trash can (🗑) icon will delete the note entry.

Map Appts/Workdays

- From the administrator's home screen, to view a map of a user's scheduled appointments for the current day or a specific workday (when enabled), click on the `Map Appts/Workdays` button and the following screen will be displayed:



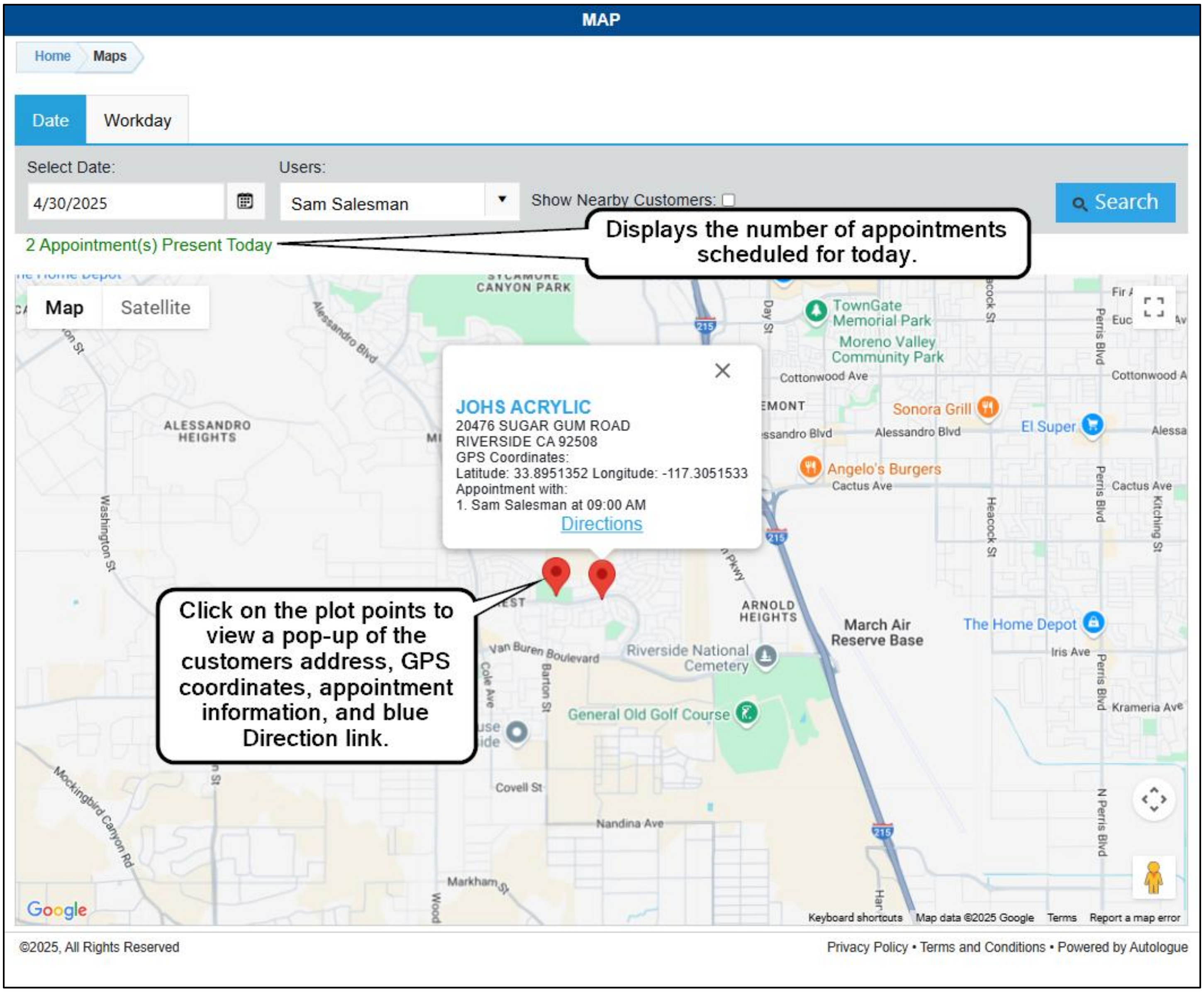
By default, the *Date* tab is selected and no map information is displayed. The `Select Date:` field is defaulted to the current day.

Date Map

- With the *Date* tab selected, to select a specific date to display map information for, click on the calendar icon (▢) button below the `Select Date:` field and click on the specific date to see appointment information for.

- To select specific Users to display map information for, click on the down arrow button below the `Users:` field and check mark the specific users you want to see appointment information for.
- To display a map for the days scheduled appointments with the customer locations plotted, click on the blue `Search` button.

The screen will now display a map plotting the locations of the customers who are scheduled for appointments as shown:



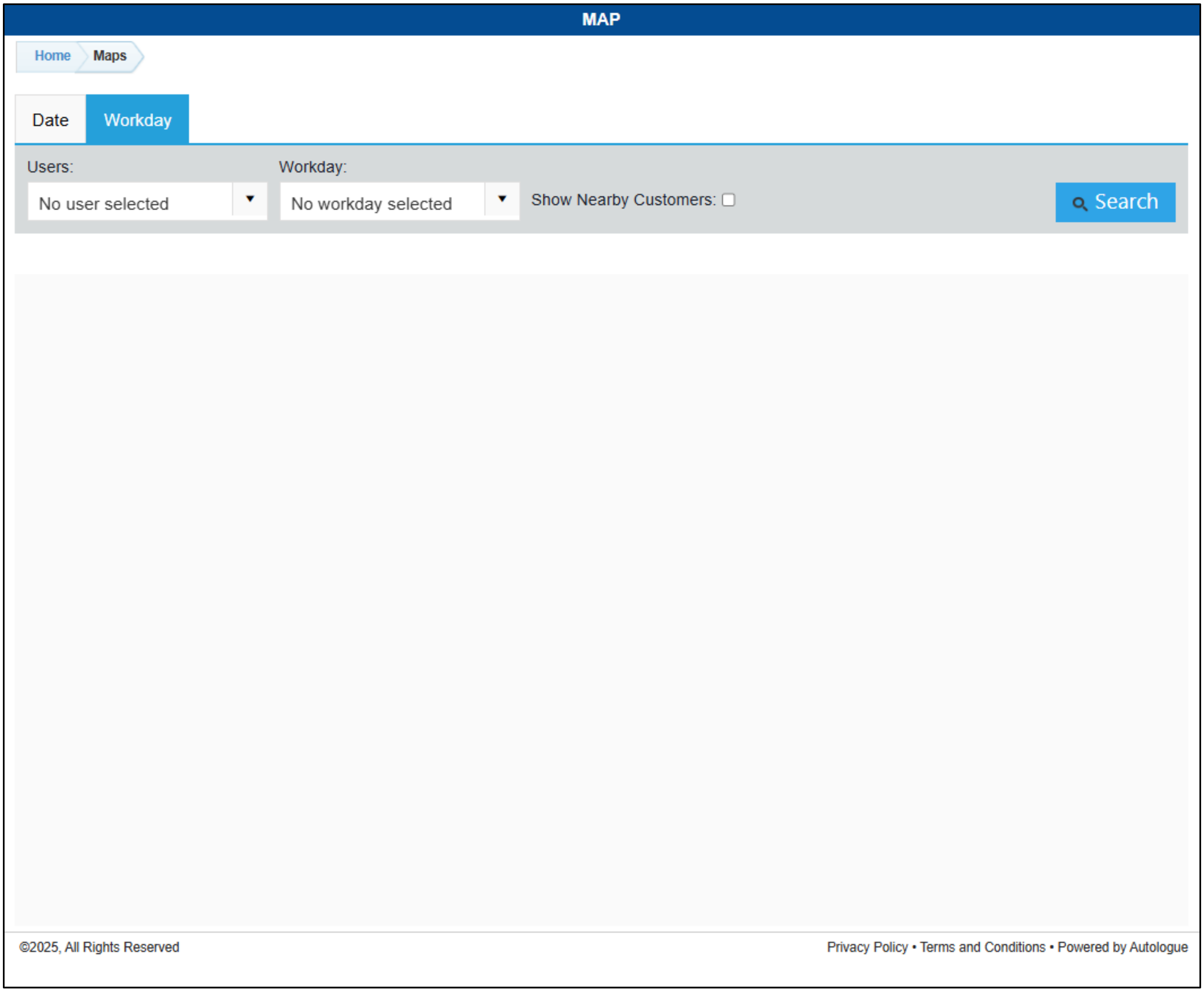
The top of the map will display the number of appointments that are scheduled for the current day.

- Click on any of the plot points to see a pop-up window that shows the customer's name as a blue hyperlink (clicking on it will take you to the Customer Navigation page), address, GPS coordinates, appointment information (who and when) and blue Directions hyperlink for the selected date.
- Clicking on the plus (+) or minus (-) buttons will zoom in/out of the map.

☞ **<u>Note:</u> Hovering over any pinpoint will display a pop-up of just the customer's name.**

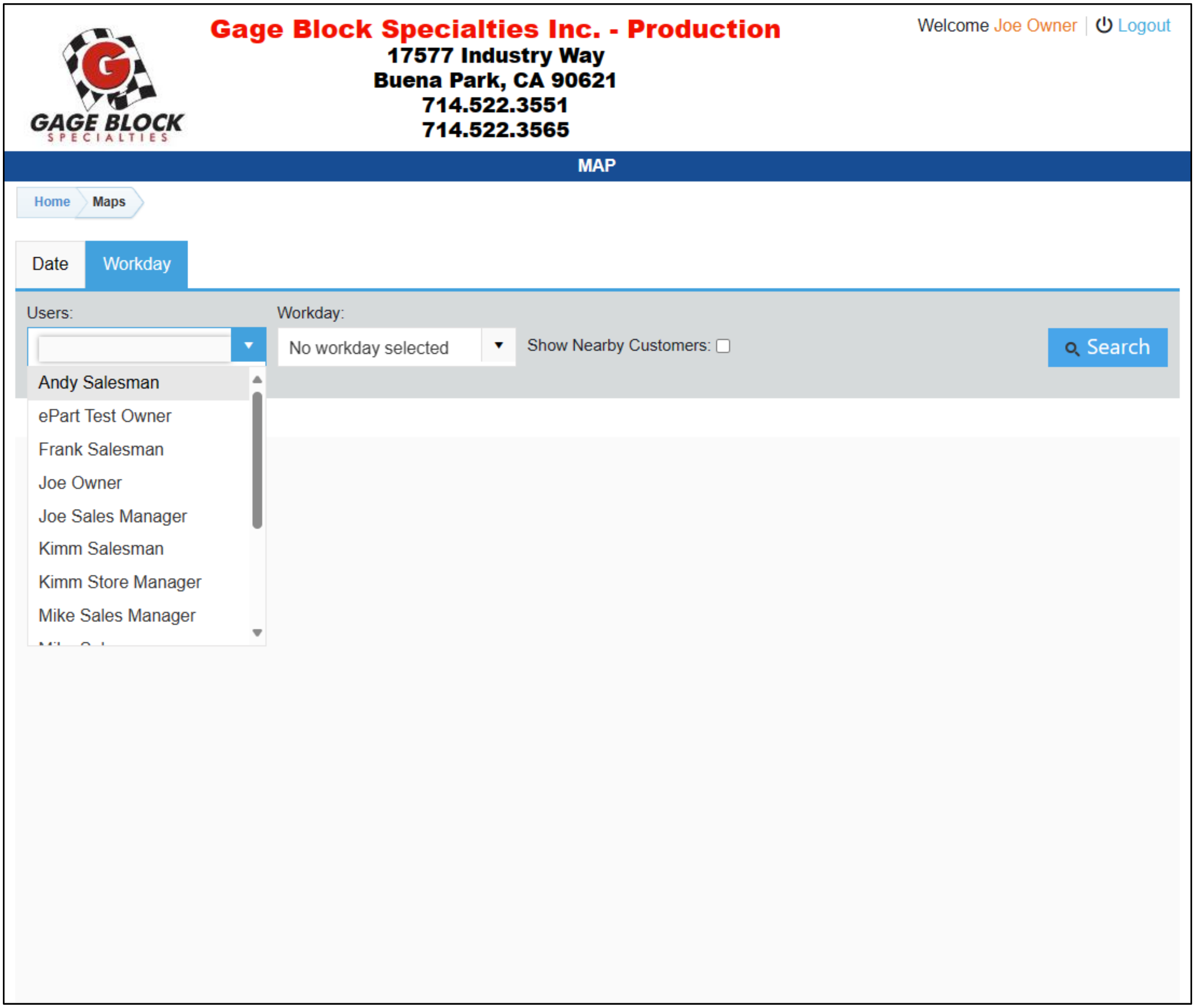
Workday Map

To view a map of a specific user's workday (when enabled), click on the *Workday* tab and the following screen will be displayed:



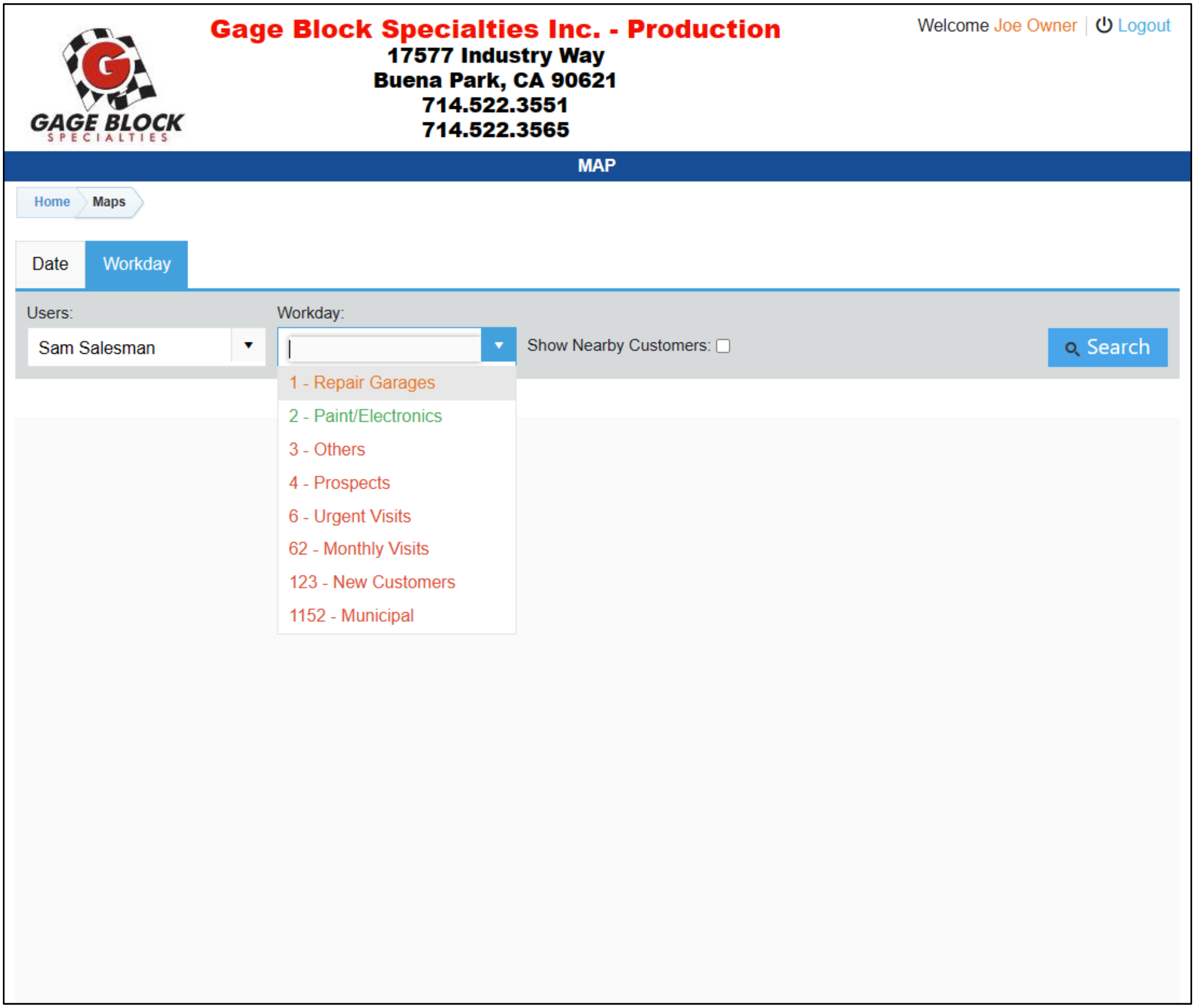
By default, no map information is displayed. The `Users:` field is defaulted to *No user selected* and the `Workday:` field is defaulted to *No workday selected*.

- To select a user to display map information for, click within the drop-down field below the `Users:` heading and a selection list of users will be displayed as shown:



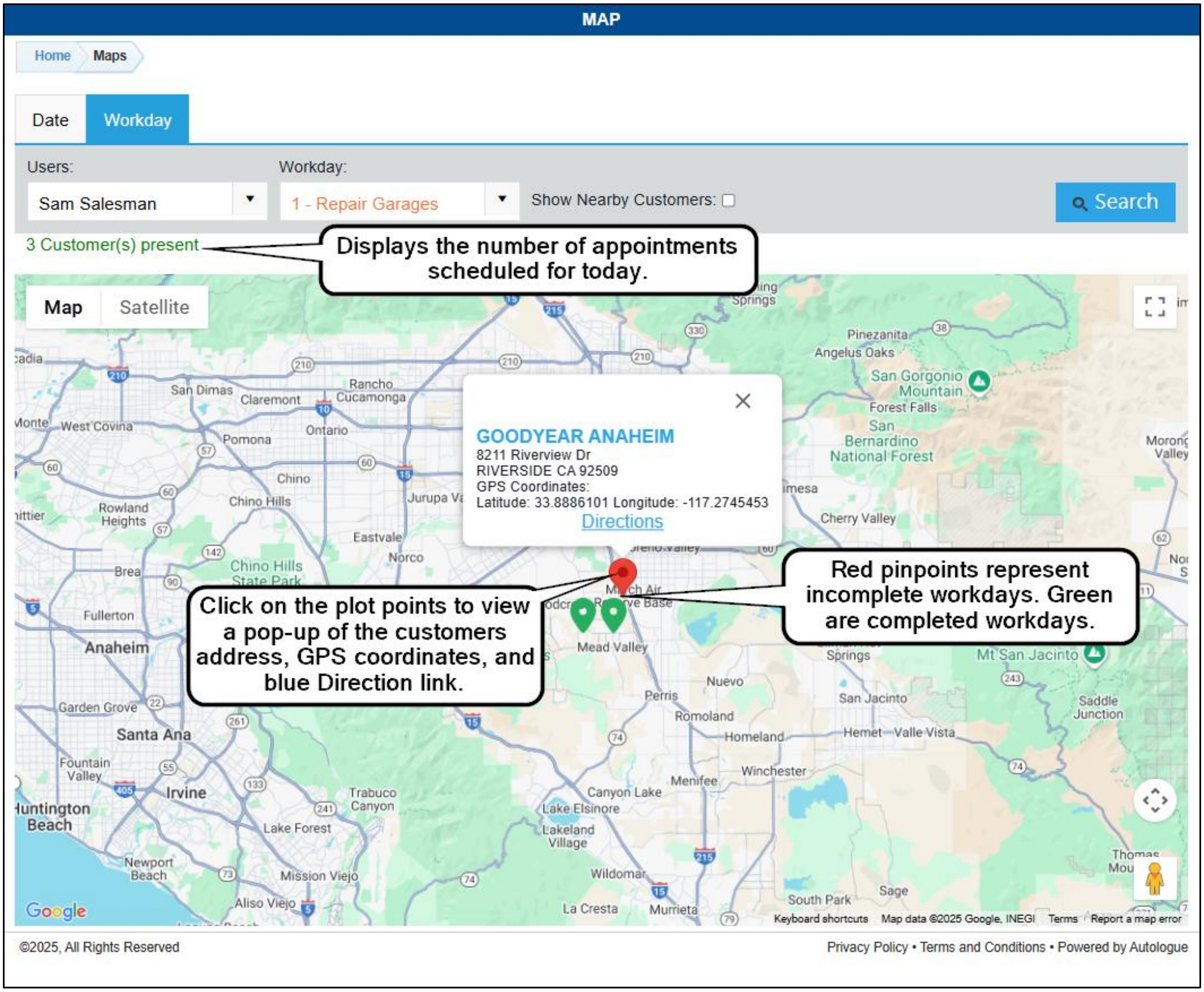
- Click on the specific user to display a map for.

- Next, click within the drop-down field below the `Workday:` heading and a color-coded selection list of workdays will be displayed as shown:



- Click on a specific workday to display a map for with the customer locations plotted, then click on the blue `Search` button.

The screen will now display a map plotting the locations of the customers for the selected workday as shown:



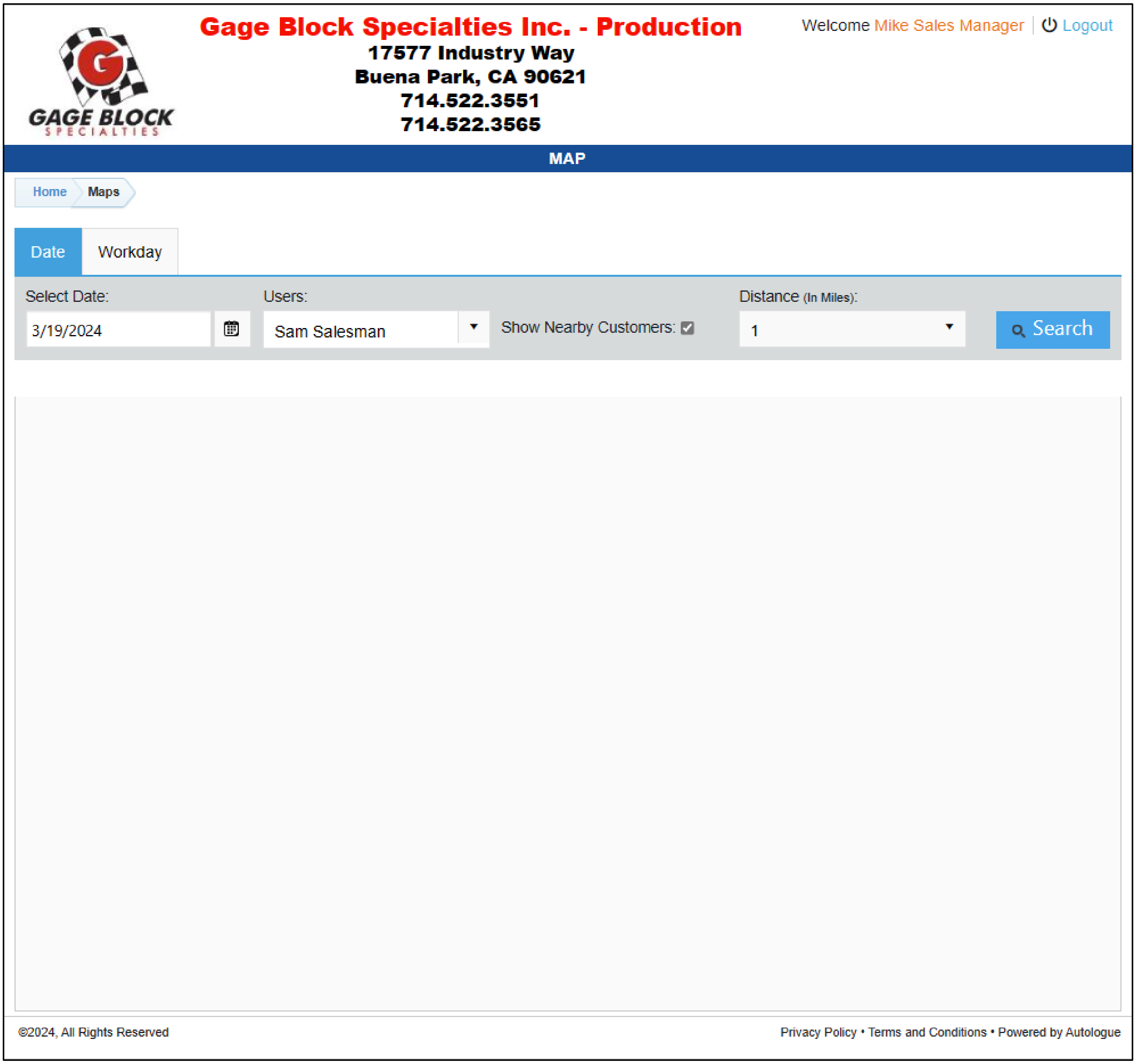
The top of the map will display the number of customers that are scheduled for the workday.

- Click on any of the plot points to see a pop-up window that shows the customer's name as a blue hyperlink (clicking on it will take you to the Customer Navigation page), address, GPS coordinates, and blue Directions hyperlink for the selected workday.
- Clicking on the plus (+) or minus (-) buttons will zoom in/out of the map.

