Training Guide: Log In and User Section

Version 001

Training Prerequisite: i2i Training Session

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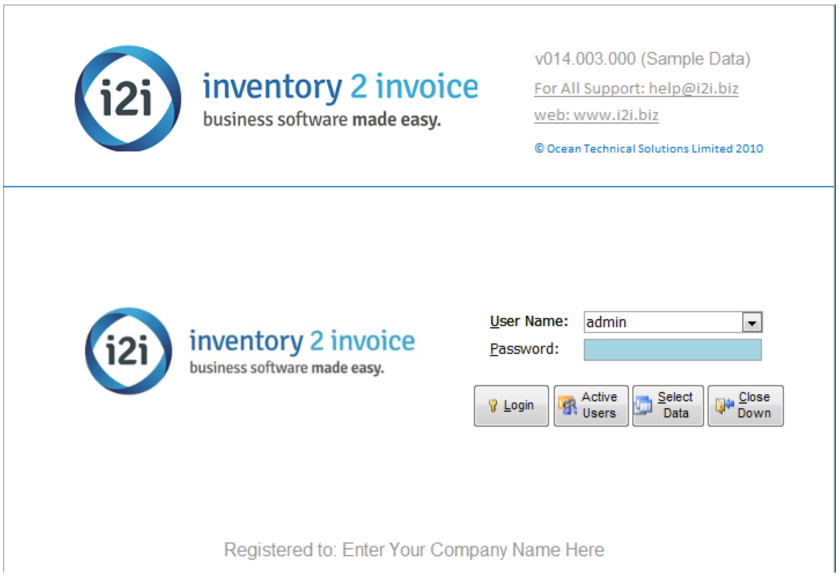
Log in



When you open i2i for the **first time,** log in with your username and your password which would have been provided by your system administrator. You can see that you have a few options on the log in page.

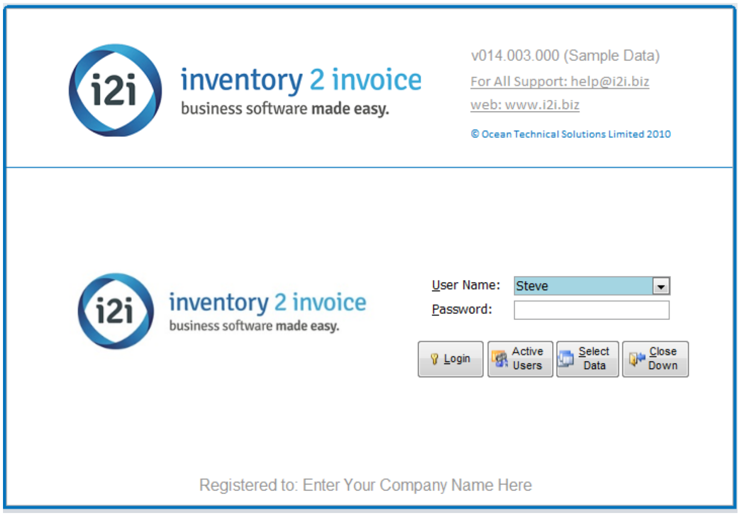
Login: This simply approves your log in once your username and password has been entered and then you will be granted access to the i2i system.

Active Users: By clicking this you will be presented with a list of users that are logged in to the system at that time. As the system is billed on a concurrent user licence limit you will be able to see how many users are currently in the system and you can form here prompt a user to log out of the system if you have reached your user licence limit.

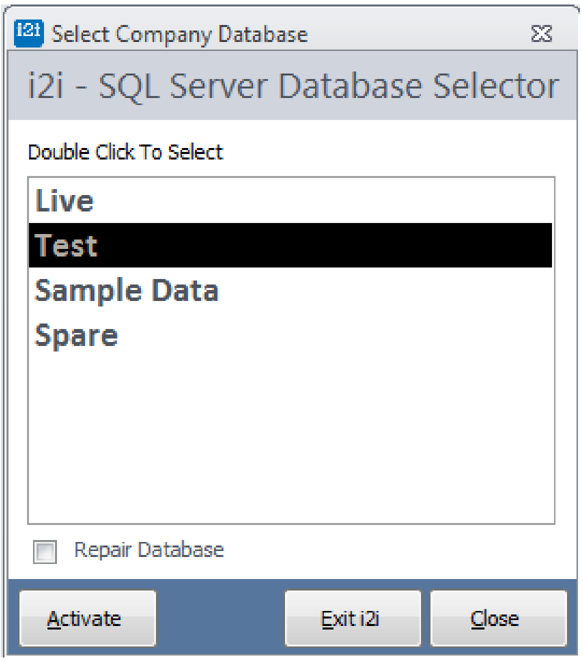
Select Data: This is where you can select whether you want to log in to 'live data', 'test data', 'sample data' or any other databases which you may have set up. This is where you will switch data in order to carry out tests etc. (See instructions below).

