

nicenstripy crm

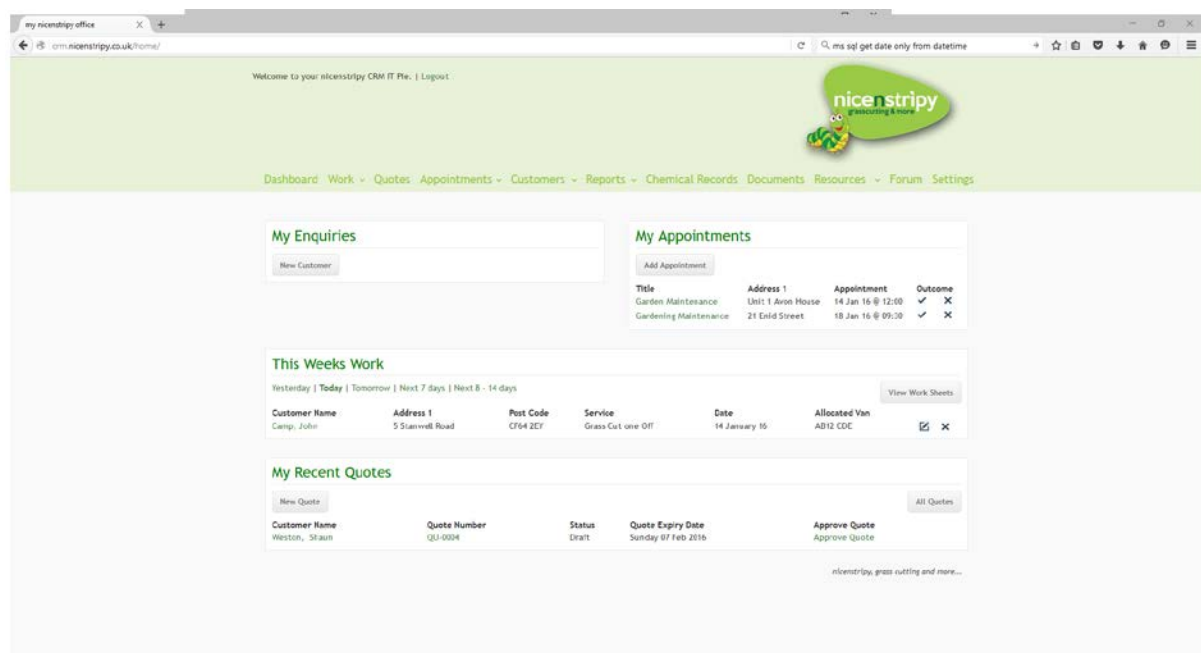


The CRM has been designed to help you manage customers, work and to generate quotes. It also has reporting functions to help you review your business performance.

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Dashboard



On entering the CRM, you will arrive at your dashboard, this is your home screen with an overview of **Recent Enquiries, Appointments, Scheduled Work** and **Recent Quotes**.

My Enquiries

Any customers found in the 'My Enquiries' section will have come from the nicensstripy website. If you click the 'New Customer' button in this section, you will be directed to a screen to add a new customer, once saved, this customer will be listed as a New Enquiry in your customer database rather than an Active Customer.

My Appointments

The 'My Appointments' section shows the next 10 appointments in your diary from the current date forward. From this section you can add a new appointment through clicking the 'Add Appointment' button. Edit an appointment by clicking the appointment Title and records the Outcome of an appointment. If the tick is clicked, an appointment is marked as successful and will be recorded on the weekly return as a presentation. If the cross is clicked, you are presented with two options, you can either delete the appointment or re-schedule the appointment for a future date.

This Weeks Work

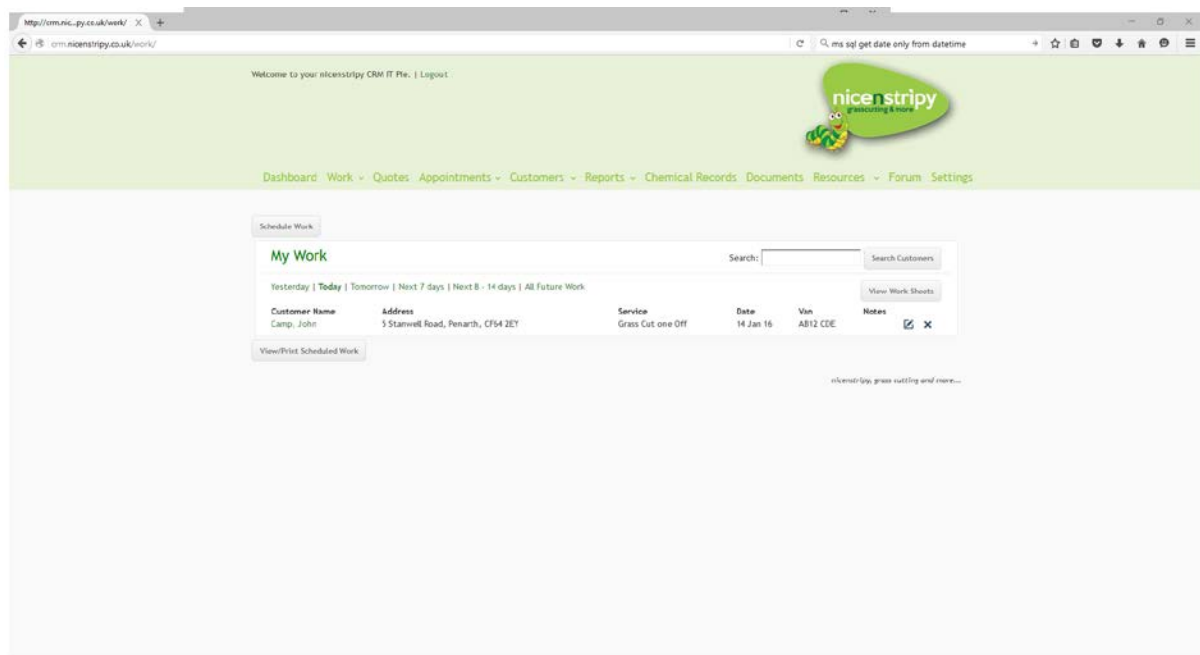
The 'his Weeks Work' by default shows the work scheduled for the current date, it also allows you to quickly scroll through past (yesterday) and future work (tomorrow, this week and next week). You can also access your Work Sheets using the 'View Work Sheets' button. Clicking the edit item (pencil over paper) you can edit the work item or clicking the cross allows you to delete the scheduled work item. Finally, if you click on the customer's name you are taken to the customer overview page for that customer.

My Recent Quotes

The 'My Recent Quotes' section lists recent quotes which are either in 'Draft' or 'Quote Sent' status. Within this section you can create a new quote through clicking the 'New Quote' button, view all

quotes by clicking the 'All Quotes' button, view and edit a quote clicking the customer name or the quote number and finally, approve a quote by clicking the 'approve quote' link.

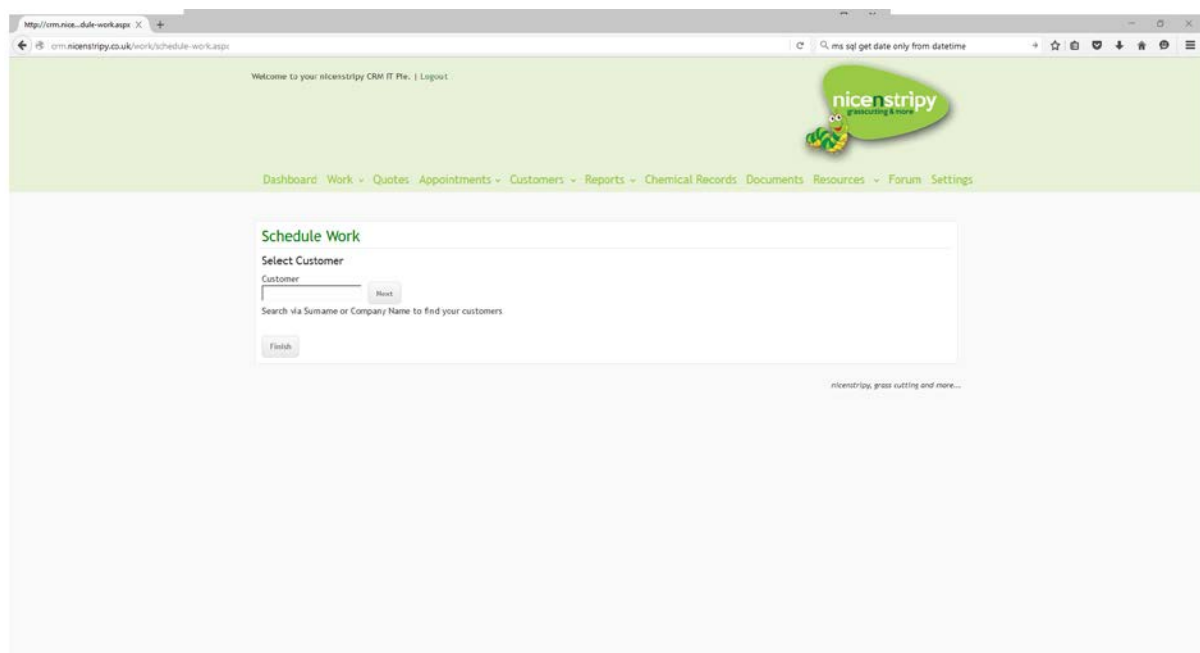
My Work



The 'my work' home screen allows you to quickly view your scheduled work selecting the relevant links. From this screen there are also buttons to Schedule Work, View Work Sheets and View/Print Scheduled Work. You can also search for a customer from this screen.

Under the listed work you are able to view the customer overview for a selected customer through clicking their name, edit a work item or delete a work item.

Schedule Work



If you click the 'Schedule Work' button, you are initially asked to select a customer, you can search your customer database through entering the customer surname or company name. Once two

characters have been entered potential customers are shown in a list, as more characters are entered this list becomes shorter. To distinguish between customers with the same name, their post code is also shown.

Select your customer and click 'Next'. You are then taken to screen showing the customer information to ensure you have the correct customer. You are also presented with a number of boxes to complete, the Date of the First Visit, you can assign the work to a Van and the Services information. To reduce the volume of admin, the main services offered by nicenstripy have been pre-loaded onto the system for you.

Should you attempt to schedule work on or before the current date, you are presented with a warning message that the date for the work has passed. Simply click 'Yes' if you are happy to schedule the work or 'No' to clear the error message.

Schedule Work | nicensitry.com X

om.nicensitry.co.uk/work/schedule-work.aspx?id=1&cmd=work

Dashboard Work - Quotes Appointments - Customers - Reports - Chemical Records Documents Resources - Forum Settings

Schedule Work

Customer Details

Company / Surname:	Weston	Customer Since:	28 October 2015
First Name:	Sham	Week 1:	Label
Address 1:	19 stanwell road	Week 2:	Label
Address 2:		One Off Job:	Label
Town:	penarth	Initial Cost:	Label
County:	vale of glam	Customer Type:	Domestic
Post Code:	CF44 2EZ	Work Type:	Domestic Maintenance
Email:	sham-test@tple-test.co.uk	Value Per Visit:	£11.39
Website:		Preferred Payment Method:	N/A
Telephone:	02920 706336	Date of First Visit:	Tue 12 January 2016
Mobile:		Date of Last Visit:	Fri 15 January 2016

Select Service to Schedule

Date of first scheduled visit
Wednesday 13 January 21

Select a Van to assign to this work
AB12 CDE Mercedes Sprinter

Saved Service(s)
Grass Cut weekly

Service	Description	Frequency*	Quantity	Unit Price	VAT	Job Notes
Grass Cut weekly	A weekly Grass Cut	7	30	10.00	+VAT	

*Frequency - Please enter the number of days between visits, a one off service visit will be 1, a weekly visit would be 7 and a fortnightly visit would be 14.
This value is used when scheduling work.