☞ **<u>Note:</u> Hovering over any pinpoint will display a pop-up of just the customer's name.**

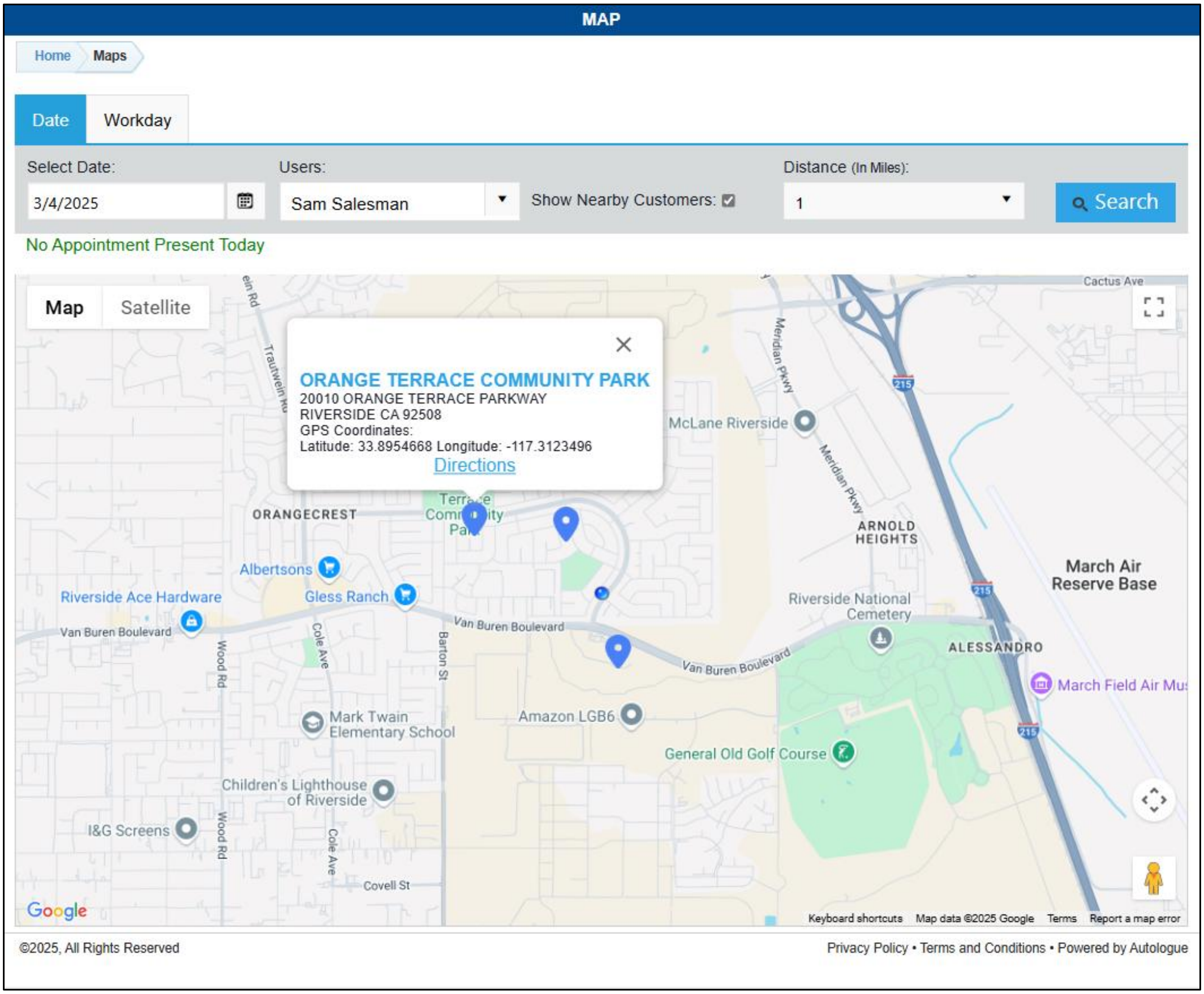
Show Nearby Customers

- To view nearby customers from your current location, click on the Show Nearby Customers check box and the following screen will be displayed:



A Distance (In Miles): field will now be displayed and will display a default value of 1.

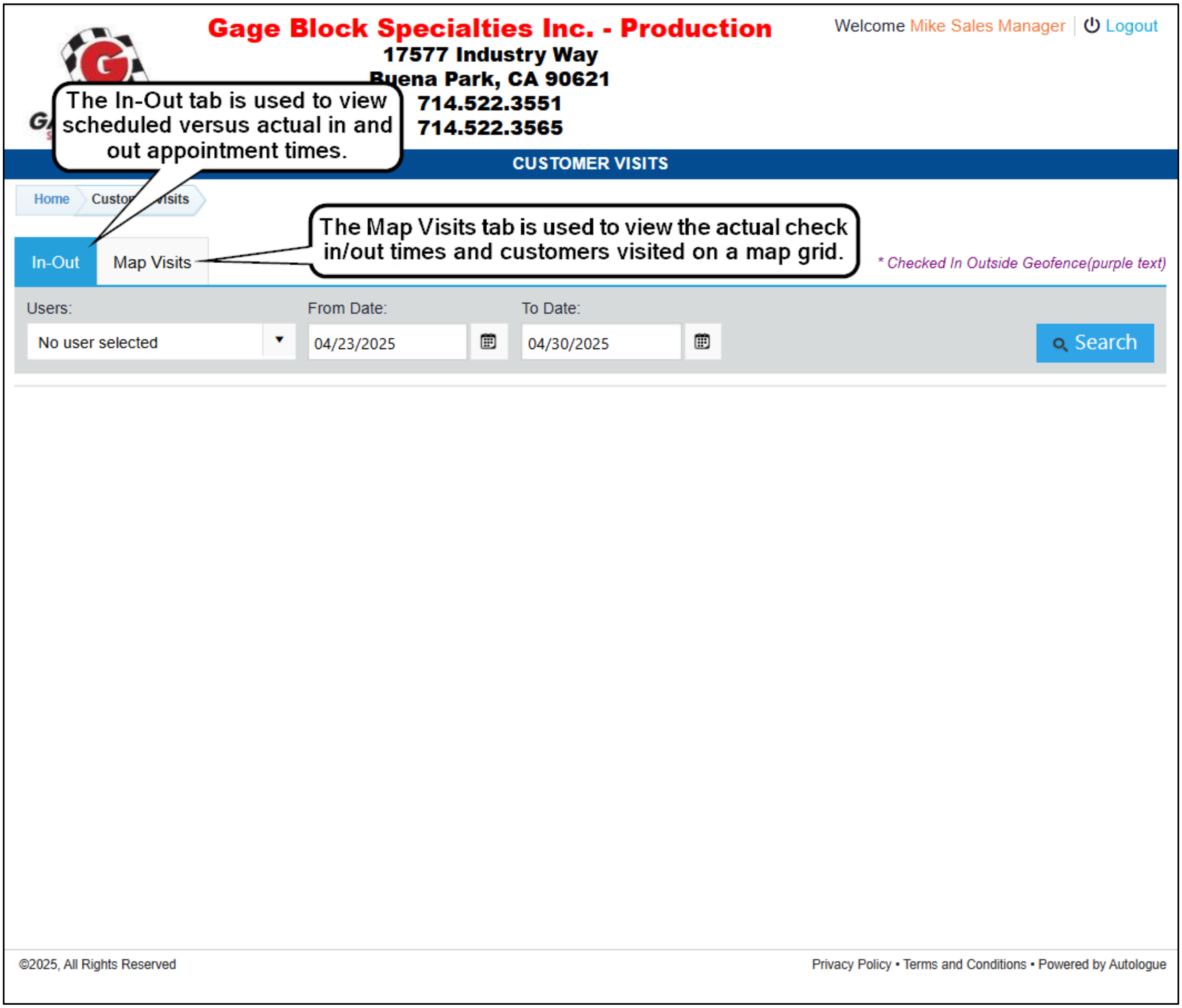
- Click within the `Distance (In Miles):` field, select a distance value of 1-10 miles, and then click on the `Search` button to view nearby customers for on the map as shown:



The blue pinpoints represent the nearby customers within the distance selected. The red pinpoints represent the incomplete appointments. The green pinpoints represent the completed appointments. Click on any of the plot points to see a pop-up window that shows the customer's name as a blue hyperlink (clicking on it will take you to the Customer Navigation page) and address, GPS coordinates, and blue Directions hyperlink.

Customer Visit Tracking

- From the administrator's home screen, to view GPS tracking information for your salesmen's appointments, click on the `Customer Visits` tile and the following screen will be displayed:

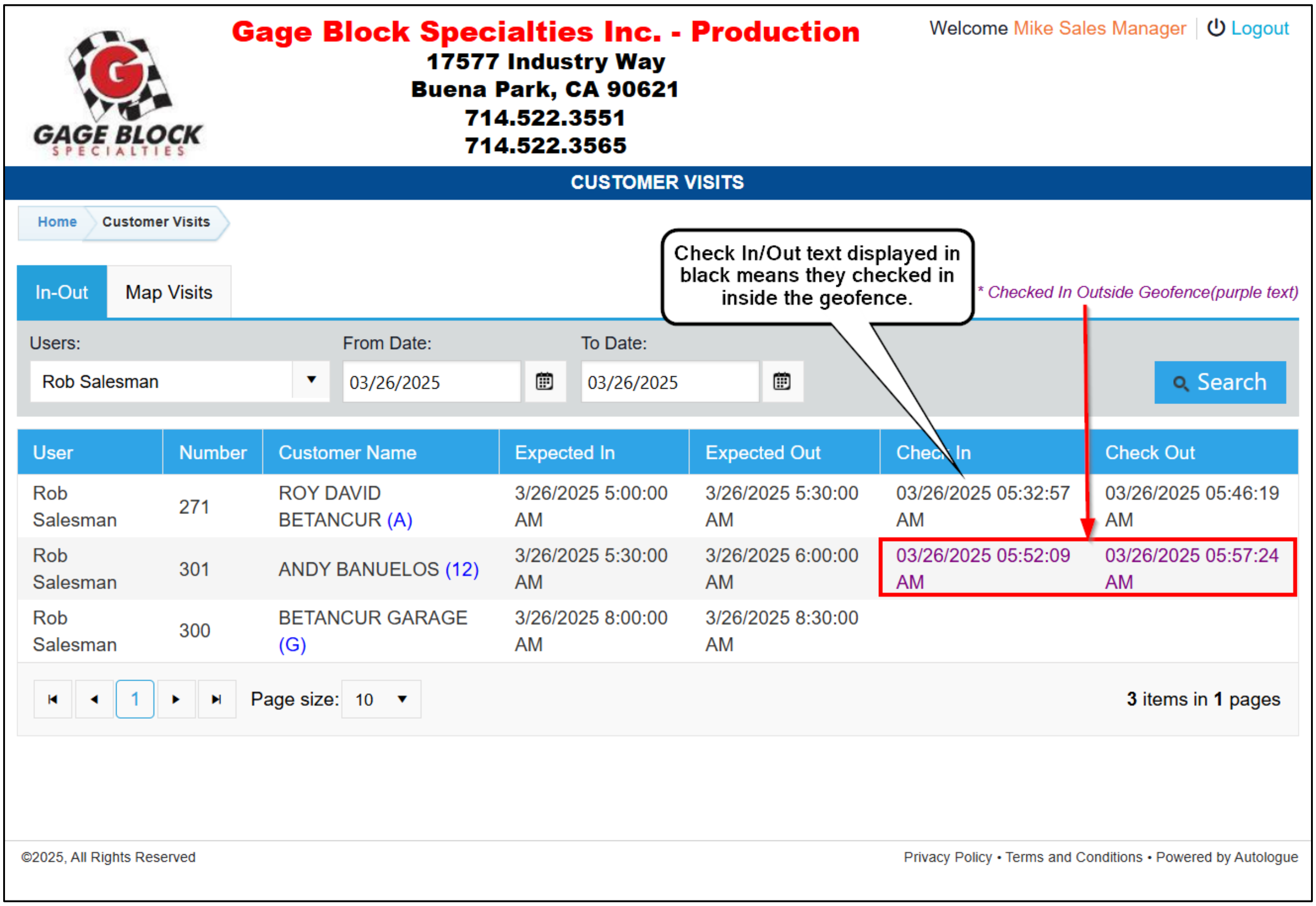


By default, the *In-Out* tab screen is shown with no users selected and the `From/To` dates will be from 7 days prior to the current date.

In-Out Time Tracking

The *In-Out* tab screen is used to view users expected in/out times (scheduled appointments) and check in/out times based upon when they clicked on those tiles within the application.

- You can select one or more users to view in-out information for by clicking on the down arrow button below the `Users` field and check mark only the specific users you want to report on from the drop-down selection list.
- To change the date range to show activity for, click within the fields below the `From/To Date:` fields and enter in the specific dates. Optionally you can click on the calendar buttons to the right of the `From/To Date:` fields and then click on the specific dates to select the date.
- Now click on the `Search` button and the screen will then redraw the screen with the in-out schedule information for the selected users:



User	Number	Customer Name	Expected In	Expected Out	Check In	Check Out
Rob Salesman	271	ROY DAVID BETANCUR (A)	3/26/2025 5:00:00 AM	3/26/2025 5:30:00 AM	03/26/2025 05:32:57 AM	03/26/2025 05:46:19 AM
Rob Salesman	301	ANDY BANUELOS (12)	3/26/2025 5:30:00 AM	3/26/2025 6:00:00 AM	03/26/2025 05:52:09 AM	03/26/2025 05:57:24 AM
Rob Salesman	300	BETANCUR GARAGE (G)	3/26/2025 8:00:00 AM	3/26/2025 8:30:00 AM		

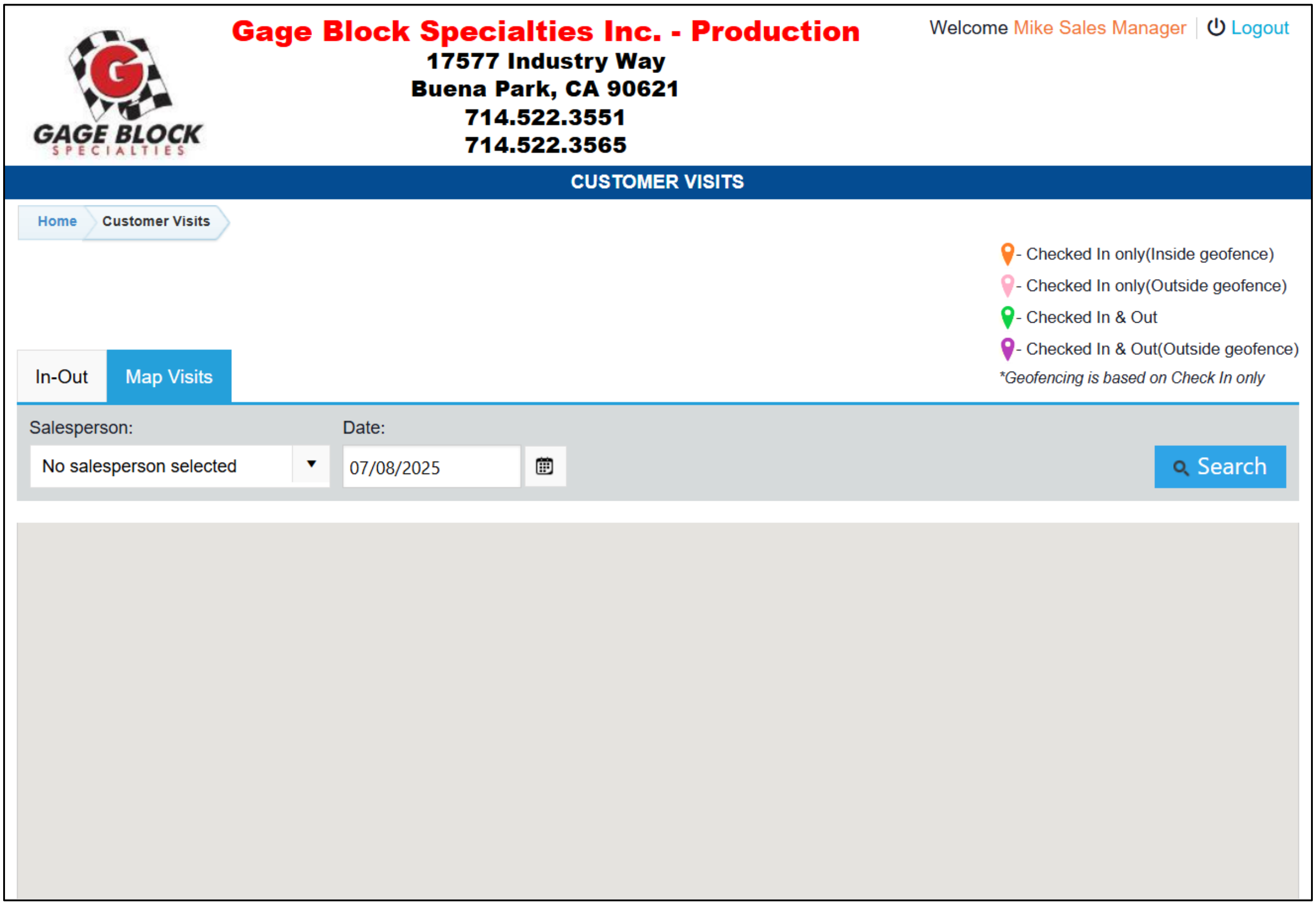
- The screen will show the *User*, the *Number* (Customer Account Number), the *Customer Name* with whom the appointment was scheduled, the *Expected In* time the appointment was scheduled to start, the *Expected Out* time the appointment was scheduled to end, the *Actual In* time the user clicked on the yellow "Check In" tile, the *Actual Out* time the user clicked on the green "Check Out" tile. The Check In/Out dates and times will be color coded. Black text means the user checked in inside the geofence of the customers location (400 meters from the address). Purple text means the user checked in outside the geofence.

Map Visits

Administrators have the option (via the *Map Visits* tab) to view a map that shows the users pinpoints (based upon their GPS coordinates when they check in at a customer's location) for a particular day. The GPS enabled device will upload the vehicles coordinates (location point) when they click on the customers navigation "Check In" tile upon arriving at the appointment so this information can be captured and viewed.

☞ **NOTE: Location Services must be enabled on the mobile device for this data to be collected.**

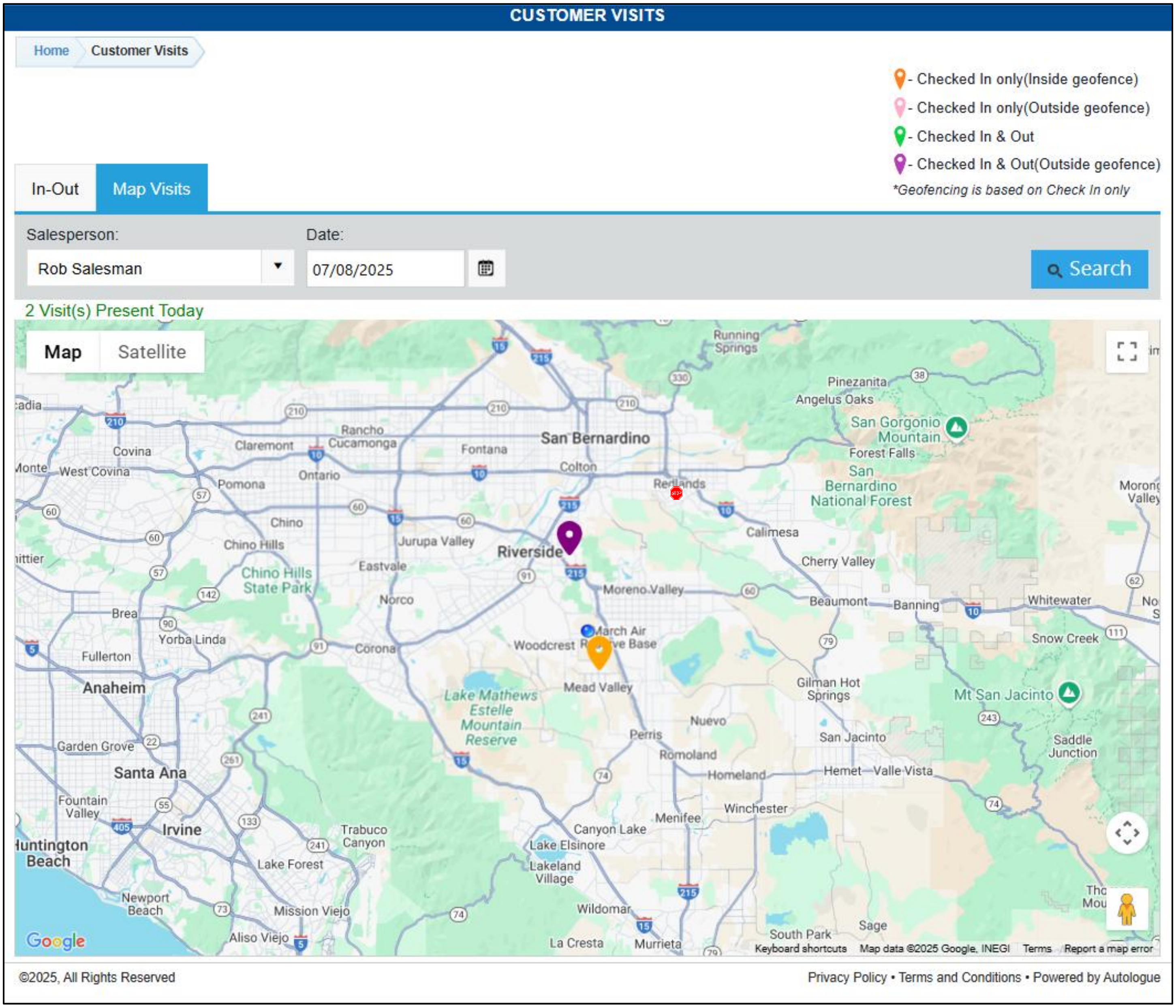
- To begin viewing this information click on the *Map Visits* tab and the following screen will be displayed:



By default, the *Map Visits* tab screen is shown with no salesperson selected, and the `Date:` field will be set to the current day.

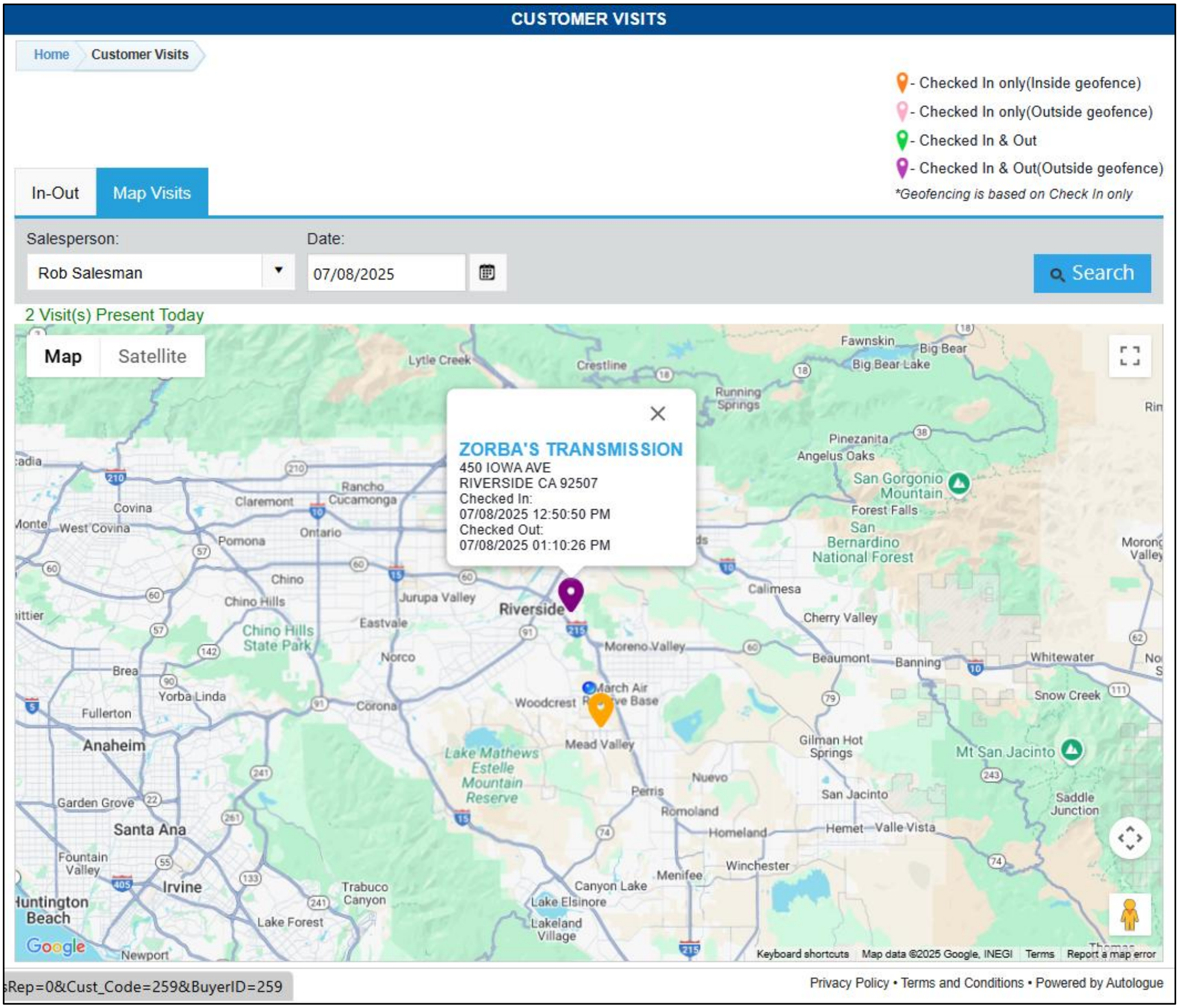
- Select a salesperson to view breadcrumb information for by clicking on the down arrow button below the `Salesperson:` field, then click on the salesperson.
- To change the date to show breadcrumbs for, click within the `Date:` field and enter in a specific date. Optionally you can click on the calendar button to the right of the `Date:` field, and then click on the specific date to select.

- Now click on the `Search` button and the screen will then redraw the screen with the pinpoint's information for the selected user:



The screen shows various colored pinpoints. A legend is displaying in the top right corner of screen that describes what each color represents.

