V201806

PLIC BIZ OPERATIONS & CRM MANUAL

Getting Started

Welcome to PLIC.BIZ – a CRM & Operations Portal for Volume Photographers.

Before you begin:

1. **History**: PLIC.BIZ has been in development for YEARS! Our team started with tools and techniques utilized in the medtech industry (with, if you can believe it, even more constraints than we have in school & volume photography). We created alliances with a variety of tech companies, licensed exclusive programming, hired ninja coders, hammered the snot out of everything during a rigorous pilot trial… That means our core technology is proven!

   THEN we worked for three solid years with a number of guinea pig photo companies (ranging in size, geography, and use load) in order to create the high-volume photography industry FIRST CRM & OPERATIONS portal! Based on all our experiences, we honed the tools and packaged template workflows so that you have a gnarly starting point.

   We're not done. PLIC BIZ will always evolve. As long as there's new technology, new demands, new ideas, we'll keep growing. Your license means that you get to use our tools, leverage our experiences & expertise, and capitalize on our continued investments in the form of updates and customization counseling. That also means that your insights matter. If you think of anything cool, let us know. If you discover hiccups, let us know.

2. **Basics**: PLIC BIZ is a CRM w/ Operational Extensions tailored for Volume Photographers. What's that mean? "CRM" Stands for Customer Relationship Management. This is where you collect information about your accounts, manage sales, coordinate contracts, launch projects, communicate with contacts, track tasks, etc. The BIZ CRM consists of three primary sections – Organizations (Accounts), Projects, and Customer Service Tickets.

   "Operational Extensions" are the various modules that integrate with the CRM and allow you to utilize the BIZ system for virtually all aspects of your operations – from managing your team to managing the entire life-cycle of your accounts and their respective projects.

   The rest of this manual will help you understand each piece and how they integrate with each other.

Getting Started

3. **Customize**: Before you log in, you'll want to make sure to schedule a session with a BIZ WIZ (our ridiculous name for BIZ experts… and also an inside joke about the PLIC Potty) along with one or more of your core users/admins. During your first session, you'll review the BIZ system modules, capabilities, and standard configurations. THEN you'll come up with your customization strategy / homework.

   Note – it may take a number of sessions to get the BIZ system configured the way you want it. We're talking about form fields so you can capture information the way you need it, project grids, workflow adaptations, etc. Make sure you build in plenty of lead time before rolling BIZ out to your team. See "Launch Sequence" (in this Getting Started section) for more information.

4. **Train**: In order to be successful, we recommend that you schedule a training session between a BIZ WIZ, your core user(s) who helped customize the system, and the rest of your team.

   You may even want to create some tutorials or an on-boarding workflow so your team members know what BIZ is, how it works, and how YOU plan to use it!

5. **Notes**:
   - Chrome is our preferred browser (though we also use Safari a fair amount). One of our operational extensions (the communication module) requires Chrome for some of its functionality – the video chat. If you plan to use video chat, then use Chrome.
   - PLIC BIZ is a web app. It's 100% online. Your secure login page is https://plic.biz. We suggest that you bookmark this page.
   - PLIC BIZ is accessible from your phone (via the browser) but it is not intended to be a mobile app or responsive site. So your sales team can definitely use it on the road but we recommend that your primary access be from a traditional / larger display. We're working on a progressive web app next gen system though. That'll improve your mobile experience.
   - Just like all our other products, contact our PLIC team for any support issue. We have folks that can help with the basics AND, if your specific issue is more impressive, we'll connect you with a BIZ WIZ. Just click the intercom PLIC molar at the bottom of your browser to get in touch.
   - BIZ is integrated with your PLIC account in a couple significant ways. First – through support and accounting. Second – when you create an active organization in the CRM, it will show up in your synchronized PLIC.io account. This means that you're always better off creating your accounts in the CRM.
     - In order to finalize the wiring, you'll need to work with a BIZ WIZ to connect your BIZ account to your PLIC.io account by signing in during a virtual session.
     - We're always working on deeper levels of integrations. The trick is that everyone uses their CRM differently. We'll keep you posted though. We expect huge strides in the upcoming months.

Getting Started: The Interface - Login

LOGIN

Login at PLIC.BIZ.

