Rakata CRM for Flooring

This is your go to place for all your training material needs for Rakata CRM for Flooring

General Settings

Set the CRM to ensure it works for you.

User Management (Create and Manage Users)

System Administrators can manage users to ensure they have the correct access, functionality and roles.

Create users

If you are a system Administrator you can manage all settings via Advanced System Settings > Advanced Settings

1. Click "Advanced Settings"

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Tip! If you cannot see the Advanced Settings link then you are NOT set an Advanced User. If this is the case please contact your Manager to discuss access.

2. Click "User Management"

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3. If you want to amend a specific user settings click Edit

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4. Click here.

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5. Manage Role and Access. One of the most important aspects of the user on-boarding process is role management. Roles add or restrict access to what users can and cannot do.

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Product Management (Product Configurator)

Product Management is crucial in RakataCRM for Flooring. The product setup is critical to ensure the correct calculations can be calculated correctly. If product setup is NOT correct when products are added to a customer order the calculation may be incorrect or not calculated at all. To ensure products are calcualted and added correct please follow this guide correctly.

Overview of Product Management

The setup of Products is one of the most important aspects of the setup of Rakata CRM for Flooring. It is critical that Products, Flooring Types and Product Ranges are configured correctly. Incorrect product setup can result in incorrect calculations or the product not calcuating at all.

Read this guide thoroughly to understand the setup to get the best out of the system.

Setup Hierachy

The system has been designed to make the onboading of products as easy as possible. There are 3 layers to setup.   These are:

Hierarcy	**Level**	**Description**

Flooring Type	Top Level	This is the top level in the tree. Flooring Types cover the calcualtions that the Products within it are based on. The calcuation types and their additional variables are:
		• Per Unit
		  ◦ (Outgoing Labour Cost Per m2 (£);
		  ◦ Labour Retail Price Per m2 (£)
		• Per M2 Fixed Width
		  ◦ Wastage % (if applicable)
		  ◦ (Outgoing Labour Cost Per m2 (£);
		  ◦ Labour Retail Price Per m2 (£)
		• Per M: Perimeter Length
		  ◦ (Outgoing Labour Cost Per m2 (£);
		  ◦ Labour Retail Price Per m2 (£)
		• Per M2
		  ◦ Wastage % (if applicable)
		  ◦ (Outgoing Labour Cost Per m2 (£);
		  ◦ Labour Retail Price Per m2 (£)

Product Range	Second Level	Product Ranges are Supplier Ranges e.g. Apollo Elite The Product range records the following information: • Suppliers who provide this range - there can be more than 1. • Available Width(s) if appicable for (Carpet, Vinyl & Safety Flooring only). • Colours related to this range. Adding colours to the range reduces to need to add mutiple products with a single colour related to the Product. • Quote Script (This is the description added to the customer quote - This is useful if you want to provide more information than simply the product range or you want a description that doesn't mention the Product Range at all.
Product	Third	The actual product you are selling. The Product records the following key information: • Product Cost • Product Price • Pack Coverage (m2): (Applicable to Laminate / Tiles / Underlay / Glue only) • Pack Linear Meterage: Additional Information (Applicable to Gripper only)

Loading the Product Configurator

The Product Configurator provides a visual view of the flow described above.

1\. Open the Product Configurator

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2. The Product tree shows shows all the flooring types.

1. View and expand the Flooring Types
2. View the Flooring Type
3. View the Product Range
4. View the Product

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3. Expanding the Product Range will reveal all the Products with the range expanded.

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4. Clicking the view icon will open the Product detail popup

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5. Click Edit to update Product details or click the X to close the Product popup.

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Creating and Managing Suppliers

1. From the Main Configurator page view the Supplier tab

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2. Clicking the Information icon will show all the Product Range that are associated to this supplier

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3. To add a supplier click the Add Supplier button

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Product Management (Product Configurator)

Create a Flooring Type

1. Click + ADD FLOORING TYPE button

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2. Complete the required fields

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3. Select the Calculation Type

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4. Add a Wastage % if applicable

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5. Complete the labour cost and price for the installation of all products within this flooring type

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6. To view and amend the range click the view icon

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Product Management (Product Configurator)

Create a Product Range

1. Click the "+" icon next to the Flooring Type where you want to create the new Product Range

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2. Type the name of Product Range, set the default supplier and add the quote script.