- Click on any of the various colored pinpoint's icons to view the customer's name and address, along with the date/time they checked in/out with as shown:



Pinpoint Colors

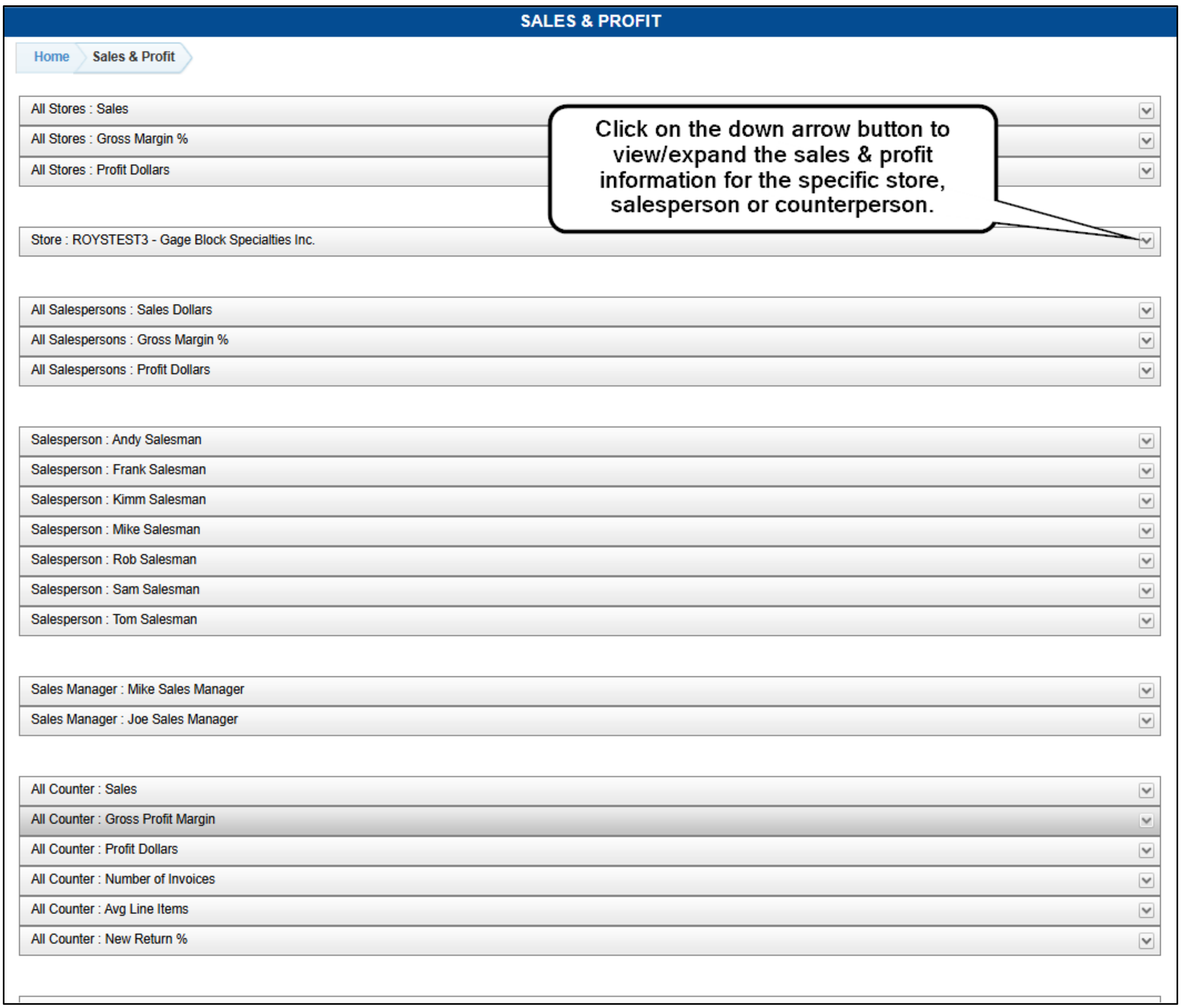
An explanation and of the various pinpoint colors and their pop-up window information are described:

ORANGE	With ONLY Check In data, and Check In coordinates INSIDE the geofence of the customer's location.
LIGHT PURPLE	With ONLY Check In data, and Check In coordinates OUTSIDE the geofence of the customer's location.
GREEN	With BOTH Check In/Check out data, and Check In coordinates INSIDE the geofence of the customer's location.

PURPLE	With BOTH Check In/Check out data, and Check In coordinates OUTSIDE the geofence of the customer's location.

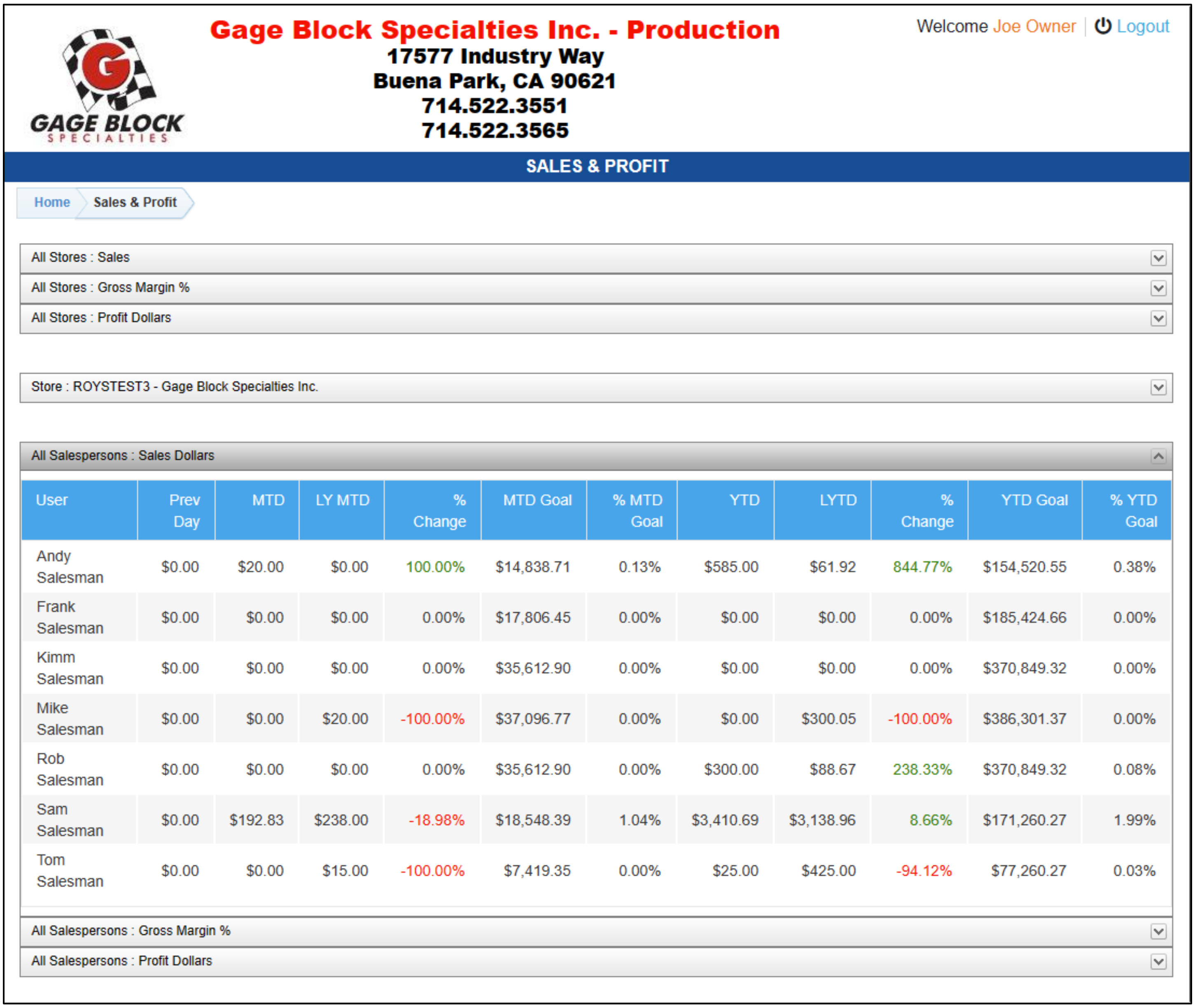
Sales & Profit

- From the administrator's home screen, to view the sales and profit information for specific stores, salespersons & counterpersons, click on the `Sales & Profit` tile and the following screen will be displayed:



The screen will display a collapsed listing of all stores, salespersons, sales managers, and counterpersons.

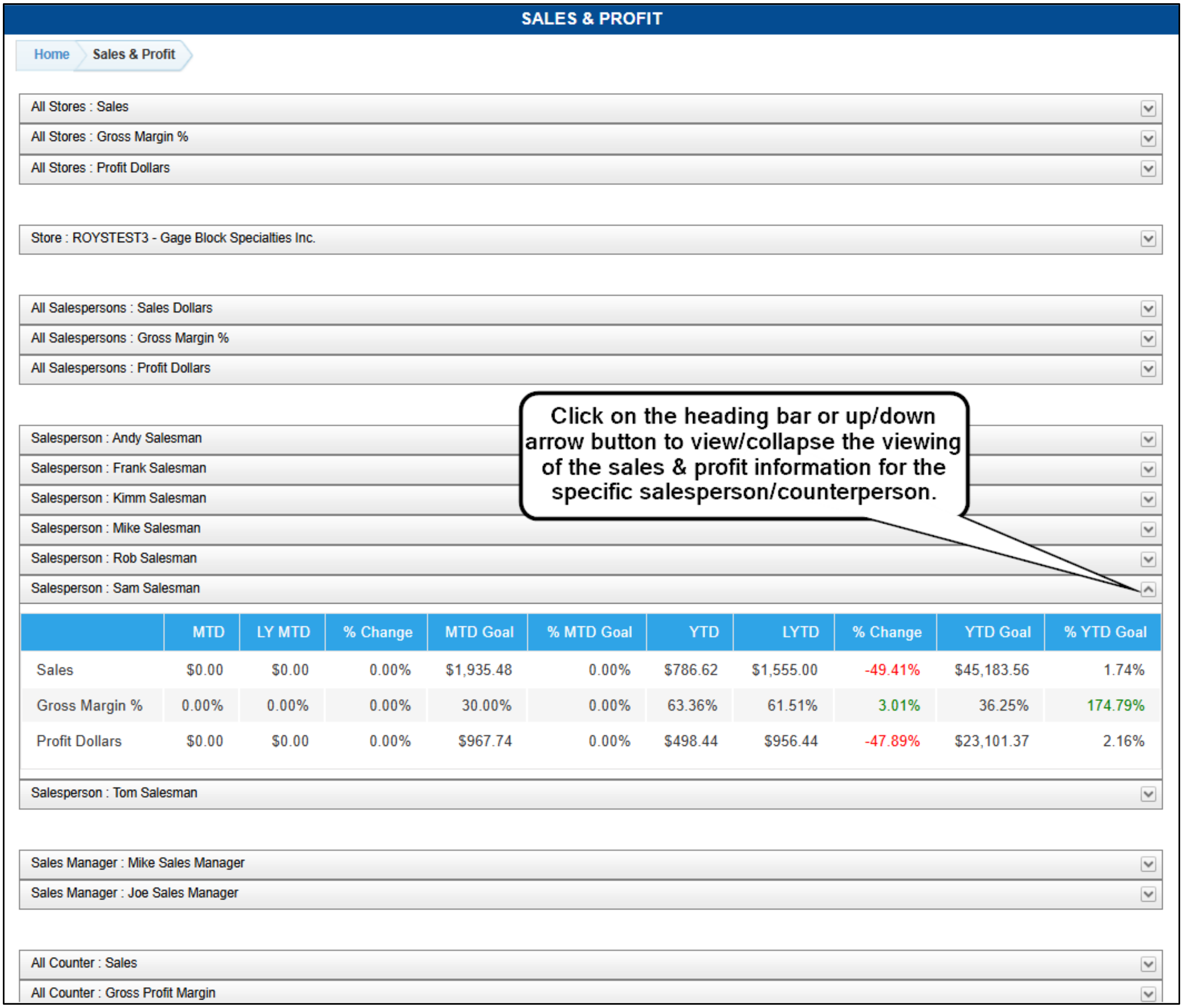
Each category also has a section of "All" listings, i.e. 'All Salespersons: Sales Dollars. This will show the Sales Dollars figures for all salespersons in one grid. 'All Counter :…' and 'All Stores' sections function the same way. (See expanded section below):



User	Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	YTD	LYTD	% Change	YTD Goal	% YTD Goal
Andy Salesman	$0.00	$20.00	$0.00	100.00%	$14,838.71	0.13%	$585.00	$61.92	844.77%	$154,520.55	0.38%
Frank Salesman	$0.00	$0.00	$0.00	0.00%	$17,806.45	0.00%	$0.00	$0.00	0.00%	$185,424.66	0.00%
Kimm Salesman	$0.00	$0.00	$0.00	0.00%	$35,612.90	0.00%	$0.00	$0.00	0.00%	$370,849.32	0.00%
Mike Salesman	$0.00	$0.00	$20.00	-100.00%	$37,096.77	0.00%	$0.00	$300.05	-100.00%	$386,301.37	0.00%
Rob Salesman	$0.00	$0.00	$0.00	0.00%	$35,612.90	0.00%	$300.00	$88.67	238.33%	$370,849.32	0.08%
Sam Salesman	$0.00	$192.83	$238.00	-18.98%	$18,548.39	1.04%	$3,410.69	$3,138.96	8.66%	$171,260.27	1.99%
Tom Salesman	$0.00	$0.00	$15.00	-100.00%	$7,419.35	0.00%	$25.00	$425.00	-94.12%	$77,260.27	0.03%

Expanding/Viewing The Sales & Profit Information

- You have the ability to display/expand the sales and profit information for any of the listed stores, salespersons and counterpersons by clicking on the heading bar or down arrow button at the end of the specific store, salesperson, sales manager or counterperson as shown: (see also the section above for the 'All *xxx*:…' option)



	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	YTD	LYTD	% Change	YTD Goal	% YTD Goal
Sales	$0.00	$0.00	0.00%	$1,935.48	0.00%	$786.62	$1,555.00	-49.41%	$45,183.56	1.74%
Gross Margin %	0.00%	0.00%	0.00%	30.00%	0.00%	63.36%	61.51%	3.01%	36.25%	174.79%
Profit Dollars	$0.00	$0.00	0.00%	$967.74	0.00%	$498.44	$956.44	-47.89%	$23,101.37	2.16%

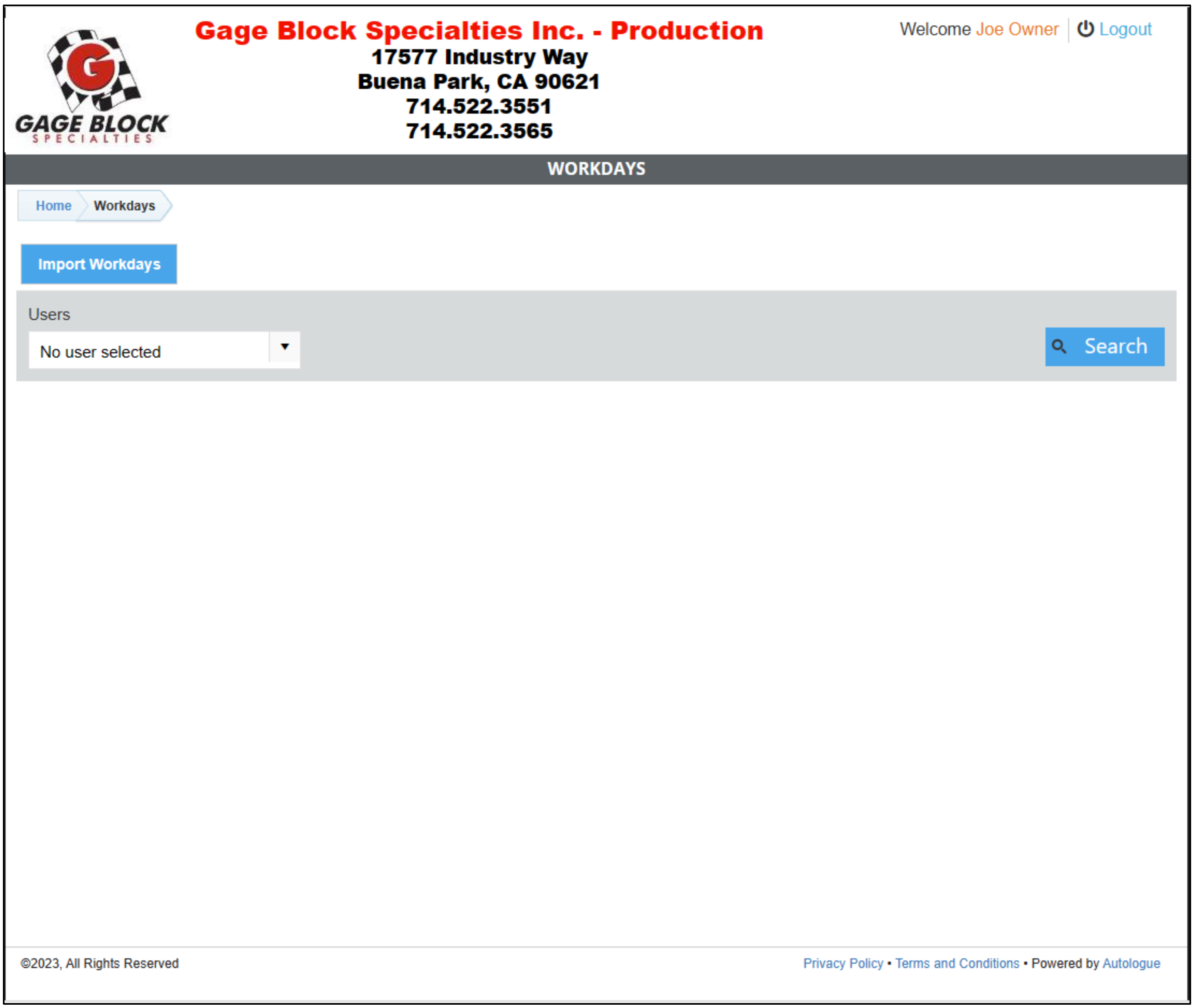
The screen will now display the expanded view of sales & profit information for a specific store, salesperson, sales manager, and/or counterperson whose arrow buttons were clicked on. When an award percentage has been setup for a counterperson, an award table that contains the actual sales amount, goal amount, the difference (goal – actual), award percentage and the award dollar amount earned when the sales goal has been met. Note: The award table only displays when setup.

Collapsing The Sales & Profit Information

The viewing of sales & profit information can be removed/collapsed from being viewed by clicking on the heading bar or up-arrow buttons.

Workdays

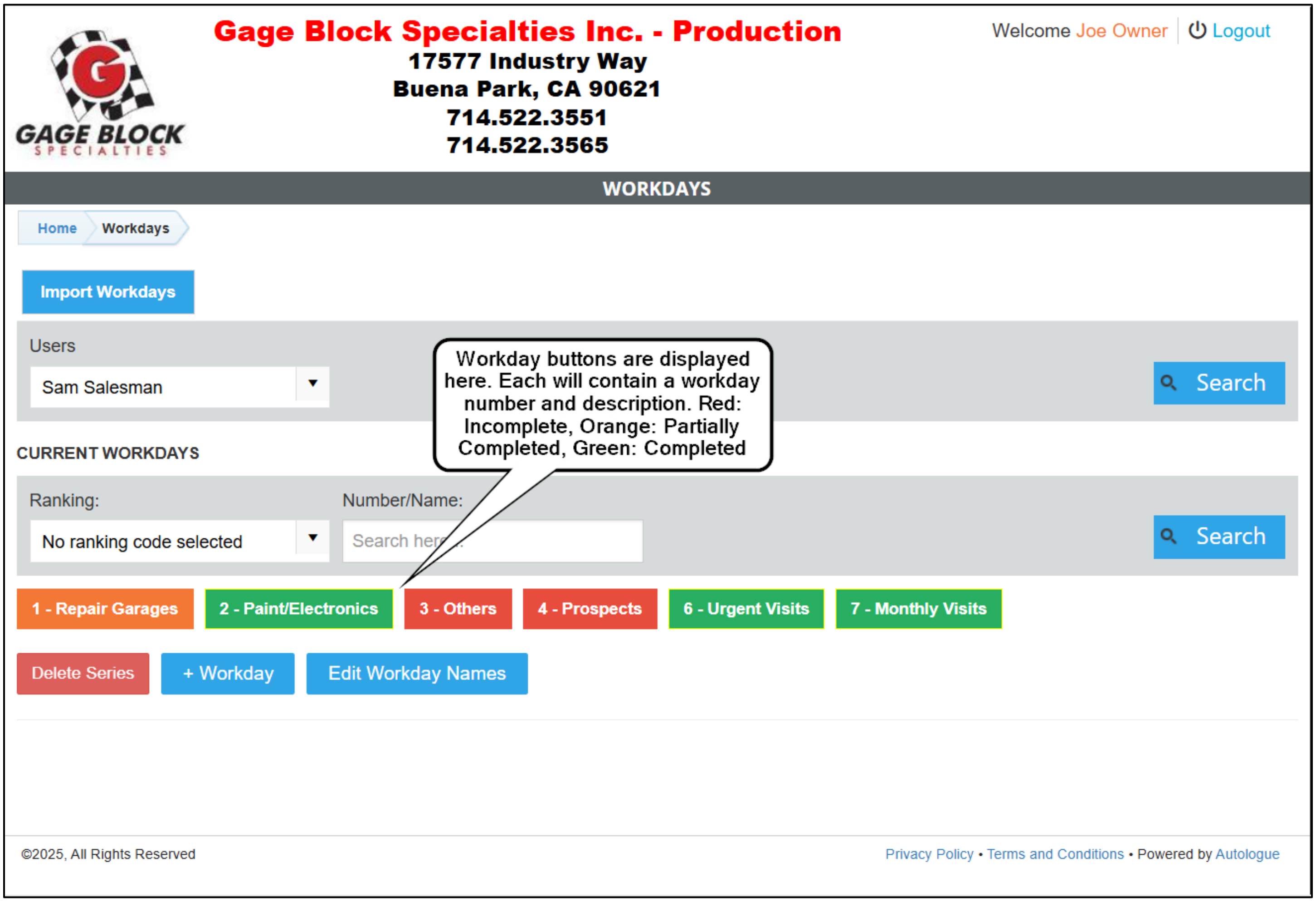
- Workdays are an alternative to the Scheduler, or can be used in addition to the Scheduler. Users can create lists of customers to visit or call during any given day, not dependent on any specific date or time. From the administrator's home screen and if the *WORKDAYS FUNCTIONALITY* option has been enabled within the `Settings` tile, click on the `Workdays` tile to view the workday schedule information for a specific user. The following screen will be displayed:



By default, no users are selected and the workdays screen will therefore be blank.

Selecting A User To View

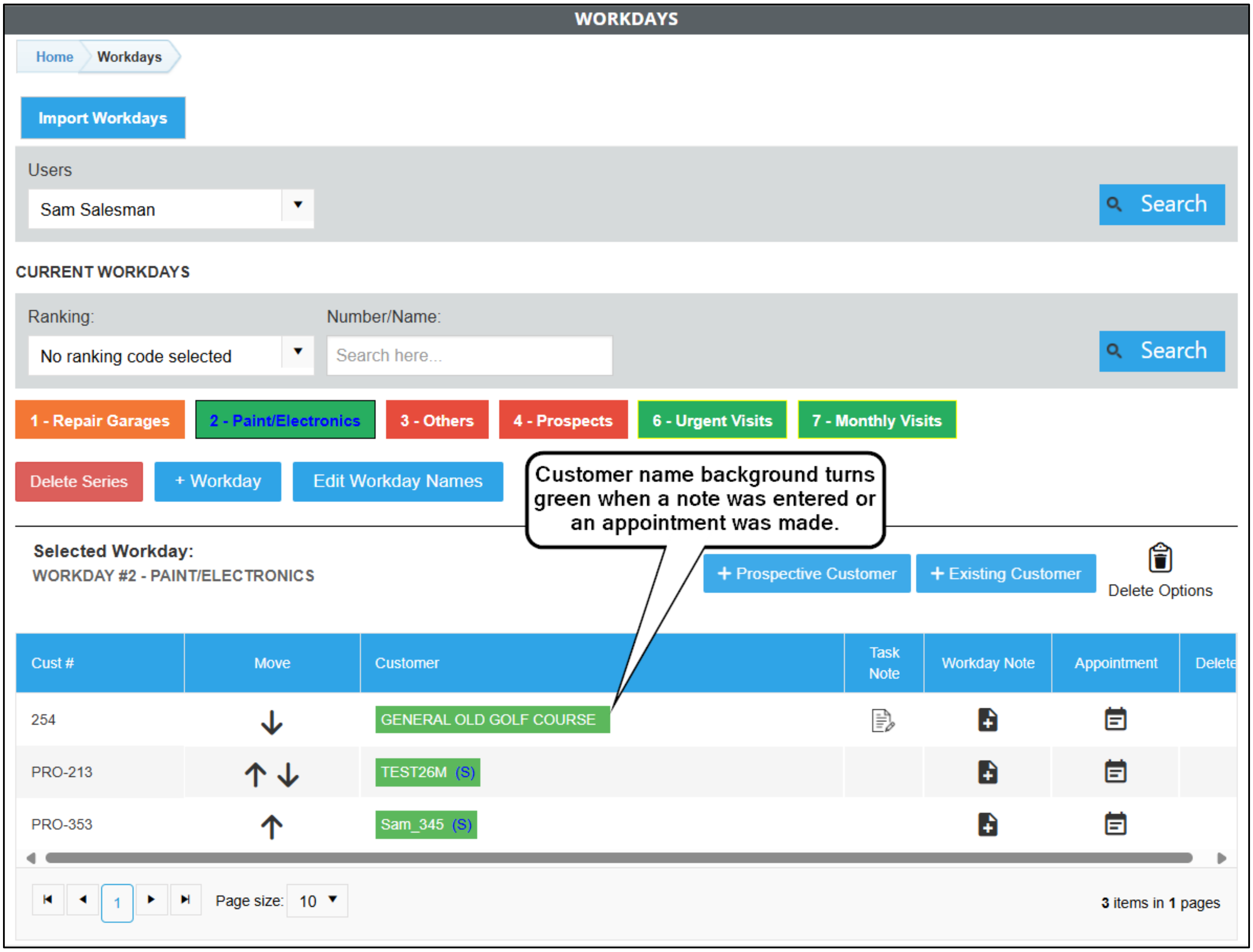
- You can select a specific user by clicking on the down arrow button below the `Users` field and then clicking on the specific user to view workday information from the drop-down selection list.
- Now click on the `Search` button and the screen will then redraw and display a list of workday number buttons for the selected user as shown:



Green Workday Button

A green workday button indicates a completed workday (all customers in that day have had notes taken or an appointment set from this screen).