You have chosen a start date that has passed, as a result some work will be scheduled to be completed for a date that has passed.

Are you sure you want to do this? Yes No

Finish

javascript:__doPostBack('ctl05:ContentPlaceHolder1:LinkButton10','')

nicensitry, grass cutting and more...

When scheduling work, there are two key fields **Frequency** and **Quantity**, depending on the values in these boxes the system will schedule the service to match the number in the quantity box at intervals dictated by the frequency box. So a weekly grass cut would have a frequency of 7 and a default value of 30 for the quantity to cover a full season, the system then adds a weekly grass cut for this customer 30 times every week from the start date specified (date of first scheduled visit). It is possible to edit each job individually if required.

Information entered in the 'Job Notes' field is intended for the worksheet and will be recorded against each job.

Once a job has been scheduled a confirmation message will appear and all editable fields will be reset for the next work item.

Schedule Work | nicensitry.com X

om.nicensitry.co.uk/work/schedule-work.aspx?id=1&cmd=work

Dashboard Work - Quotes Appointments - Customers - Reports - Chemical Records Documents Resources - Forum Settings

Schedule Work

Customer Details

Company / Surname:	Weston	Customer Since:	28 October 2015
First Name:	Sham	Week 1:	Label
Address 1:	19 stanwell road	Week 2:	Label
Address 2:		One Off Job:	Label
Town:	penarth	Initial Cost:	Label
County:	vale of glam	Customer Type:	Domestic
Post Code:	CF44 2EZ	Work Type:	Domestic Maintenance
Email:	sham-test@tple-test.co.uk	Value Per Visit:	£11.39
Website:		Preferred Payment Method:	N/A
Telephone:	02920 706336	Date of First Visit:	Tue 12 January 2016
Mobile:		Date of Last Visit:	Fri 15 January 2016

Select Service to Schedule

Date of first scheduled visit
Wednesday 13 January 21

Select a Van to assign to this work
Don't Assign Van

Saved Service(s)
Please Select a Saved Service

Service	Description	Frequency*	Quantity	Unit Price	VAT	Job Notes
					+VAT	

*Frequency - Please enter the number of days between visits, a one off service visit will be 1, a weekly visit would be 7 and a fortnightly visit would be 14.
This value is used when scheduling work.

Grass Cut weekly scheduled successfully

Finish

To exit the Schedule Work screen, click the 'Finish' button or simply navigate away.

It is also possible to access the Schedule Work screen from a customer page, this will take you directly to the screen to schedule work for your chosen customer rather than having to search for the customer.

Work Sheet

You can navigate to the work sheet from the 'View Work Sheet' button on your dashboard and my work overview section or using the dropdown navigation.

The Work Sheet works on fortnightly blocks, showing the current week and next week, you can cycle through each day by selecting the appropriate day and date, click 'Next Week' or 'This Week' to cycle between weeks. The day that the work is being shown for will appear in bold.

The screenshot shows the 'Work Sheet' page in the nice nstripy CRM. The page has a green header with the logo and a navigation menu. The main content area is divided into two sections: 'Van' and 'Weather'.

Van Section:

- A dropdown menu labeled 'Select Van' with a downward arrow.
- Fields for 'Mileage Start - First Job:' and 'Mileage Finish - Last Job:'.
- A button labeled 'Enter Van Details'.

Weather Section:

- A message: 'No record found for this date'.
- Fields for 'Weather:', 'Temperature High:', and 'Temperature Low:'.
- A button labeled 'Record Weather'.

Work Sheet Table:

Monday (11 Jan) Tuesday (12 Jan) Wednesday (13 Jan) Thursday (14 Jan) Friday (15 Jan) Saturday (16 Jan) Next Week									
Name	Address	Service	Van	Notes	Payment Method	Remaining Visits	Payment Amount	Work Done	Edit Order of Work
John Camp	5 Starwell Road, Penarth, CF34 2EY	Grass Cut one Off	AB12 CDE	N/A		4	£12 Cash		

At the bottom right, there is a small text link: 'nice nstripy, grass cutting and more...'

On this screen you can also view and edit the mileage for each van for that day and also record the weather conditions, the weather conditions will feed into your weekly return.

To edit either item, simply click the 'Edit Van Details' or 'Record Weather' button, complete the relevant fields and click Save

Work Sheet | nicensstripy.com

Welcome to your nicensstripy CRM IT Ple. | Logout

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Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

Work Sheet

Monday (11 Jan) | Tuesday (12 Jan) | Wednesday (13 Jan) | **Thursday (14 Jan)** | Friday (15 Jan) | Saturday (16 Jan) | Next Week

[Edit Order of Work](#)

Name	Address	Service	Van	Notes	Payment Method	Remaining Visits	Payment Amount	Work Done
John Camp	5 Stanwell Road, Penarth, CF94 2EY	Grass Cut one Off	AB12 CDE		N/A	4	£12 Cash	

Van

AB12 CDE Mercedes Sprinter

Date: Thursday 14 January 2016

Mileage Start - First Job:

Mileage Finish - Last Job:

[Save Van Info](#)

Weather

Date: Thursday 14 January 2016

Weather:

Temperature High:

Temperature Low:

[Save Weather Record](#)

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From this screen it is also possible to 'Edit the Order of Work' for that day, click the link and you are presented with an 'Order of Work' column, simply number the jobs in the order you want them to be completed, the lowest coming first and the highest number being last and save. It is possible to save just that day's work or all future work sheets through clicking the appropriate button.

Work Sheet | nicensstripy.com

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Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

Work Sheet

Name	Address	Service	Van	Notes	Payment Method	Remaining Visits	Order of Work
3715 John Camp	5 Stanwell Road, Penarth, CF94 2EY	Grass Cut one Off	AB12 CDE		N/A	3	<input type="text"/>
3744 Tony Pitter	19 stanwell road, Penarth, CF94 2EZ	Garden Tidy Up	AB12 CDE		N/A	6	<input type="text"/>
3753 Shaun Winston	19 stanwell road, penarth, CF94 2EZ	Gutter Cleaning	N/A		N/A	0	<input type="text"/>

[Save This Worksheet](#) [Save All Future Worksheets](#) [Cancel](#)

Van

Select Van

Mileage Start - First Job:

Mileage Finish - Last Job:

[Enter Van Details](#)

Weather

No record found for this date

Weather:

Temperature High:

Temperature Low:

[Record Weather](#)

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On the work sheet, besides every job there is an option to 'Complete Job', select this to complete the job. Once a job has been completed the status of the that work is recorded on the system and shows on the Work Sheet, this will be 'Work Done' or 'Work Incomplete' to reflect the outcome of the work. If a job wasn't completed the system asks for a reason to be recorded and it is possible to access this through clicking the customer name.

When completing a job, you are taken through a series of questions, '**Did you visit the site?** **Did you Complete the Job?** If no is selected for either of these, the user is asked to record the reason for not completing the work and this is recorded on the system.

http://omnicrm.nicensstripy.co.uk/supervisor/complete-job.aspx?formid=view&id=3744

Welcome to your nicensstripy CRM IT File. | Logout

nicensstripy

Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

Complete Job

Customer Pitter, Tony 19 stanwell road Penarth CF64 2EZ	Job Details Service: Garden Tidy Up Description: Garden Tidy Up Notes: Payment: N/A
--	--

Did you visit the site?

Yes No

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If a job is completed and the service was listed as Domestic Maintenance or Commercial Maintenance you are asked to complete the commercial works sheet. The data recorded under Commercial Works can be viewed for each customer and a history of the services undertaken viewed for each day. The system will also show you the time spent and the revenue per man hour taken to complete the work.

http://omnicrm.nicensstripy.co.uk/supervisor/complete-job.aspx?formid=view&id=3744

Welcome to your nicensstripy CRM IT File. | Logout

nicensstripy

Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

Complete Job

Customer Camp, John 5 Stanwell Road Penarth CF64 2EZ	Job Details Service: Commercial Maintenance Description: Commercial Maintenance Notes: Payment: N/A
---	--

Commercial Works Record Sheet

Number of Men Assigned to Job:

Arrival Time: Hour Minutes Departure Time: Hour Minutes

Services Completed

<input type="checkbox"/> Autumn Feed	<input type="checkbox"/> Hedge Cutting	<input type="checkbox"/> Shrub Pruning
<input type="checkbox"/> Bed Works	<input type="checkbox"/> Jet Washing	<input type="checkbox"/> Spot Spray
<input type="checkbox"/> Blow Up	<input type="checkbox"/> Landscaping	<input type="checkbox"/> Spring Feed
<input type="checkbox"/> Clear Leaves	<input type="checkbox"/> Litter Picking	<input type="checkbox"/> Summer Feed
<input type="checkbox"/> Grass Cutting	<input type="checkbox"/> Planting	<input type="checkbox"/> Tree Pruning
<input type="checkbox"/> Hard Spray		

Job Completed

Keys Used: Did you need to use customer keys to complete the work? (leave blank if no keys used)

Keys Out:

Keys In:

Payment taken? ☐ tick if payment was collected

Amount and Payment Method:

Save

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For any other service you are simply asked to record the basic information

http://crm.nicenstripy.co.uk/supervisor/complete-job.aspx?cmd=newJob+3753

Welcome to your nicenstripy CRM IT Plc. | Logout

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@rescuing & more

Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

Complete Job

Customer Weston, Shaun 19 stanwell road penarth CF54 2EZ	Job Details Service: Gutter Clearing Description: Gutter Clearing Notes: Payment: N/A
---	--

Job Completed

Keys Used! Did you need to use customer keys to complete the work? (leave blank if no keys used)

Keys Out:

Keys In:

Payment taken? ☐ tick if payment was collected

Amount and Payment Method:

Save

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Click Save to complete a job.

View/Print Scheduled Work

Finally, under the work section it is possible to view and print all scheduled work for your chosen date range. Simply use the date picker controls (click in the box and it should appear) and click 'Search'

http://crm.nica...nt-work.aspx

Welcome to your nicenstripy CRM IT Plc. | Logout

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Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

Print Work

Please select a date range to see all completed work within your chosen date range.

Start: Friday 31 January 2016 End: Sunday 31 January 2016 Search Print

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A list of all the work in your chosen date range will appear organised by date. Click the 'Print' button to print off the results.

Dashboard Work - Quotes Appointments - Customers - Reports - Chemical Records Documents Resources - Forum Settings

Print Work

Please select a date range to see all completed work within your chosen date range.