Close Down: This is how you close down the system if you do not wish to proceed.

Selecting Data

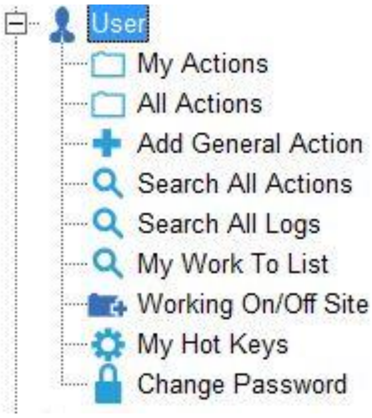


Before you log in you can select which data you require. Press "select data"



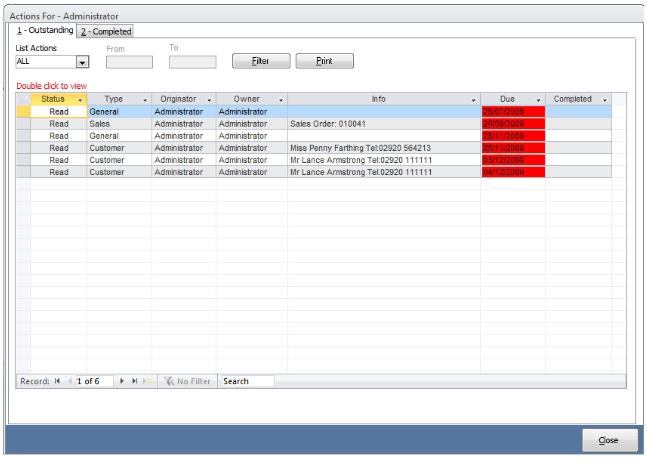
Choose the data and press "Activate". You may need to log back into the system again. This is also where you will find your test environment if you want to practice something on the system. You will be prompted every 10 minutes to state that you are in test data (Please remember that any work completed in here cannot be transferred into the Live Database.) Your i2i Icon will turn Red also to let you know that you are in test data instead of Live data (Live data Icon is Blue).

Users



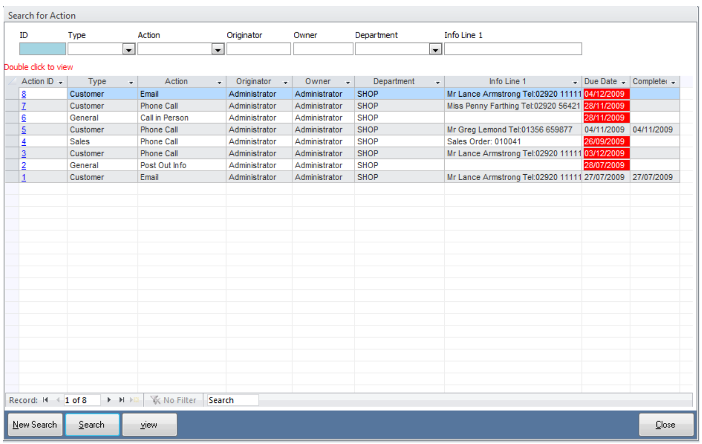
You can see from the menu here the full list of options within the user tab section.