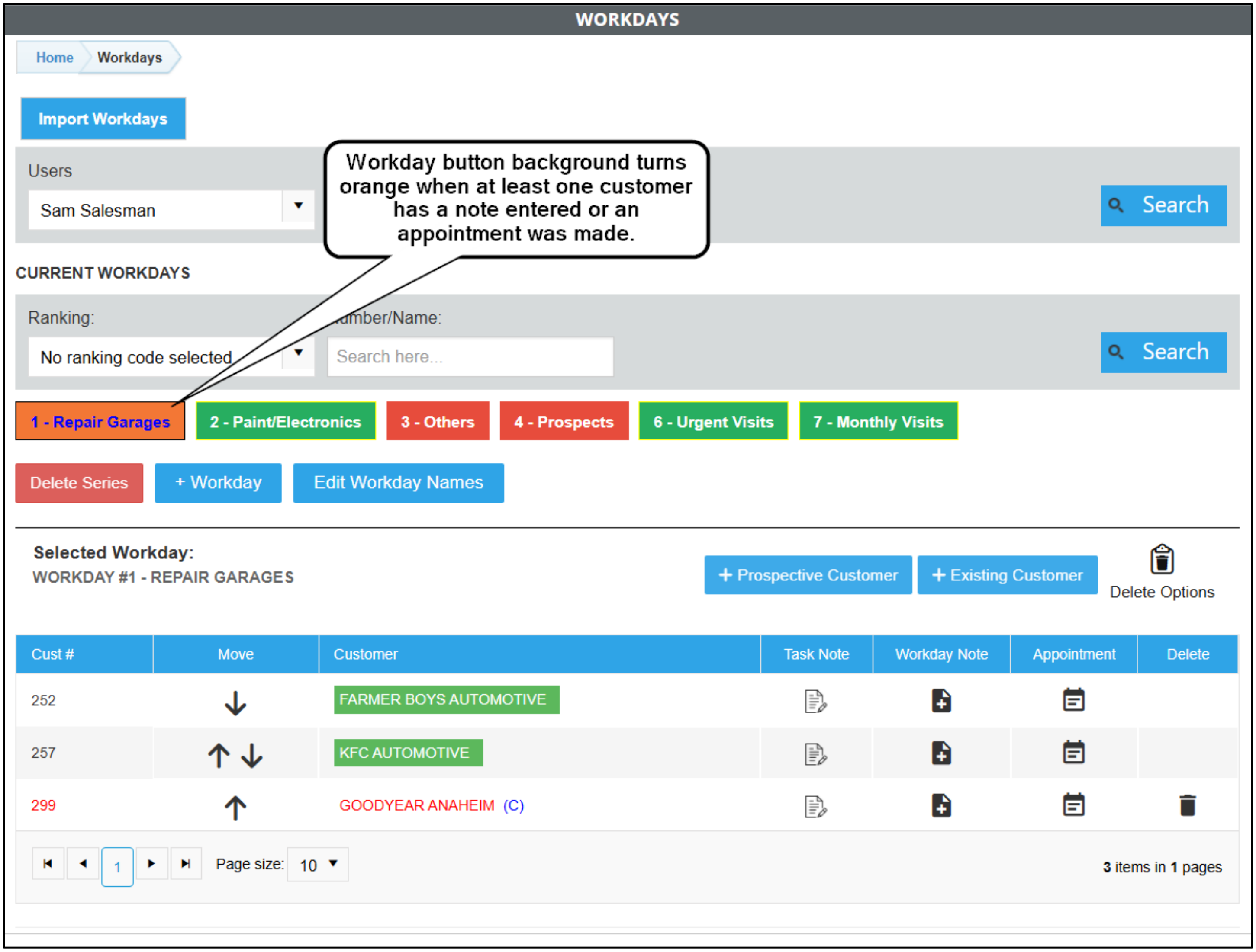
- Clicking on a green workday button will display all the customer names in the list with a green background as shown:



Orange Workday Button

An orange workday button indicates a partially completed workday (at least one of the customers in that day have had notes taken or an appointment set from this screen).

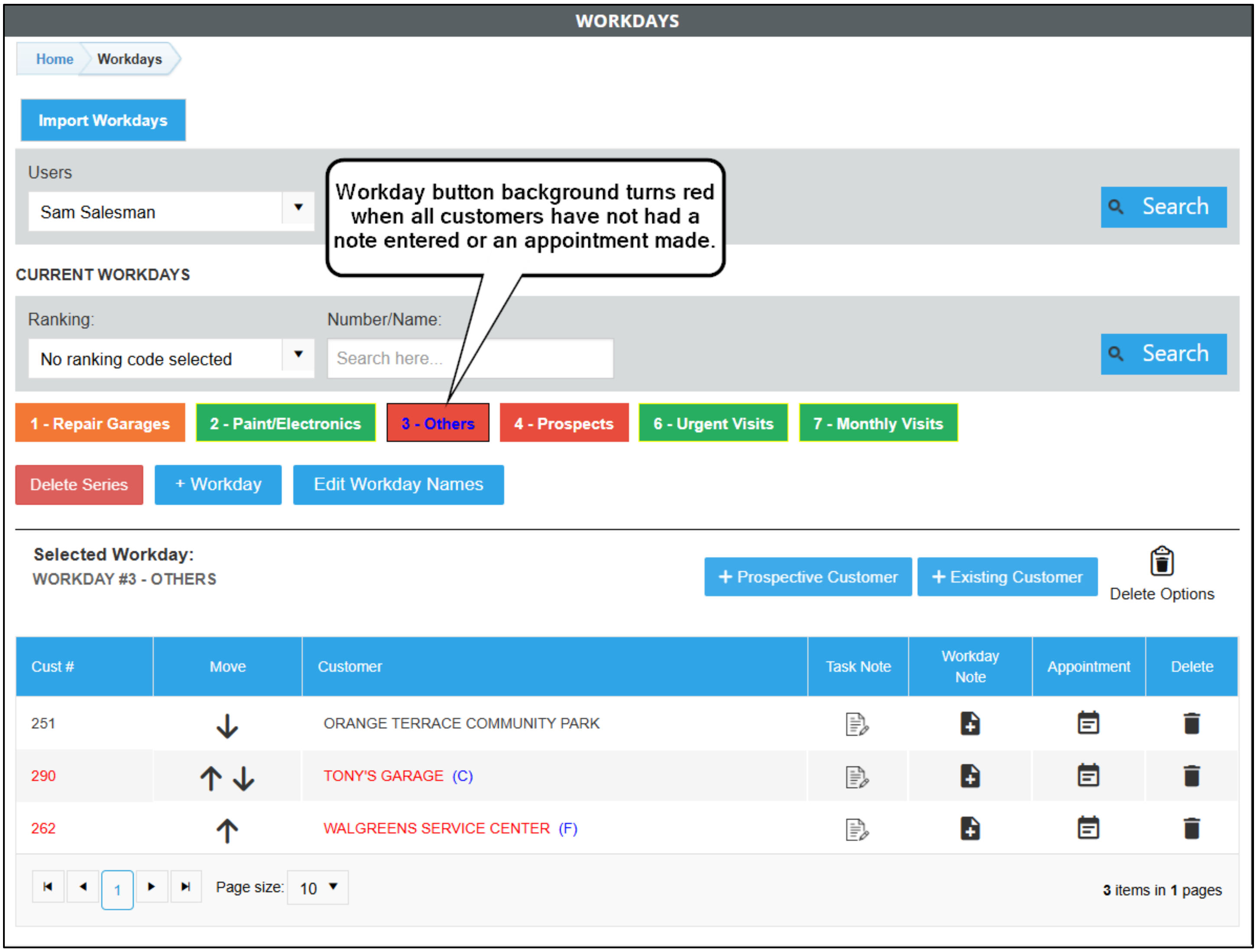
- Clicking on an orange workday button will display all the customer names in the list with at least one green colored background as shown:



Red Workday Button

A red workday button indicates an incomplete workday (all customers in that day have NOT had notes taken or an appointment set from this screen).

- Clicking on a red workday button will display all the customer names in the list with NO green colored background as shown:



Ranking Codes are displayed next to the Customer's name in parenthesis on all workday lists.

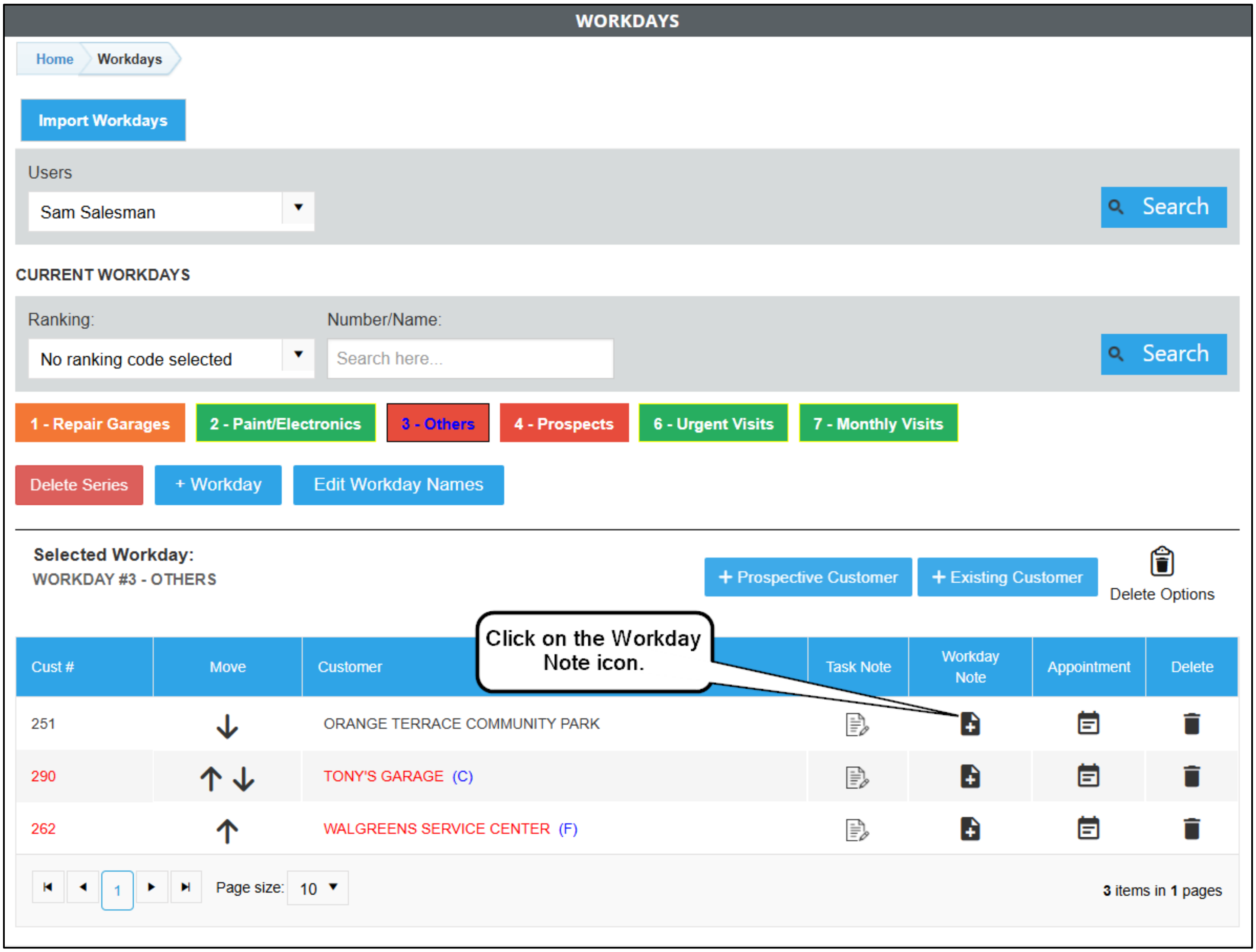
Customers on workday lists can optionally be shown on the Map.

Yellow Upcoming Workday Buttons

Yellow buttons indicate an upcoming series of workdays. When all the current series workday buttons are green (completed), the upcoming series workdays will move up and replace the old completed workdays. You can upload multiple upcoming workday series.

Creating A Workday Note

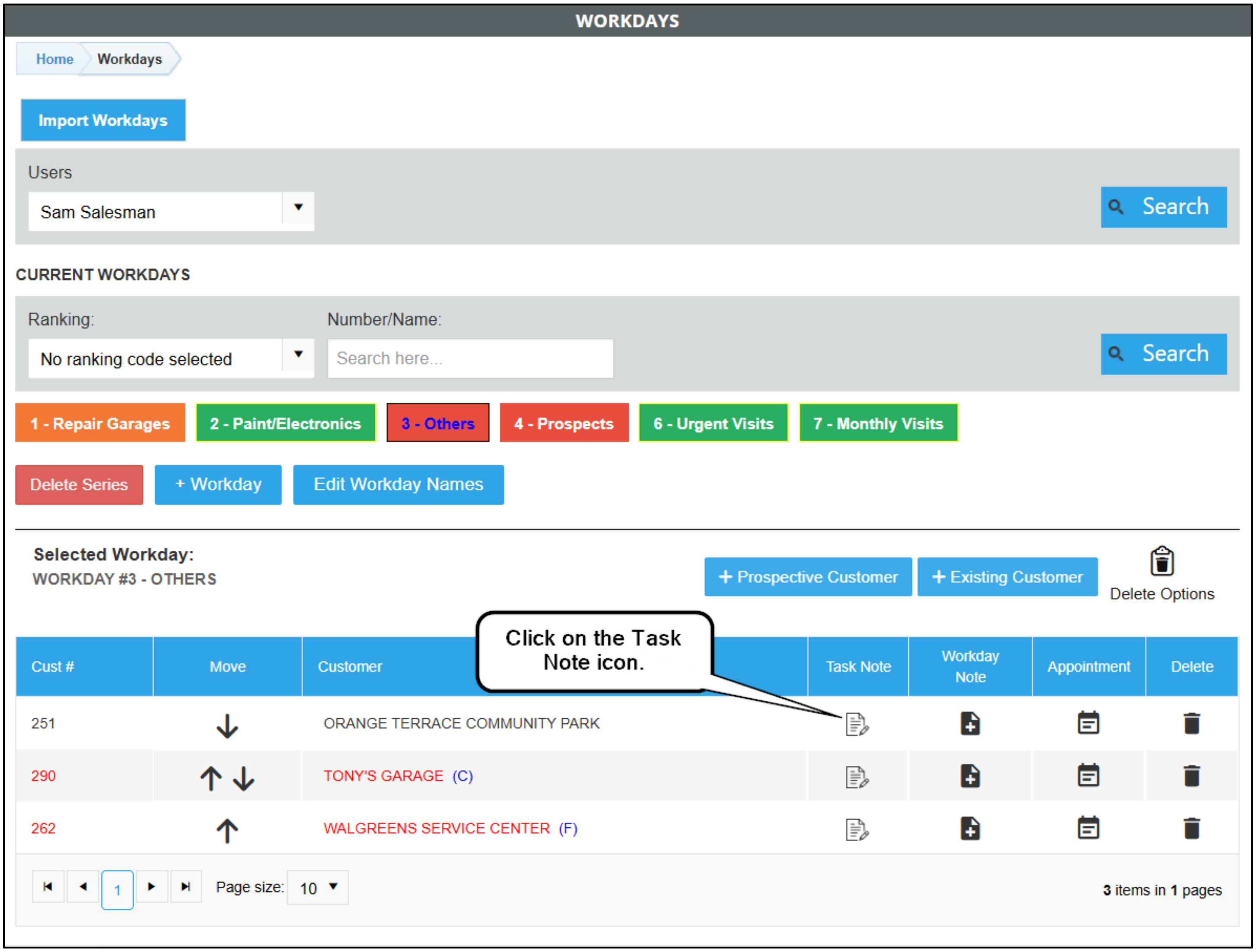
- Within a workday, you can create a workday note for a customer by clicking on the icon under the *Workday Note* column.



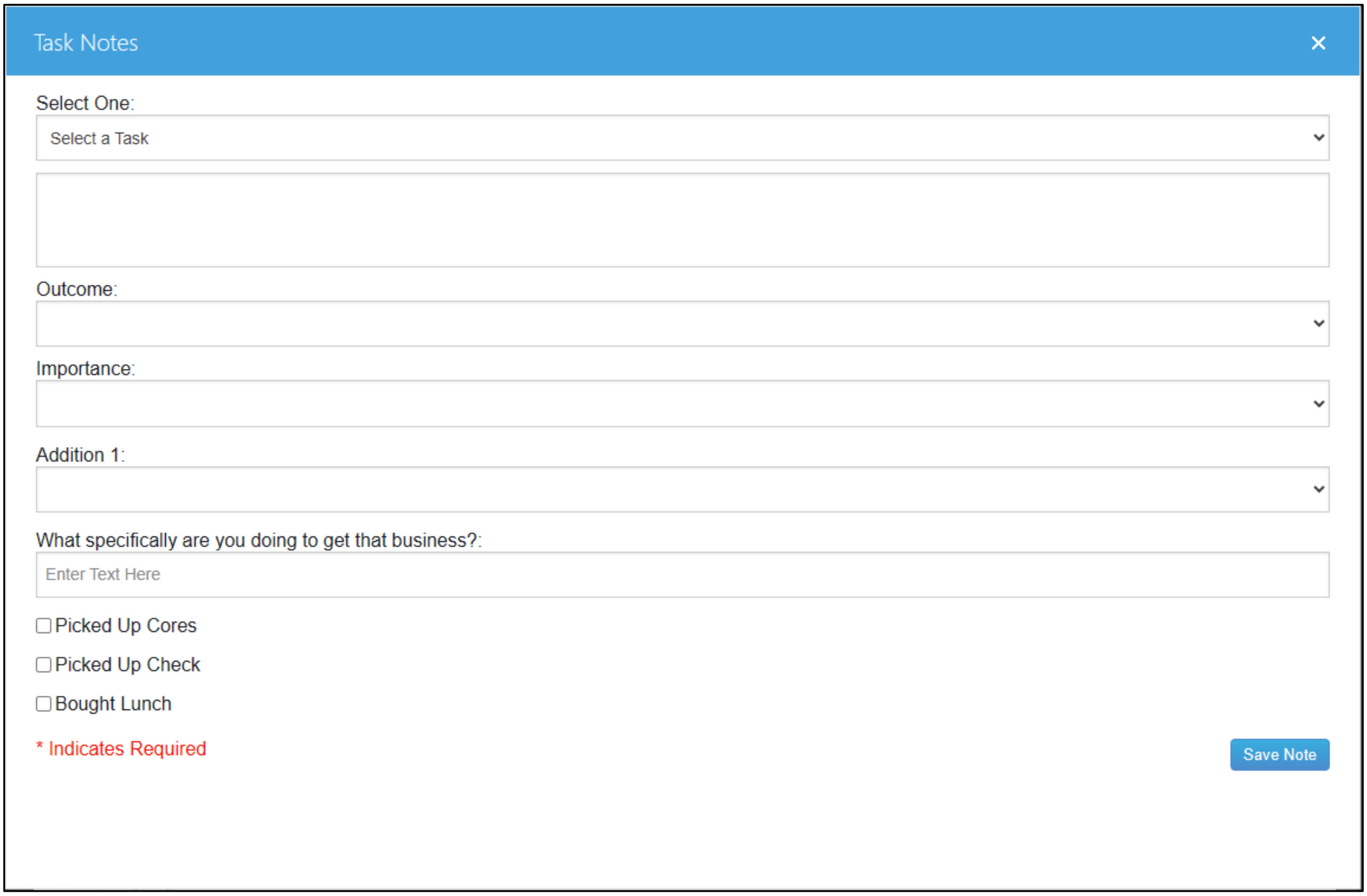
The screen will then pop-up a window with all the notes for the customer. A note can be added by clicking on the (Add ✚) button. Once the note entry has been saved, close the window and the customer's name will turn green which denotes the customer has been contacted.

Creating A Task Note

- Within a workday, if any of the listed customers have outstanding tasks, you can create a task note for them by clicking on the icon under the *Task Note* column.



A *Task Notes* window will pop-up as shown:

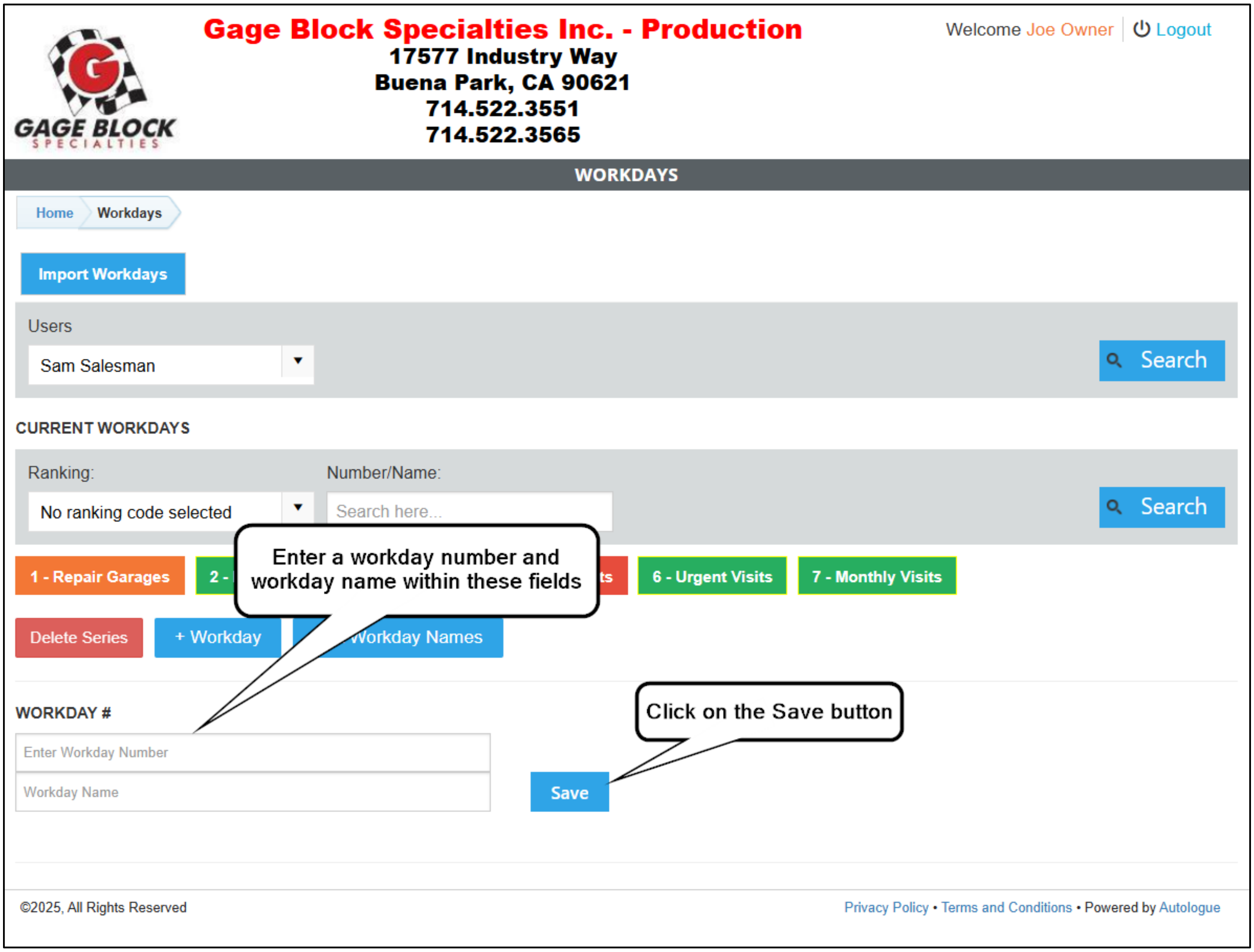


- Click with the *Select One:* field and a drop-down selection list of available tasks for the customer will be displayed. Click on the specific task to enter a note for, enter in the note entry information and then click on the blue `Save Note` button to save the entered task note information.

The task note icons only display for customers with outstanding tasks.

