The document guides a first time Cerrebro user the general usage of the Cerrebro CRM mobile app

MOBILE MANUAL

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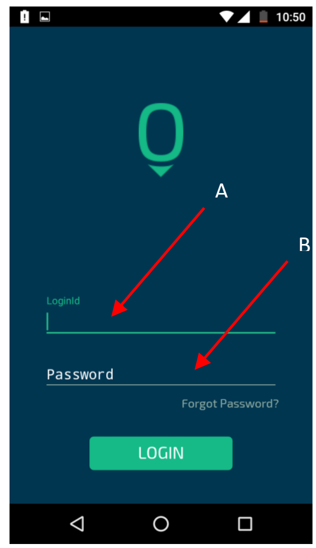
Login & Home Screen

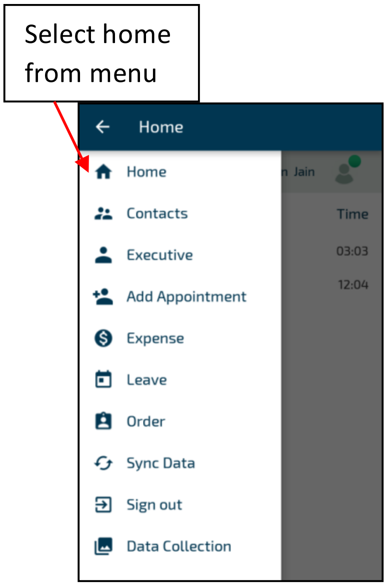
- User can login using his Username (email id) and Password
- When user does first login after installing Cerrebro from play store, Internet must be available on mobile otherwise error message will appear on screen
- If Internet is available the login screen will appear.The login screen has the following details:
    - User Id(A) – Enter User Id
    - Password(B) – Enter Password

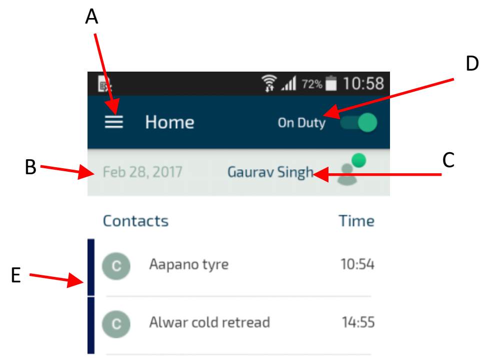


- Click on “Login” after entering valid user ID and Password, Cerrebro home screen will appear.

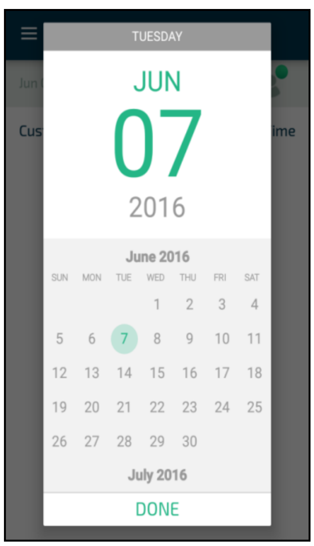
Home

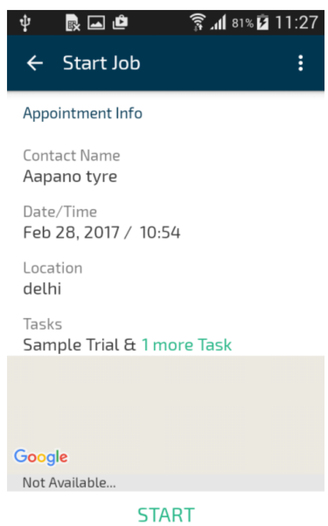
- The home screen has the following details:
    - Menu(A)
    - Job Date(B)
    - User Name(C)
    - Duty On/Off(D)
    - Job Details(E)

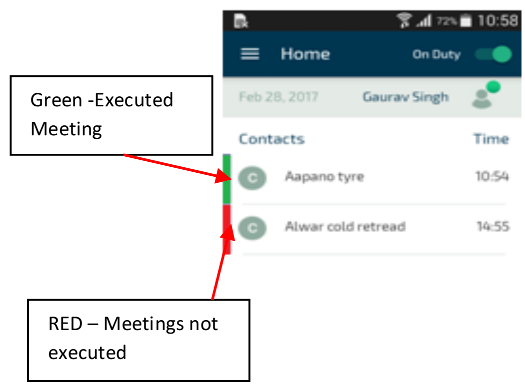




- On click of (B) user can select a date. On change of date we can view jobs for any other day.
- On click of (D) user can start his duty. Duty needs to be on for a user to execute meetings.
- On click of (E) user can view a specific Job.



