



# **Quick User Guide**

## **Professional Consultant Profile Guide**




In the Home workspace you receive an overview of all available workspaces with a short description for each of them.

## Project Management



In this workspace you are able to manage customers, projects and settings of selected projects.

- Create projects / companies
- Delete projects / companies
- Edit projects / companies
- Share projects / companies
- Track project status
- Copy projects
- Merge projects
- Change project settings

### Create a new company

1. Click on the [add-button](#)  at the top of the company list
2. On the right working area you can edit the [company form](#)
3. It is recommended to enter at least the following [data](#):
  - Contact Person
  - Business Sector
  - Geographic Region
  - Country
  - Legal Company Name
  - Number of Employees

### Create a new project


1. Click on the [Add-Button](#)  on the top of the Project List
2. On the right working area you can edit the [Project Form](#)
3. It is highly recommended to fill in as much information as possible
4. If necessary create an individual address for your project (e. g. if the project address is different to the company address)
  - Create a new address by clicking on the  Button
  - Add some address details






## Structure

Select this workspace to create or change the project structure. You are able to add new sites and assign floor plan images to them.

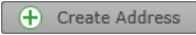

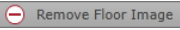
### Site structure and floor plans



SalesDrive will create one default location structure for each project. You can rename this default location / building / floor by clicking on the desired entry and editing the name directly 

Create a site structure and assign floor plans

1. With the  [Button](#) you can create new site structures (this includes 1 location, 1 building, 1 floor)
2. With the  [Button](#) you can create new buildings in the selected location (this includes 1 building and 1 floor)
3. With the  [Button](#) you can create new floors in the selected building


As soon as structures have been created, you can

- Create an address for each **location** by clicking on the  [button](#)
- Change floor details like the default font size of the label text and the maximum export quality of the floor plans
- Upload  or remove  the floor plans for each floor

Note: as soon as a floor plan is uploaded, the icon colour of the floor will be changed from blue  to orange 

### Departments


It is possible to create departments that might be useful if you want to filter your report by departments. For example having an overview of the TCO / volumes for each department.

1. Create Departments
  - Select the department tab on the [bottom, left](#)
  - To create a new department click on the  [add button](#) above the department list.
  - The department name can be [edited directly](#)

## Current State Assets

### Import devices

Import devices from a .CSV file


1. Click the [Import Button](#)  on top of the Asset List
2. Choose your import file from your local disc and click on open
3. Choose an existing [import profile](#) or create a new one ([click here to see how to create an own Profile](#))
4. Check or define the import [profile properties](#) and click on "OK"
5. Check or define which .CSV columns are [allocated](#) to asset properties in SalesDrive
6. Start the import by clicking "OK"



## Check the imported devices


1. After the import finished the list style changes to [Import Checking](#)
2. This style supports to check if every device had been imported correctly
3. The green group (matching 90-100%) shows all devices that matched with the database correctly
4. For the devices in the other groups, you should double check if the correct devices were imported

## Reassign devices

1. Select the wrongly imported device
2. Click on the [Reassign Button](#)  on the action bar
3. In the opening dialogue search for the correct device in the SalesDrive database
4. Select the correct device from the list and click on "OK"
5. When all devices are correct, switch the style of the list to the standard table layout, by selecting this in the [dropdown](#) right above the list

## Add devices and modify their data / settings

### Add devices from the database

1. Add a device directly from the database by clicking on the [Add-Button](#)  on top of the Asset List
2. Search for the correct device in the database
3. Select the correct device from the list and click on "OK"

### Change the device identity

1. Select the device from the asset list
2. Select the tab [Current Asset Dynamic Form](#)
3. Within the [identity frame](#) you can change all identity values

### Add a monthly volume to a device

1. Select the device from the asset list
2. Select the tab [Current Asset Dynamic Form](#)
3. Select the tab [Estimated Volumes](#)
4. Enter the monthly volumes accordingly

### Add a counter reading

1. Select the device in the asset list
2. Select the tab [Current Asset Dynamic Form](#)
3. Select the tab [Last Meter Reading](#)
4. Fill in the last counter reading info

### Change supply material

1. Select the respective device of which you want to change supply material
2. Select the tab [Current Asset Consumable List](#)
3. On the right you can see every [linked supply material](#) which is associated to the selected device
4. To change the supply material, untick the "Use" checkbox on the right
5. [Select the supply](#)




Change the costs of supply material


1. In table view you are able to [enter prices or / and discounts](#) directly into the table

## **Current State Contracts**

### Create a new current contract for the project

1. Click on the [Add-Button](#)  at the top of the Contract List
2. In the [New Contract Dialogue](#) choose the [Scope and Ownership](#) and the [Type Combination](#) of the contract
3. Add the contract to your project by clicking on the “Ok” button
4. Enter some [Basic details](#):
  - Name
  - Start-date
  - Duration
  - Input time interval
5. enter more detailed information in the tabs below