My Actions



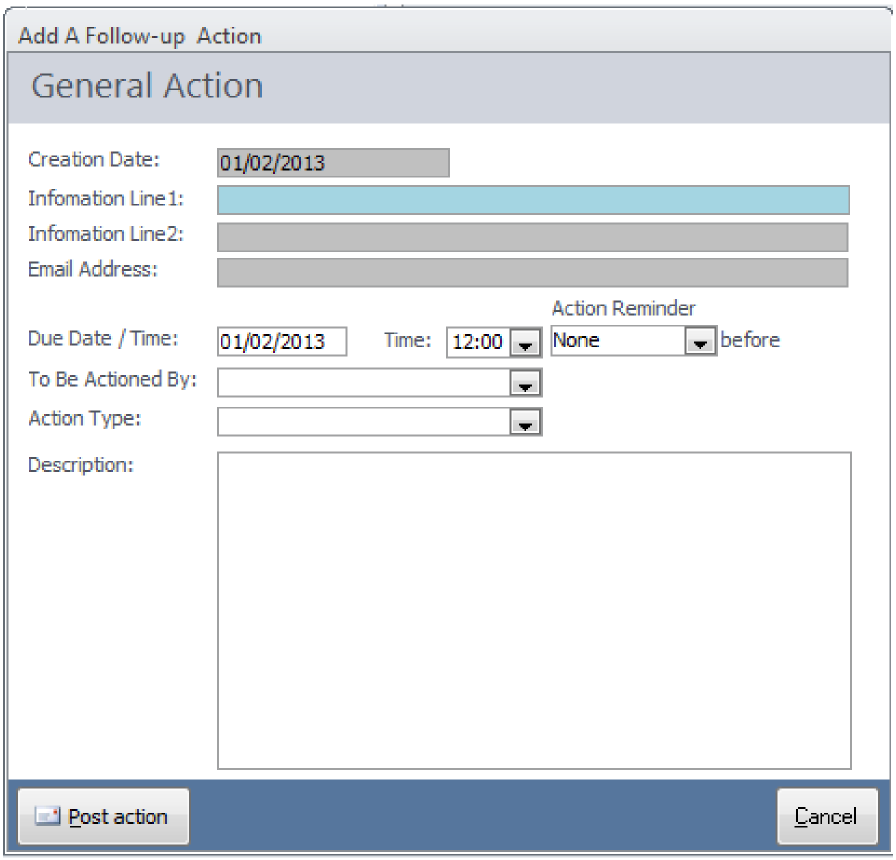
The 'My Actions' shows you all of your current actions. An action is a prompt/message which can be set up by yourself or by other users auctioning you to carry out a task. The due date will show in red if the task is overdue. This can be set up so that this will prompt the user on log in to remind them. You can action each other and the administrator can see all of the actions that need to be undertaken by the users. This allows for the management to ensure that actions are completed and when they were set.
There is a drop down menu to view a specific category of actions, also a filter to filter by date.

All Actions



This section simply looks the same as the 'my actions' section however it shows all of the actions within the system. This can be limited to the management team if you so wish. You can filter your search using the filters.