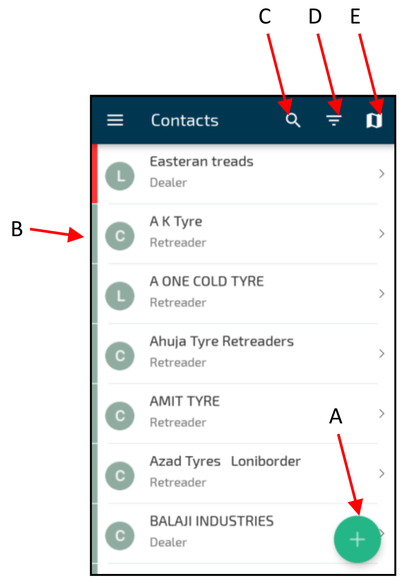




Contacts

- Contacts option can be selected from menu; List of customers will appear.
  The Contacts screen has the following details:
  - Add contact Button (A)
  - List of contact (B)
  - Search (C): Search contacts based on name
  - Select filter (D): Apply filters to contacts data

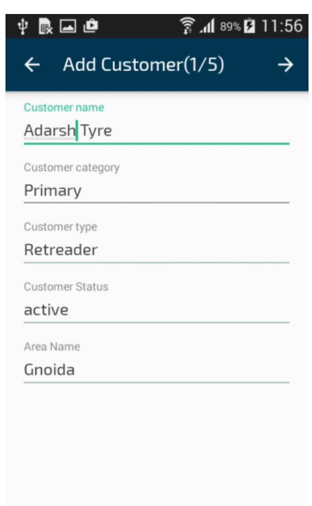
- View contacts on map(E)

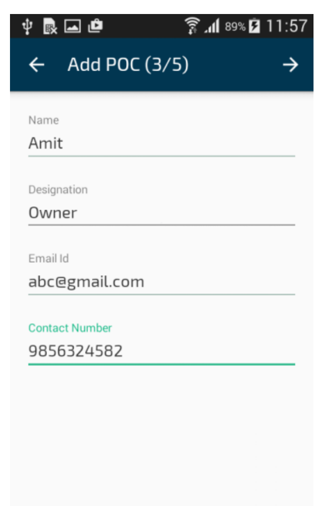


- User can add a contact by clicking (A), Add contact screen will appear

Adding a customer / lead

- Customer
  - Customer name - Customer’s name
  - Customer category - Category of customer
  - Customer Type - Type of customer
  - Customer Status- Customer status
  - Area / Sales Person