### Add devices to the contract

1. To link an asset from the current assets to the contract, click on the [Assign-Button](#) 
2. Select the asset you want to add to the contract and drag it from the list on the left into the [contracted objects list](#) on the right

Then you can add [detailed information](#) to your contract, like

1. Fixed volumes
2. Customer Buy Prices per Page
3. Overage costs
4. Etc.

## **Current State Dashboard**

This workspace shows graphical information about the current situation and highlights the TCO

### Current TCO vs Volumes

Utilisation Rate:


- Good (green): Utilization rate is between 1,6% and 6%
- Acceptable (yellow): Utilization rate is between 0,3% and 1,6%, or between 6% and 8%
- Bad (red): Utilization rate below 0,3% or over 8%







## Optimisation

The [optimisation workspace](#) is structured in 2 halves:

- Left: Current state
  - Right: Future state
1. To optimise assets, [select one or more devices](#) (by holding the CTRL key and click on the assets with your left mouse key)
  2. To optimise the selected assets, either drag the assets from the list on the left to the list on the right or click on the [optimise button](#) 
  3. In the [Asset Transfer - Dialogue](#) you can choose how to optimise
  4. In the [Product Selector](#) you can search for the new device then
  5. Click on "Ok" to add the selected device to the new future situation
  6. Do this for all other devices

## Visual Optimisation

As soon as the devices are [placed in a floor plan](#), they can be optimised within the “Visual Optimisation”.

1. Start without any optimised assets in the floor plan [\(play\)](#) 
  - To start with the optimisation, [select the devices first](#) (hold the CTRL key for selecting a multiple number of devices)
  - After all devices have been selected, right-click at one of them and choose [“Optimise Asset\(s\)”](#) in the context menu
  - Choose the asset transfer type you want to optimise and the replacing device
  - After the optimisation has been finished, you can see [which devices are linked](#) with arrows
2. Link current devices with future device(s) which are already placed in the floor plan [\(play\)](#) 
  - Select current and future devices in the floor plan (use the CTRL key for the selection)
  - Right-click at one of the selected devices (current or future device)
  - Click on [“Add Optimisation Link\(s\)”](#) to optimise the selected current device
  - To split the volume of the current device among a multiple number of future devices, just repeat steps
3. Change / Edit the optimisation (In order to edit the optimisation, a current asset needs to have a connection to at least two future assets - it's not possible to reduce the volume here)
  - To change the optimisation, right-click at an optimisation arrow and choose [“Edit Optimisation”](#)
  - In the following [dialogue](#) you can redistribute the volume of your optimisation
  - Consider that you need at least 2 optimisation links for redistributing the volume
  - You can choose a new device or make a new optimisation and choose keep
4. Is Locked for Volume Distribution
  - The checkbox “Is Locked for Volume Distribution” will be checked automatically as soon as you change the distribution
  - If the checkbox is activated the software will not change the volume of this optimisation
  - This is important if there are more than 2 optimisation links for one current device





## Future State Assets


Distribute commercial data for the new devices

1. [Select](#) all devices in the “Future Asset List” which you want to update with commercial data
2. Distribute a discount for each of the new devices
  - a. Select the price group on the right
  - b. Enter your discount for the new devices in the [Discount Percent Textbox](#)
3. Distribute Dealer Costs Per Page (Service Click Prices)
  - a. Select the [Dealer Cost Prices Per Page](#) on the right
  - b. Enter the price per page




## Future State Contracts

Create a new “Future Contract”

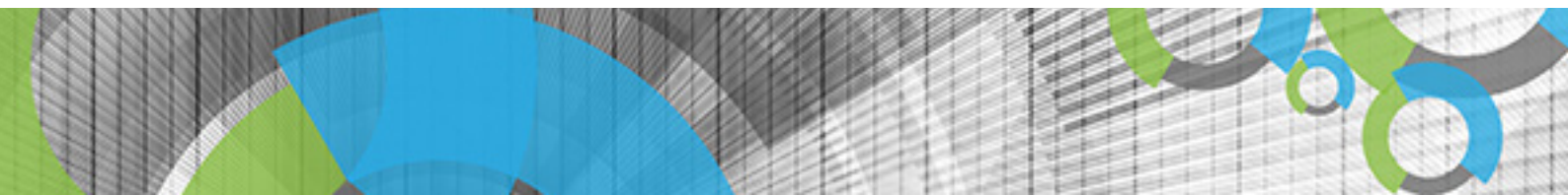
1. Click on the “Add-Button”  at the top of the [Contract List](#)
2. In the “New Contract” dialogue choose the [Scope and Ownership](#) and the [Type Combination of the contract](#)
3. Add the contract to your project by clicking on the “Ok” button
4. Enter some [Basic details](#):
  - Name
  - Start-date
  - Duration
  - Input time Interval
5. Before you start entering the “advanced” details, add the devices to the contract