Start: Friday 01 January 2016 End: Sunday 31 January 2016 Search Print

Name	PostCode	Service	Price	Vat	Total	Work Date
Rhys, Tuckwood	CF40 2UR	Lawn Feed Autumn	£180.00	£20.00	£120.00	Tue 05 Jan 16
Rhys, Tuckwood	CF40 2UR	Jet Washing	£180.00	£20.00	£120.00	Wed 06 Jan 16
Rhys, Tuckwood	CF40 2UR	Garden Tidy Up	£180.00	£20.00	£120.00	Thu 07 Jan 16
Rhys, Tuckwood	CF40 2UR	Commercial Maintenance	£0.00	£0.00	£0.00	Thu 07 Jan 16
Rhys, Tuckwood	CF40 2UR	Feeding	£180.00	£20.00	£120.00	Fri 08 Jan 16
Rhys, Tuckwood	CF40 2UR	Commercial Maintenance	£0.00	£0.00	£0.00	Fri 08 Jan 16
Rhys, Tuckwood	CF40 2UR	Domestic Maintenance	£0.00	£0.00	£0.00	Fri 08 Jan 16
Shaun, Weston	CF64 2EZ	Domestic Maintenance	£25.00	£5.00	£30.00	Tue 12 Jan 16
John, Camp	CF64 2EY	Grass Cut one Off	£18.00	£2.00	£12.00	Tue 12 Jan 16
John, Camp	CF64 2EY	Grass Cut one Off	£18.00	£2.00	£12.00	Wed 13 Jan 16
John, Camp	CF64 2EY	Grass Cut one Off	£18.00	£2.00	£12.00	Thu 14 Jan 16
Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Fri 15 Jan 16
Shaun, Weston	CF64 2EZ	Gutter Cleaning	£0.00	£0.00	£0.00	Fri 15 Jan 16
John, Camp	CF64 2EY	Commercial Maintenance	£137.00	£27.40	£164.40	Fri 15 Jan 16
Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Sat 16 Jan 16
John, Camp	CF64 2EY	Grass Cut one Off	£18.00	£2.00	£12.00	Sat 16 Jan 16
John, Camp	CF64 2EY	Grass Cut one Off	£18.00	£2.00	£12.00	Sun 17 Jan 16
Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Sun 17 Jan 16
Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Mon 18 Jan 16
Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Tue 19 Jan 16
Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Wed 20 Jan 16
Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Thu 21 Jan 16

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Edit Work

If you choose to edit a job, you will be presented with all future related work items.

Customers | my.nicesstrip.py of... | Welcome to your nicesstrip CRM IT Re. | Logout

Dashboard Work - Quotes Appointments - Customers - Reports - Chemical Records Documents Resources - Forum Settings

Edit Work Item

Work Scheduled Date Monday 18 January 2016 Service Grass Cut weekly Description A weekly Grass Cut

Unit Price £10.00 Discount 0.00 Vat (%) 0.20 Vat (€) 2.00

Job Notes

Remaining Visits 9

Allocated Van Don't Assign Van

Save Single Item Save All Repeating Items Cancel

Related Work Item(s)

Service	Description	Work Scheduled Date
Grass Cut weekly	A weekly Grass Cut	25 Jan 16
Grass Cut weekly	A weekly Grass Cut	01 Feb 16
Grass Cut weekly	A weekly Grass Cut	08 Feb 16
Grass Cut weekly	A weekly Grass Cut	15 Feb 16
Grass Cut weekly	A weekly Grass Cut	22 Feb 16
Grass Cut weekly	A weekly Grass Cut	29 Feb 16
Grass Cut weekly	A weekly Grass Cut	07 Mar 16
Grass Cut weekly	A weekly Grass Cut	14 Mar 16
Grass Cut weekly	A weekly Grass Cut	21 Mar 16

Customer Details

Tuckwood
Rhys Tuckwood
39 Enid Street
Treolaw
Tonypandy
Mid Glamorgan
CF40 2UR

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The system will allow you to edit an individual item or all related items.


Delete Work

If you choose to delete a work item you are presented with two options, to delete all future related work or the single item.

Delete Work Item | nicestripy | Customers | my nicestripy |

orm.nicestripy.co.uk/work/delete-item.aspx?id=3786ms sql get date only from datetime

Welcome to your nicestripy CRM IT Ple. | Logout



Dashboard | Work | Quotes | Appointments | Customers | Reports | Chemical Records | Documents | Resources | Forum | Settings

Work Items

Delete Work Item

You have chosen to delete the scheduled work item: Grass Cut weekly - A weekly Grass Cut, as detailed below.

Once you delete this item you will not be able to recover it.

Are you sure you want to delete this item?

☐ please click to delete all future related work items

☐ please click to confirm deletion

YesNo

Work Item Details

Date Work Scheduled: Monday 25 January 2016

Service: Grass Cut weekly

Description: A weekly Grass Cut

Notes:

Related Work Item(s)

Service	Description	Work Scheduled Date
Grass Cut weekly	A weekly Grass Cut	01 Feb 16
Grass Cut weekly	A weekly Grass Cut	08 Feb 16
Grass Cut weekly	A weekly Grass Cut	15 Feb 16
Grass Cut weekly	A weekly Grass Cut	22 Feb 16
Grass Cut weekly	A weekly Grass Cut	29 Feb 16
Grass Cut weekly	A weekly Grass Cut	07 Mar 16
Grass Cut weekly	A weekly Grass Cut	14 Mar 16
Grass Cut weekly	A weekly Grass Cut	21 Mar 16

Customer Details

Tuckwood

Rhys Tuckwood

39 Enid Street

Tredaw

Tonybandy

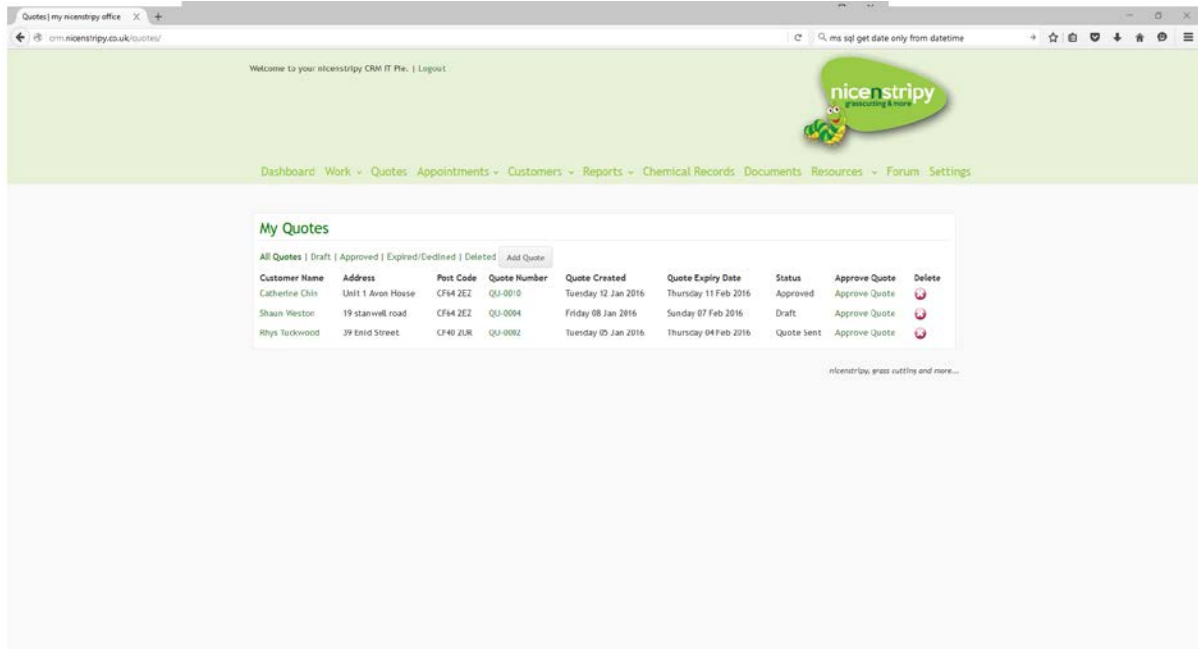
Nic Glamorgan

CF40 2UR

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Quotes

The 'My Quotes' section shows a quick overview of your quotes and allows you to filter by status, a quote status can be 'Draft', 'Quote Sent', 'Approved' or 'Removed', quotes can also show under the expired/declined tab where the expiry date has passed.



My Quotes

All Quotes | Draft | Approved | Expired/Declined | Deleted | Add Quote

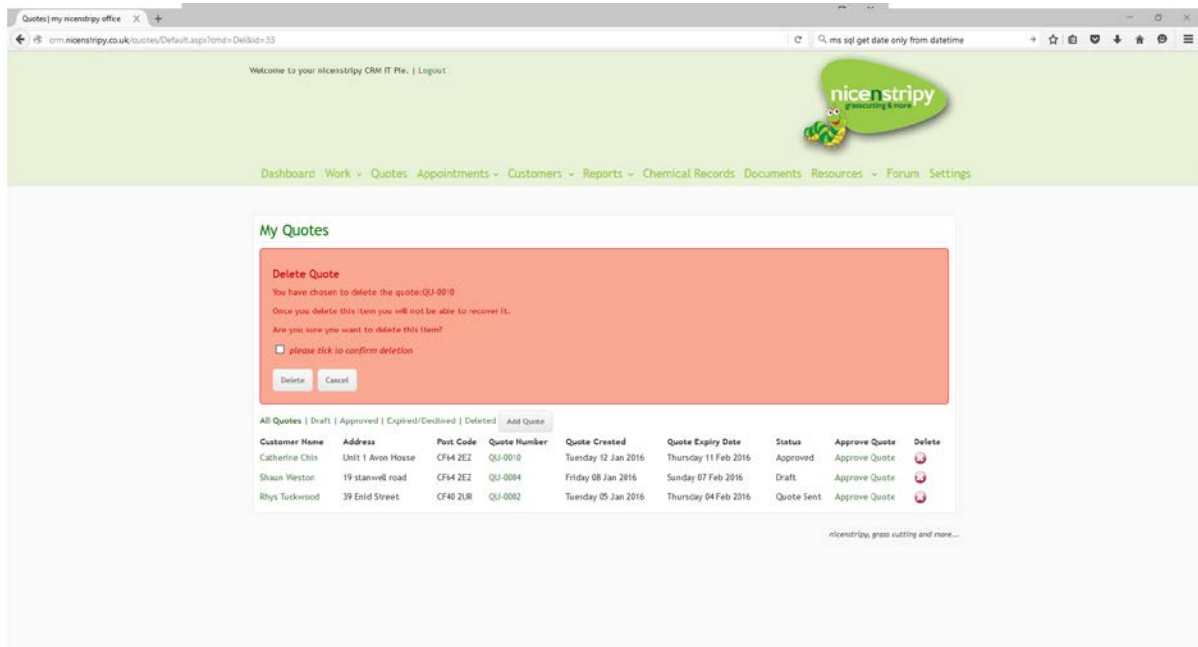
Customer Name	Address	Post Code	Quote Number	Quote Created	Quote Expiry Date	Status	Approve Quote	Delete
Catherine Chis	Unit 1 Avon House	CF14 2EZ	QJ-0010	Tuesday 12 Jan 2016	Thursday 11 Feb 2016	Approved	Approve Quote	
Shaun Weston	19 stanwell road	CF14 2EZ	QJ-0004	Friday 08 Jan 2016	Sunday 07 Feb 2016	Draft	Approve Quote	
Rhys Tuckwood	39 Enid Street	CF40 2UR	QJ-0002	Tuesday 05 Jan 2016	Thursday 04 Feb 2016	Quote Sent	Approve Quote	

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From this screen it is possible to Add a New Quote by clicking the 'Add Quote' button, view and edit the quote by clicking a client name or quote number, approve a quote or delete a quote.

If you select to Approve a Quote, the system redirects you to the 'Schedule Work' (see P.5) to schedule work for the customer linked to the quote.

If you select to delete a quote a warning is presented asking you to confirm the quote deletion.



My Quotes

Delete Quote

You have chosen to delete the quote: QJ-0010

Once you delete this item you will not be able to recover it.

Are you sure you want to delete this item?

