FLEET COST & CARE

NexGen Sales Assistant User Guide

version 1.0

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ABOUT THIS MANUAL

The Sales Assistant User Guide covers the setup, task management, and task review processes for Tasks associated with Quotes and Customer.
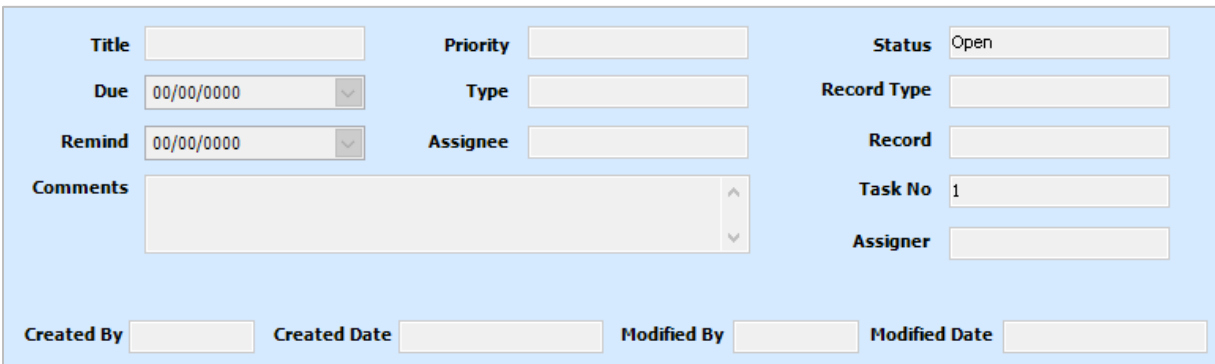
The intent of this manual is to provide end users with clear instructions on the data entry processes for NexGen and Atom, the desktop and mobile application versions of the Fleet Cost & Care suite of products. Be aware that some functionality and images in this manual represent options that may be turned on or off by the system administrator and other functions may not be available in a specific version of NexGen.

PURPOSE – EXPAND NEXGEN'S CRM CAPABILITIES

NexGen and Atom already have many of the features of CRM software, and we have added Tasks as the first of the Sales Assistant features to expand already-built capability. This can save time and effort by keeping sales tasks within NexGen where Customer records and Quotes are already being managed. There is no need to work in a different platform and manage the information flow.

New Function – Tasks Overview

All tasks will have these attributes:

Title		Priority		Status	Open
Due	00/00/0000	Type		Record Type	
Remind	00/00/0000	Assignee		Record	
Comments				Task No	1
				Assigner	
Created By		Created Date		Modified By		Modified Date	

Details of each of these fields will be covered in the Creating Tasks section below.

Existing Function – CRM abilities

Within NexGen, users are already able to:

- Maintain information about Customers
- Maintain information about Contacts who work for those customers
- Create Quotes
- Look up quotes by a variety of factors, including due date and award date.

By also associating Tasks with the same Customers and Quotes, sales teams can generate follow-up tasks, and by Completing them, create a log of activities.

1. TURN ON SALES ASSISTANT

1. From Admin > Set System Defaults > Features, check the "Enable Sales Assistant" box to turn on the Sales Assistant Feature in your environment.
2. Go to Admin > Menu Security and
    a. Restrict "View" for "Task Setup" for user Profiles that should not access the Task Setup parameters. Typically, the users who should be able to access these would be system administrators and sales managers.
    b. Restrict "View" for "Task Lookup" for user Profiles that should not be able to look up tasks.
3. Go to Admin > Profile Screen Settings to set appropriate restrictions for user profiles. The ability to view Tasks is significant, as is the ability to delete Tasks, depending on your organization and workflow. These screens are the relevant ones.
    a. All Screens > Maintain > Customers > Customers > Tasks
    b. All Screens > Enter > Quotes > Job Quotes > Tasks
    c. All Screens > Enter > Quotes > Trucking Quotes > Tasks
    d. All Screens > Enter > Quotes > Work Order Quotes > Tasks
4. Go to Maintain > Sales Assistant > Task Setup > Record Types
    a. Keep as "Active" those types of records you would like Tasks to be added to. As appropriate to your organization, you may elect to associate Tasks with Customers, Quotes, or both.

2. SET UP TASKS

Setup A – Configuring Priorities and Types

All Tasks can be given a Priority and a Type. These are user-definable, and can be defined differently for Customers, Quotes, and Work Order Quotes. To define these, navigate to Maintain > Sales Assistant > Task Setup.