Add devices to the contract

1. To add an asset from the current assets to the contract, click on the [Assign-Button](#) 
2. Select the asset you want to add to the contract and drag it from the list on the left into the [contracted objects list](#) on the right

Then you can add [detailed information](#) to your contract, like

1. Installation Fee
2. Other costs / Fee
3. Lease Rate
4. [Product margin](#)
5. Fixed volumes
6. Service margin
7. Etc.





## Future State Dashboard

This workspace displays the comparison of the current and the future state




The following results will be compared

- TCO
- KWH Consumption
- CO2 Emission



## Report Generator

The report generator workspace provides an overview of the results of the current selected project



- Download a report with your project results
  1. Select a report in the [Reporting Template List](#)
  2. Click on the [download button](#) 
- Download a filtered report
  1. Select a report in the [Reporting Template List](#)
  2. Select a filter for the report [on the right](#)
  3. Click on the [download button](#) 
- Download a report template to customize it
  1. Select a report in the [Reporting Template List](#)
  2. Click on the [edit button](#) 



## Portfolio

The portfolio is a custom database. It provides the possibility to pre-configure devices from the device database and deposit custom prices (e.g. customer prices, service clicks).

### Asset configuration

1. To create a new portfolio just click on the [Portfolio List Tab](#) and then on the  [Add button](#) at the top of the portfolio list
2. You can add assets to the portfolio by clicking on the  [Add button](#) at the top of the article list
3. Select that device from the database which you would like to configure
4. [Select the asset from the list of articles](#) and start the configuration of the asset at the right
5. Almost every technical property of the device could be customized. For example:
  - [Overwrite the make and model name, order number etc.](#)
  - Change the [capabilities](#) (e.g. adding a faxcard or a finisher as default equipment)
  - Change the [performance information](#)
  - Change energy information





## 6. Predefine custom prices for the device



- Default [dealer and customer price](#)
- [Service click prices](#)
- Charges

## Accessory configuration

Configure prices and capabilities

1. If an asset is being added to the Portfolio, SalesDrive automatically adds all available accessories for the asset to the portfolio as well
2. To configure this accessories (change prices, discounts, capabilities), select the tabs [Accessory-Article List and Accessory-Article Form](#)
3. In the Accessory-Article List choose the desired Accessory and configure it in the [Accessory-Article Form](#)

Assign default accessories to assets


1. No accessories are assigned to an asset in the portfolio by default
2. To assign accessories to assets, click on the  [accessory button](#)
3. [The Assesory Assignment](#) dialogue is structured in 2 halves
  - Left: shows all available accessories in the current portfolio
  - Right: shows all linked accessories for the selected assets
4. To assign a default accessory to an asset, just add the quantity in the column "Number"
5. All the accessories at the right are "optional" - the user can decide if more accessories should be added to the project
6. For unneeded optional accessories, select the "not needed" accessory / accessories and delete them by clicking on the  delete button

## Consumable configuration


Configure prices and capabilities

1. If an asset is being added to the Portfolio, SalesDrive automatically adds all available consumables for the asset to the portfolio as well
2. To configure this consumables (change prices, discounts, capabilities), select the tabs [Consumable-Article List and Consumable-Article Form](#)
3. In the Consumable-Article List select the desired Consumable and configure it in the [Consumable-Article Form](#)

Assign default consumables to assets

1. SalesDrive adds asset specific consumables to each asset by default
2. To assign consumables to assets, click on the  [consumables button](#)
3. The [Consumable Assignment](#) dialogue is structured in 2 halves
  - Left: Shows all available consumables in the current portfolio
  - Right: Shows all linked consumables for the selected asset




4. To assign a consumables to an asset, just mark the desired consumable with [Use](#)
5. All the accessories at the right are "optional" - the user can decide if more or a different consumable(s) should be added to the project
6. For unneeded optional consumables, select the "not needed" consumable / consumables and delete them by clicking on the  delete button

### Usage in projects

After having created a portfolio you can use the customs configurations within the product selector in the different workspaces

For Example [Future Assets Configuration](#):

1. Add a device by clicking on the  [add button](#)
2. In the Product Selector choose [Switch to Portfolio](#)
3. [Choose your portfolio and the customized asset\(s\)](#)
4. [The accessories being added according to the configuration](#)
5. Prices, service clicks and all other pre-defined data is being taken over from the portfolio



## Device Database

In this workspace, you have an overview of the assets stored in the database of SalesDrive

You can:

1. [Search](#) assets
2. See all the [asset prices, capabilities etc.](#)
3. See what [consumables and accessories](#) are linked to the selected asset
4. Download available [Brochures](#)
5. Download available [Certificates](#)





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