☐ please tick to confirm deletion

Delete Cancel

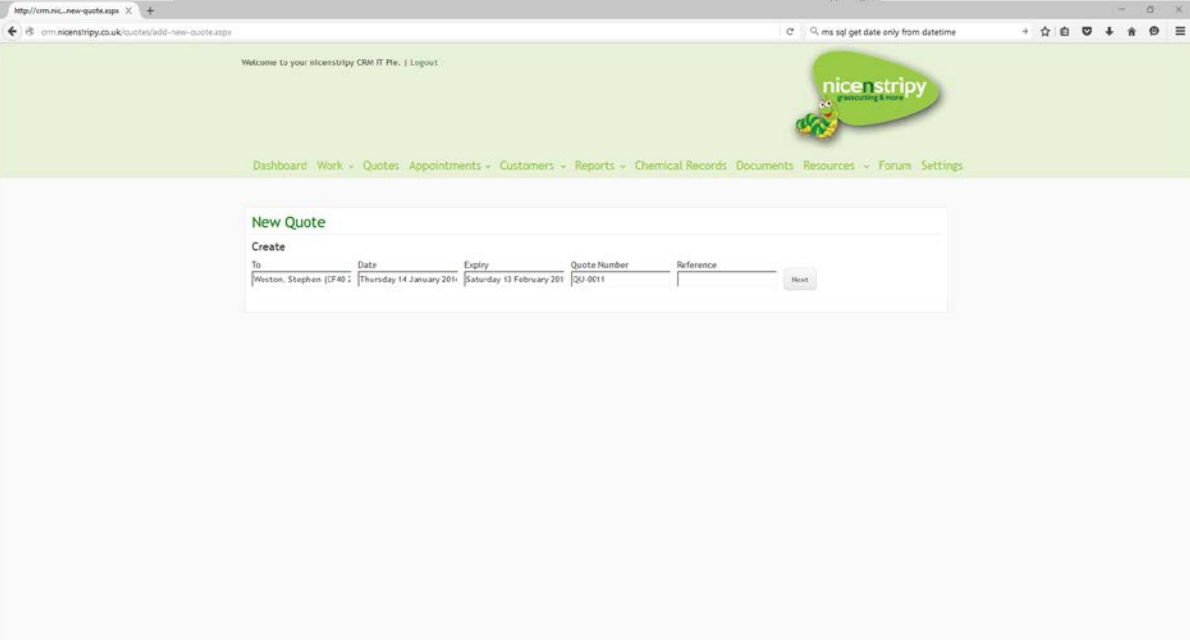
Customer Name	Address	Post Code	Quote Number	Quote Created	Quote Expiry Date	Status	Approve Quote	Delete
Catherine Chis	Unit 1 Avon House	CF14 2EZ	QJ-0010	Tuesday 12 Jan 2016	Thursday 11 Feb 2016	Approved	Approve Quote	
Shaun Weston	19 stanwell road	CF14 2EZ	QJ-0004	Friday 08 Jan 2016	Sunday 07 Feb 2016	Draft	Approve Quote	
Rhys Tuckwood	39 Enid Street	CF40 2UR	QJ-0002	Tuesday 05 Jan 2016	Thursday 04 Feb 2016	Quote Sent	Approve Quote	

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To delete a quote, tick the tick box and click 'Delete' the quote is then moved to your deleted pile.

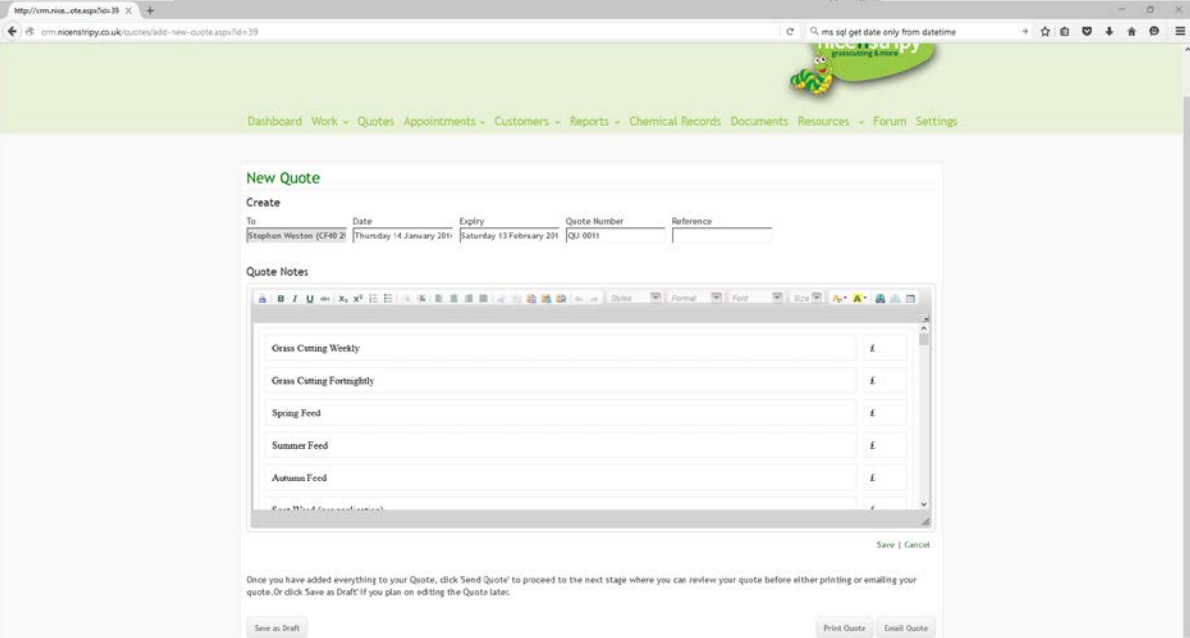
To add a new quote, click the 'Add Quote' button. At first you are asked to select your customer, (the customer search works as detailed on page 5), the system will import today's date and set the expiry for 30 days from today's date. The quote number is automated and will simply be the next number based on the total number of quotes created on the system. The reference field is a free text field and you can enter anything you want.

Click the 'Next' button.



The screenshot shows a web browser window with the URL <http://crm.nicensstripy.co.uk/quotes/add-new-quote.aspx>. The page has a green header with the nicensstripy logo and a navigation menu: Dashboard, Work, Quotes, Appointments, Customers, Reports, Chemical Records, Documents, Resources, Forum, Settings. The main content area is titled 'New Quote' and contains a 'Create' form. The form has five fields: 'To' (containing 'Weston, Stephen (CF40 2)'), 'Date' (containing 'Thursday 14 January 2011'), 'Expiry' (containing 'Saturday 13 February 2011'), 'Quote Number' (containing 'QU-0011'), and 'Reference' (empty). A 'Next' button is located to the right of the 'Reference' field.

On the next screen you will then see a template to create your quote.

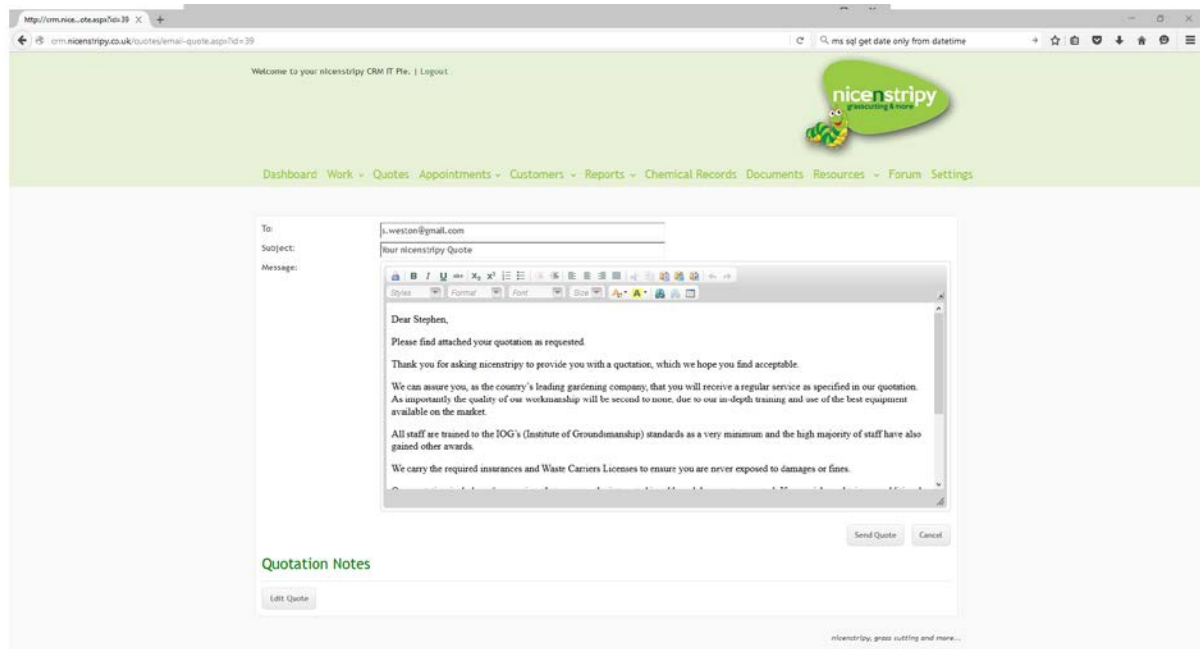


The screenshot shows the same 'New Quote' form, but with an additional 'Quote Notes' section. This section contains a rich text editor with a toolbar and a list of items: 'Grass Cutting Weekly', 'Grass Cutting Fortnightly', 'Spring Feed', 'Summer Feed', and 'Autumn Feed'. Each item has a corresponding input field to its right. Below the list, there is a 'Save | Cancel' button. At the bottom of the form, there is a message: 'Once you have added everything to your Quote, click 'Send Quote' to proceed to the next stage where you can review your quote before either printing or emailing your quote. Or click 'Save as Draft' if you plan on editing the Quote later.' Below this message are three buttons: 'Save as Draft', 'Print Quote', and 'Email Quote'.

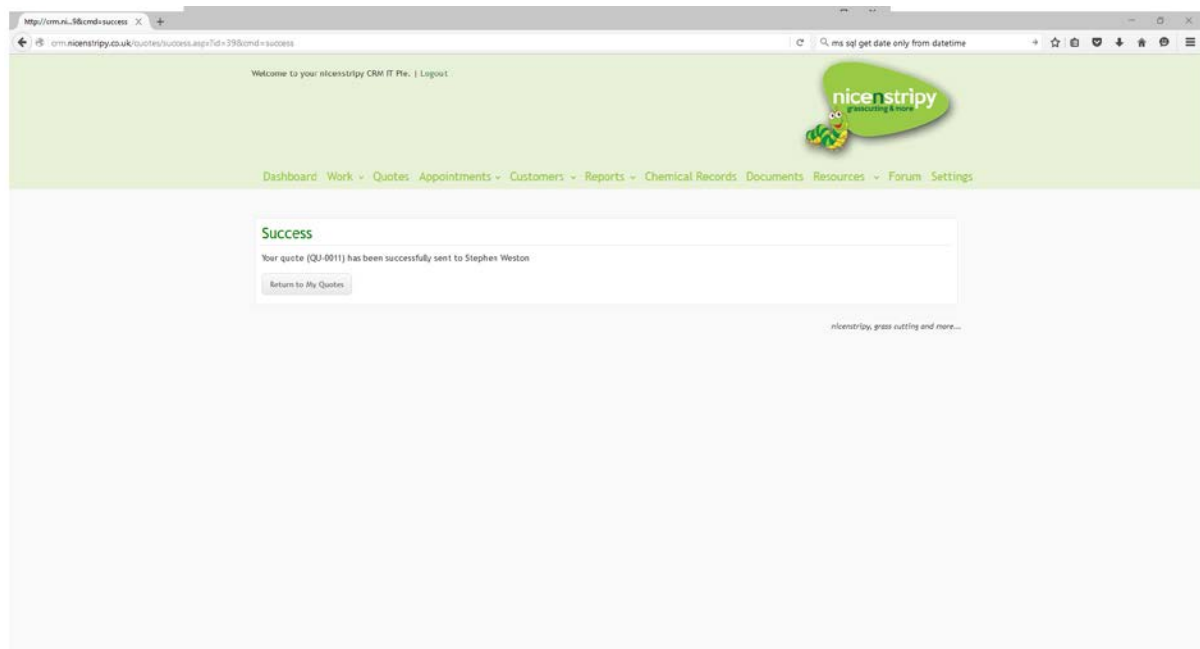
Complete the template to create your quote and click the 'Save' button to save the quote. Cancel will return you to the quotes page without saving. 'Save as Draft' will save the quote as a draft and return you to the quotes overview page.