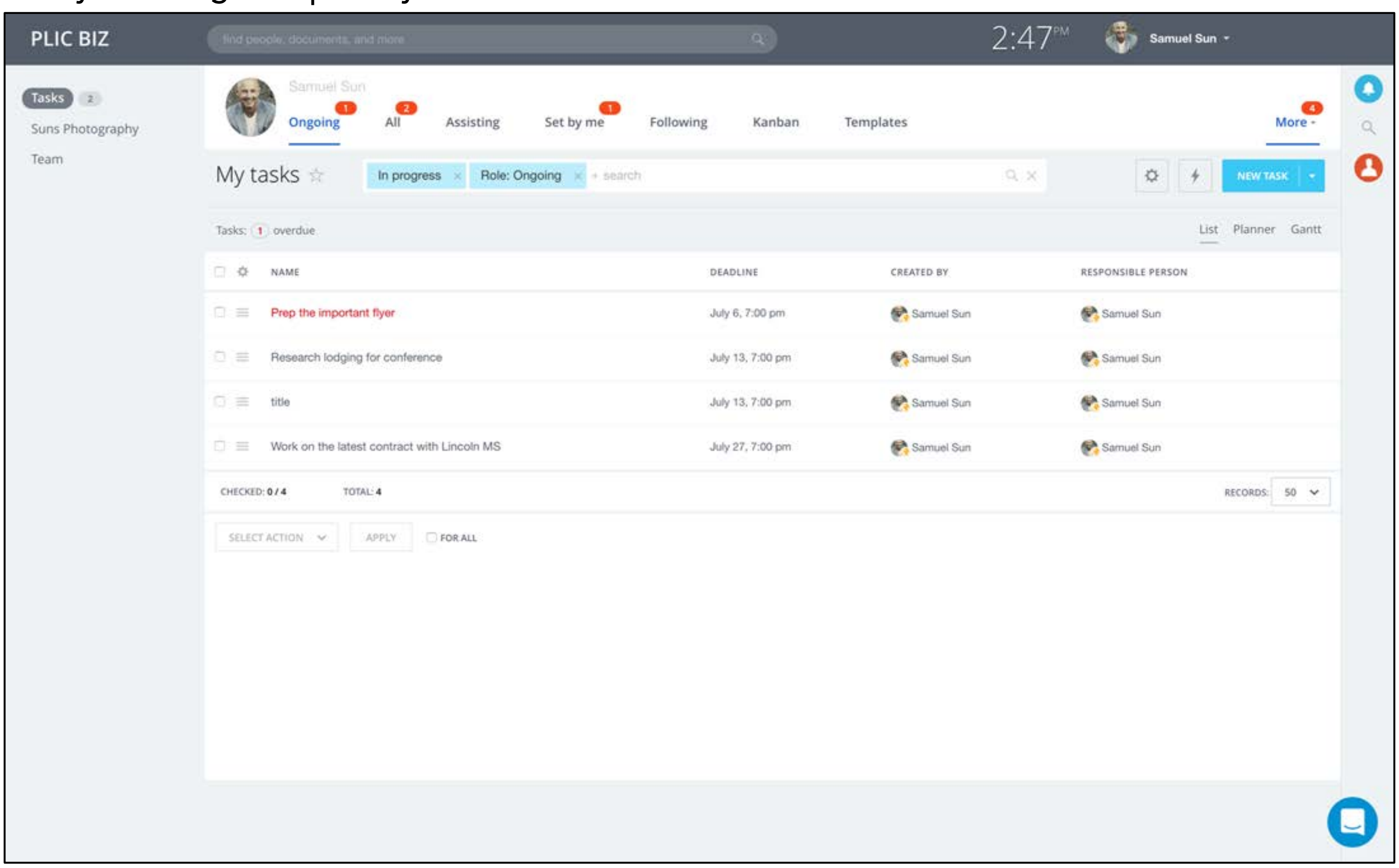
We suggest you bookmark the page on your comp AND your phone (if you're using BIZ from there)

You can enable cookies if you want the system to remember you.

Note that you will be automatically timed out after roughly an hour of non-use

HOME

Landing Page. When you first log in, this is what you'll see – your tasks. The next page(s) will walk you through the primary interface.