Creating A New Workday

- After selecting a user within the workdays screen, you can add/create a new workday by clicking on the blue `+Workday` button and the following screen will be displayed:

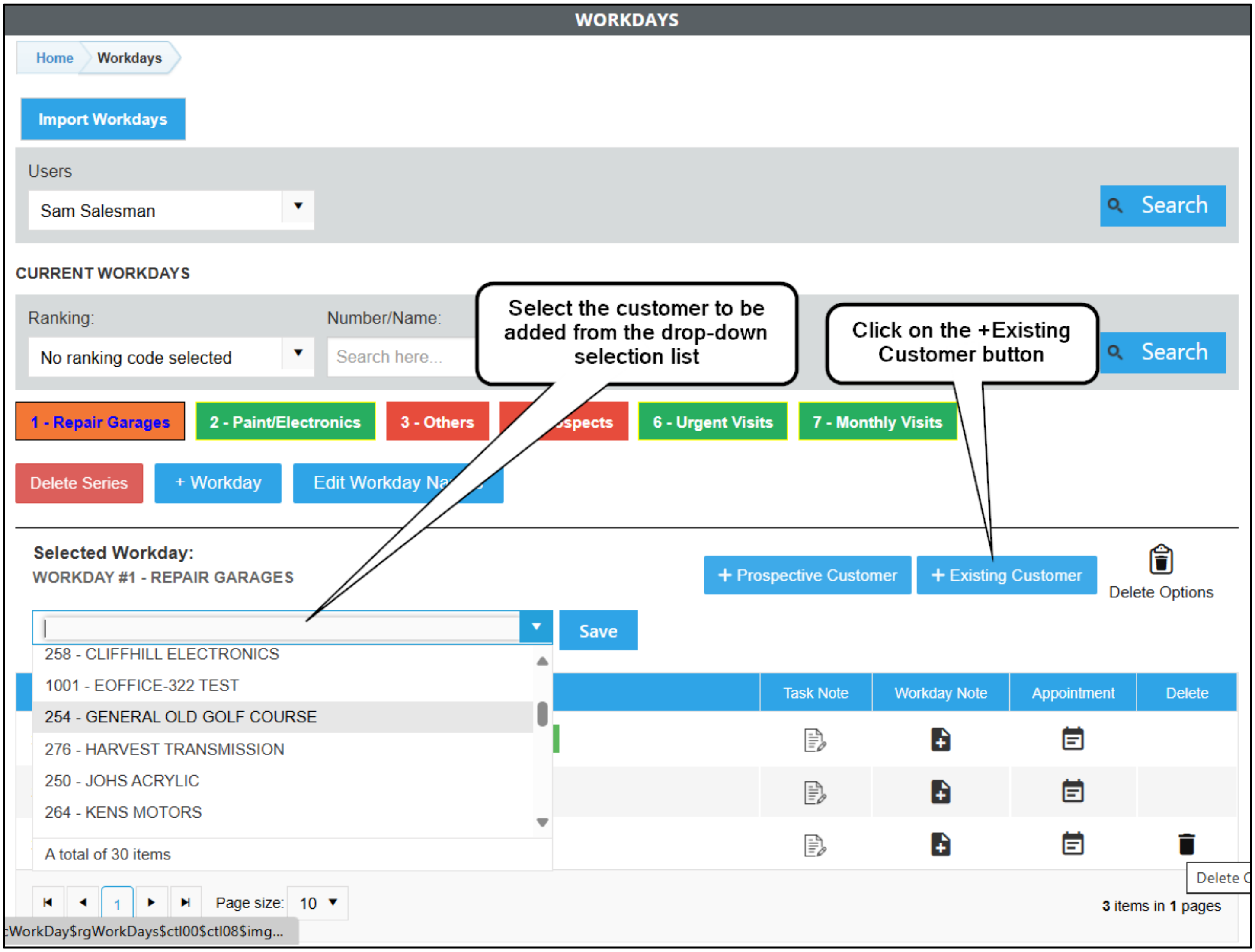


- Below the `WORKDAY #` heading, click within the *Enter Workday Number* field and enter a workday number.
- Click within the *Workday Name* field and enter a workday name (up to 20 characters).
- Click on the blue `Save` button and the workday will be saved.

☞ **<u>Note:</u> To save blank workdays, the first workday in a series must contain at least one customer. Otherwise, a blank workday cannot be saved. Users can then add customers to a selected blank workday later.**

Adding A Customer To A Workday

- Within a workday, you can add a customer by clicking on the green `+Existing Customer` button.



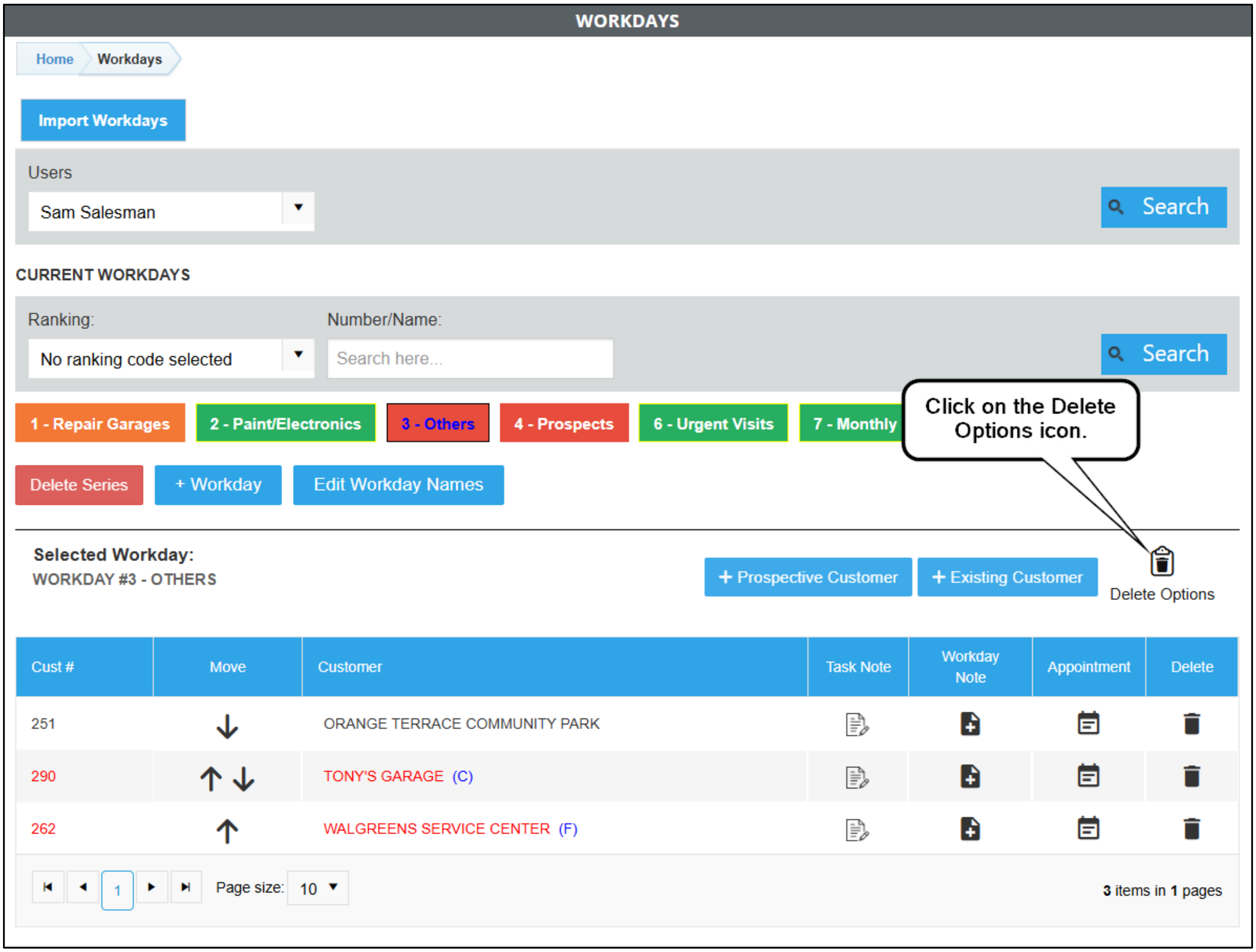
- Click within the `Select Customer` drop-down field (that contains the all customers for the user) and select a customer.
- Click on the blue `Save` button and the customer will be added to the last row of the workday.

Deleting A Customer From A Workday

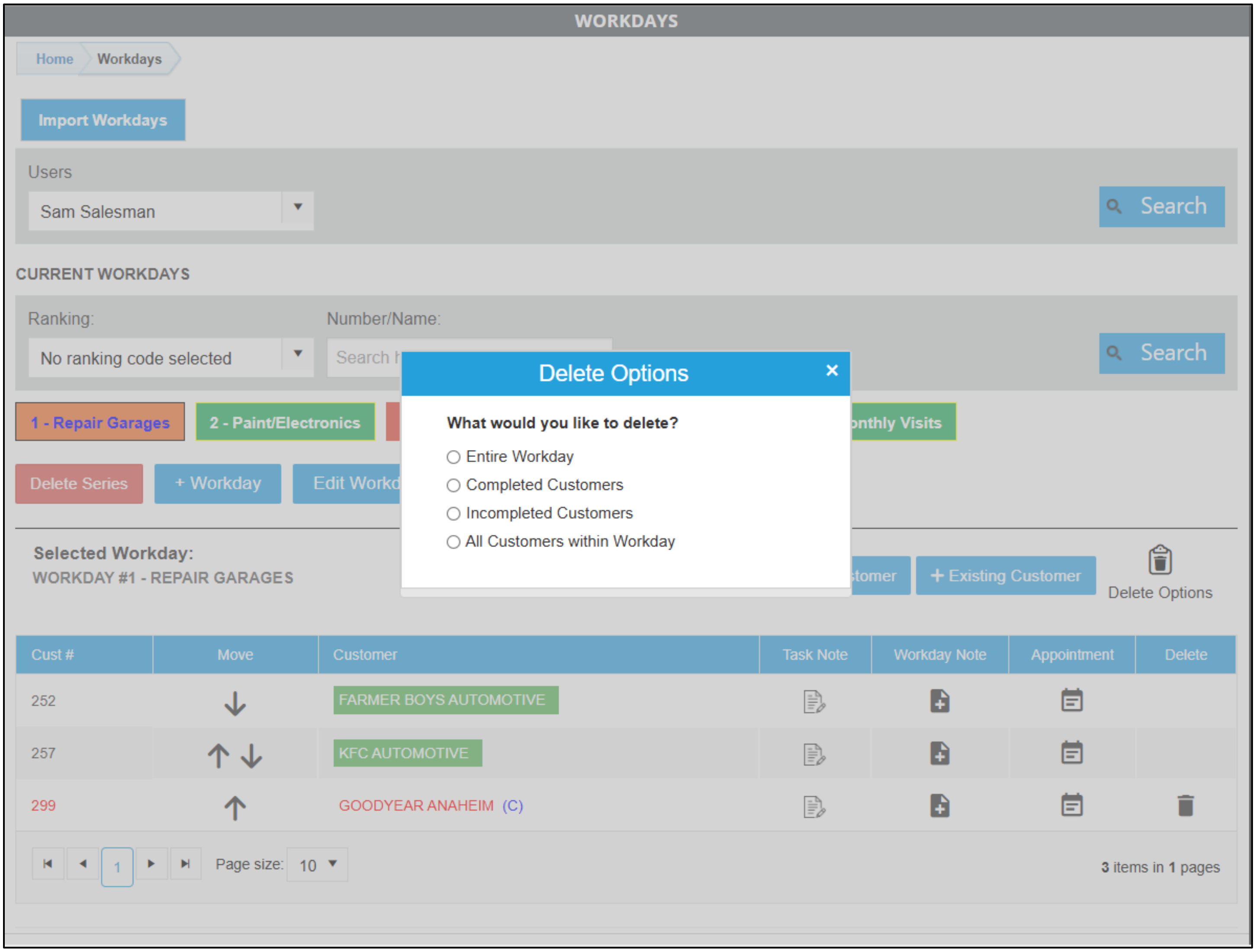
- You can delete individual customers from a workday by clicking on the trash can (🗑) icon in the row of the customer's name (if a customer has had a note taken or an appointment scheduled and is green, it cannot be deleted).

Deleting An Entire Workday

- You can an entire workday by clicking on the `Delete Options` icon within the workday.

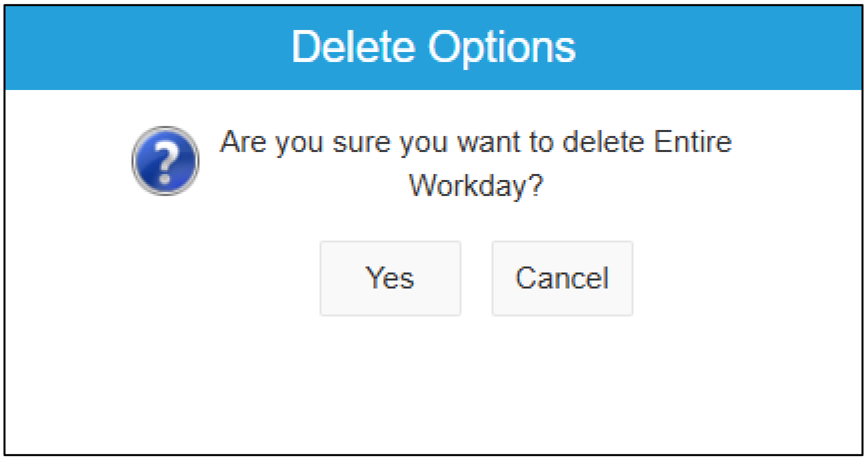

WORKDAYS
Home
Workdays
Import Workdays
Users
Sam Salesman
Search
CURRENT WORKDAYS
Ranking:
No ranking code selected
Number/Name:
Search here...
Search
1 - Repair Garages
2 - Paint/Electronics
3 - Others
4 - Prospects
6 - Urgent Visits
7 - Monthly
Click on the Delete Options icon.
Delete Series
+ Workday
Edit Workday Names
Selected Workday:
WORKDAY #3 - OTHERS
+ Prospective Customer
+ Existing Customer
Delete Options
Cust #
Move
Customer
Task Note
Workday Note
Appointment
Delete
251
ORANGE TERRACE COMMUNITY PARK
290
TONY'S GARAGE (C)
262
WALGREENS SERVICE CENTER (F)
1
Page size: 10
3 items in 1 pages

A *Delete Options* pop-up window will now be displayed as shown:



- Click on the `Entire Workday` selection.

A *Delete Options* pop-up window will now display the following:



- Click on the `Yes` button to delete the entire workday or click on the `Cancel` button to return to the first *Delete Options* pop-up window.

Deleting Completed Customers Within A Workday

- You can delete all completed customers (highlighted with green background) within a workday by clicking on the `Delete Options` icon within the workday.
- Within the *Delete Options* pop-up window, click on the `Completed Customers` selection.
- Within the *Delete Options* pop-up window, click on the `Yes` button to delete the completed customers within the workday or click on the `Cancel` button to return to the first *Delete Options* pop-up window.

Deleting Incompleted Customers Within A Workday

- You can delete all incompleted customers within a workday by clicking on the `Delete Options` icon within the workday.
- Within the *Delete Options* pop-up window, click on the `Incompleted Customers` selection.
- Within the *Delete Options* pop-up window, click on the `Yes` button to delete the incompleted customers within the workday or click on the `Cancel` button to return to the first *Delete Options* pop-up window.

Deleting All Customers Within A Workday

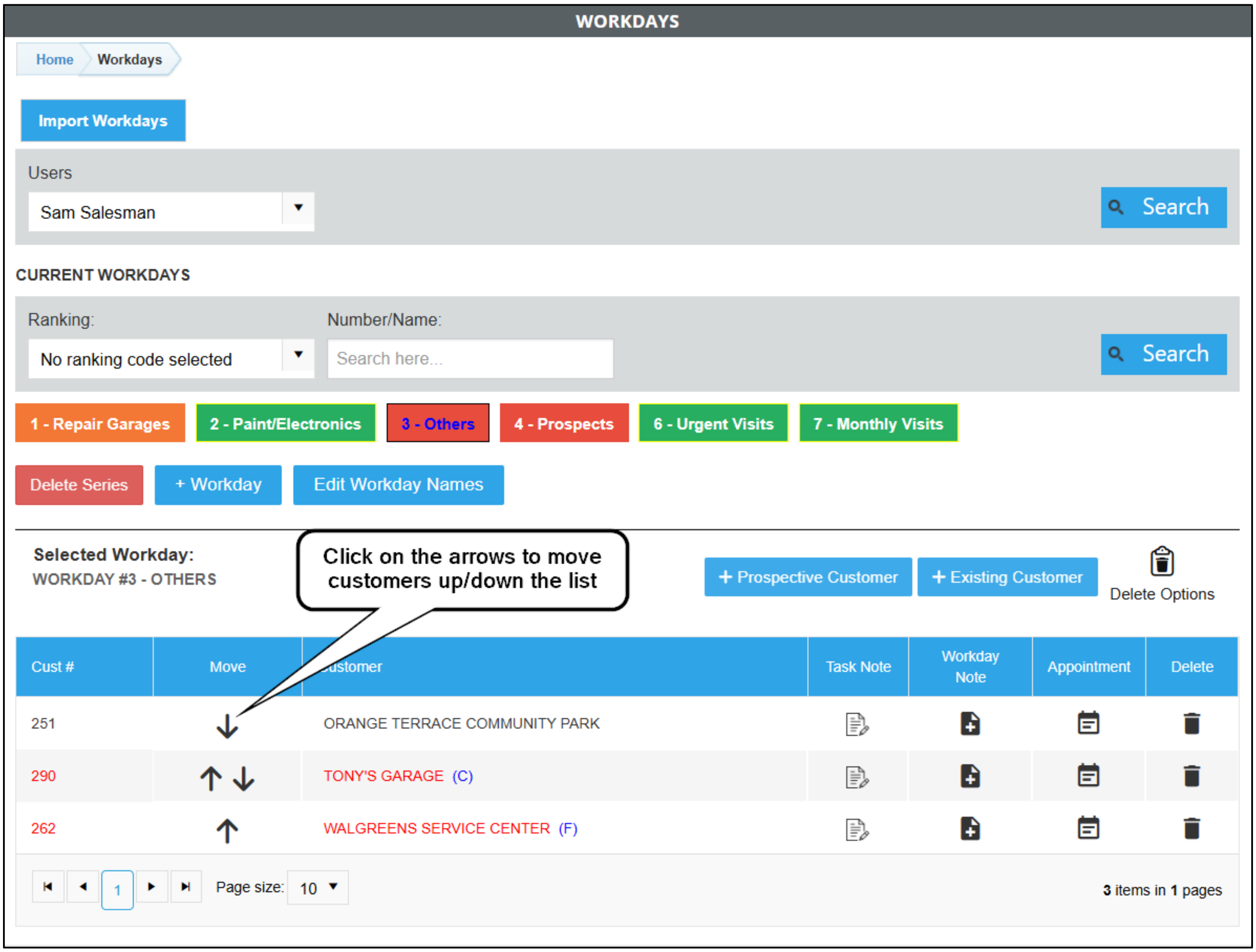
- You can delete all customers within a workday by clicking on the `Delete Options` icon within the workday.
- Within the *Delete Options* pop-up window, click on the `All Customers within Workday` selection.
- Within the *Delete Options* pop-up window, click on the `Yes` button to delete all customers within the workday or click on the `Cancel` button to return to the first *Delete Options* pop-up window.

Deleting A Workday Series

- You can delete a complete series of workdays by clicking on the red `Delete Series` button.

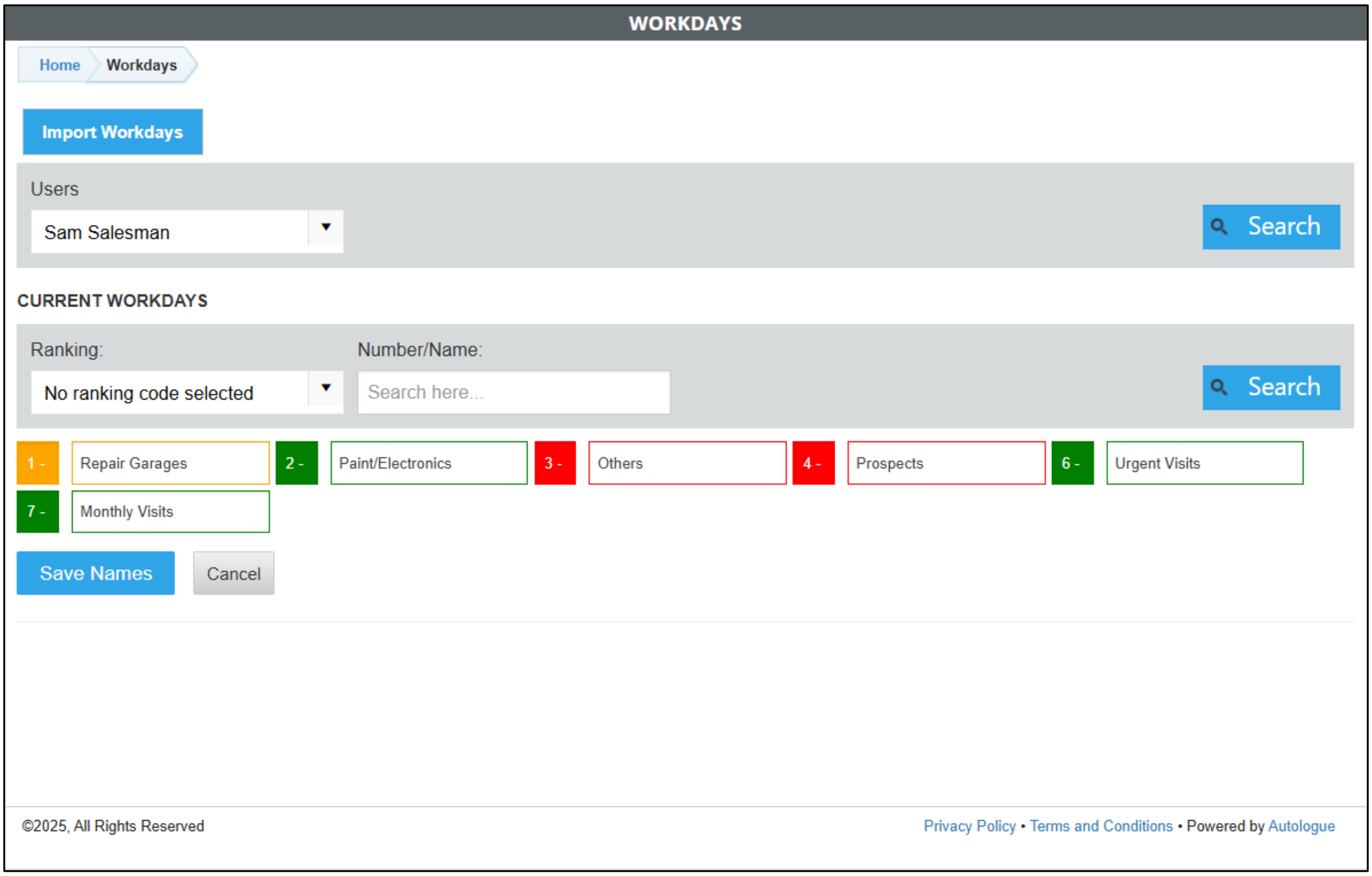
Reordering The Customer List Within A Workday

- You can re-order the list of customers within a workday by clicking on the up/down (↑↓) arrows next to the customer's name. This can be used to set the order the user will visit their customers.



Editing Workday Names

- Clicking on the blue `Edit Workday Names` button allows the user to name their workdays. Simply type the name in the box and click on the blue `Save Names` button as shown:



Downloading A Sample Workdays Spreadsheet

- To download a sample workdays spreadsheet, click on the blue `Import Workdays` button.
- Click on the *Download Spreadsheet* link on the screen to download the currently created workdays (*workdays.xlsx*) that can be opened and edited within Excel and setup for a sales manager, salesperson and/or store manager.

	A	B	C	D	E	F	G
1	Series	WorkDay#	WorkdayName	Cust_Code	Customer_Name	Salesperson_Code	Delete
2		1	Repair Garages	252	CHUCK AND SAMS AUTOMOTIVE	3142	
3		1	Repair Garages	299	GOODYEAR ANAHEIM	3142	
4		1	Repair Garages	257	DUNCAN'S AUTOMOTIVE	3142	
5		2	Paint/Electronics	250	AMERICAN ACRYLIC	3142	
6		2	Paint/Electronics	268	F & R PAINT	3142	
7		3	Others	251	CERTIFIED APPLIANCE	3142	
8		3	Others	299	GOODYEAR ANAHEIM	3142	
9		3	Others	460	MARISCOS CLEMENTE RESTAURANT	3142	
10		4	Prospects	PRO-MB	Mookie Betts	3142	
11		4	Prospects	PRO-Quest	Quest Diagnostics	3142	
12							

There are 7 columns of information (Series, WorkDay#, Workday Name, Cust Code (Customer_number), Customer_Name, Salesperson_Code and Delete). Assign the specific customers you want the user to call or visit for each workday and save the file to your computer.