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3. Select the options required for the Product Range.

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Tip: Tip! The options required for the Product Range are automatically shown based on the parent Flooring Type of the Product Range. If you are not seeing the fields you are expecting it is likely that the Parent Flooring Type type is set incorrectly.

4. Click "SUBMIT" to save the Product Range

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Create a Product

1. Click the "+" icon from the Product Range where you want to the create the Product

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2. Complete the required fields

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3. Add the purchase cost and sale price of the product

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4. Complete the specific fields as required.

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5. Click "SUBMIT"

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6. To view or amend the product click the view icon

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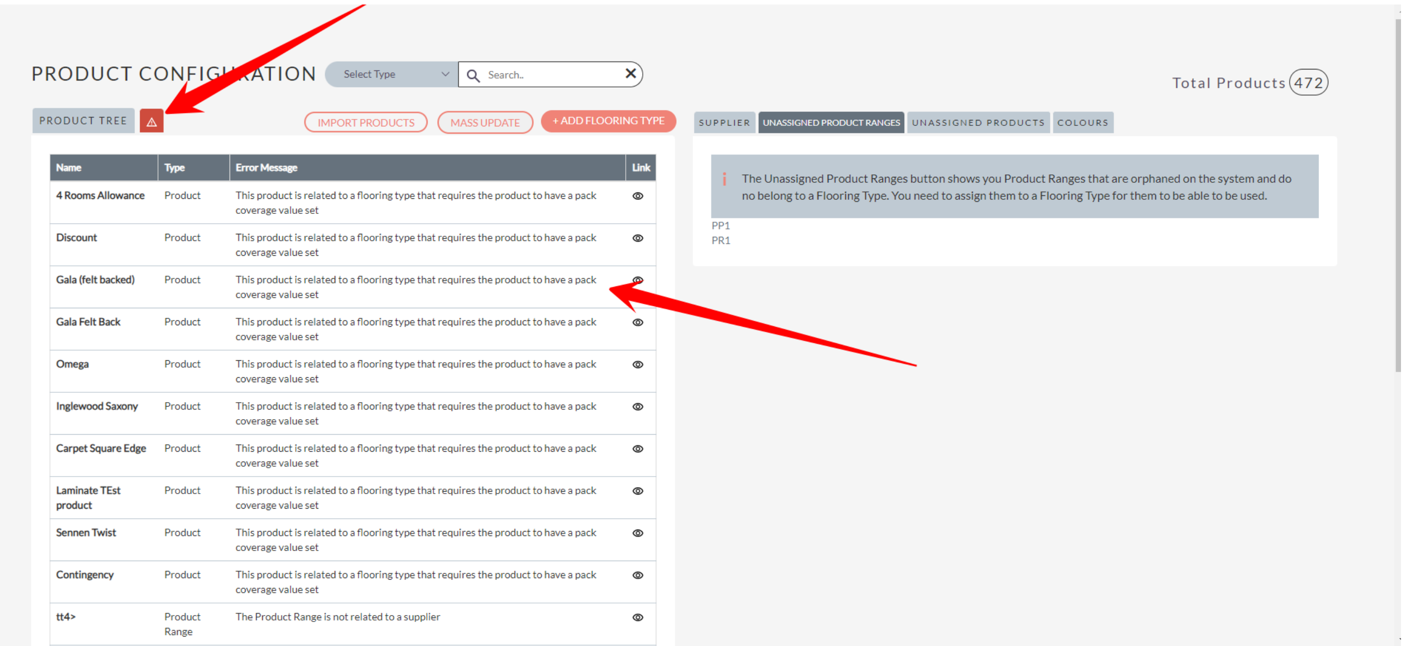
Tip! You can quickly change the status of a product from Active/Inactive by clicking the switcher.

Review Incorrect Setup Products

Incorrectly configured products will NOT show when selecting products in the survey. If you cannot see the product when attempting to select it within the survey there is likely a problem with the configuration. To assist in identifying incorrectly configured products the Configurator will highlight all incorrectly configured products.