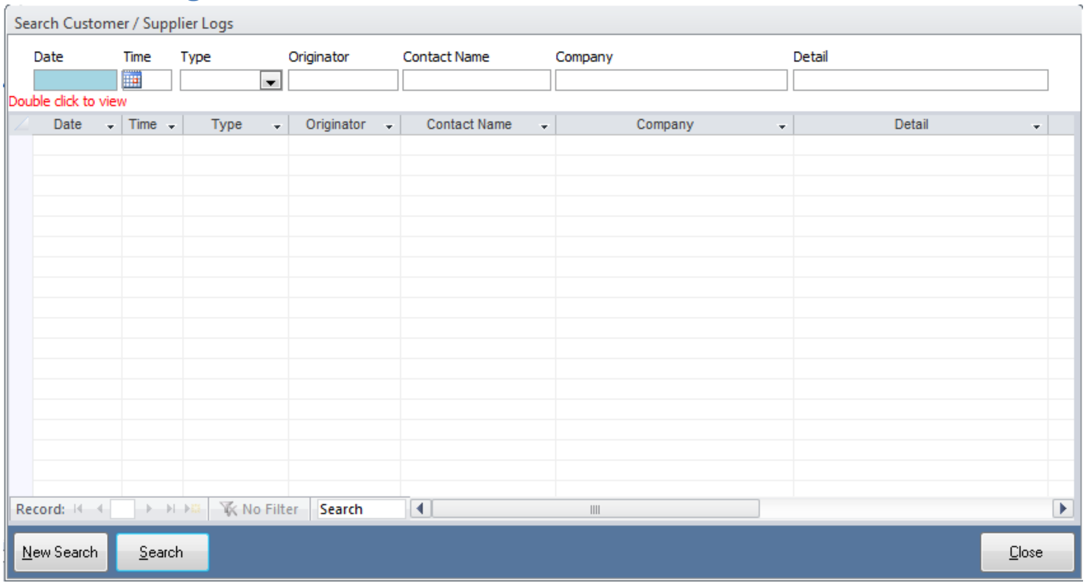
Add General Action



This form allows the user to create the action. You can set a due date/time, who the action is to be sent to/Actioned by (This will show you all of the users in the system to select from), the type of action e.g. phone call, email etc. (Select from the drop down menu) and then the description box is for prompts or information on what is required of the actioner. This is where the CRM side of the system starts to build up as the actions will store on the system for your records against the relevant customer.

Once you have completed the action form simply click on 'Post Action' and then you will be asked whether you wish to email the user you are sending the action to or not.

Search All Logs

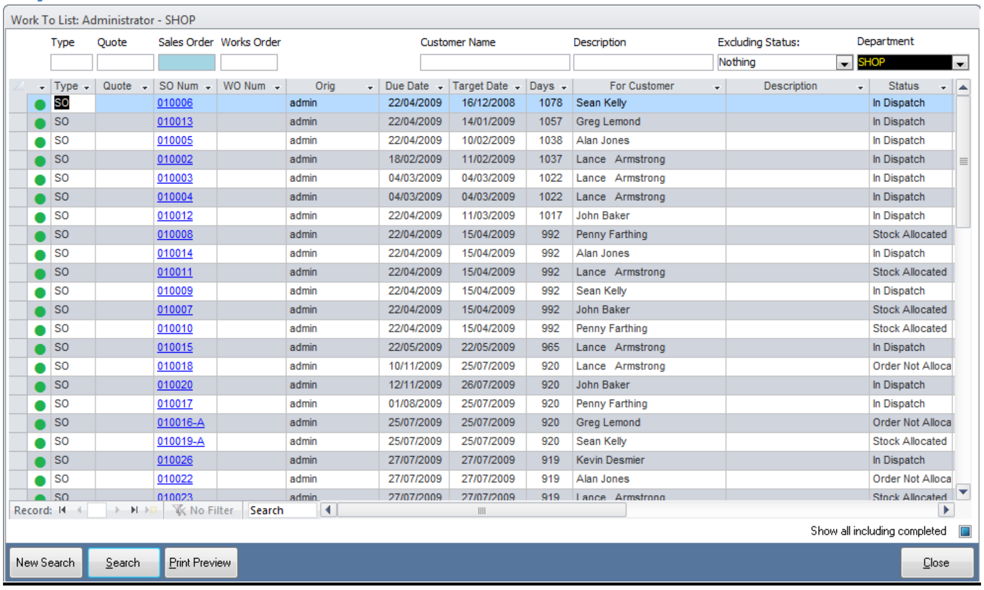


This form allows you to search all logs in the system or to narrow down the search, you can use the filters on the top of the form to narrow the search if you know the information you are looking for.

The difference between a log and an action is simply that a log does not need to be actioned off. A log will record all manual entered logs, letters and emails sent to the customer. This aids the CRM section of the software as all contact against a customer or contact can be recorded and therefore any user can pick up where a previous advisor finished up.

You can begin a new search when ready by clicking enter or search or by changing the information entered in the filter boxes.

My Work To List



Work to lists can be set up on the system to allow for a process of tasks to be undertaken before a process can be signed off.

For example when setting up a new sales order it can be set so that it must be signed off by a user within a certain department such as the credit control department. Therefore the sales order is produced but before it can be completed it will show up in the relevant users work too list and then you can go in and sign it off when the relevant checks have been made.