When setting Priorities, we recommended you use the same prioritization scheme your sales team already uses so there is consistency between your current workflow and NexGen Tasks. When setting Types, it is may be helpful to consider the types of events you want prompts to remember or that you want to log as completed.

Inactive Types or Priorities will not appear in the drop-down lists for users to select but may still appear as attributes of current Tasks that have already been given that Type or Priority. A Type or Priority that has already been assigned to a Task cannot be deleted from the list. These should be configured early, when implementing Sales Assistant in your organization, and only changed infrequently.

Setup B – Email addresses

If one user (Assigner) assigns a Task to another user (Assignee), the system will generate an email notification to the Assignee. There is a slight difference in this notification based on whether the Assigner is using NexGen (desktop) or Atom (mobile).

If the Assigner is assigning the Task from NexGen, the notification will be sent according to the setup in Admin > Email Settings > NexGenFMS. This is the same way users who already email from NexGen send emails (for invoices, for example).

From Atom, notification emails are sent from the account configured in Admin > Email Settings > Atom. To utilize the automatic notifications, this account must be configured to allow users who will be assigning tasks to others to be able to email from this account. In other modules, such as sending Quotes or E-Tickets, there are options to send the email from the Device account or System account. For Task notifications, all emails are sent from the System account.

Setup C – User Settings for Assignees

Potential Assignees are taken from the list of Users, and this can be a very long list. To manage this length, the list of potential Assignees is filtered to include Users who share a Company, Yard, and Department. These user settings are set in Admin > Users > My Companies, My Yards, and My Departments.

If a user needs to assign a task to another user who does not appear in the list, one or both users may need an additional Yard, Company, or Department. If too many potential users are appearing in the list, then some more granularity in Yard or Department may need to be created to delineate user scopes.

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3. CREATE TASKS

All Tasks are associated with Customers or Quotes. To enter a Task, navigate to the Tasks tab of the related Customer or Quote. There is a Task tab in each of these.
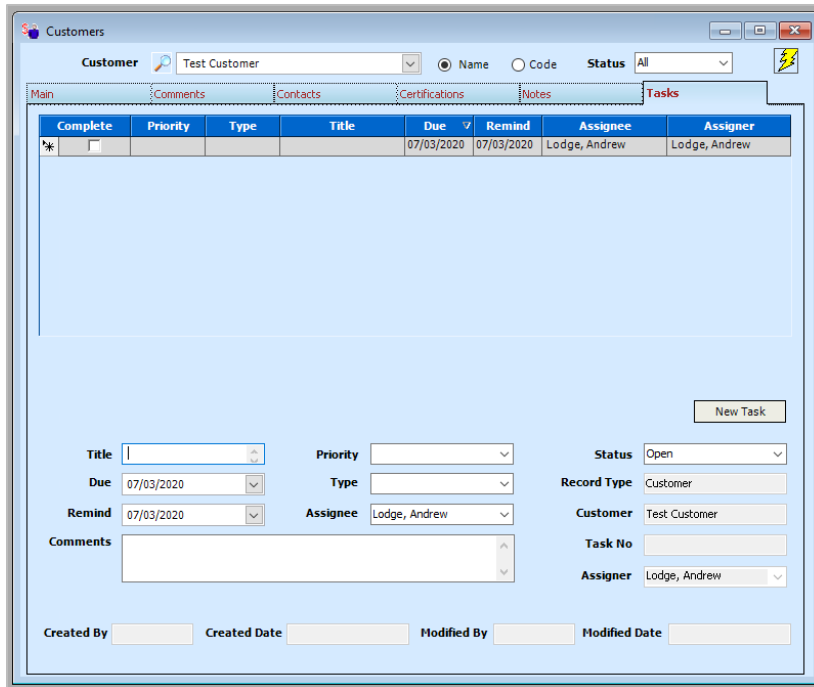
If there are no Tasks assigned to this Customer, this tab appears blank:
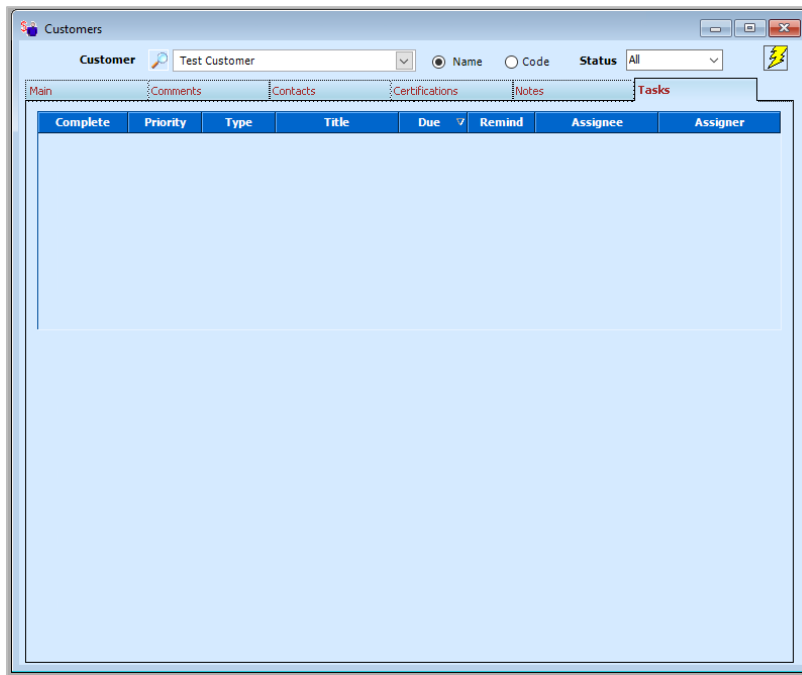
There are two ways to enter the first Task for this Customer:

- Ctrl-A keyboard shortcut
- Click "Add Task" in the menu bar

After adding a Task, the blank details will be visible:

Some of these details can be entered by users, while the system maintains others. These details are set by users:

Field Name	Explanation
Title	A free text field with a 300-character limit. Titles do not have to be unique. Double Click to open a window to see the entire length.
Due	A date the user sets as Due.
Remind	A date the user sets as Remind. ** Important – this is a "passive" reminder. Users can search for Tasks with a reminder set for a certain day, but at this point users will not receive an active notification on that day.
Priority	Drop-down menu list of the Priorities defined in Maintain > Sales Assistant > Task Setup
Type	Drop-down menu list of the Types defined in Maintain > Sales Assistant > Task Setup
Assignee	The person the Task is currently assigned to. This is a drop-down list of all other Users who share a common Company, Yard, and Department.

Status	Two states: Open or Complete. This can be updated either in the details pane below or the grid above.
Comments	A free entry text field. Double click to open a window to see the entire comment.

These details are system managed not modifiable by the user

Field Name	Explanation
Assigner	The person who most recently assigned or reassigned the Task. If the current user reassigns the Task, the current user becomes the Assigner. If the current user creates their own Task, the current user is both Assignee and Assigner
Record Type	Three options: Customer, Quote, or WO Quote. (A Quote includes both a Job Quote and a Trucking Quote).
Record	The Customer or Quote the Task is attached to.
Task No	This is the unique identifier of the Task.
Created By	The user who created the task.
Created Date	Date and time the task was created.
Modified By	The last user to modify the task.
Modified Date	Date and time the task was modified.

Unlike most other Quote functions, the Task tab is still active after a quote has been converted to a job. You can create and update Tasks for a quote that's been converted so you can set reminders to thank a customer for the work or ask if they have any other upcoming projects.

Tasks can also be created and edited from Atom. The fields and functions are the same as from NexGen, and the interface is consistent with the other modules.

