

Job & Account Management - Introduction

There are many different ways to accomplish tasks with the CRM. This quick guide illustrates a simple logical flow. As you get more familiar with the system you may use better flows that work for you.

The following guide provides details based on the following flow:

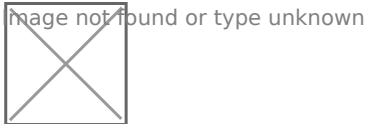
- Create Account
 - Create Survey
 - Add Rooms and Products (both from the CRM and the Andriod App)
 - Make any room adjustments
 - Create the customer quote
 - Customer Sign-off
 - Book a fitting
 - Manage the fitting
 - Close the job
-
- [Creating an Account](#)
 - [Alternatively, you can create a Job from the Kanban \("Walk In" or "On-Site Survey"\)](#)
 - [Create a Job Survey/Order \(Measure Up\)](#)
 - [Create the order \(Adding rooms and products\)](#)
 - [Create the Quote > Send the quote > acknowledge the quote!](#)

- Customer Quote Acceptance
- Book a Fitting
- Inform the Fitter
- Close Job

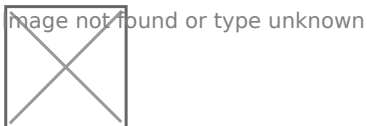
Creating an Account

Tip: Accounts or Customers are the focus for the entire system. Jobs, Site Locations, Surveys, Quotes and Invoices all must be linked to an Account. An Account can be either a single person e.g. Mr Joe Bloggs or a company e.g Persimmon Homes

1. Click "Accounts"

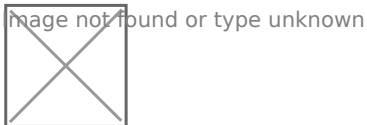


2. To search to see if the Account already exists click this link the filter icon.



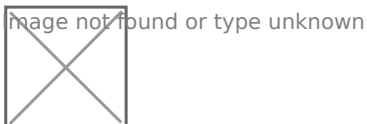
Tip: It is possible to search on multiple options to narrow your search. E.g. you can search on the Accounts surname and email address at the same time. NB: The search will only return matches where there is an exact match to both options.

3. Click here.

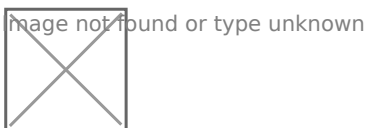


Tip: To set the search either scroll down to the search button or simply press Enter on the keyboard.

4. If the Account doesn't exist click Create Account

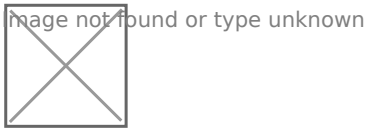


5. Add Account details.



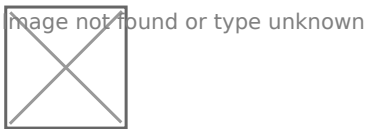
Tip: There are only 3 required fields to create an Account however the more detail the better the administrator experience.

6. Enter the Installation address of the 1st Job if required. If the job is within the UK we recommend using the Post Code lookup to search for the address.

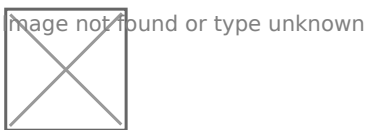


Tip: Tip! It is not necessary to add a installation address at this stage. For example if this was a corporate customer or landlord with multiple addresses you may leave this blank and then add specific installation locations when create jobs.

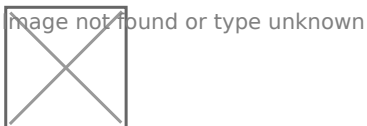
7. Add the Post Code and click this Lookup field.



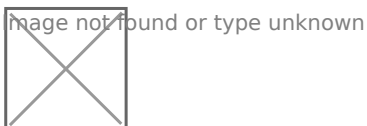
8. Search the List of Addresses based on the Post Code



9. Click "State/Region:"



10. If the Installation address is also the Invoice address click the copy field to populate the invoice address.



11. Click this save button to create the Account

Alternatively, you can create a Job from the Kanban (“Walk In” or “On-Site Survey”)

1. Click "Jobs" button in the main header



2. Click the + Create Job Icon



Tip: Tip! There are two types of Job. Select the option most appropriate.