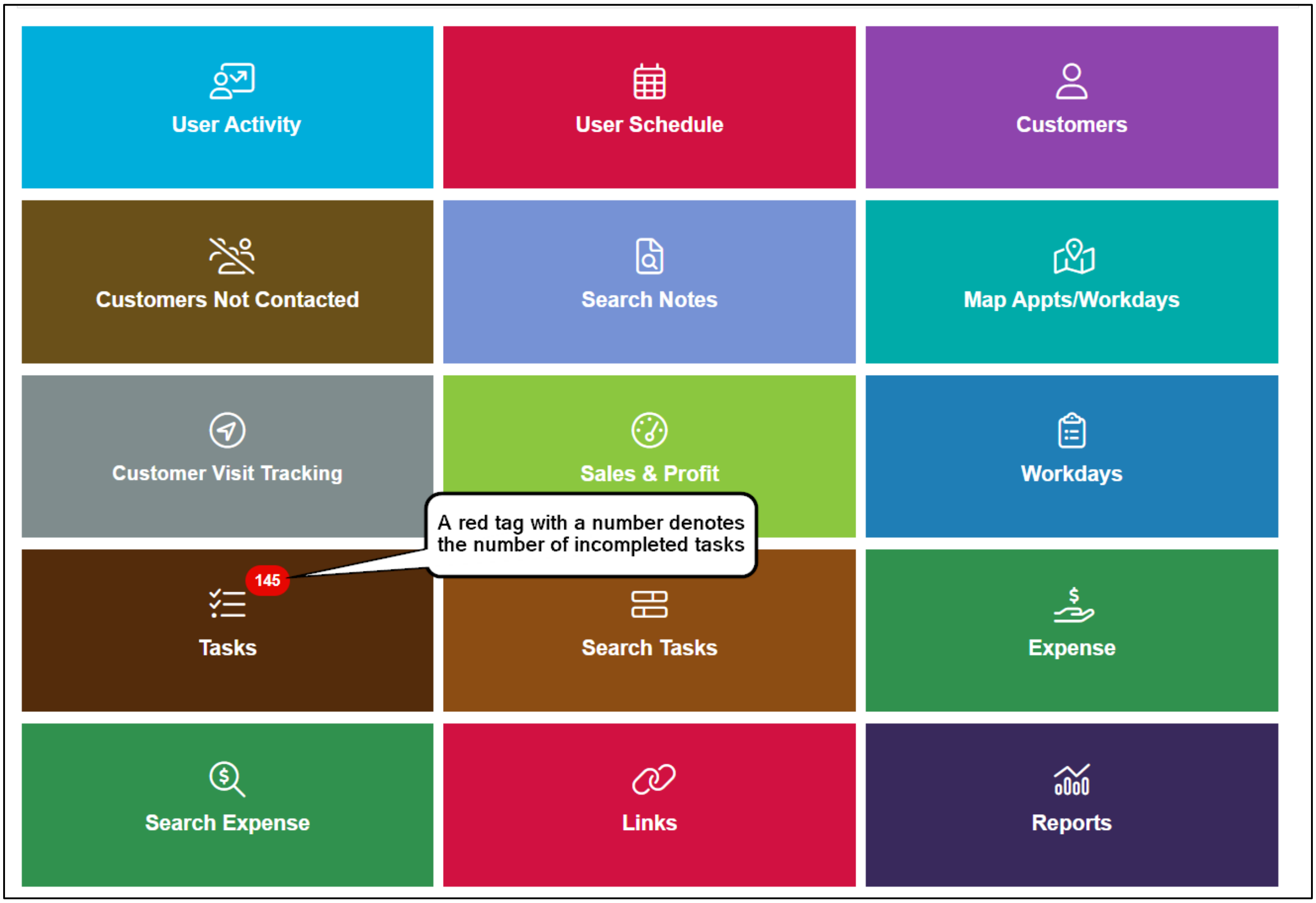
One spreadsheet can be used to import workdays for multiple users using the Salesperson_Code (from *Users & Emails* within the `Settings` tile). The second tab at the bottom of the spreadsheet is titled *Instructions*. It describes each column and what values to enter within it.

Creating/Importing Workdays

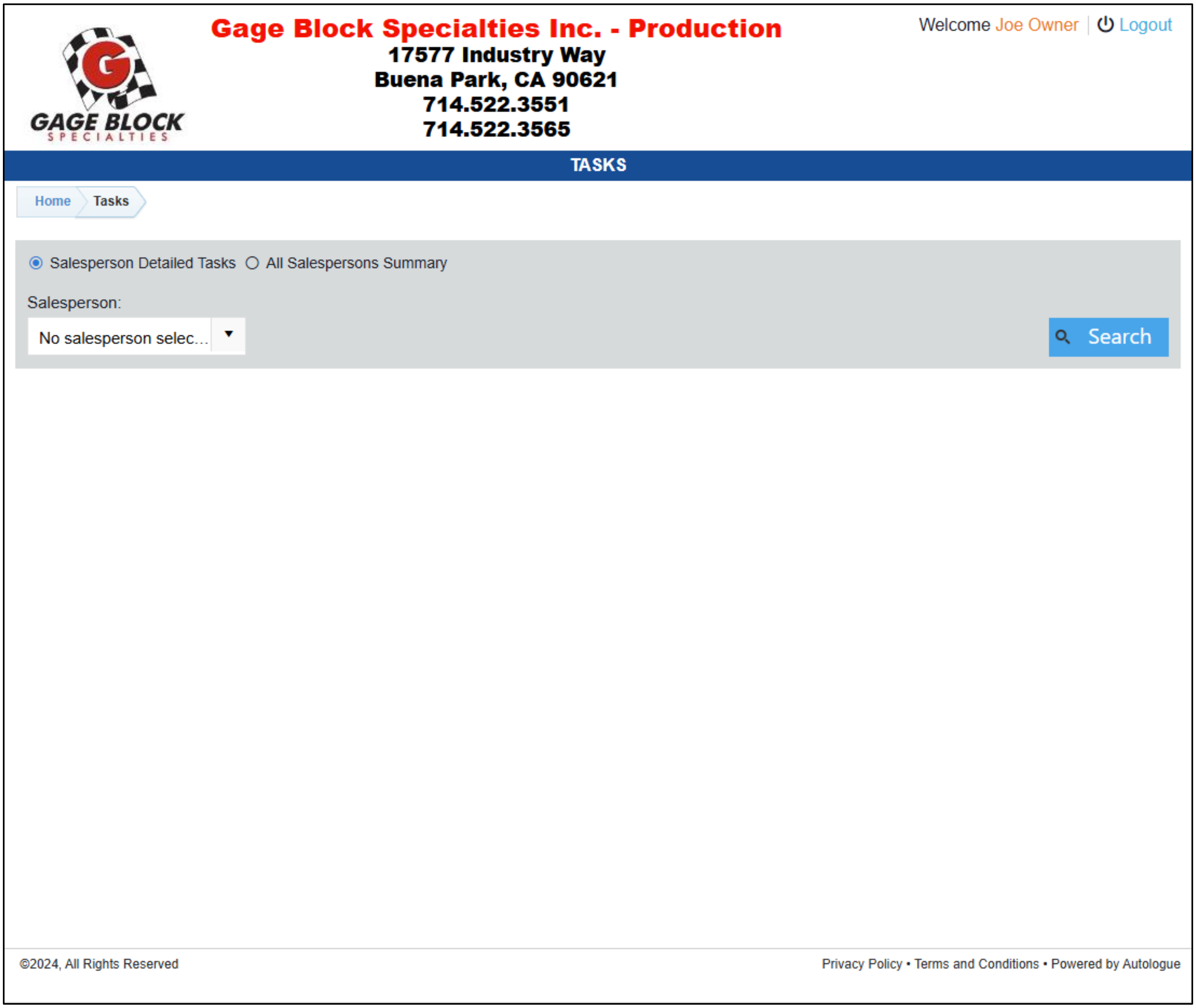
- An administrator can create and import workdays for sales/store managers or a salesperson by first selecting the sales/store manager or salesperson.
- Choose the file you configured and saved as explained above by clicking on the `Import Workdays`, then click on the `Upload`.

Tasks

From the user's home screen, if there are any pending tasks that are not completed, a red number tag (red circle with a number) next to the Tasks icon indicating the total number of active non-completed task items for their customers (see example below). The badge will not show if the number is zero.



- To view pending tasks for a specific user, click on the `Tasks` tile and the following screen will be displayed:

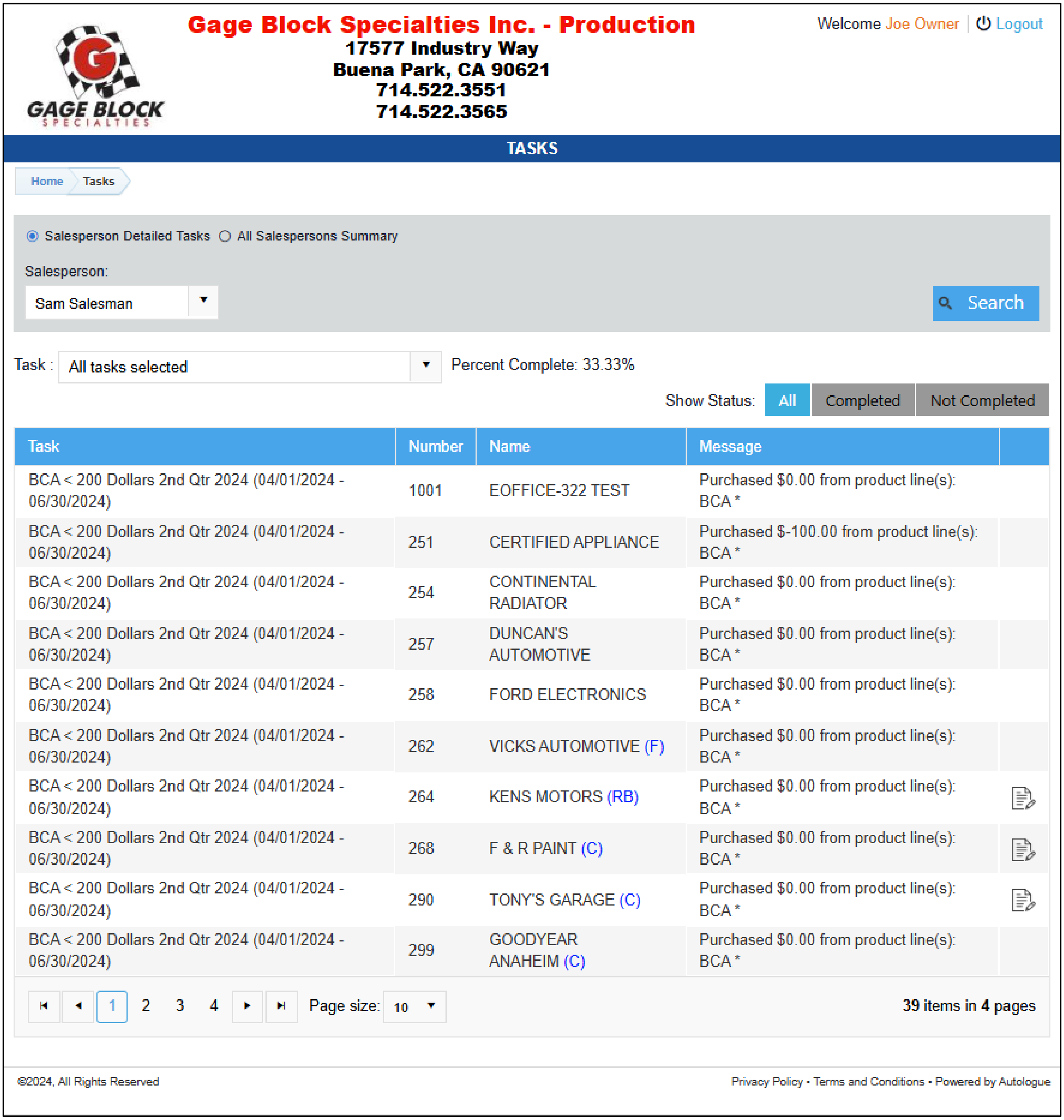


By default, the `Salesperson:` drop-down selection field is set to *No salesperson selected* and the `Salesperson Detailed Tasks` option is selected.

Salesperson Detailed Tasks

- With the `Salesperson Detailed Tasks` selected, you can select a specific salesperson to view tasks information for by clicking on the down arrow button below the `Salesperson:` field and then clicking on the specific user you want to report on from the drop-down selection list.

- Now click on the blue `Search` button and the screen will then redraw the screen with the task's information for the selected user:



Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome Joe Owner | Logout

TASKS

Home > Tasks

(•) Salesperson Detailed Tasks ( ) All Salespersons Summary

Salesperson: Sam Salesman

Search

Task : All tasks selected   Percent Complete: 33.33%

Show Status: All | Completed | Not Completed

Task	Number	Name	Message	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	1001	EOFFICE-322 TEST	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	251	CERTIFIED APPLIANCE	Purchased $-100.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	254	CONTINENTAL RADIATOR	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	257	DUNCAN'S AUTOMOTIVE	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	258	FORD ELECTRONICS	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	262	VICKS AUTOMOTIVE (F)	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	264	KENS MOTORS (RB)	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	268	F & R PAINT (C)	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	290	TONY'S GARAGE (C)	Purchased $0.00 from product line(s): BCA *	
BCA < 200 Dollars 2nd Qtr 2024 (04/01/2024 - 06/30/2024)	299	GOODYEAR ANAHEIM (C)	Purchased $0.00 from product line(s): BCA *	

1 2 3 4 Page size: 10   39 items in 4 pages

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By default, all the tasks assigned to the selected salesperson are automatically selected for display. The *Task* column displays the task name and the start/end dates in parenthesis. The *Number* column displays the customer account number.

The *Name* column displays the customer account name. The *Message* column displays the message information for the customer in regards to the task. The last column will display a note (🗎) icon when a task note has NOT been entered for the customer.

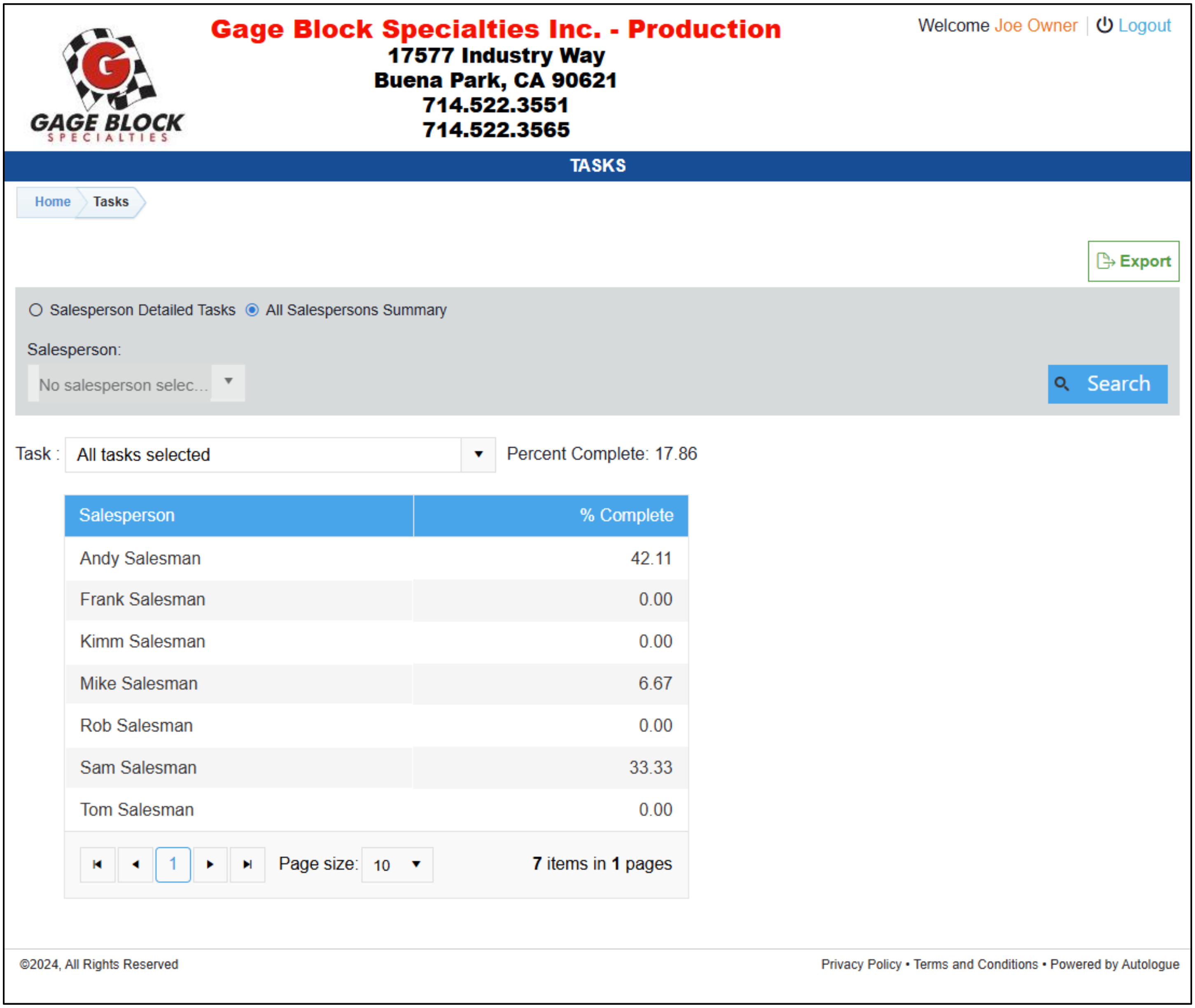
The `Percent Complete:` field will reflect the overall percentage completed for all the selected tasks.

The `Show Status:` field is defaulted to *All*, which means the screen will show all customers that have tasks assigned to them. Click on *Completed* to only show customers that had task notes entered (denoted by the note (🗎) icon missing in the last column). Click on *Not Completed* to only show customers that have NOT had task notes entered (denoted by the note (🗎) icon displayed in the last column).

Tasks will be removed from this list as they reach their end date as specified within the *ePartConnection Setup->Manage Alerts/Tasks/Notifications* section.

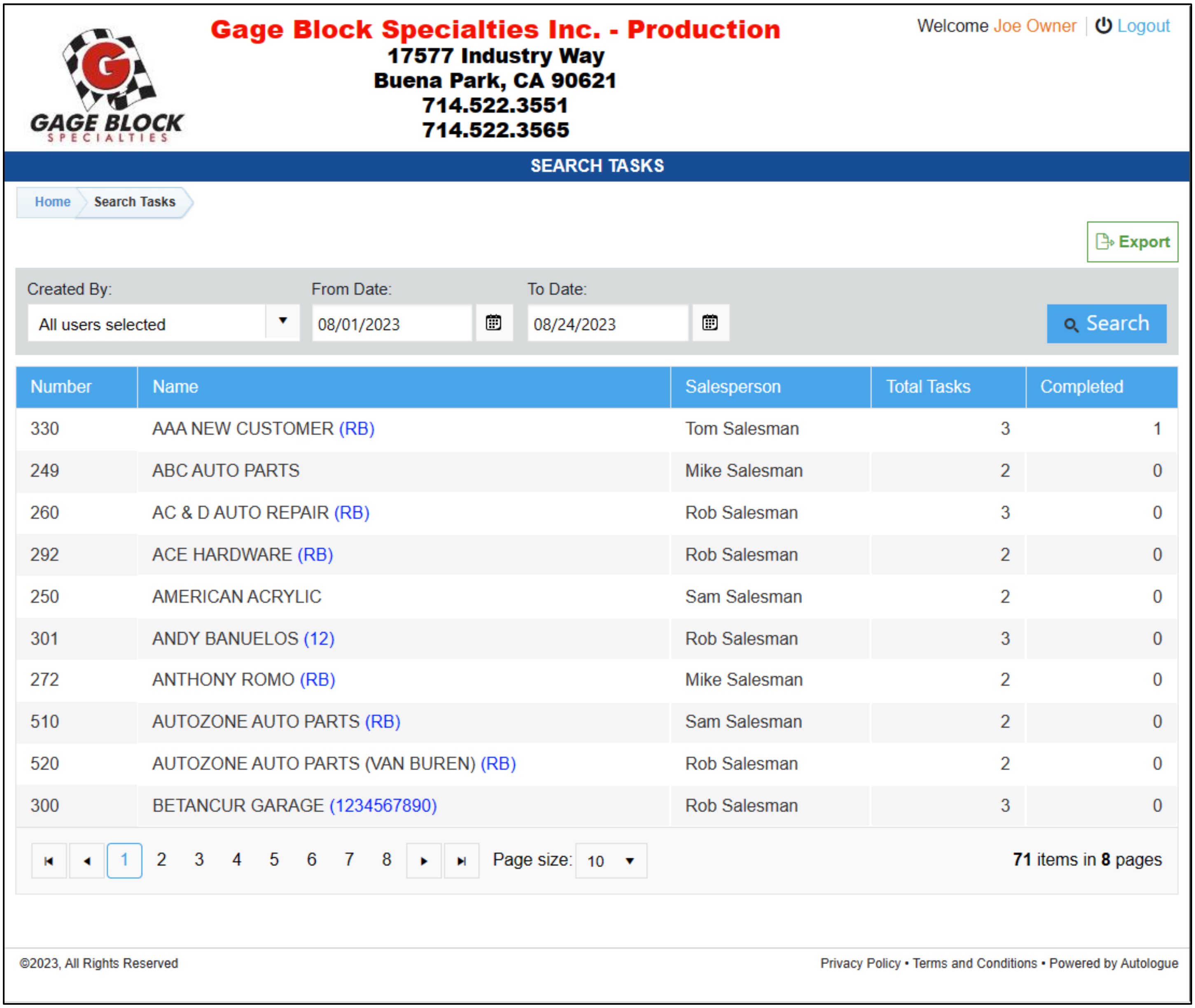
All Salesperson Summary

- Clicking on the `All Salespersons Summary` selection and then clicking on the blue `Search` button will display all salespersons on one screen in a dashboard format grid table that will shows the overall percent complete and the percent complete for each salesperson:



Search Tasks

- From the administrator's home screen, to view all customers with pending tasks for all users, click on the `Search Tasks` tile and the following screen will be displayed:



Number	Name	Salesperson	Total Tasks	Completed
330	AAA NEW CUSTOMER (RB)	Tom Salesman	3	1
249	ABC AUTO PARTS	Mike Salesman	2	0
260	AC & D AUTO REPAIR (RB)	Rob Salesman	3	0
292	ACE HARDWARE (RB)	Rob Salesman	2	0
250	AMERICAN ACRYLIC	Sam Salesman	2	0
301	ANDY BANUELOS (12)	Rob Salesman	3	0
272	ANTHONY ROMO (RB)	Mike Salesman	2	0
510	AUTOZONE AUTO PARTS (RB)	Sam Salesman	2	0
520	AUTOZONE AUTO PARTS (VAN BUREN) (RB)	Rob Salesman	2	0
300	BETANCUR GARAGE (1234567890)	Rob Salesman	3	0

By default, all users are selected and the `From/To Date:` activity dates will be from the beginning of the current month through the current day. If there are any pending tasks for customers, the screen will display the customer number, customer name, salesperson, total tasks they are currently assigned to and the number of tasks completed within the date period shown.

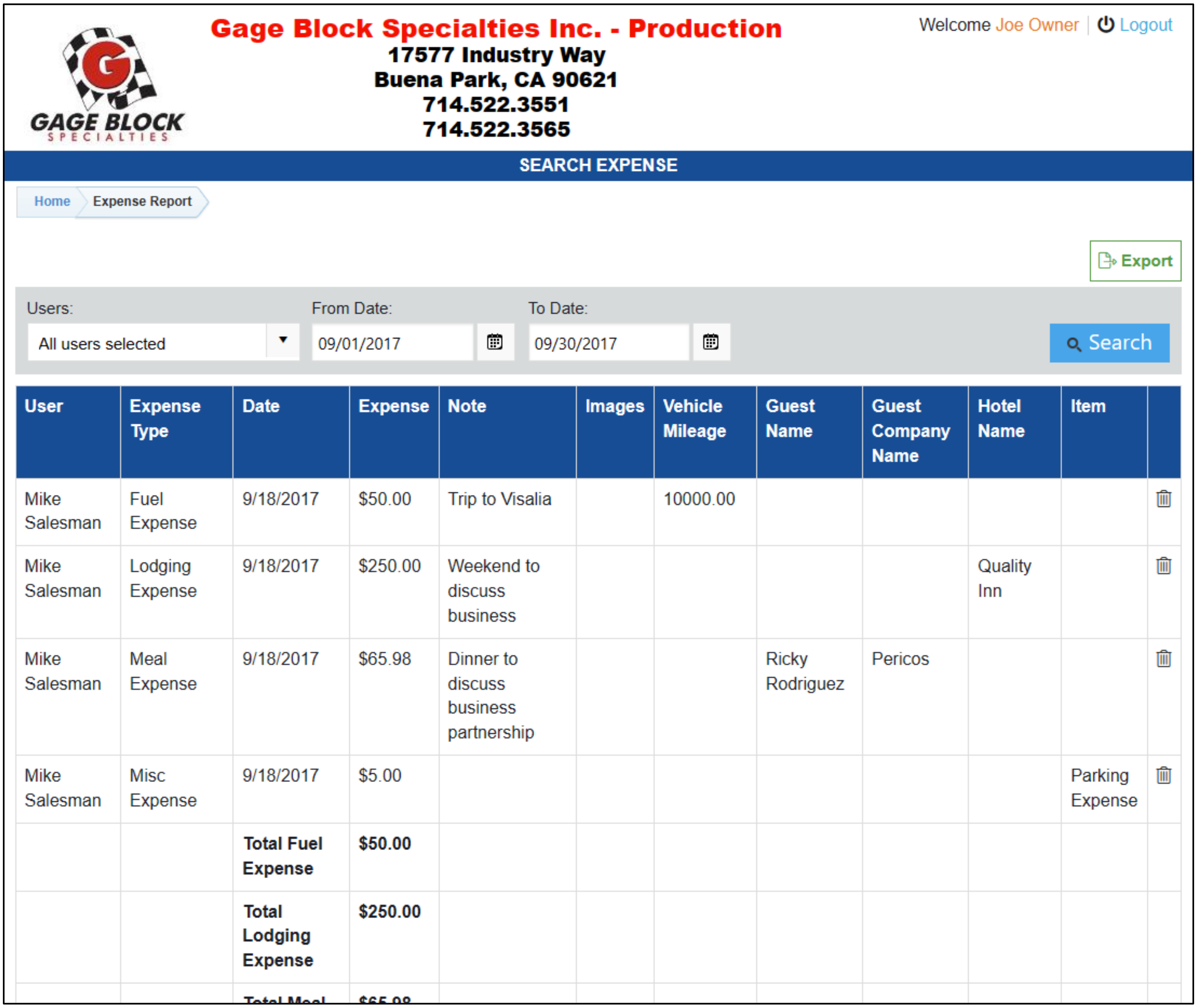
- Click on the `Export` button to save the customers tasks information to an Excel formatted spreadsheet file (*Task_Export.xlsx*) showing the information below:

Salesman	TaskName	Customer Number	CustomerName	Task Note	Complete
Sam Salesman	Fram Filter Units < 25	250	AMERICAN ACRYLIC	Joe said he will begin buying more Fram	Y
Sam Salesman	BCA Dollars < $200	250	AMERICAN ACRYLIC		N
Sam Salesman	Fram Filter Units < 25	258	FORD ELECTRONICS		N

This report can be used by management to follow progress on tasks.