Click on the errors tab. This will highlight all the products that are NOT configured correctly.

The configurator will also inform you of the error preventing the product from being selected.



The tree view will also show you if the product is configured incorrectly.


Wool Rib (Alternative Flooring) | 1 | +
Woosie (Alternative Flooring) | 1 | +
York Wilton (Ulster Carpets) | 1 | +
CARPET DUAL STICK | 5 | +
Metallic () | 2 | +
Naturals (Unnatural Flooring) | 1 | +
New England (Unnatural Flooring) | 1 | +
Sisal Malay (Alternative Flooring) | 1 | +

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

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"

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

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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.

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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

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5. Add Account details.

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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.

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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.

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

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9. Click "State/Region:"

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

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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

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2. Click the + Create Job Icon

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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 Adavanced User Settings.

1. Click the "Create Job Survey" button

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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

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3. Set the Survey to and from time

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4. Select the Surveyor

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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"

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2. Select the room type

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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

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

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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.

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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

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3. View the PDF quote by clicking the PDF ICON

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

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

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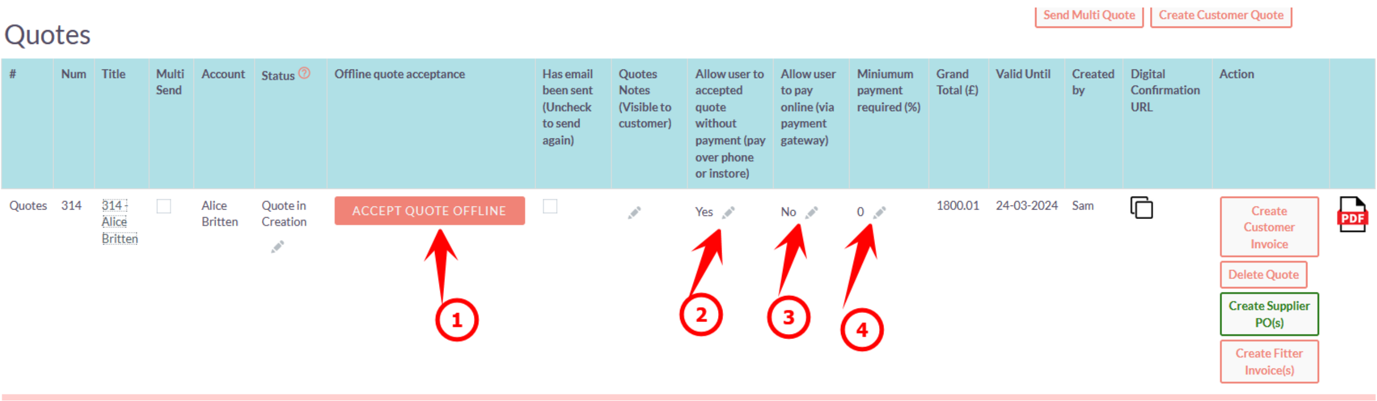
6. Set the paremeters you want the customer to accept the quote.

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.



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 and Email and SMS with the quote details to complete

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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

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

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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.

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5. Click "CONFIRM QUOTE"