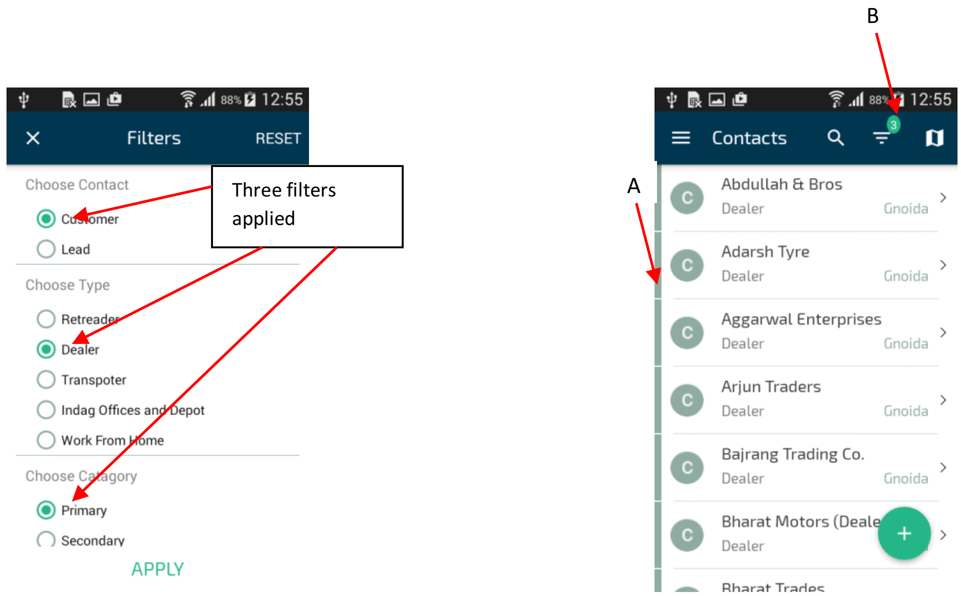




- User will add at least one POC while adding the customer. Additional POC can be added later. In POC the following details are entered:
  - Name
  - Designation
  - Email Id
  - Contact Number
- User will add at least one address while adding a customer. The details that are entered:
  - Location Name
  - Contact Number – Any landline number if available
  - Address details
  - Geotag
- When user adds a location, then a user can also geotag the location. It is not necessary to geotag the location while adding a customer but will be required when the first job is executed.
- Click on geotag label to geotag, camera will open up. Take an image of the customer office or complex and click ok. Geotag status will be updated as geotagged
- In the rare scenario geotag status is shown as non-geotagged, please repeat the above step
- After the Contact is saved, the Contact will show on Contact Screen.

Applying filters to contacts

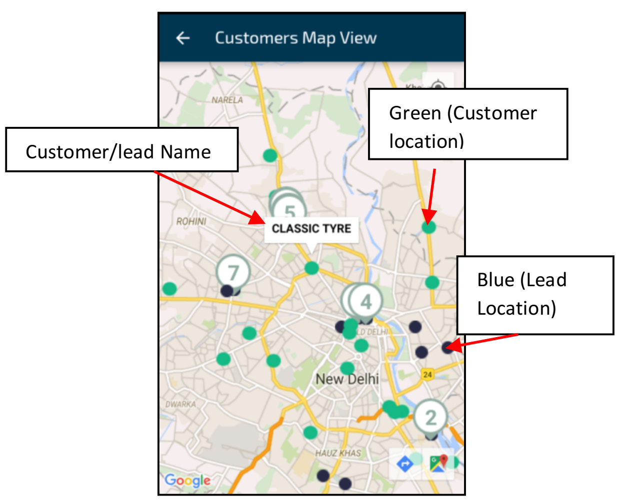
- On click of filter button, filter screen will appear.
- User can apply any filter as per requirement
- User can reset any filters applied by clicking on reset.



- Filtered Data(A): User can see filtered data according to its need.
- No of Filters Applied(B)

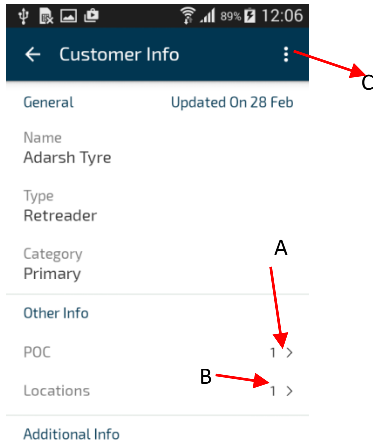
Contact Map View

- On click of (E in Contacts) goggle Map screen will appear.
- User can see the location and name of the customers/lead that are geo tagged with Green(customer)/blue(lead) dots on map



Contact detail view

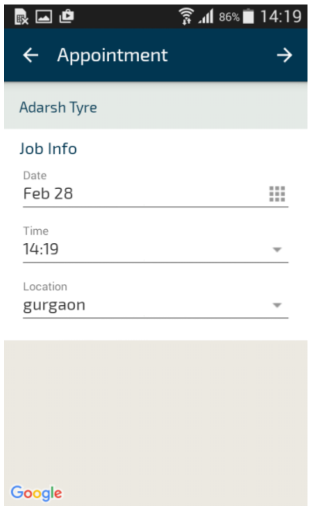
- On click of a specific contact in contact view, the user can see the contact details