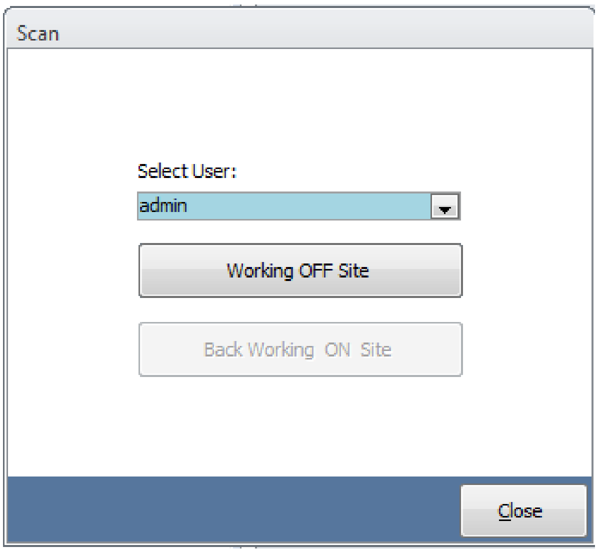
This is what you can see above it is the users 'work to list' of all of the quotes or sales orders that need to be checked and signed off.

The box above shows you the work to list and the line will be red until it is complete and then it will change to green when completed.

The administrator can view the full work to list on the system and can use this to see what tasks are outstanding as a management tool.

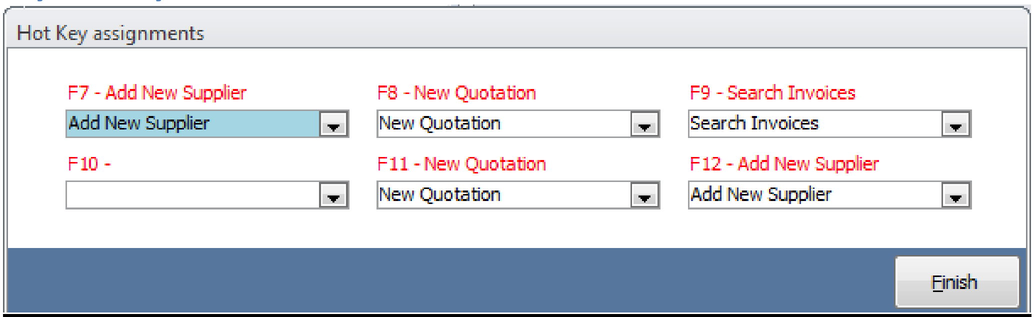
Along the top are the relevant filter boxes in order for you to easily narrow down the search.

Working On/Off Site



This simply allows you to select whether you are working on or off site and is part of the Human Resource section of the system. This is then recorded within the system and can alert other members that you are working on or off site.

My Hot keys



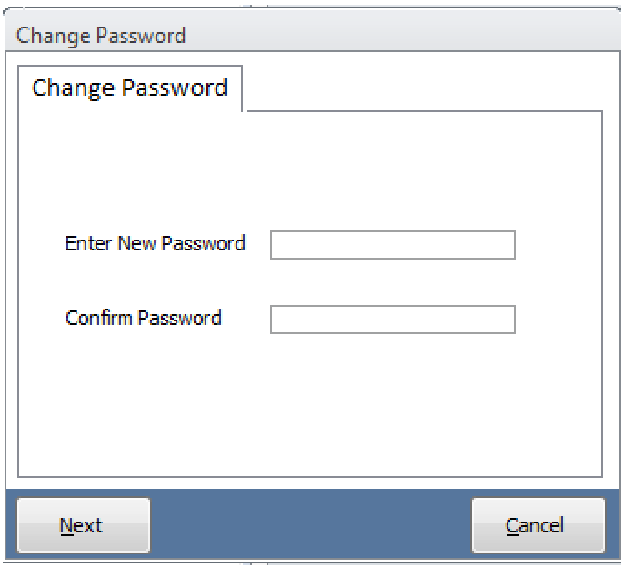
The 'My Hot Keys' set up is a usability tool for the user. You will see on the ribbon on the software that there is a series of F Key buttons that will be blank.

You may find that as a user carrying out a series of similar tasks depending on your job role that you are using the same parts of the software on a regular basis. Therefore you can configure some hot keys as shown above.

For Example: If you are in a sales role you may wish to have the 'New Quote', 'New Sales Order' and 'Add New Customer' on your hot keys so that you can just press the relevant key to start this process instead of going into your tree menu.

Once you have set this up you will see your selected options show up on the ribbon of the software and you can either click these manually or press the relevant 'F' key on your keyboard.

Change Password



This simply allows you to change your user password for access into the i2i software, as shown you must confirm the new password in order for this to take effect. This will take affect from your next log in to the software.