Once you're happy with your quote you can either print the quote to deliver or send in the post or you can email the quote to the customer using the 'Email Quote'.

If you choose to Email the Quote, the system will pre-load the customers email if available but this can be manually entered, it will also preload a subject and an email with the customer's details which can be edited. It also loads your details which can be configured in the settings section.

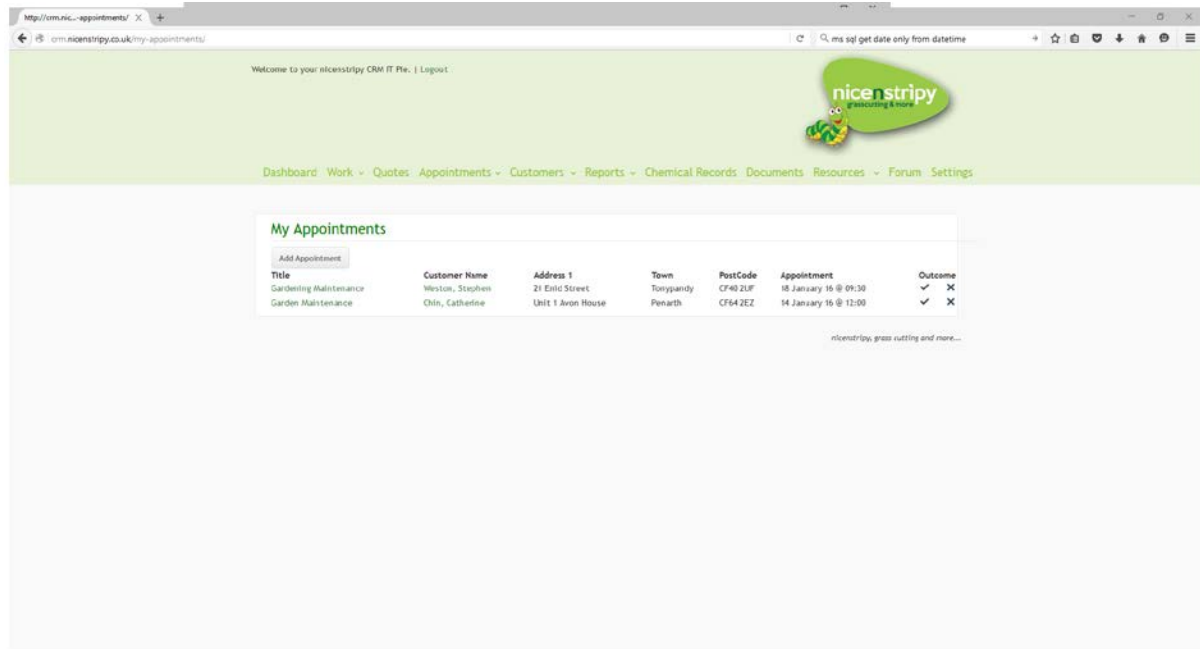


Once a quote has been emailed, you will be redirected to a success screen confirming the email was sent.



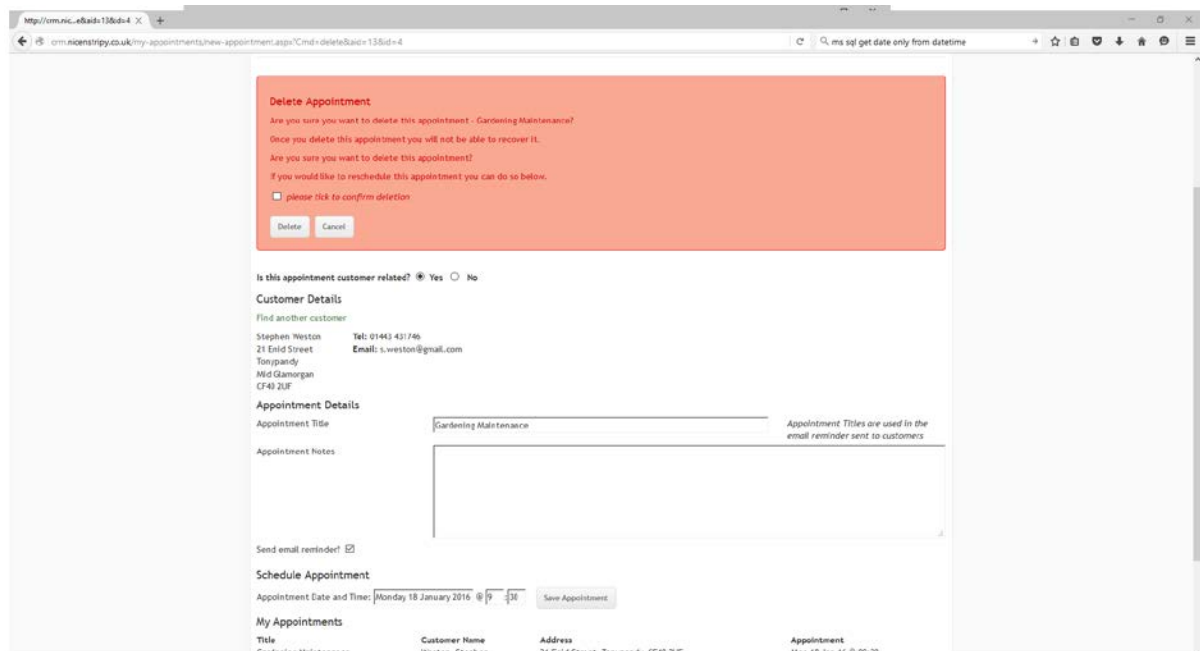
My Appointments

The 'my appointments' section gives you an overview of your appointments.



From this screen you can Add an Appointment, view/edit an appointment through clicking the appointment title, view a customer through clicking their name, mark the outcome of the appointment as successful which is then recorded as a presentation on the weekly return or delete an appointment.

If you choose to delete the appointment the system will ask you to confirm that you want to delete the appointment, but will also present you with the option of editing the appointment should you need to re-schedule the appointment.



To delete the appointment tick the tick box and click the 'Delete' button.

If a quote is marked as success through clicking the tick next to the appointment. If the appointment was linked to a customer, the system will update your weekly return to include a successful presentation and will then redirect you to the quote page to complete a quote for that customer. See Page 13 for quotes.

Add Appointment

It is possible to add customer appointments and non-customer appointments to the system, when you click 'Add Appointment' you are first asked if the appointment relates to a customer.

Welcome to your nice nstripy CRM IT Pte. | Logout

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grass cutting & more

Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

New Appointment

Is this appointment customer related? ☐ Yes ☒ No

Appointment Details

Appointment Title Appointment Titles are used in the email reminder sent to customers

Appointment Notes

Send email reminder? ☐

Schedule Appointment

Appointment Date and Time: @

My Appointments
No Appointments Found within 7 days of your chosen date

My Work Schedule
No Scheduled Work Found within 7 days of your chosen date

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If it does, change the radio button to yes and you will be presented with the customer search box (page 5) or an option to add a new customer.

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Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

New Appointment

Is this appointment customer related? ☒ Yes ☐ No

Existing Customer

[Add New Customer](#)
[Search Customers](#)

Appointment Details

Appointment Title Appointment Titles are used in the email reminder sent to customers

Appointment Notes

Send email reminder? ☐

Schedule Appointment

Appointment Date and Time: @

My Appointments
No Appointments Found within 7 days of your chosen date

My Work Schedule
No Scheduled Work Found within 7 days of your chosen date

Add New Customer under new appointment screen shot

New Appointment

Is this appointment customer related? ☒ Yes ☐ No

New Customer

Find Existing Customer

Company / Surname:

First Name:

Address 1:

Address 2:

Town:

County:

Post Code:

Email:

Website:

Telephone:

Mobile:

Appointment Details

Appointment Title: Appointment Titles are used in the email reminder sent to customers

Appointment Notes:

Send email reminder? ☐

Schedule Appointment

Appointment Date and Time: @

My Appointments

No Appointments Found within 7 days of your chosen date

My Work Schedule

No Scheduled Work Found within 7 days of your chosen date

Complete the relevant appointment information and select the appointment date, the system will show you the scheduled work and any appointments within the next seven days once a date has been entered, each time you change the date the system will also refresh your future appointments and work schedule. Enter a time using a 24-hour clock to complete the appointment.

New Appointment

Is this appointment customer related? ☐ Yes ☒ No

Appointment Details

Appointment Title: Appointment Titles are used in the email reminder sent to customers

Appointment Notes:

Send email reminder? ☐

Schedule Appointment

Appointment Date and Time: Monday 18 January 2016 @ 14:36

My Appointments

Title	Customer Name	Address	Appointment
Gardening Maintenance	Wenton, Stephen	21 Edd Street, Tonypandy, CF40 2UF	Mon 18 Jan 16 @ 09:30

My Work Schedule

Customer Name	Address	Service	Notes	Date
Pittar, Tony	19 stanwell road, Penarth, CF64 2EZ	Garden Tidy Up		Mon 18 Jan 16
Pittar, Tony	19 stanwell road, Penarth, CF64 2EZ	Garden Tidy Up		Tue 19 Jan 16
Pittar, Tony	19 stanwell road, Penarth, CF64 2EZ	Garden Tidy Up		Wed 20 Jan 16
Pittar, Tony	19 stanwell road, Penarth, CF64 2EZ	Garden Tidy Up		Thu 21 Jan 16

If your appointment is for a customer meeting, you can also opt to send an automated email to the customer reminding them of the appointment 24-48 hours before the meeting. It is important to note that if you opt to use this feature the appointment title along with the date and time will be sent to the customer. If you have not entered an email address the system will flag this up for you. You can edit the customer later to make use of the email reminder feature.

The screenshot shows a web browser window with the URL `http://localhost:61205/my-appointments/new-appointment.aspx?cmd=new&id=5`. The page has a green header with the nicenstripy logo and a navigation menu: Dashboard, Work, Quotes, Appointments, Customers, Reports, Chemical Records, Documents, Resources, Forum, Settings.

The main content area contains a form for scheduling an appointment. At the top, it asks "Is this appointment customer related?" with radio buttons for Yes and No. Below this is the "Customer Details" section, which includes a "Find another customer" link and the following information: Tony Pittar, Tel: 02920 703323, 19 Starwell road, Penarth, Vale Of Glamorgan, CF64 2EZ. A red error message states "Email Address Missing - unable to send appointment reminder".