4. LOOK UP TASKS

From the Desktop version of NexGen, the Task Lookup screen is navigated via Maintain > Sales Assistant > Task Lookup. Upon first opening, the screen will look like this:
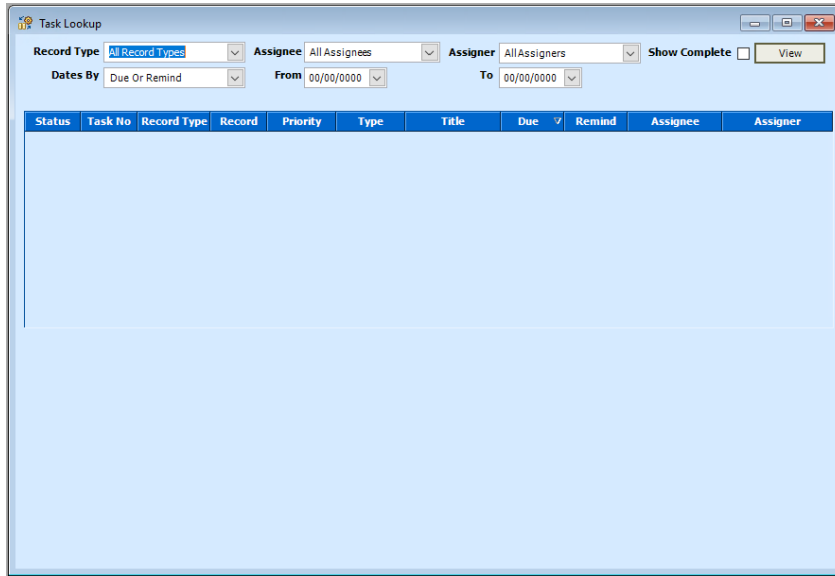
From here, a few basic filter selections allow a salesperson to find Tasks where they are the Assignee. A sales manager can likewise review all Tasks where they are the Assigner.
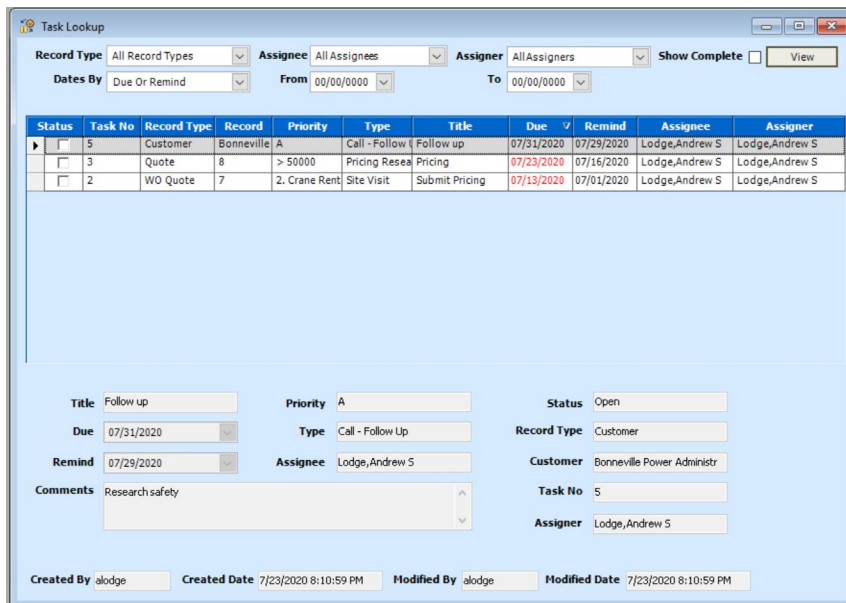

By default, the list is ordered by Due date. Past due items appear in red. To reduce visual noise, there is an additional filter to show/hide completed Tasks, and Tasks that fall outside the selected date range are hidden. For this reason, it is important to occasionally search a broad date range to make sure you have not forgotten any Tasks.

Clicking on any column heading sorts the grid by that column to make it easier to find the highest Priority Tasks, the most outdated, or the most similar. You can also change the order of the columns by clicking and dragging the column header left or right.

To edit one of the Tasks, double click on it to go to the Task tab within that parent Customer or Quote record. All edits are made in the Task tab of the Customer or Quote; edits cannot be made in the Task Lookup screen.

Task lookups work a bit differently in Atom. To look up Tasks in Atom, first click on the Tasks icon on your Atom home screen:
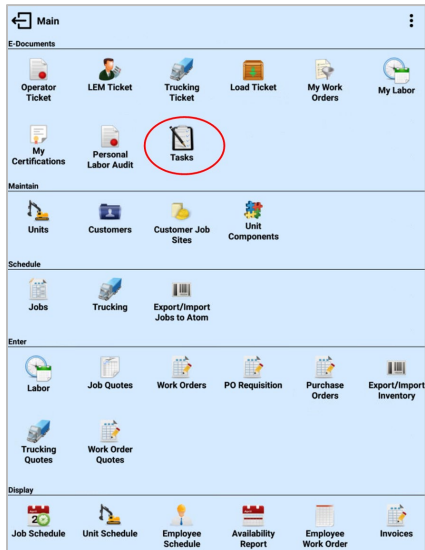
From here there are three ways to look up Tasks – via the quick lookups of open Tasks, by entering the parent Customer or Quote and selecting View, or with a detailed lookup via the magnifying glass. It is again necessary to occasionally make a detailed look up for a broad date range to make sure there are not any incomplete Tasks that fall outside the predetermined date ranges of the quick lookups.