Walk In

A walk-In job is a job that will NOT require an on-site survey. This might be a customer who has all the information or simply a customer wanting to purchase carpet.

On-Site Survey

This is the normal approach where you take some details about the site and are arranging for a surveyor to visit to measure up.

3. Click "On-Site Survey"



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4. The job will need to be related to an Account/Customer - to do this click on the link icon.



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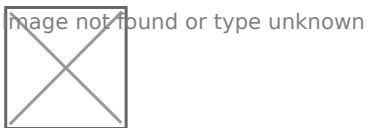
Tip! From here you can either relate the job to an existing Account or create a new account at this point.

Create a Job Survey/Order (Measure Up)

Within RakataCRM a Survey is a critical piece of the system. Every order, quote, fitting etc has to be based on a Survey. A Survey is where the Order is created and products/costs etc set.

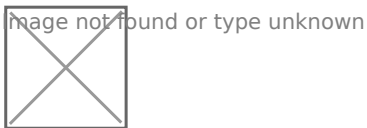
Tip! The Word "Survey" can be renamed to a term more specific to your business. This can be found in Advanced User Settings.

1. Click the "Create Job Survey" button

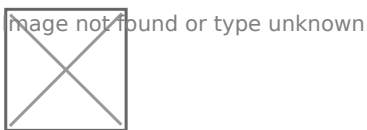


Tip! If you are visiting the site simply select No to the 1st option of "Is a Time/Date required?" which will create a Survey without any dates to visit.

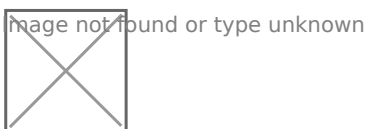
2. Complete the booking form



3. Set the Survey to and from time



4. Select the Surveyor



Tip! Surveyors are users that are in the Surveyor role. To manage users go to Advanced Settings and set the user you wish to be available for booking as a surveyor and mark them as a surveyor

5. Add a specific notes for the survey to see when visiting the property

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6. Choose to send the Customer and any related contact an SMS and Email regarding the survey booking.

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Tip! As soon as the survey is saved the Email and SMS will be sent at this point.

7. Click "Submit" to create the survey appointment

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8. To confirm the Survey has been booked click the Appointments tab

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9. or view in the diary by clicking the Diary button and selecting the Diary of your choice.

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Create the order (Adding rooms and products)

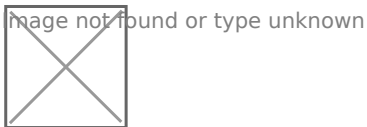
Rooms can be added in two ways.

The Surveyor can use the Android APP on site

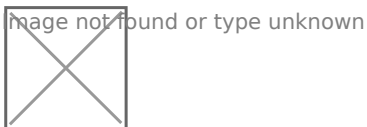
The surveyor can take notes and return to this page and complete the survey.

This guide explores option 2.

1. Click "Add Room"

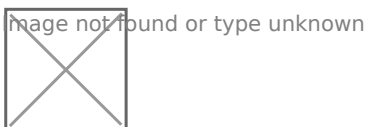


2. Select the room type

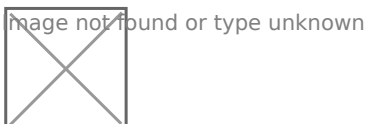


Tip! If you want to personalise the room name you can set the name e.g. Alice Bedroom

3. Set the dimensions of the room



4. If the requires a second cut you can add this here



5. The room creation will display both cuts

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Tip! When adding products the system will create two products - one for each cut. This will compute the product and fitting cost for each cut automatically. You do NOT need to do any calculations.

6. Select the room specifics

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7. Type " [[down]] [[down]] [[down]] [[down]] [[down]] [[down]]"

8. Room specifics are a good way to select typical products you would add to every room e.g. Grippers or underlay. You can add these here or later in the process.

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9. Select the options (you can add more than one) per area.

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10. Click Save - this will create the room with the products selected.