The "Appointment Details" section has a text box for "Appointment Title" (with a note: "Appointment Titles are used in the email reminder sent to customers") and a larger text box for "Appointment Notes".

Below the notes is a checkbox for "Send email reminder?" which is checked. The "Schedule Appointment" section includes a date and time picker and a "Save Appointment" button.

At the bottom, there are two sections: "My Appointments" (No Appointments Found within 7 days of your chosen date) and "My Work Schedule" (No Scheduled Work Found within 7 days of your chosen date).

Email Appointment Reminders

Every 24 hours, the system will check for any appointments due within the next 48 hours and send an email reminder, the email will automatically insert the customer's name, appointment title, date and time of appointment along with your contact details should the customer wish to rearrange the appointment.



Dear Geraint Jones,

This is a quick reminder of your scheduled appointment with Geraint Rhys-Jones of nicenstripy on Thursday 14 January 2016 at 09:30 to discuss Garden Maintenance.

We hope this is still convenient for you, however if it is not, please contact Geraint Rhys-Jones on 029 2070 6336 / 07764740081 or email geraint.jones@itpie.co.uk.

Many thanks and we look forward to seeing you soon.

Regards

nicenstripy team

please note this is an automated email. Please do not reply

If the system finds an invalid or missing email address it will email you to notify you that it wasn't able to send a reminder to the customer.



Hi Geraint Rhys-Jones,

We weren't able to remind Catherine Chin about your appointment on Thursday 14 January 2016 at 12:00 as the email address entered was invalid.

You can either contact the customer on the phone number found on the system (02920 706336 or 07718 057 920) to confirm your appointment or update their email address and the system will try again.

This is an automated email, please do not reply.

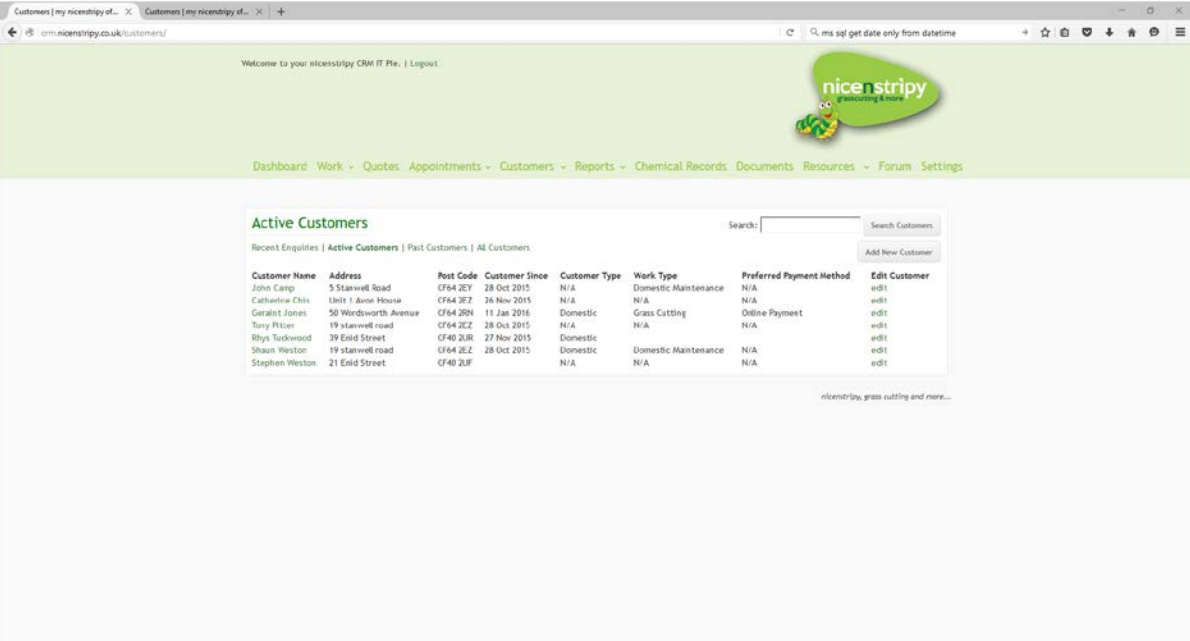
Kind Regards

nicenstripy team

Customers

The customer overview section allows you to quickly view your customers divided under three headings, 'Active Customers', 'Recent Enquiries' and 'Past Customers'. Active Customers are those who you currently do work for, Past Customers are customers you have worked for but no longer do work for and Recent Enquiries are customers you have added or who have come through the website but aren't actual customers.

From this screen you can search your customers, add new customers or edit existing customers.



Customers | my nice nstripy of... | Customers | my nice nstripy of... | +

CRM nice nstripy.co.uk/customers/

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Dashboard | Work | Quotes | Appointments | Customers | Reports | Chemical Records | Documents | Resources | Forum | Settings

Active Customers

Recent Enquiries | **Active Customers** | Past Customers | All Customers

Search: Search Customers

Add New Customer

Customer Name	Address	Post Code	Customer Since	Customer Type	Work Type	Preferred Payment Method	Edit Customer
John Camp	5 Stanwell Road	CF64 2EY	28 Oct 2015	N/A	Domestic Maintenance	N/A	edit
Catherine Chin	Unit 1 Anne House	CF64 3EY	26 Nov 2015	N/A	N/A	N/A	edit
Gerald Jones	50 Wordsworth Avenue	CF64 2BN	11 Jan 2016	Domestic	Grass Cutting	Online Payment	edit
Tony Pitter	19 stanwell road	CF64 2EJ	28 Oct 2015	N/A	N/A	N/A	edit
Rhys Tudorvold	39 Enid Street	CF40 2UR	27 Nov 2015	Domestic			edit
Shaun Weston	19 stanwell road	CF64 2EJ	28 Oct 2015	Domestic	Domestic Maintenance	N/A	edit
Stephen Weston	21 Enid Street	CF40 2UR		N/A	N/A	N/A	edit

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Add Customers

When adding a customer, you are asked to complete as many fields as possible, but the only required field is 'Company/Surname'

The screenshot shows the 'Add New Customer' form in the nice+stripy CRM. The form is titled 'Add New Customer' and is located under the 'Customers' tab. It contains several input fields for customer information, including Company / Surname, First Name, Address 1, Address 2, Town, County, Post Code, Email, Website, Telephone, and Mobile. There are also dropdown menus for Customer Since, Customer Type, Work Type, and Preferred Payment Method. The form is set against a light green background with the nice+stripy logo and navigation menu visible at the top.

Customer Overview Future Work Past Work Chemical Records Commercial Works Quotes

Add New Customer

Company / Surname:

First Name:

Address 1:

Address 2:

Town:

County:

Post Code:

Email:

Website:

Telephone:

Mobile:

Customer Since:

Customer Type:

Work Type:

Preferred Payment Method:

Customer Overview

When you view a customer, all the information linked to their account is shown under various tabs. To view any of this information simply click a tab.

The screenshot shows the 'View Customer Details' page in the nice+stripy CRM. The page is titled 'View Customer Details' and is located under the 'Customers' tab. It displays a comprehensive overview of a customer's information, including their details, notes, and photos. The customer's name is Tuckwood, Rhys. The page also shows the customer's status as 'Active Customer' and provides links to 'Schedule Work' and 'Archive Customer'. The form is set against a light green background with the nice+stripy logo and navigation menu visible at the top.

Customer Overview Future Work Past Work Chemical Records Commercial Works Quotes

View Customer Details

Company / Surname: Tuckwood

First Name: Rhys

Address 1: 29 Enid Street

Address 2: Trealaw

Town: Tonypandy

County: Mid Glamorgan

Post Code: CF40 2LR

Email: kippet.tuck@hotmail.com

Website:

Telephone: 01443 000 000

Mobile: 00000 000 000

Customer: Active Customer (click to change to 'past customer')

Customer Since: 27 November 2015

Initial Cost: £100.00

Customer Type: Domestic

Work Type:

Value Per Visit: £57.14

Preferred Payment Method:

Date of First Visit: Tue 05 January 2016

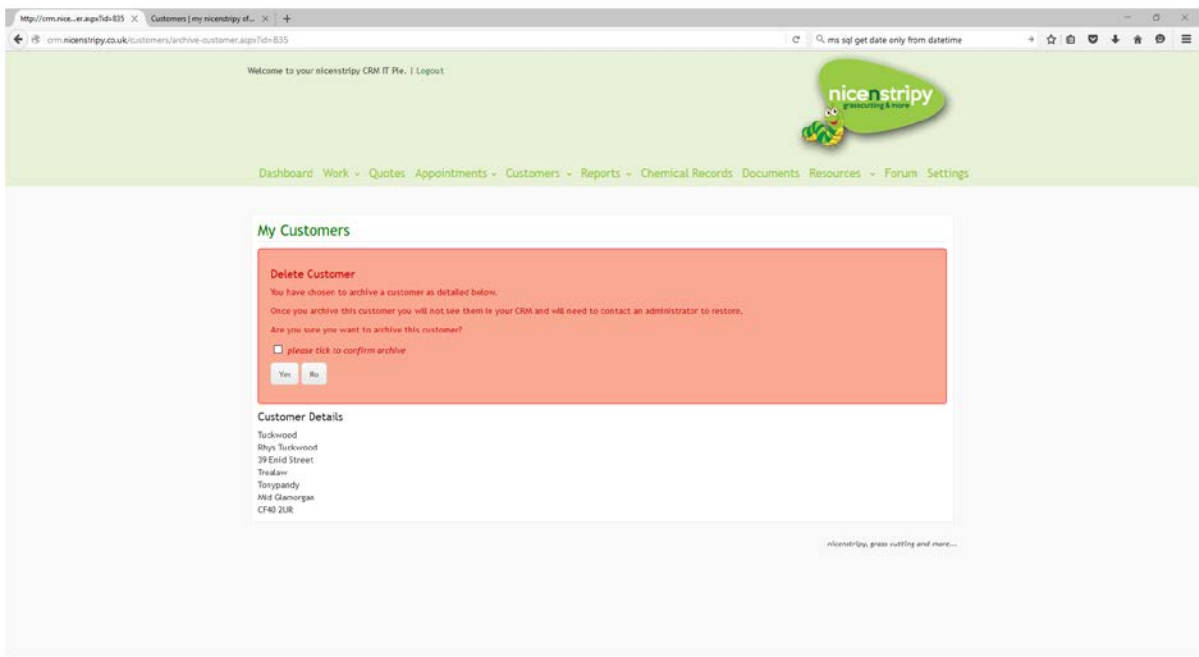
Date of Last Visit: Fri 08 January 2016

Notes

Photos

On the Customer Overview page it is possible to edit the customer information, Add/Edit notes linked to the customer, Upload Images for the customer, Schedule Work for the Customer, Update the Customer Status and Archive the Customer.