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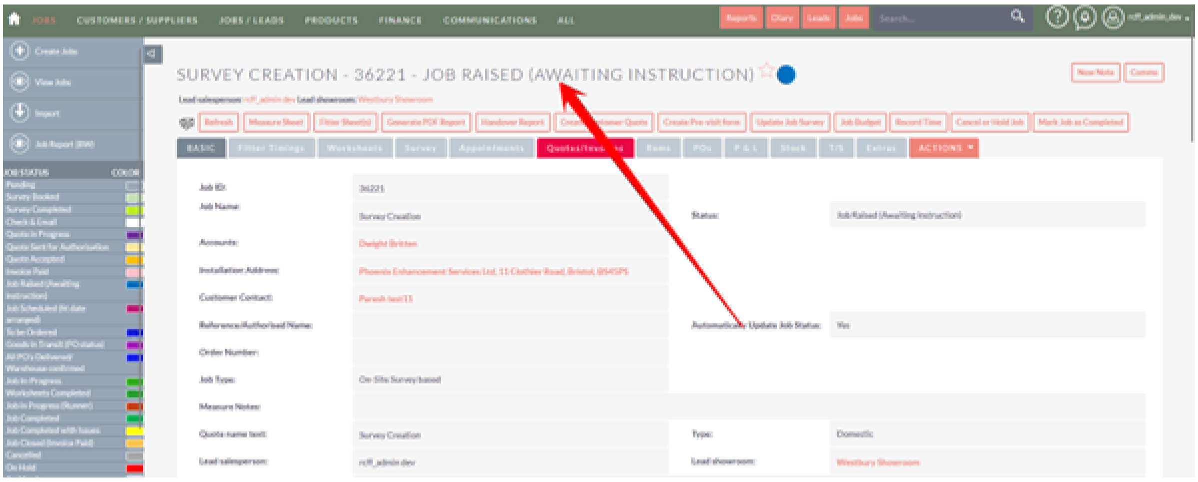
Tip! If you accept online payments and this is configured you can set a minimum online payment to accept the quote e.g. 50%. The customer will always have the option to pay the full amount. If you have set configured the option to confirm quote and pay in the showroom the customer will have this option.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

quote sending stage.

Book a Fitting

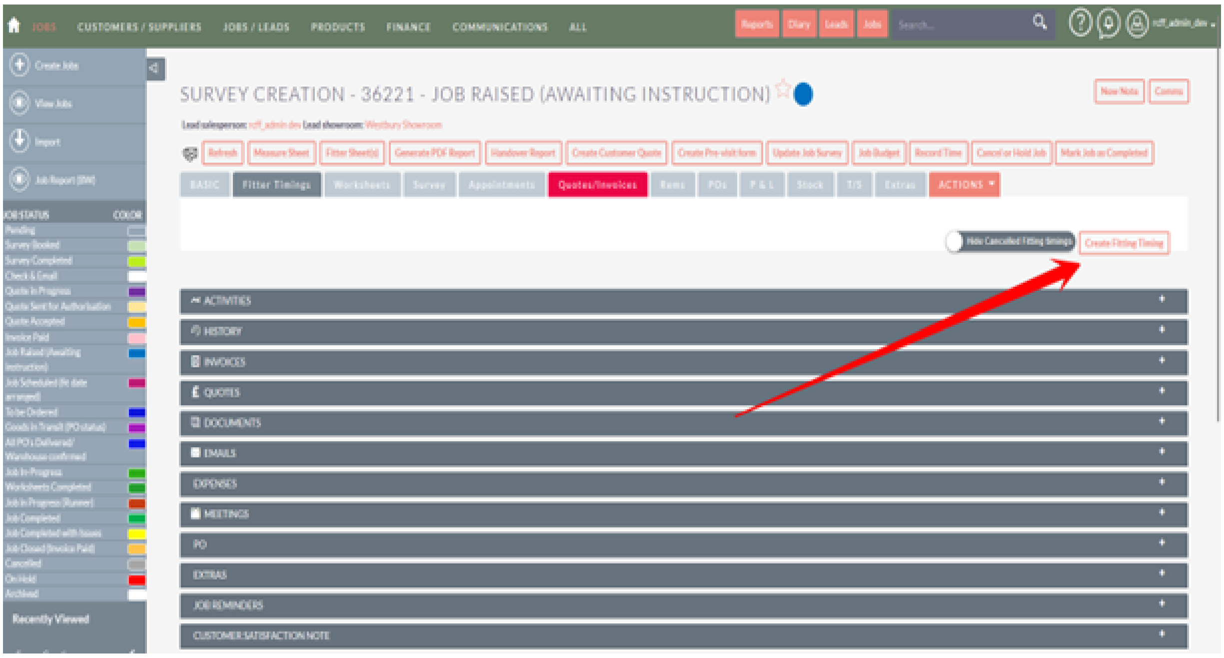
Once a quote has been accepted the salesperson will automatically receive an email to confirm this.