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Adding Products

1. Click "ADD PRODUCT"

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2. Type the Product you wish to select and click Search

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3. Click select on your desired product

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4. Click "Submit"

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5. The system will automatically add the products to all the cuts within the room as well as automatically calculate the product and fitting cost based on the room dimensions. The system will also calculate to the the product quantity/dimensions for the selected product.

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Tip! You can update any aspect of the Product once it is set. For example if the system calculates 10 grippers but you know you can complete the job with 8 grippers you can click the edit button and override the quantity to 3 grippers.

6. The system will calculate the total room price. You can override this price to be anything you want. For example if the price was £346.02 but you wanted the price for be £330.00 add this value and click the calculate button. The system will adjust all product prices BUT NOT the labour cost.

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7. The calculate button will update the cost of room.

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Adjusting the order price (Price to win)

1. At the top of the page you can the total quote value.

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2. If you want to get the price to a certain value you can simply input the price (price to win) number and click the calculate button. This will update all the Product cost (NOT the labour) cost for every product evenly and ensure the quote value gets to the price you want.

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3. In this example - adding 300.00 and clicking the calculate button.

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4. Will adjust the entire order to meet your price desires.

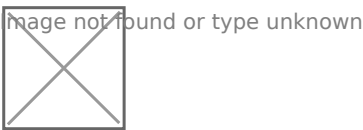
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**** Tip! There may be instances where it is not possible to simply adjust the entire room in one go. You can however adjust either an entire room or any product or service individually ****

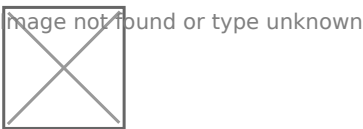
Create the Quote > Send the quote > acknowledge the quote!

1. Click the "Create Customer Quote" button.

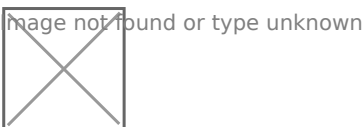


Tip! The system allows you to create different quotes based on rooms. For example a customer might want a quote for the downstairs and a separate quote for the upstairs.

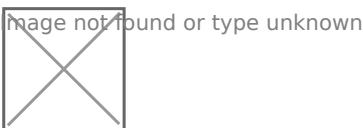
2. Select the rooms you want to create the quote



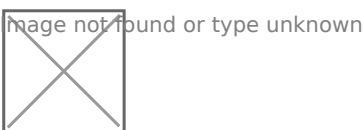
3. View the PDF quote by clicking the PDF ICON



4. Any specific quote text you want to add can be added here



5. Add the customer specific quote notes that will be appended to the quote



6. Set the parameters you want the customer to accept the quote.

TIP: RakataCRM for Flooring is integrated to BLINK and Square Payments. Please contact Rakata to discuss this setup and integration. There is no additional cost from Rakata to use these tools however there may be costs associated from the payment provider.

Quotes

Send Multi Quote | Create Customer Quote

#	Num	Title	Multi Send	Account	Status	Offline quote acceptance	Has email been sent (Uncheck to send again)	Quotes Notes (Visible to customer)	Allow user to accepted quote without payment (pay over phone or instore)	Allow user to pay online (via payment gateway)	Miniumum payment required (%)	Grand Total (£)	Valid Until	Created by	Digital Confirmation URL	Action
Quotes	314	314 Alice Britten	<input type="checkbox"/>	Alice Britten	Quote in Creation	ACCEPT QUOTE OFFLINE	<input type="checkbox"/>		Yes	No	0	1800.01	24-03-2024	Sam		<div>Create Customer Invoice Delete Quote Create Supplier PO(s) Create Fitter Invoice(s)</div>

There are a 4 options that a customer can accept a quote:

1. If you are happy to accept the quote offline (e.g. they call you or email you click the "Accept Quote Offline" button).