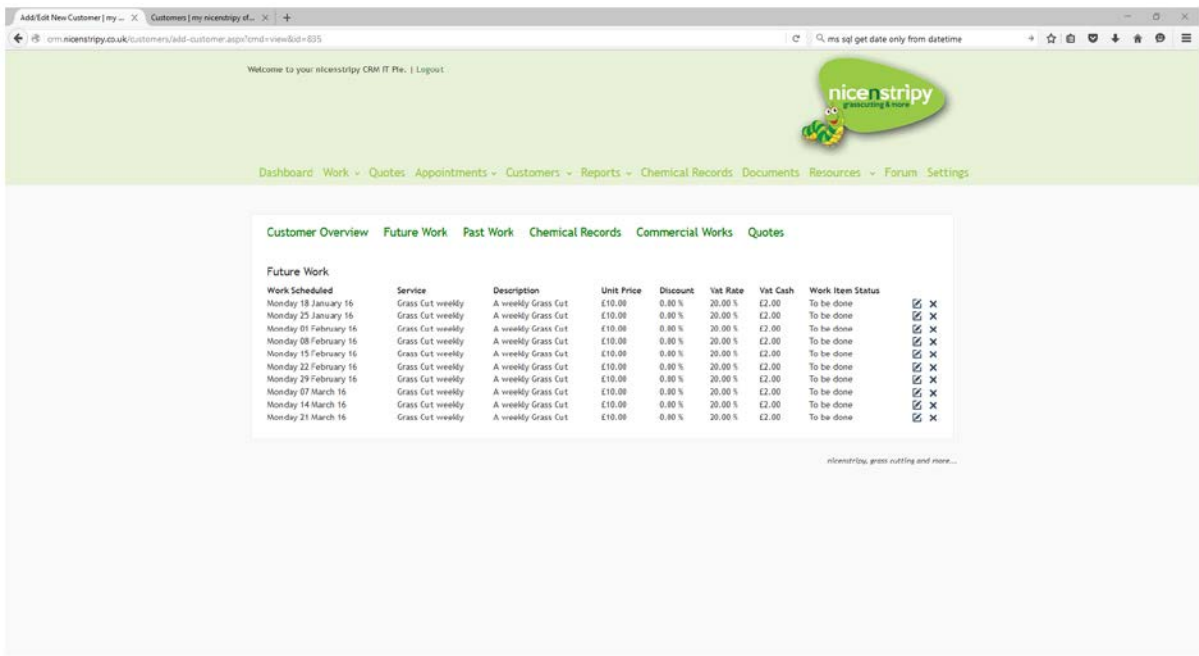
If you choose to archive a customer you are presented with a warning.



As explained, archiving a customer will remove them entirely from your CRM.

Future Work

Future Work presents all future work for this customer and allows you to edit and delete the work.



Past Work

Past Work shows all past work and its status following completion of the Work Sheet

Add/Edit New Customer | my...Customers | my.nicenstripy of...+

om.nicenstripy.co.uk/customers/add-customer.aspx?cmd=view&id=835ms sql get date only from datetime

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DashboardWorkQuotesAppointmentsCustomersReportsChemical RecordsDocumentsResourcesForumSettings

Customer OverviewFuture WorkPast WorkChemical RecordsCommercial WorksQuotes

Past Work

Work Scheduled	Service	Description	Unit Price	Discount	Vat Rate	Vat Cash	Work Item Status
Friday 08 January 16	Commercial Maintenance	Commercial Maintenance	£0.00	0.00 %	20.00 %	£0.00	Complete
Friday 08 January 16	Domestic Maintenance	Domestic Maintenance	£0.00	0.00 %	20.00 %	£0.00	Complete
Friday 08 January 16	Fencing	Fencing	£100.00	0.00 %	0.00 %	£20.00	Complete
Thursday 07 January 16	Commercial Maintenance	Commercial Maintenance	£0.00	0.00 %	20.00 %	£0.00	Complete
Thursday 07 January 16	Garden Tidy Up	Garden Tidy Up	£100.00	0.00 %	0.00 %	£20.00	To be done
Wednesday 06 January 16	Jet Washing	Jet Washing	£100.00	0.00 %	20.00 %	£20.00	To be done
Tuesday 05 January 16	Lawn Feed Autumn	Lawn Feed for Autumn	£100.00	0.00 %	20.00 %	£20.00	To be done

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Chemical Records

Chemical Records shows the most recent recorded information for each type of chemical record and allows you to view all historical data by each customer.

Add/Edit New Customer | my...Customers | my.nicenstripy of...+

om.nicenstripy.co.uk/customers/add-customer.aspx?cmd=view&id=835ms sql get date only from datetime

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DashboardWorkQuotesAppointmentsCustomersReportsChemical RecordsDocumentsResourcesForumSettings

Customer OverviewFuture WorkPast WorkChemical RecordsCommercial WorksQuotes

Hard Spray Records

Customer Name	Address	Post Code	Chemical	Application Rate	Number Of Litres	Date Of Application	Operator
Turkwood Strips	39 Enid Street	CF40 2UR	Round Up Weed Killer	Fast	12.00	Thursday 12 November 15	Shawn Weston

View All Records

Spot Weed Records

No Spot Weed Records

View All Records

Poison Spray Records

No Poison Spray Records

View All Records

Lawn Feed Records

No Lawn Feed Records

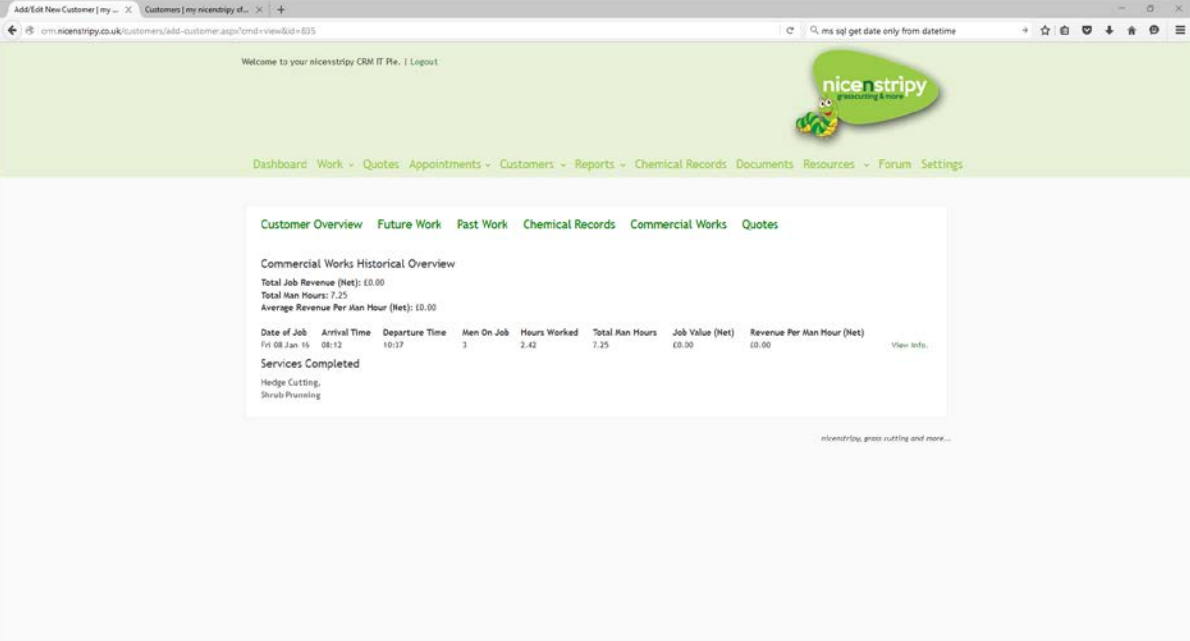
View All Records

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Commercial Works

The Commercial Works section shows an overview of each entry for commercial works, the summary presents the date of the work, arrival and departure time, hours worked, men on the job and total hours worked. The job value and the revenue per man hour. The system also calculates the total value and man hours for all commercial works under this customer giving you the average revenue per man hour.

To view what commercial works were entered onto the system on completion click the 'View Info.' Button.



The screenshot shows a web browser window with the URL `crm.nicensstripy.co.uk/customers/add-customer.aspx?cmd=view&id=835`. The page title is "Add/Edit New Customer | my...". The browser address bar shows a search query: `ms sql get date only from datetime`. The page content includes a welcome message: "Welcome to your nicensstripy CRM IT Re. 1 Logout". The nicensstripy logo is visible in the top right corner. A navigation menu is located below the logo, containing links: Dashboard, Work, Quotes, Appointments, Customers, Reports, Chemical Records, Documents, Resources, Forum, and Settings. The main content area displays the "Commercial Works Historical Overview" for a customer. It includes a table with columns: Date of Job, Arrival Time, Departure Time, Men On Job, Hours Worked, Total Man Hours, Job Value (Net), and Revenue Per Man Hour (Net). The table shows data for a job on Fri 08 Jan 16, with an arrival time of 08:12, departure time of 10:17, 3 men on job, 2.42 hours worked, 7.25 total man hours, a job value of £0.00, and a revenue per man hour of £0.00. Below the table, it lists "Services Completed" as Hedge Cutting and Shrub Pruning. A "View Info." button is located to the right of the table. At the bottom right of the page, there is a small text link: `nicensstripy, grass cutting and more...`

Date of Job	Arrival Time	Departure Time	Men On Job	Hours Worked	Total Man Hours	Job Value (Net)	Revenue Per Man Hour (Net)
Fri 08 Jan 16	08:12	10:17	3	2.42	7.25	£0.00	£0.00

Services Completed
Hedge Cutting,
Shrub Pruning

[View Info.](#)

[nicensstripy, grass cutting and more...](#)

Quotes

Quotes shows and allows you to edit quotes linked to the customer. To edit a quote, simply click the Quote Number.

Reports

Under the reports tab you can see the most recent weekly returns and the most recent Commercial Works.

Welcome to your nice nstripy CRM! Log out.

Weekly Returns

Below is a list of the 10 most recently submitted weekly returns, select a return to edit.

Week Ending	Total Income	Total Net	Total VAT	Revenue Per Van	Revenue Per Staff
Fri 20 November 15	£95.67	£80.00	£15.67	£40.00	£8.00
Fri 20 November 15	£95.67	£80.00	£15.67	£40.00	£20.00

[Add New Weekly Return](#) [Edit Weekly Return](#) [Edit Weekly Return](#) [View All Weekly Returns](#)

Commercial Works

Below is a list of the 4 most recently completed commercial works customers.

Customer Name	Date of Job	Arrival Time	Departure Time	Men On Job	Hours Worked	Total Man Hours	Job Value (Net)	Revenue Per Man Hour (Net)
Weston, Shaun	Mon 11 Jan 16	09:05	10:00	2	0.92	1.83333333333333	£25.00	£13.64
Tuckwood, Rhys	Fri 08 Jan 16	08:12	10:37	3	2.42	7.25	£0.00	£0.00
Pittier, Tony	Wed 09 Dec 15	13:00	17:00	2	4.00	8	£16.67	£2.08
Camp, John	Wed 09 Dec 15	09:00	11:30	2	2.50	5	£18.33	£3.67

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Weekly Returns

It is possible to add a new weekly return or edit an existing weekly return from here.

If you choose to add or edit a weekly return the system pre-populates as much information as possible based on data recorded on the system via appointments and work sheets.

Submit Weekly Return

Weekly Return Date: Friday 15 January 2016

Finance

Day	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Total Income	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Value (net)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
VAT	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

Resources

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
No. Van Working	0	0	0	0	0	0	0	0
Revenue Per Van (net)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
No. of Staff Working	0	0	0	0	0	0	0	0
Revenue per staff member (net)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

Weather

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Temperature High	N/A	N/A	10		N/A	N/A	N/A
Temperature Low	N/A	N/A	4		N/A	N/A	N/A
Precipitation	N/A	N/A	Dry		N/A	N/A	N/A

Marketing

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
No. of Presentations	0	1	0	1	0	0	0	2
No. of Cards Delivered	0	0	0	0	0	0	0	0

[Calculate Results](#)

Marketing Activities / Comments on the week

The Finance section is the sum of all completed work for each day.