One benefit of the mobile platform is that it enables us to do some more complex searches for things such as:

- All Tasks for Quotes to a certain Customer
- All Tasks that contain a certain word in the comments, such as "safety" or "powerlines".

5. MODIFY TASKS

Modifying Tasks works the same as creating new ones and happens in the same screens. A Task that needs to be modified will most often be found via the Lookup screens, but the modification will happen in the same Task tab of the parent record.

From the lookup screen in NexGen, double click a row to navigate to that Task within its parent record. In Atom, from the Task detail view, the parent record functions as a hyperlink, so you don't have to navigate around to find it:
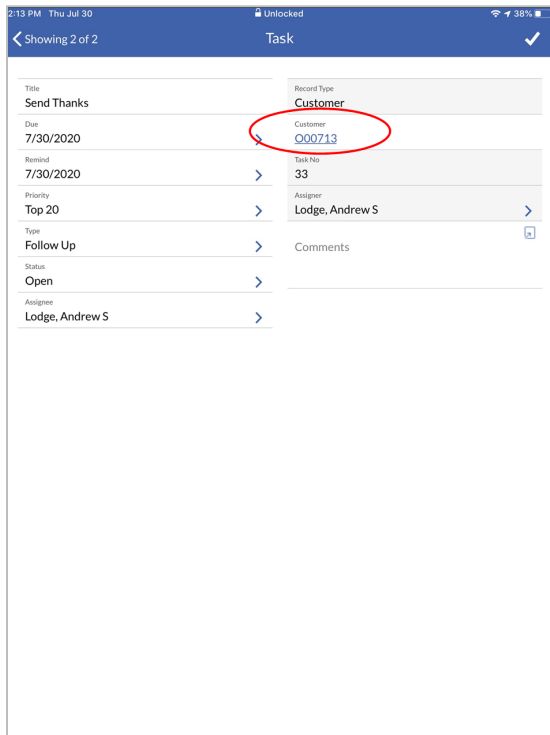
6. Email Notifications

Both NexGen and Atom ask if you want to send an email notification when:

- A Task is created or updated, and
- The Assignee and Assigner are different users.

If a Task is being updated, the changed fields are red in the body of the email to highlight the difference.

As busy professionals, you get a lot of emails. The subject line is designed to help you manage this. One example of what the subject line will look like is:

[Task] - Call Purchasing - Acme Paper - [High] - [Call] - Update to Task # 173

This subject would be sent as an update to this Task:

Field		
Title	Call Purchasing	Priority: High — Status: Open
Due	07/29/2020	Type: Call — Record Type: Customer
Remind	07/24/2020	Assignee: 2Lodge, Andrew — Customer: Acme Paper
Comments	Check on status of new vendor packet	Task No: 173 — Assigner: Lodge, Andrew

Created By: alodge   Created Date: 7/27/2020 3:55:46 PM   Modified By: alodge   Modified Date: 7/30/2020 5:29:48 PM

There are six fields we are presenting in the subject line:

Field	Explanation
[Task]	Every subject line is prefixed with the word [Task], brackets included
Title	Title of the Task
Customer Name	Customer name associated with the Task or the Task's Quote
[Priority]	Priority of the Task, brackets included
[Type]	Type of the Task, brackets included.
Task #	Either "Task #", or "Update to Task #"

The reason for the unique appearance of the subject line is to focus the information coming at you. You can know at a quick glance that an email is a NexGen assignment due to the [Task] prefix. You can create filters in your email client to generate alerts or organize into folders. By keeping the brackets around Task, Priority, and Type, these strings become unique and you can use that unique string as the basis for your filters. The word "Call" will be a very common Type of Task but is a word that will also commonly appear in other unrelated email subject lines. The string "- [Call] –" will probably never happen outside a NexGen email about a Task with a Type "Call".

7. REMIND DATE

The Remind Date is a passive reminder. It is not an active reminder such that it automatically generates a notification on that date. It is a lookup field and users of Tasks can use it to find Tasks similar to the way a dispatcher finds jobs.

You might have a large bid due in a month but want a prompt two weeks ahead of time to review it, so you do not get a last-minute surprise. For example, if I am working on this Task:

And during the last week of July, I am doing Task lookups from NexGen:

Or from Atom:

Then I will see that Task in my results and be reminded to work on the large bid whose Due Date will not appear in my searches for another two weeks.