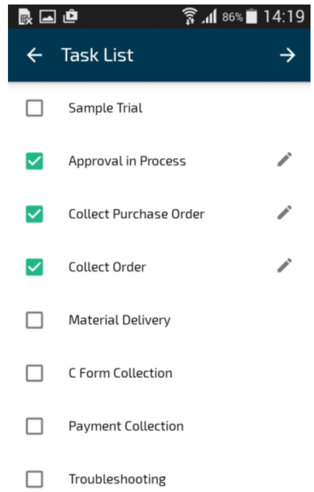


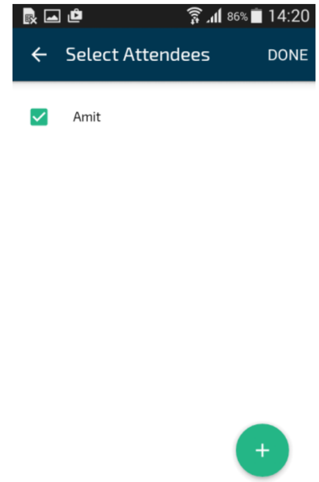
- The Contact detail screen has the following details:
    - View and Add New POC (A)
    - View and Add New Location(B)
    - Contact Menu Option (C)
        - Start Meeting: User can Start the Meeting
        - Call
        - Route: User can Find Route
        - Edit: User can Edit Customer Info
        - Sync: To get changes in contact instantly
        - Deactivate
        - Data Collection

Add Job

- Add Job option will be selected from menu. Add Job screen will open up.
- Create Job
    - Date
    - Time
    - Location
- Select Task.
- Select Attendees.



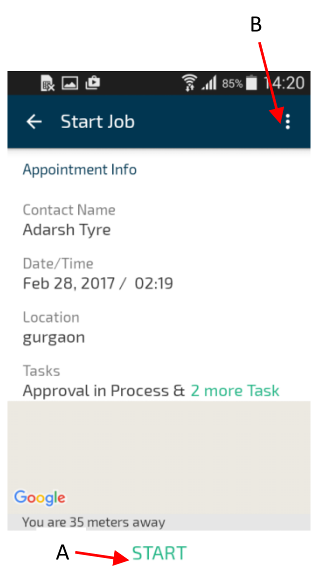




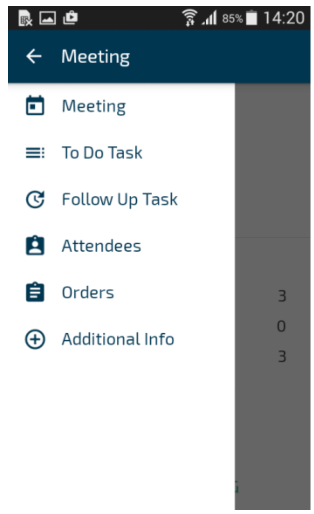
- After entering all details, click on “DONE” to save the job. The job will now be visible on the home screen and can be executed on the schedule date

Job Execution

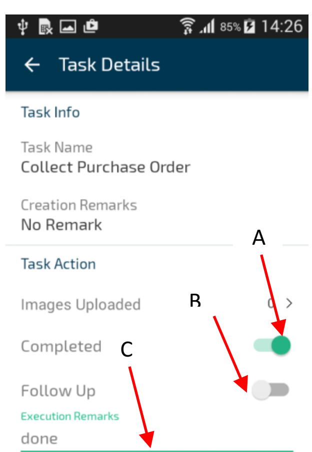
- The Start Job screen has the following details:
  - Start(A): User can start meeting
  - Menu Option(B)
    - Reschedule
    - Cancel

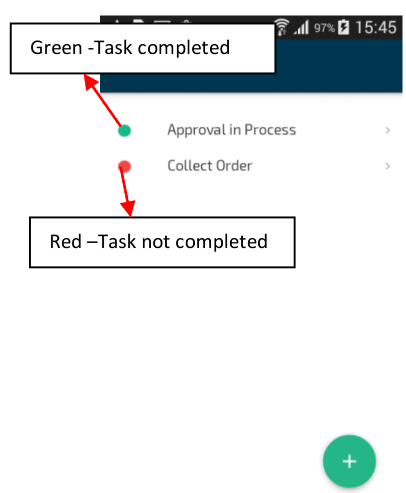


- On click of (A) meeting will be started. Meeting screen will open up. The Meeting screen has the following details:
    - Meeting: View details and can Complete the Meeting.
    - To Do Task: User can view task detail and Add new task.
    - Follow up task: User can follow the task
    - Attendees: User can Select and Add new attendees
    - Additional info



- Click on "To Do Task", To Do Task screen will open up. User can add a task as shown before in Add Job section.
- Select task, task Details screen will open up. The Task Details Screen has following details:
    - Completed(A): Task will be completed.
    - Follow Up(B): Task will follow up.
    - Remarks: Enter Remarks (mandatory).





- Click on complete meeting, under meeting tab once the meeting is done.