If Vans have been associated with work their total is included under resources, but you will need to include the number of staff worked each day.

The weather data is pulled from the work sheet.

Marketing shows the sum of all successful appointments/presentations associated with customers but you will need to enter the cards delivered.

Commercial Works

If you navigate to the Commercial Works tab from the navigation bar you will see the most recent commercial works completed for each customer along with the total revenue, hours and average revenue per man hour for the commercial work shown.

http://com.nice_nstripy.com/ X

com.nice_nstripy.co.uk/commercial-works/

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Dashboard Work Quotes Appointments Customers Reports Chemical Records Documents Resources Forum Settings

Commercial Works

Below is a list of the most recently completed commercial works per customer.
To view all historical commercial work completed for each customer, please view the customer profile.

Total Job Revenue (Net): £271.17
Total Man Hours: 29.08
Average Revenue Per Man Hour (Net): £9.32

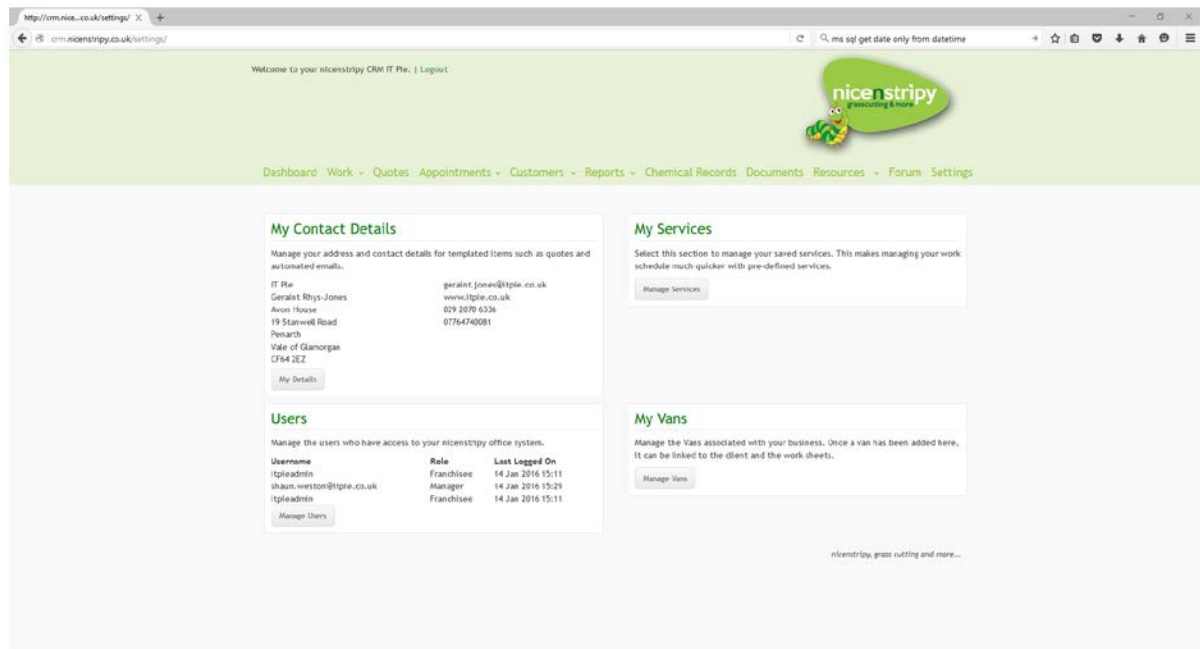
Customer Name	Date of Job	Arrival Time	Departure Time	Men On Job	Hours Worked	Total Man Hours	Job Value (Net)	Revenue Per Man Hour (Net)
Pitoe, Tony	Wed 09 Dec 15	13:00	17:00	3	4.00	12.00	£222.00	£18.50
Camp, John	Wed 09 Dec 15	13:00	17:00	2	4.00	8.00	£24.17	£3.02
Tuckwood, Rhys	Fri 08 Jan 16	08:12	16:37	3	2.42	7.25	£0.00	£0.00
Weston, Shaun	Mon 11 Jan 16	09:05	10:00	2	0.92	1.83	£25.00	£13.66

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Select a customer to view all commercial work for that customer.

Settings

The settings tab is where you manage your information.



Under settings you can manage your contact details which is used on quotes and emails.

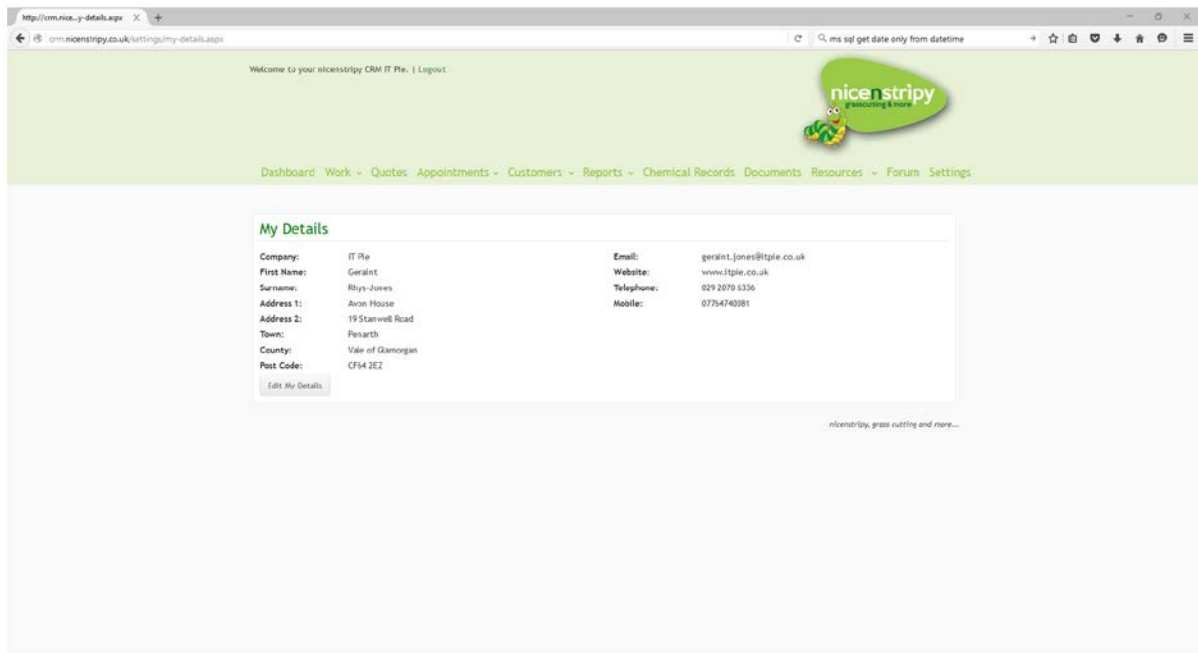
Add services beyond the already pre-programmed services found on the system to make scheduling work quicker.

Manage your team

Manage your Vans

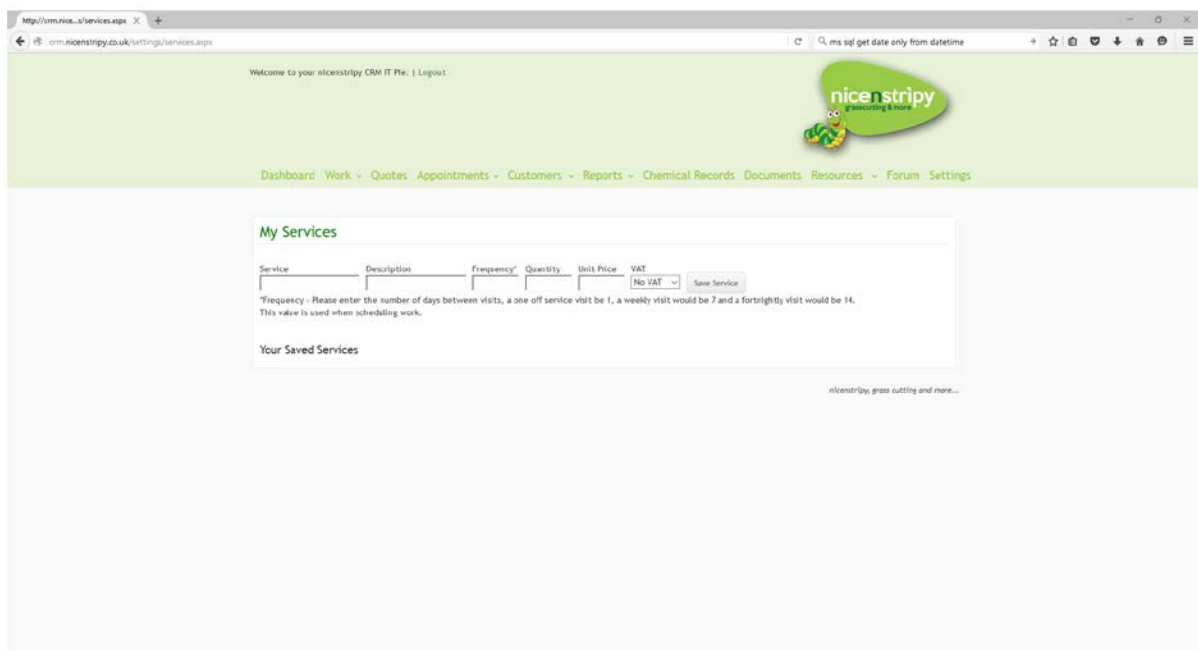
My Details

Select Manage my Details and you can view and edit your details.



My Services

Add services linked to your account which will then appear in the dropdown menu when scheduling work.



Manage Users

The screenshot shows the 'Manage Users' page in the nice-nstripy CRM. The page has a green header with the logo and navigation links: Dashboard, Work, Quotes, Appointments, Customers, Reports, Chemical Records, Documents, Resources, Forum, and Settings. The main content area is titled 'Manage Users' and includes an 'Add New User' button. Below this is a table titled 'My Team' with columns for Username, Role, Last Logged On, Edit Role, and Delete User. The table lists three users: itpleadmin (Franchisee), sharon_watson@itple.co.uk (Manager), and itpleadmin (Franchisee). The last logged on times are 14 Jan 2016 15:11, 14 Jan 2016 15:29, and 14 Jan 2016 15:11 respectively.

Username	Role	Last Logged On	Edit Role	Delete User
itpleadmin	Franchisee	14 Jan 2016 15:11	Edit Role	Delete User
sharon_watson@itple.co.uk	Manager	14 Jan 2016 15:29	Edit Role	Delete User
itpleadmin	Franchisee	14 Jan 2016 15:11	Edit Role	Delete User

Add, delete and edit user roles. You can give access to staff, change their roles which dictates what access they have and also delete them from the system when needed.

My Vans

The screenshot shows the 'My Vans' page in the nice-nstripy CRM. The page has a green header with the logo and navigation links: Dashboard, Work, Quotes, Appointments, Customers, Reports, Chemical Records, Documents, Resources, Forum, and Settings. The main content area is titled 'My Vans' and includes a form to add a new van with fields for Van Make, Van Model, Registration, and Notes. Below the form is a table titled 'My Saved Vans' with columns for Registration, Make, Model, Notes, and Van Added. The table lists one van: AB12 CDE, Mercedes, Sprinter, Some Test Notes, and Van Added 11/10/2015 18:20:55.

Registration	Make	Model	Notes	Van Added
AB12 CDE	Mercedes	Sprinter	Some Test Notes	11/10/2015 18:20:55

Add Vans to your account which can then be associated with work and will populate your weekly return.