2. If you allow them to accept the quote via a link and NOT pay - set this to YES

3. If you want to give them the option to pay online (Assuming it is setup) click YES

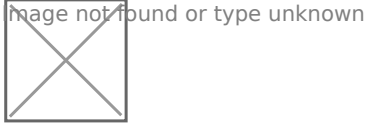
4. Set the % amount of the quote you are prepared to accept as a deposit.
- TIP: If option 4 is set the system will always provide the customer with the option to pay in full as an additional option to paying the minimum deposit amount.**
7. Send the quote for the customer to sign

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8. Click "Submit"

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- Tip! If the person who creates the quote is NOT the Sales Person they can select Check and Email. This will send an email to the Sales Person that a quote is waiting for review. The Sales Person can then review the quote and send from themselves.**

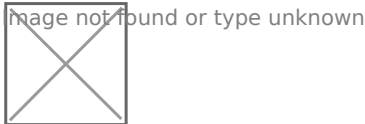
Customer Quote Acceptance

1. The customer will receive an Email and SMS with the quote details to complete

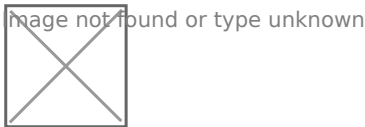


Tip! It is possible to embed the Quote Acceptance link directly within the Email. This is configurable based on your preferences.

2. The customer can open and click the link to accept the quote

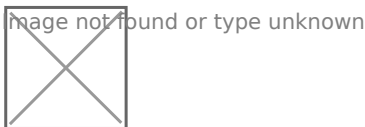


3. Clicking the link will open a customised customer acceptance page

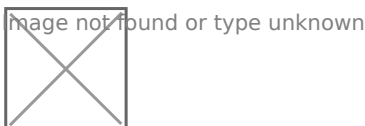


Tip! This page is branded with your logo and company colours. The acceptance quote text and confirmation text are configurable by your system administrator.

4. The customer will be requested to complete all the required fields.



5. Click "CONFIRM QUOTE"



Tip! If you accept online payments and this is configured you can set a minimum online payment to accept the quote e.g. 50%. The customer will always have the option to pay the full amount. If you have set configured the option to confirm quote and pay in the showroom the customer will have this option. These options are configurable at the quote sending stage.

Book a Fitting

Once a quote has been accepted the salesperson will automatically receive an email to confirm this.

The job status will automatically update to “Job Raised Awaiting Instruction”

SURVEY CREATION - 36221 - JOB RAISED (AWAITING INSTRUCTION)

Lead salesperson: nrf_admin dev Lead showroom: Westbury Showroom

Buttons: Refresh, Measure Sheet, Filter Sheet, Generate PDF Report, Handover Report, Create Customer Quote, Create Pre-visit form, Update Job Survey, Job Budget, Record Time, Cancel or Hold Job, Mark Job as Completed

Tabs: BASIC, Fitter Timings, Worksheets, Survey, Appointments, **Quotes/Invoicing**, Rems, POs, P & L, Stock, T/S, Extras, ACTIONS

Job ID: 36221
Job Name: Survey Creation
Status: Job Raised (Awaiting Instruction)
Accounts: Delight Britain
Installation Address: Phoenix Enhancement Services Ltd, 11 Cliffield Road, Bristol, BS40PS
Customer Contact: Parash Ismail
Reference/Authorised Name:
Order Number:
Job Type: On Site Survey based
Measure Notes:
Quote name text: Survey Creation
Type: Domestic
Lead salesperson: nrf_admin dev
Lead showroom: Westbury Showroom

Automatic Update Job Status: Yes

Once you have arranged a date with the customer for a ‘Fit Date’ you can book this.

Job > Fitter Timings > Create Fitting Timing

SURVEY CREATION - 36221 - JOB RAISED (AWAITING INSTRUCTION)

Lead salesperson: nrf_admin dev Lead showroom: Westbury Showroom

Buttons: Refresh, Measure Sheet, Filter Sheet, Generate PDF Report, Handover Report, Create Customer Quote, Create Pre-visit form, Update Job Survey, Job Budget, Record Time, Cancel or Hold Job, Mark Job as Completed

Tabs: BASIC, **Fitter Timings**, Worksheets, Survey, Appointments, Quotes/Invoicing, Rems, POs, P & L, Stock, T/S, Extras, ACTIONS

Hide Cancelled Fitting Timings: ☐ Create Fitting Timing

ACTIVITIES

- HISTORY
- INVOICES
- QUOTES
- DOCUMENTS
- EMAILS
- EXPENSES
- MEETINGS
- PO
- EXTRAS
- JOB REMINDERS
- CUSTOMER SATISFACTION NOTE

Complete the fitter timing criteria

LOCATION TIMING

X

1) What do you want to do?