Search Expense

- From the administrator's home screen, to view expenses for all users, click on the `Search Expense` tile and the following screen will be displayed:



Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome Joe Owner | Logout

GAGE BLOCK SPECIALTIES

SEARCH EXPENSE

Home > Expense Report

Export

Users: All users selected
From Date: 09/01/2017
To Date: 09/30/2017
Search

User	Expense Type	Date	Expense	Note	Images	Vehicle Mileage	Guest Name	Guest Company Name	Hotel Name	Item	
Mike Salesman	Fuel Expense	9/18/2017	$50.00	Trip to Visalia		10000.00					
Mike Salesman	Lodging Expense	9/18/2017	$250.00	Weekend to discuss business					Quality Inn		
Mike Salesman	Meal Expense	9/18/2017	$65.98	Dinner to discuss business partnership			Ricky Rodriguez	Pericos			
Mike Salesman	Misc Expense	9/18/2017	$5.00							Parking Expense	
		Total Fuel Expense	**$50.00**								
		Total Lodging Expense	**$250.00**								
		Total Meal	**$65.98**								

By default, all users are selected and the `From/To Date:` activity dates will be from the beginning of the current month through the current day. If there were any expenses that were entered by a salesperson, the screen will display the *User* (salesperson), *Expense Type* (fuel/lodging/meal/misc. expense), *Date* (of the expense), *Expense* (dollar amount), *Note*, *Images* (receipts), *Vehicle Mileage* (if applicable), *Guest Name*, *Guest Company Name*, *Hotel Name*, *Item* (name) within the date period shown.

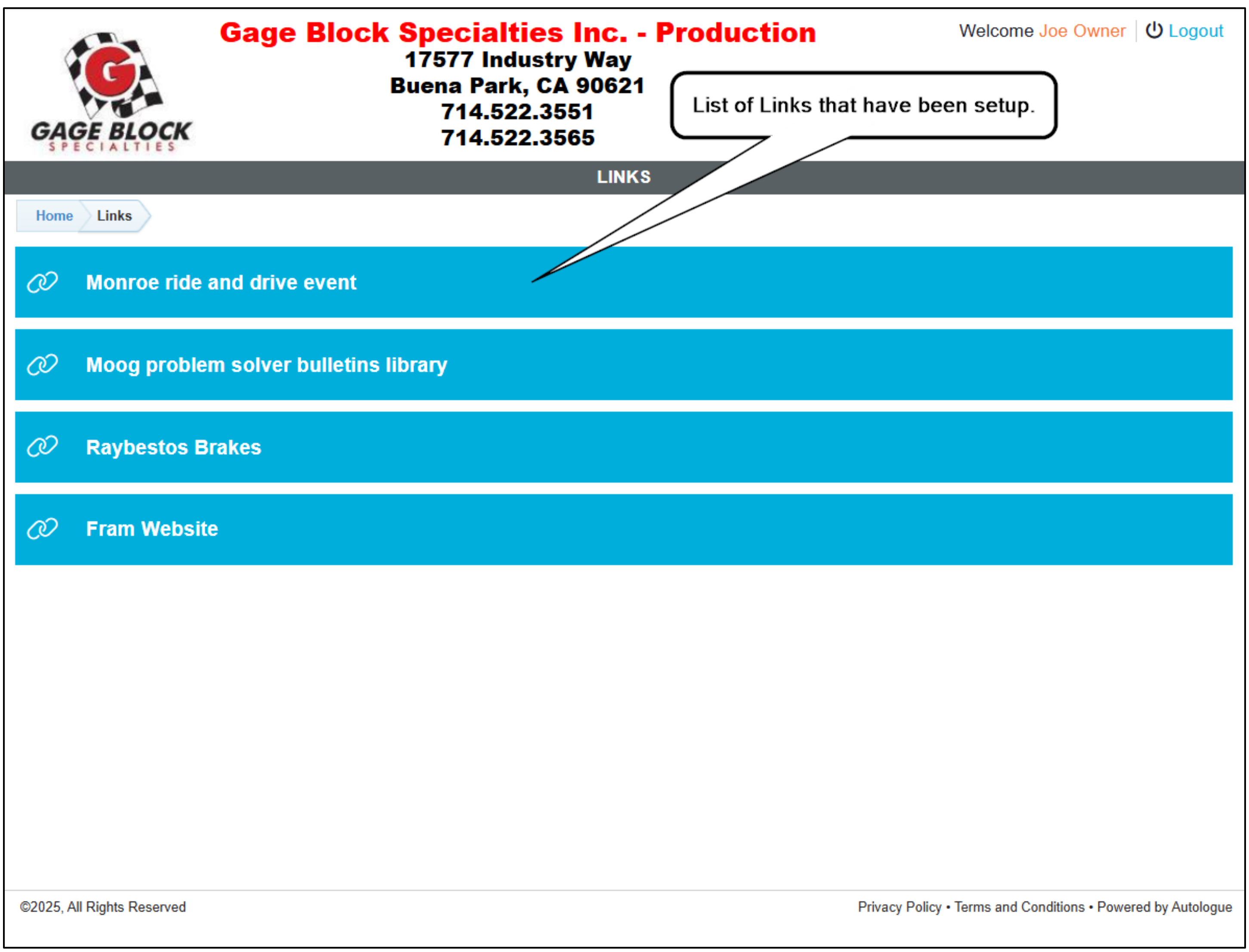
Selecting A User To View

- You can select a specific user to view expense information for by clicking on the down arrow button at the end of the `Users:` field and then clicking on the specific user you want to report on from the selection list.
- Now click on the `Search` button and the screen will then redraw the screen with the expense information for the selected user.
- Click on the `Export` button to save the expense report information to an Excel formatted spreadsheet file (*Expense.xlsx*).

The expense information will be emailed to the assigned user either daily, weekly, or monthly as specified within the *USERS & EMAILS* section of the `Settings` tile.

Links

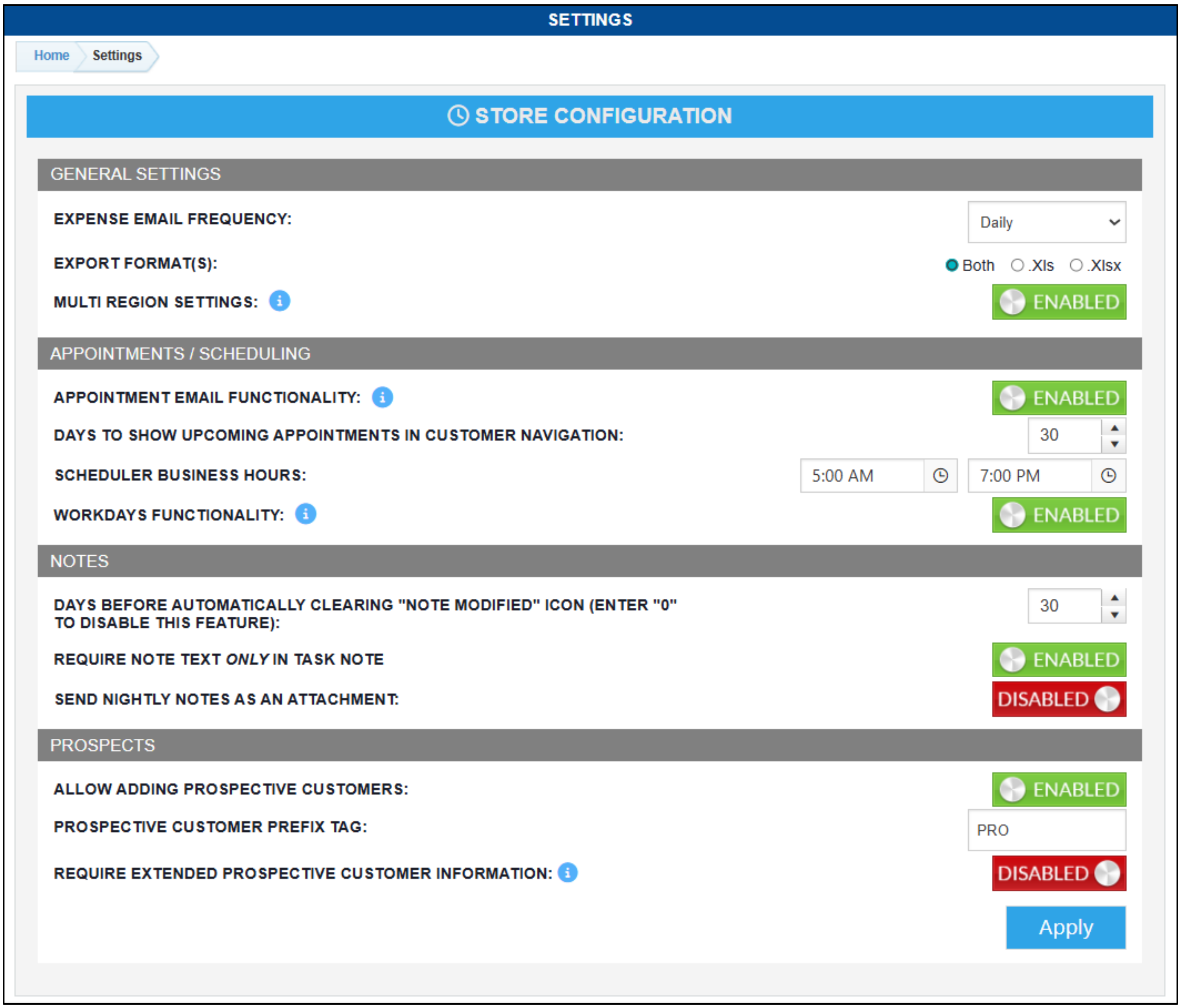
- From the administrator's home screen, to access a listing of opportunities that have been setup by management, click on the `Links` button and the following screen will be displayed:



The links can be reminders of important information or can be links to web pages. This information is setup within the *Manage Links* section of the *Setup ePartConnection* webpage.

Settings

- From the administrator's home screen, the user can setup the scheduler business hours, enable various store wide functionality, setup frequent email recipients, setup users as active/inactive, setup multi-region settings (if applicable), setup expense labels, create call outcome options by click on the `Settings` button. The following screen will be displayed:



Store Configuration

The *Store Configuration* screen section is for global settings (all users) apart from the *Multi Region Settings* which is unique per admin user and explained below.

General Settings

- To enable expense functionality, you must enable the `Expense Email Frequency` option. Click on the drop-down and choose a frequency to email the assigned recipient. Now click on the `Apply` button to save the setting. When this option is enabled, you may choose to have any users with the *Exp Rpt* option set to *Yes* to receive an email of all saved expenses either Daily, Weekly or Monthly by selecting your choice in the drop-down. This will also enable the `Expense` and `Search Expense` tiles on the salespersons home screen.
- The `Export Format(s):` field tells the system which formats are allowed when exporting data throughout the program. It allows for **.xls** (older excel format), **.xlsx** (newer excel format) or both. Click on the desired format and then click on the `Apply` button to save the setting.
- To enable `Multi Region Settings`, click on the `Enable` button. Clicking on this button will toggle between Enable/Disable. Now click on the `Apply` button to save the setting.

Appointments/Scheduling

- To enable the `Appointment Email Functionality`, click on the `Enable` button. Clicking on this button will toggle between Enable/Disable. Now click on the `Apply` button to save the setting. When this option is enabled, an email will be sent to the customer when they are scheduled for an appointment on the scheduler. It will be for confirming an appointment and the recipient must select *Yes* or *No* to an appointment request. If they select *Yes*, an email will be sent to the salesperson and the appointment will be shaded green on the schedule screen. If they reply *No*, the salesperson will also receive an email and the appointment will be shaded red on the schedule screen. Importing appointments will also send emails.
- The `Days To Show Upcoming Appointments In Customer Navigation:` field tells the system how days to look forward when displaying the upcoming appointments for the customer being viewed. Allowable range is from 9 to 999 days.
- To setup the scheduler business hours, click within the first field to the right of the `SCHEDULER BUSINESS HOURS:` heading and enter the time the sales staff begins working. Click within the second field and enter the time the sales staff stops working. Now click on the `Apply` button to save the entered times.
- To enable the `Workdays Functionality`, click on the `Enable` button. Clicking on this button will toggle between Enable/Disable. Now click on the `Apply` button to save the setting. When this option is enabled, a new Workdays button tile will be displayed when logged in as an administration, sales manager, or salesperson user.

Notes

- The `Days Before Automatically Clearing "Note Modified" Icon (Enter "0" To Disable This Feature:` field defining the number of days the "Red Bell" (note modified) icon displays within the customer list screen before being automatically cleared (reset). Allowable range is from 0 to 365 days.
- To enable the `Require Note Text Only In Task Note` functionality, click on the `Enable` button. Clicking on this button will toggle between Enable/Disable. Now click on the `Apply` button to save the setting. When this option is enabled, the task note window will appear with just the note entry field displayed. When the setting is disabled, the task note window will appear with the note entry field along with all other note option fields displayed.

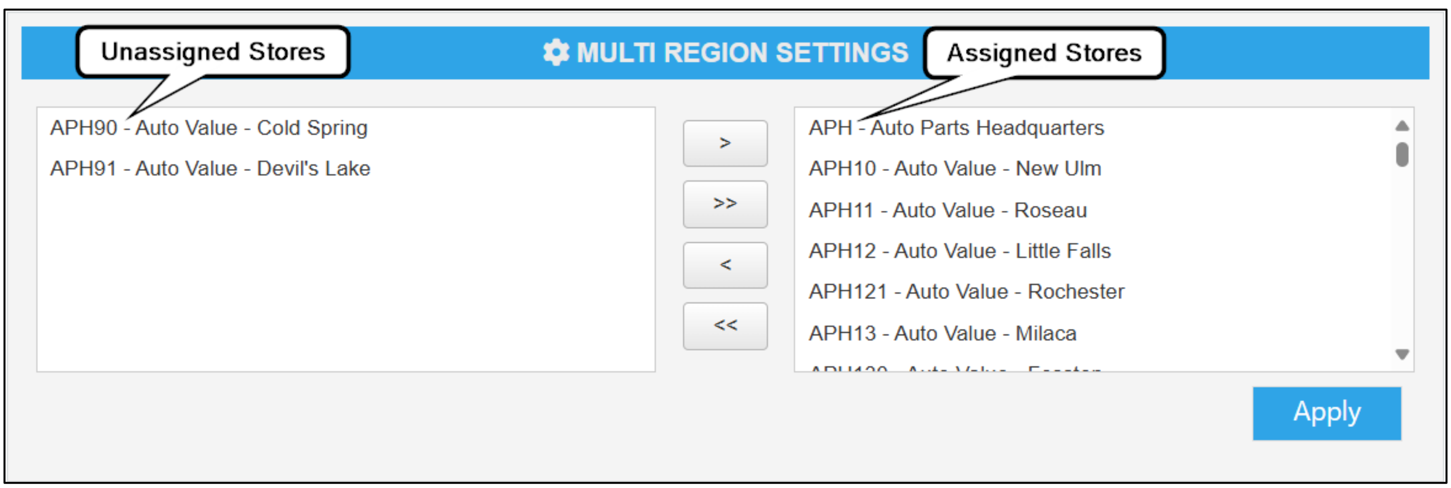
- To enable the Send Nightly Notes As An Attachment functionality, click on the Enable button. Clicking on this button will toggle between Enable/Disable. Now click on the Apply button to save the setting. When this option is enabled, the nightly notes email will contain an attached Excel spreadsheet with the notes information instead the notes being embedded within the email.

Prospects

- The enabling of the Allow Adding Prospective Customers: field allows users to add potential customers, temporarily to their customer list (or the list of the Salesperson assigned to them). These accounts can be copied to a permanent account once it is created on the management system and will move all notes and schedule items to the permanent customer number.
- The Prospective Customer Prefix Tag: field is added in front of the customer number the user creates. This helps identify prospective customers in the customer list by allowing a separate search for just those customers.
- To enable the Require Extended Prospective Information functionality, click on the Enable button. Clicking on this button will toggle between Enable/Disable. Now click on the Apply button to save the setting. When this option is enabled, all fields are required except for the Ranking. When the setting is disabled, only the customer Name and Number fields are required.

Multi Region Settings

- When this option is enabled, EACH admin user will have the capability of selecting stores for their region. Their login screen will reflect sales only for customers assigned to stores within their region. This requires the user to setup their *MULTI REGION SETTINGS* as shown:



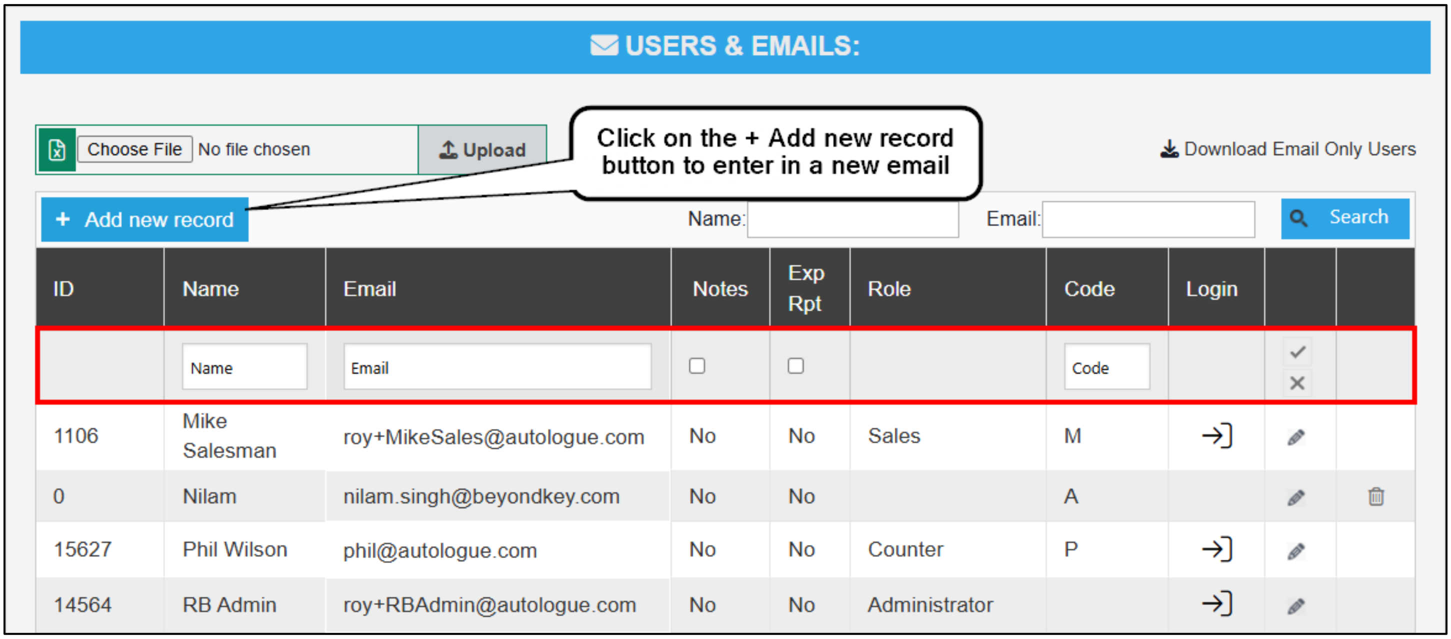
Stores on the right side ARE assigned to this administration user. Stores on the left are NOT assigned to this user. EACH administration user has a unique *MULTI REGION SETTINGS* table.

Users & Emails

- To enter in a new email recipient, click on the + Add new record button.

This is for adding email only users that are not assigned a role as an eSalesBI user (Code 0 recipients). eSalesBI users are automatically added to this list when they are saved within the *ePart Setup->Manage BI Users/Roles* section and can only have the Notes and Exp Rpt checkboxes edited.

The screen will now display a blank row:



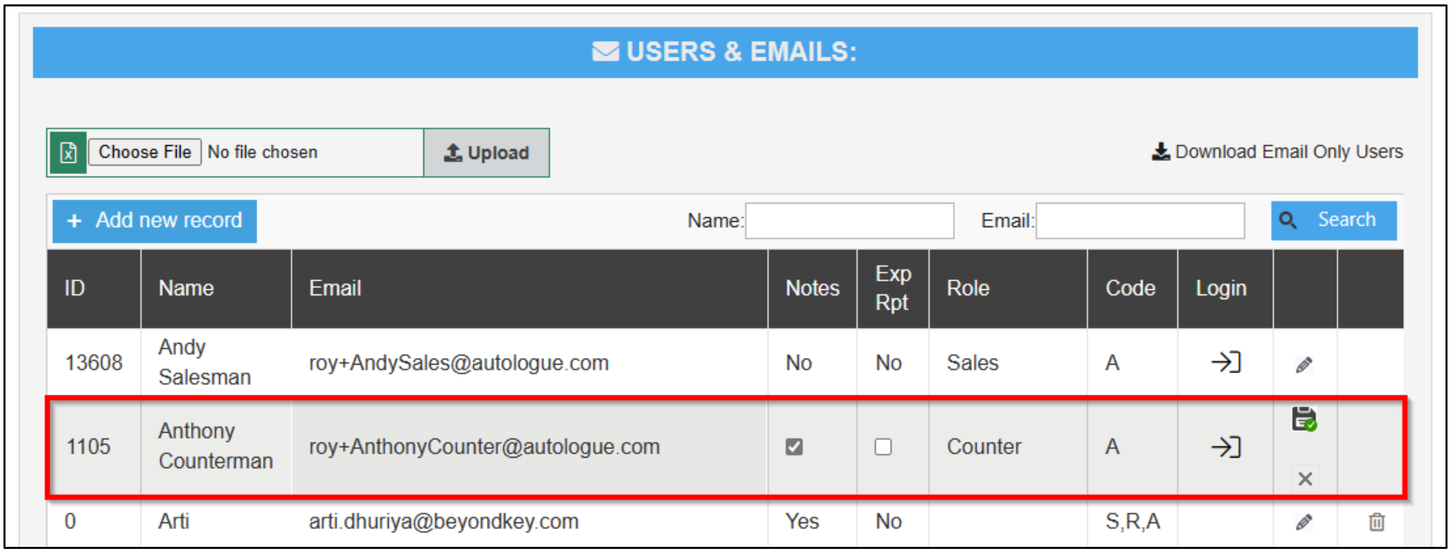
- Click within the `Name` field and enter in the email only user's full name.
- Click within the `Email` field and enter in the email only user's email address.
- If the email only user is going to receive a notes report, click on the `Notes` check box field.

☞ **<u>Note:</u> All names that have the Notes box check marked will automatically receive a daily email of all notes entered within the past 24 hours. If the recipient is a Sales Manager, they will only receive notes taken for customers of their assigned salespersons. If the recipient is an Admin user with Regional Settings turned on, they will only receive notes saved for customers assigned to stores in their region.**

- If the email only user is going to receive an expense report, click on the `Exp Rpt` check box field.

☞ **<u>Note:</u> All names that have the Exp Rpt box check marked will automatically receive an email of all saved expenses based upon the Expense Email Frequency setting.**

- If the email only user is going to get filtered reports for only specific salesperson codes, enter those codes within the `Code` field. When entering multiple codes, separate each code with a comma (i.e. A,F,G). If this field is left blank, the notes report will contain information for all salesperson codes.
- Click on the (✓) check mark button to save the new record entered.
- To edit the settings for an existing user, click on the Edit (✐) icon button.



- Edit any of the available fields as previously described and click on the Update (🖫) icon to save the changes.
- To delete an email only user (Code 0), click on the Delete (🗑) icon button.

☞ **<u>Note:</u> Only email only users can be deleted and will have Delete (🗑) icon buttons.**

Expense Label Settings

- Within the *EXPENSE LABEL SETTINGS* screen section, there are four default expense labels (Fuel/Meal/Lodging/Misc). To change any of these, click within the field next to the label to be changed and enter in the new expense label name and then click on the `Apply` button to save the setting.