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

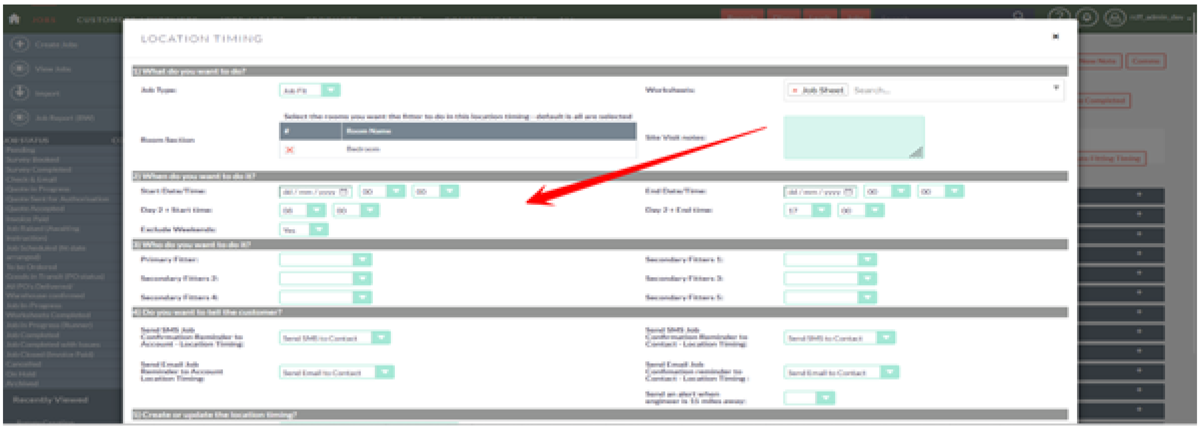


Once you have arranged a date with the customer for a ‘Fit Date’ you can book this.

Job > Fitter Timings > Create Fitting Timing



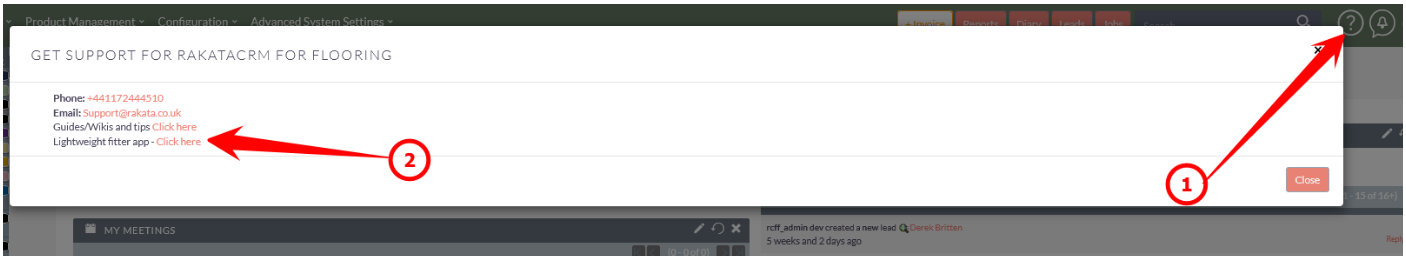
Complete the fitter timing criteria


LOCATION TIMING
1) What do you want to do?
Job Type:
Worksheets:
Job Sheet
Search...
Select the rooms you want the fitter to do in this location timing - default is all are selected
Room Section
Room Name
Bedroom
Site Visit notes:
2) When do you want to do it?
Start Date/Time:
End Date/Time:
Day 2 + Start time:
Day 2 + End time:
Exclude Weekends:
Yes
3) Who do you want to do it?
Primary Fitter:
Secondary Fitters 1:
Secondary Fitters 2:
Secondary Fitters 3:
Secondary Fitters 4:
Secondary Fitters 5:
4) Do you want to tell the customer?
Send SMS Job Confirmation Reminder to Account - Location Timing:
Send SMS to Contact
Send SMS Job Confirmation Reminder to Contact - Location Timing:
Send SMS to Contact
Send Email Job Reminder to Account Location Timing:
Send Email to Contact
Send Email Job Confirmation reminder to Contact - Location Timing :
Send Email to Contact
Send an alert when engineer is 15 miles away:
5) 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.