Job Type:

JOB FB

Workspaces:

Jobs Sheet Search...

Select the rooms you want the filter to do its location timing - default is all are selected

Room Selection

#	Room Name
X	Bachman

Site Visit notes:

2) When do you want to do it?

Start-Stop Times:

08:00 am / every PM 00 00 00

End Date/Times:

08:00 am / every PM 00 00 00

Day 1 + Start time:

00 00 00

Day 2 + End Time:

00 00 00

Exclude Weekends:

Yes

3) Which email would you like to get?

Primary Filter:Secondary Filters 1:Secondary Filters 2:Secondary Filters 3:Secondary Filters 4:Secondary Filters 5:

4) Do you want to tell the customer?

Send SMS Job Confirmation Reminder to Account - Location Timing:

Send SMS to Contact

Send Email Job Confirmation reminder to Customer - Location Timing:

Send Email to Contact

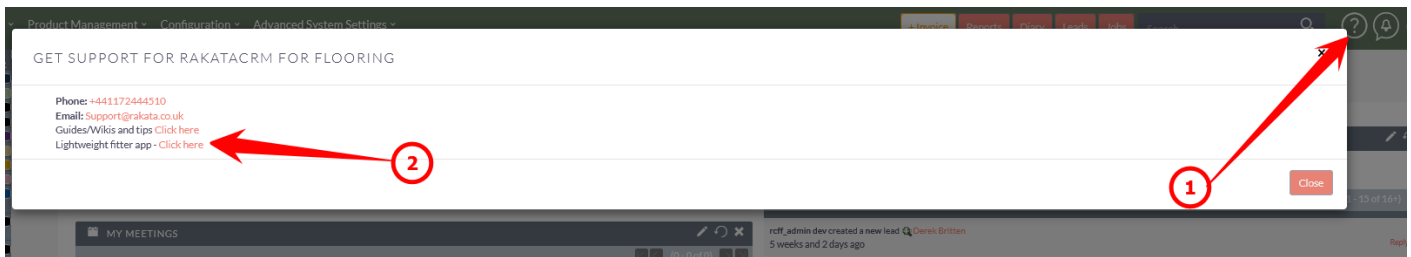
Create or update the location timing?

Inform the Fitter

There are 3 methods for the fitter to be informed of the job timings and details. These are:

1. The Fitter uses the Android App and logs in to see their upcoming schedule.
2. Fitter logs into the simple fitter website to see the basic details and download the fitter sheet PDF onto their phone - The website for the fitter to view is:

https://<<YOUR_CRM_DOMAIN>>/Fitterweb



3. salesperson downloads the Job Fitter sheets from the job record.

Close Job

Once a job is completed you can make the job as completed with notes. After 14 days this job is then automatically updated to Archived.

Home Account Management Product Management Configuration

Reports Diary Leads Jobs Search...

STAIR CARPET - 36037 - ALL PO'S DELIVERED/WAREHOUSE CONFIRMED

Lead subsequence: Data/Genie Lead showroom: Teddiesham

Refresh Measure Sheet Filter Sheet(s) Generate PDF Report Handover Report Create Customer Quote Create Pre-visit form Update Job Survey Job Budget Cancel or Hold Job Mark Job as Completed

BASIC Filter Timings Worksheets Surveys Appointments Quotes/Invoices Rems POs F & L Stock I/S Extras ACTIONS

Selected View: No PRICE DEC 180

Budget							
Job Total Labour Cost (£)	Job Total Product Price (£)	Desired Margin (%)	Actual Margin (%)	Total Budget For This Job (£)	Quote Value (£)	Reset Job Budget	
216.00	662.03	30	46	550.00	879.83		

Survey											
Survey Name	Worksheet Name	Attachments	Note	Is there a skip onsite?	Job Type	Surveyor	Survey Start Date/Time	Date Created	Created By	Status	Actions
Site Survey Form	Site Survey Form Stair carpet			No	Domestic		11-09-2024 14:45	12		Not Completed	