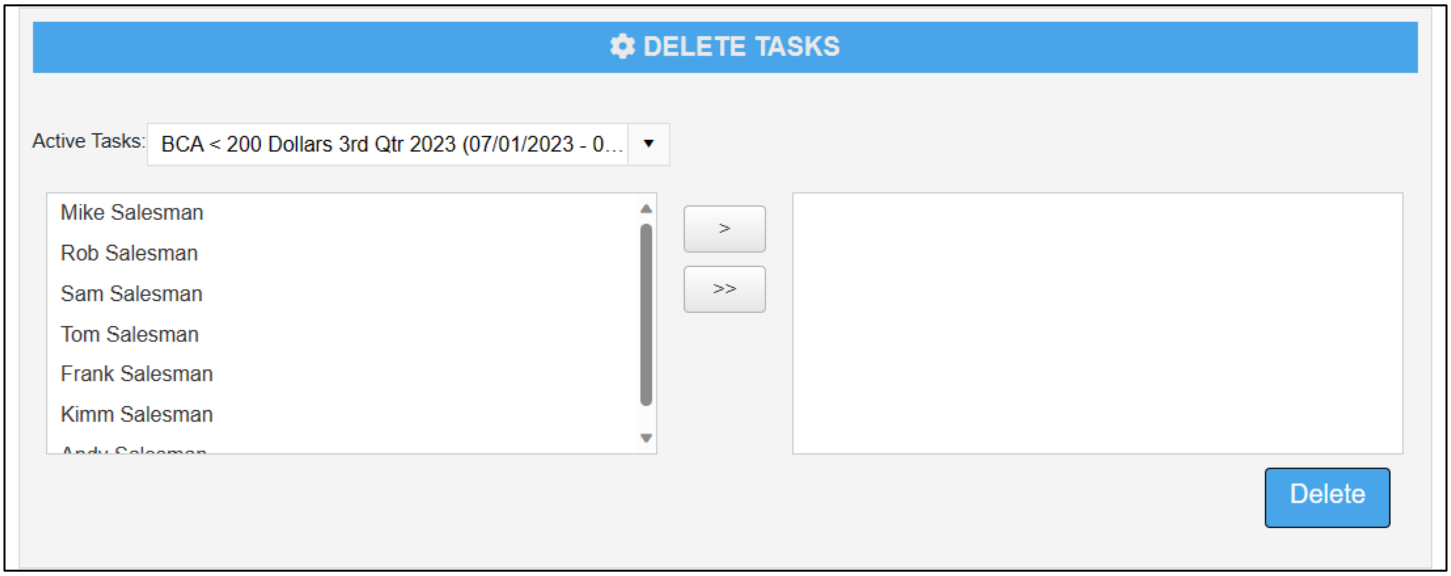
Customer-UDF Labels

There are 10 user defined fields (UDF) within the *About Customer* section of the *Customer Navigation* screen. You can create custom fields that can be entered and searched within the `Search CRM/View Changes` tile.

Delete Tasks

- To delete a task for a user(s), click within the `Active Tasks:` field and select a task from the drop-down selection list.

The screen will now display a list of all the salespersons with customers assigned to that task as shown:



- Click on the salesperson to be removed from the list, then click the single arrow > button. The salesperson will now be displayed on the right side of the screen.

☞ **<u>Note:</u> Clicking the >> button will automatically select and move all the salespersons listed to the right side of the screen.**

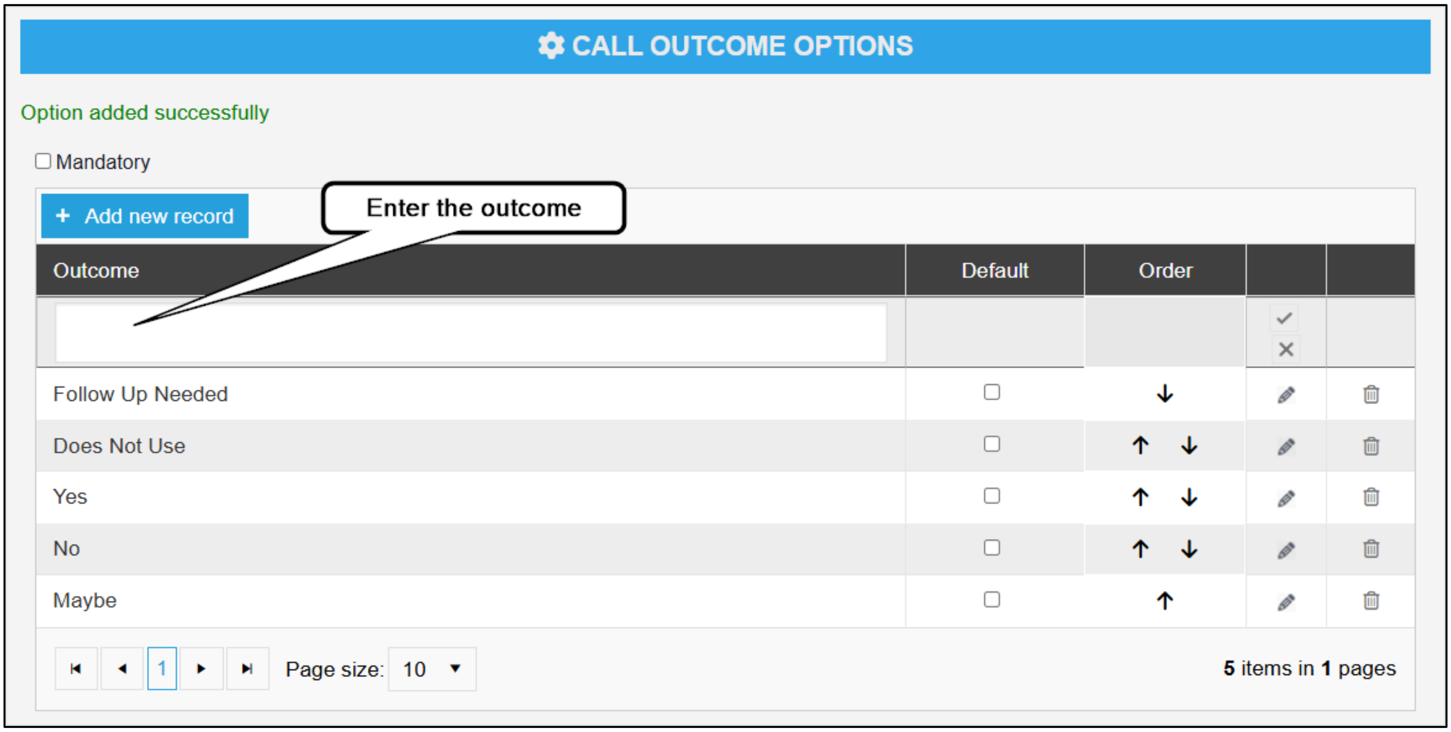
- Once all the desired salespersons have been selected and are listed on the right side of the screen, click on the `Delete` button and all those salesperson(s) customers will no longer be assigned to that task.

Call Outcome Options

Within the *CALL OUTCOME OPTIONS* screen section, specific call outcome entries can be setup and attached to customer note entries.

- To make call options mandatory for all notes entered, click on the `Mandatory` check box field.
- To enter in a new call outcome, click on the `+ Add new record` button.

The screen will now display a blank row:



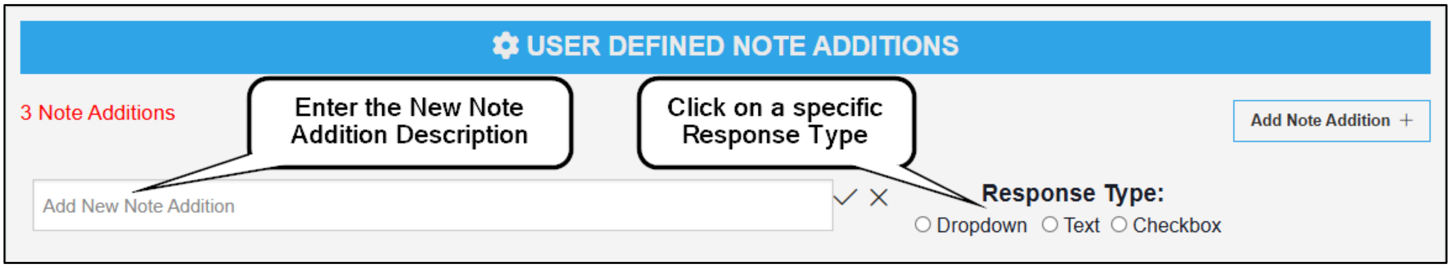
- Click within the `Outcome` field and enter in the desired outcome description.
- Click on the checkmark (✓) icon to save the new outcome entered. Continue this step until all the desired outcomes have been entered.
- Outcome display can be re-ordered by clicking on the arrows (↑↓) within the `Order` column.
- To set a default value when entering a note, click on the `Default` check box field for one of the outcome items and that outcome will be selected by default when users are entering notes.
- To edit any outcome, click on the Edit (✐) icon button.
- To delete any outcome, click on the Delete (🗑) icon button.

User Defined Note Additions

Within the *USER DEFINED NOTE ADDITIONS* screen section, specific note addition headings and responses can be setup and attached to customer note entries.

- To make specific note addition headings mandatory for all notes entered, click on the `Mandatory` check box field, and click on the blue `Apply` button to save the change.
- To enter in a new note addition heading, click on the `Add Note Addition +` button.

The screen will now display a new *Add New Note Addition* blank field as well as *Response Type* selections as shown:

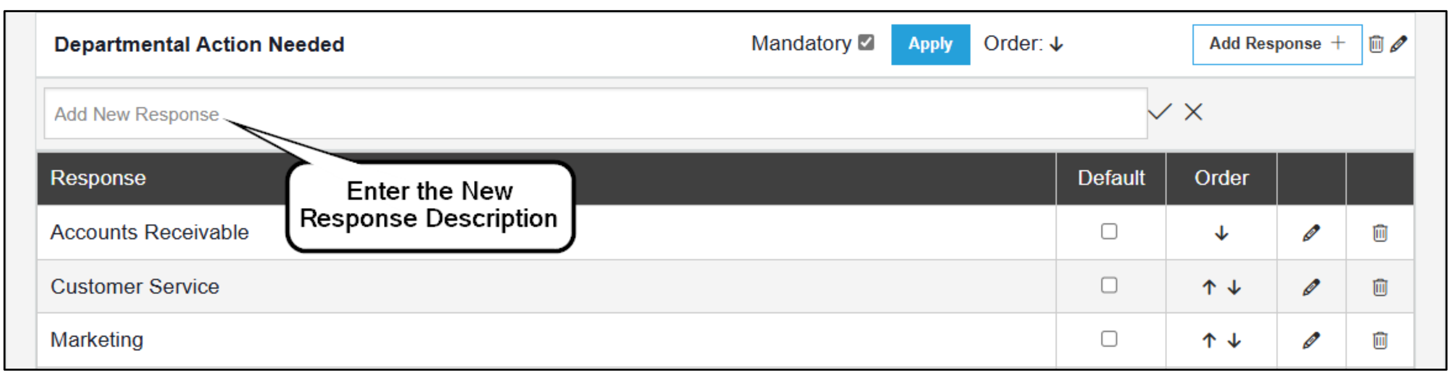


- Click within the `Add New Note Addition` field and enter in the note description heading.
- Under the `Response Type:` heading, click on the *Dropdown*, *Text* or *Checkbox* field.

Response Type	**Description**
Dropdown	Will consist of a dropdown selection list the user can choose from.
Text	Will consist of a blank freeform entry field the user can type information within in response to the subject heading.
Checkbox	Will consist of a heading with a checkbox the user can click on when a specific action was taken/completed.

- Click on the checkmark (✓) icon to save the new note description entered. Continue this step until all the desired note description headings have been entered.
- Once note headings have been added, responses can be added for dropdown response type headings by clicking the `Add Response +` button.

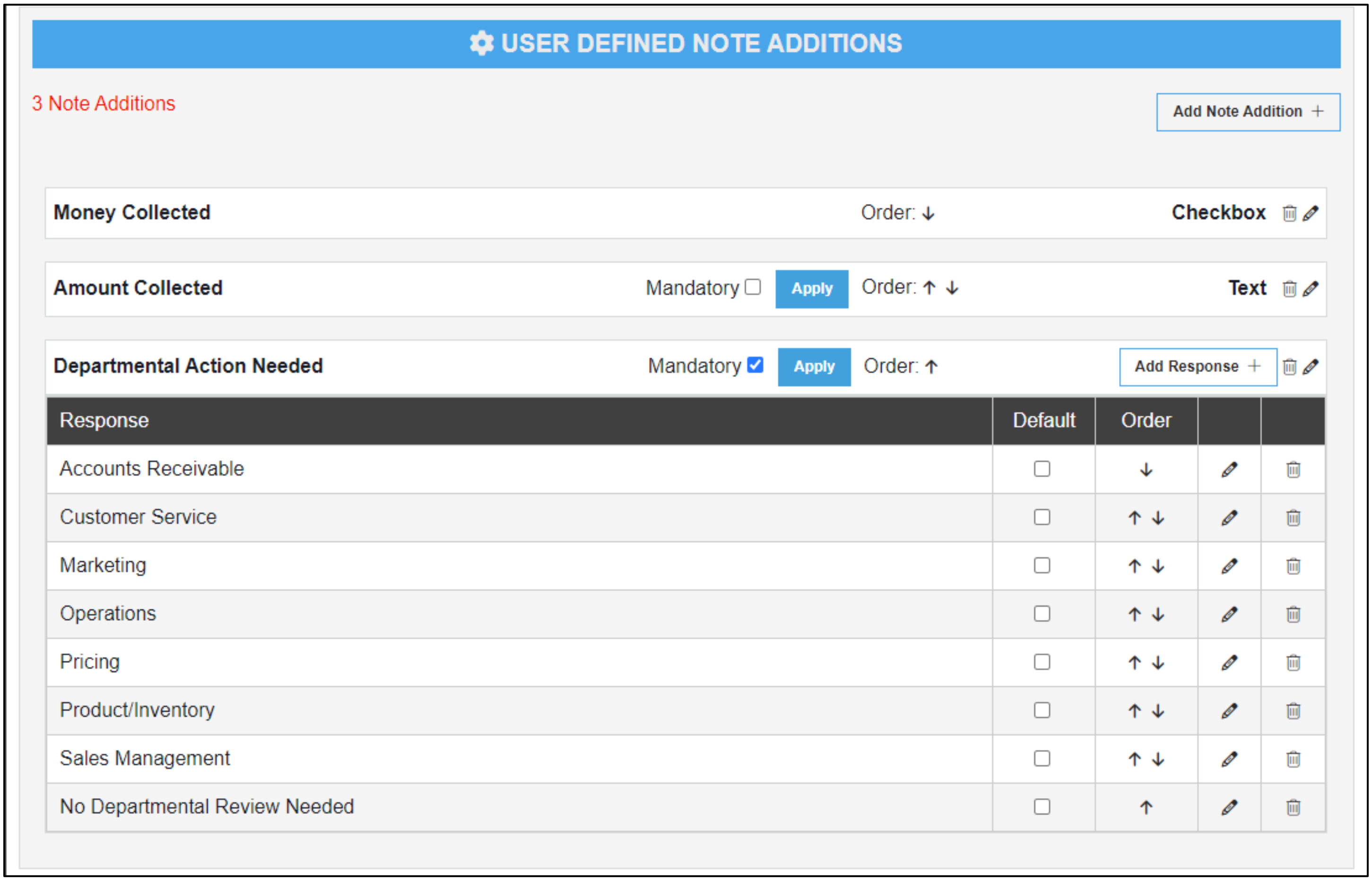
The screen will now display a new *Add New Response* blank field as shown:



- Click within the `Add New Response` field and enter in the response description.
- Click on the checkmark (✓) icon to save the new response entered. Continue this step until all the desired response descriptions have been entered.
- Note Addition display can be re-ordered by clicking on the arrows (↑↓) within the heading row.
- To set a default value when entering a note, click on the `Default` check box field for one of the response items and that response will be selected by default when users are entering notes.
- To edit any note description headings or responses, click on the Edit (✐) icon button.

- To delete any note description headings or responses, click on the Delete (🗑) icon button.

The *Dropdown* and *Text* response types can be set as mandatory or optional.

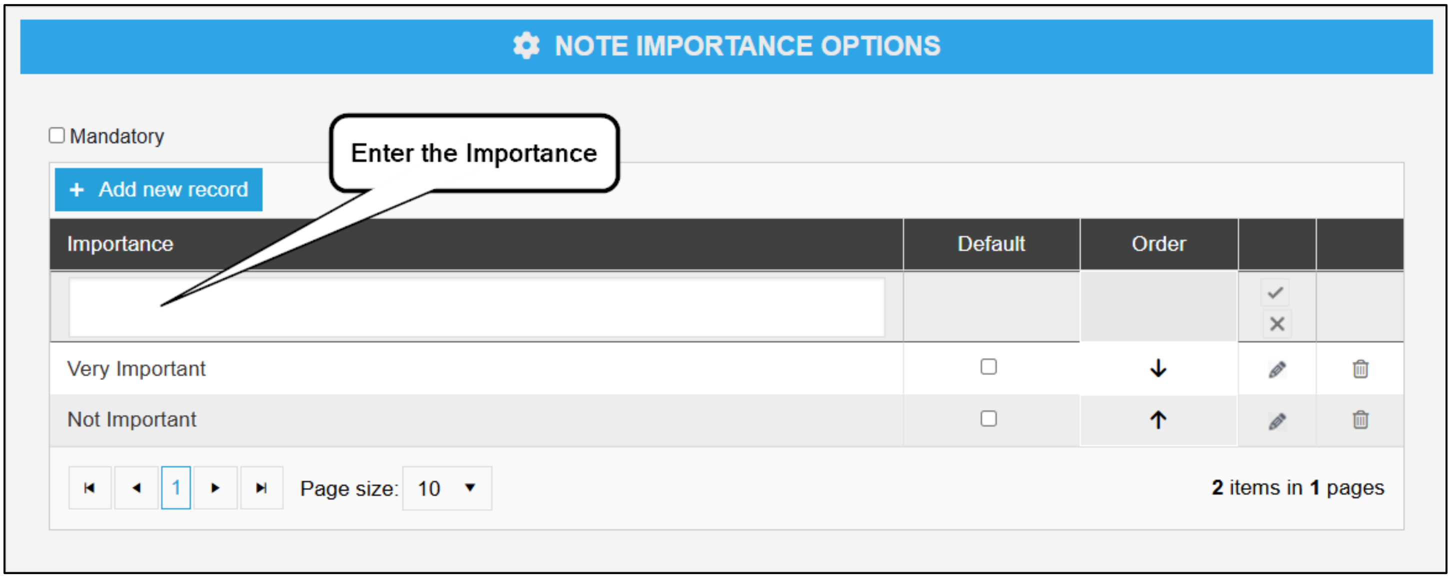


Note Importance Options

Within the *NOTE IMPORTANCE OPTIONS* screen section, specific importance option entries can be setup and attached to customer note entries.

- To make note importance options mandatory for all notes entered, click on the `Mandatory` check box field.
- To enter in a new importance option, click on the `+ Add new record` button.

The screen will now display a blank row as shown:

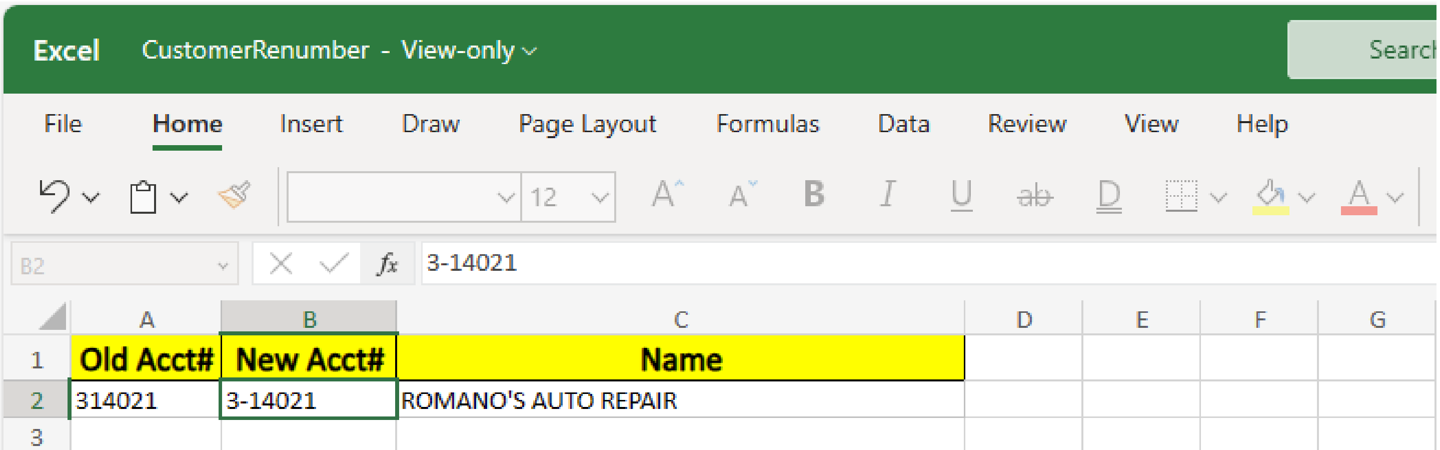


- Click within the `Importance` field and enter in the desired importance description.
- Click on the checkmark (✓) icon to save the new importance description entered. Continue this step until all the desired importance options have been entered.
- Importance display can be re-ordered by clicking on the arrows (↑↓) within the `Order` column.
- To set a default value when entering a note, click on the `Default` check box field for one of the importance items and that importance will be selected by default when users are entering notes.
- To edit any importance, click on the Edit (✐) icon button.
- To delete any importance, click on the Delete (🗑) icon button.

Customer Renumber

If customer numbers have changed on your management system or you have created prospective customers, you can import a file to change them within eSalesBI and to keep all previous notes assigned to the new customer number.

- Click on the `Import Customer Renumber` button and click on the *Download sample Spreadsheet* link to download an example file spreadsheet file (*CustomerRenumber.xlsx*) as shown:



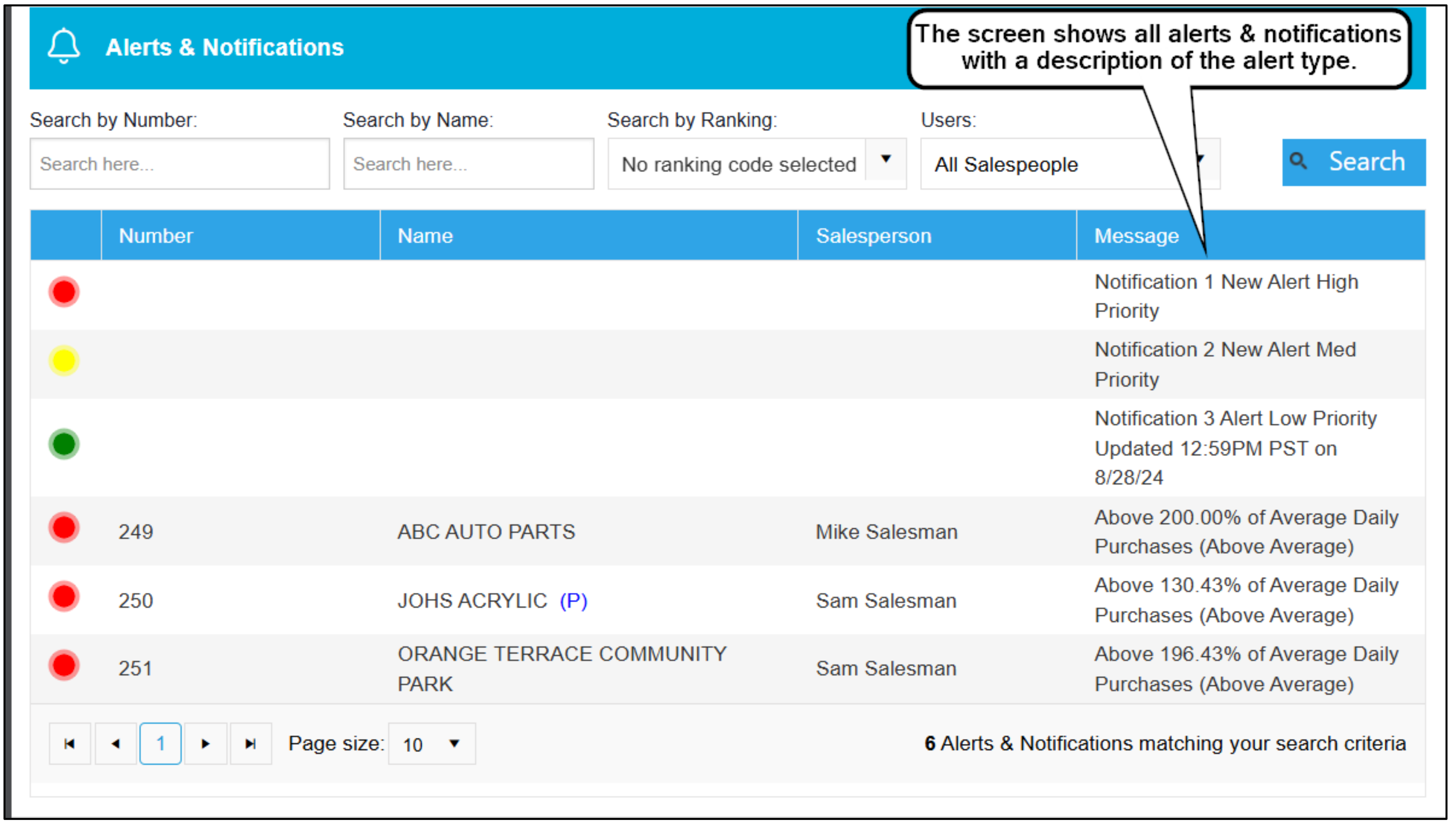
- Edit this file and enter in old/new account numbers and save. Then select this file and click on the `Upload` button to import.

Autocube Reports

If enabled, this tile activates the AutoCube Reporting tool and logs the user in directly.

Alerts & Notifications

- From the administrator's home screen, all alerts & notifications are collapsed (not displayed) by default. If any alerts or notification has been setup and/or met, they will be displayed below the `Alerts & Notifications` heading section when clicking on the `Search` button as shown:



The screen above is showing examples of alerts for customers whose purchases are trending up. The other 3 alert types are *No Purchases, Trending Up* and *Over Returning* merchandise based upon criteria setup within *ePart Setup->Manage Alerts/Tasks/Notifications* menu option. Notifications are always listed first and alerts second.

- Alerts are sortable by clicking on the column heading and can be filtered by salespersons using the `Users:` drop selection list or by entering a specific customer number /name within their respective search by fields.

☞ **<u>Note:</u> Only administration & sales manager users can select a user to view their specific alerts.**