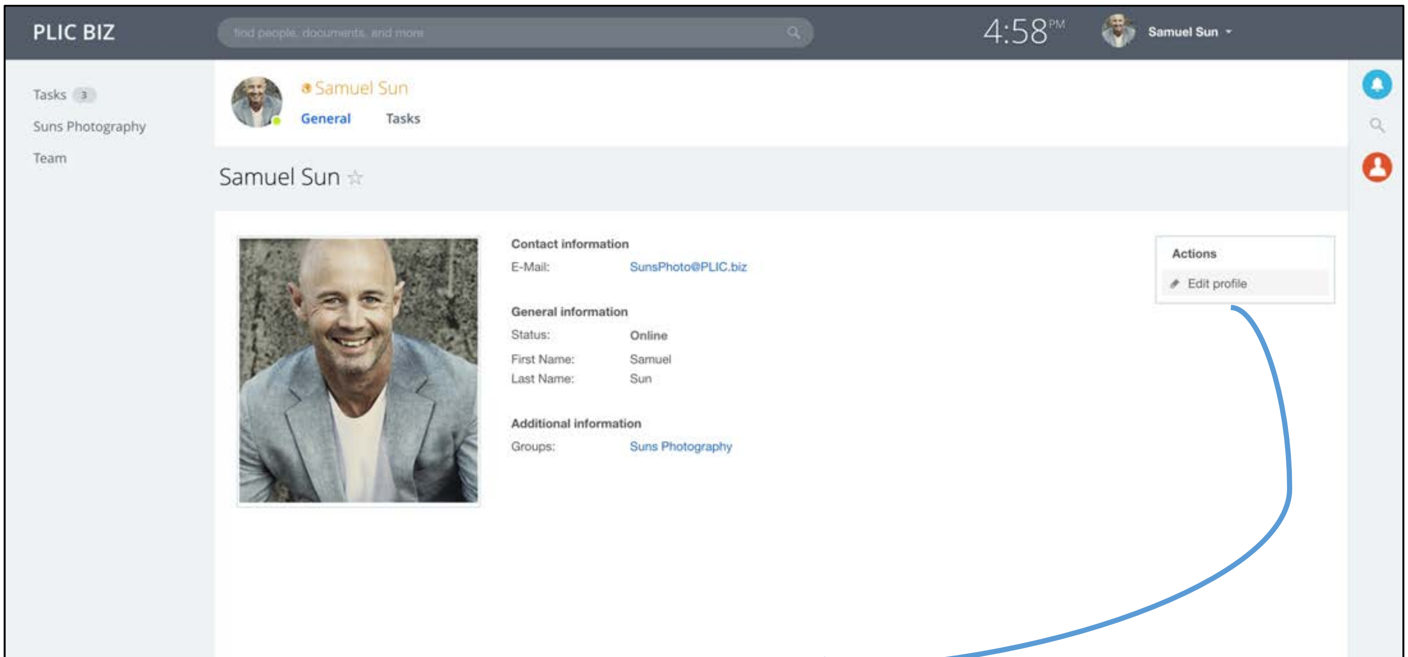


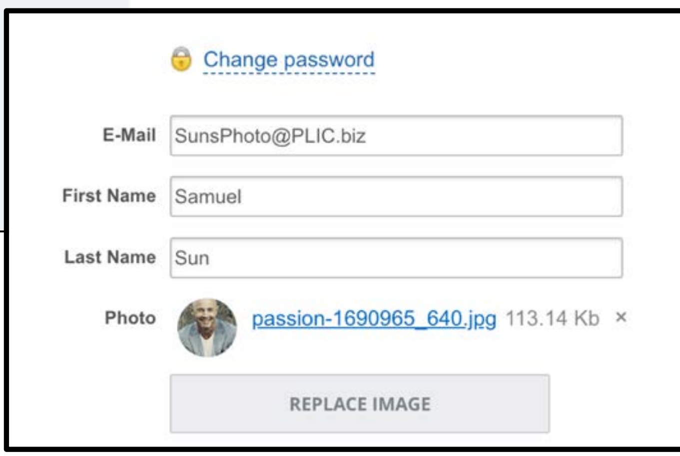
Getting Started: The Interface - Profile

TOP MENU

Click Your Profile in the top right to open your full profile (mostly for the sake of seeing what your team members will see and editing your info)

PROFILE





Click "Edit Profile" to change your password or update your picture.

Getting Started: The Interface – Menu & Support

Left Menu:

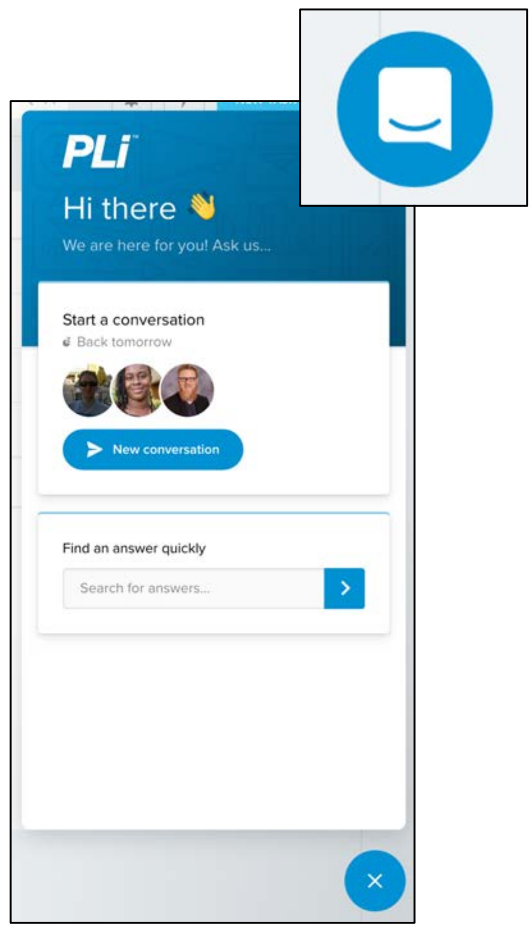
By default, you'll land in your tasks.

Click your company name to access that shared workspace.

The Team link will take you to the Team communication module.

PLIC SUPPORT

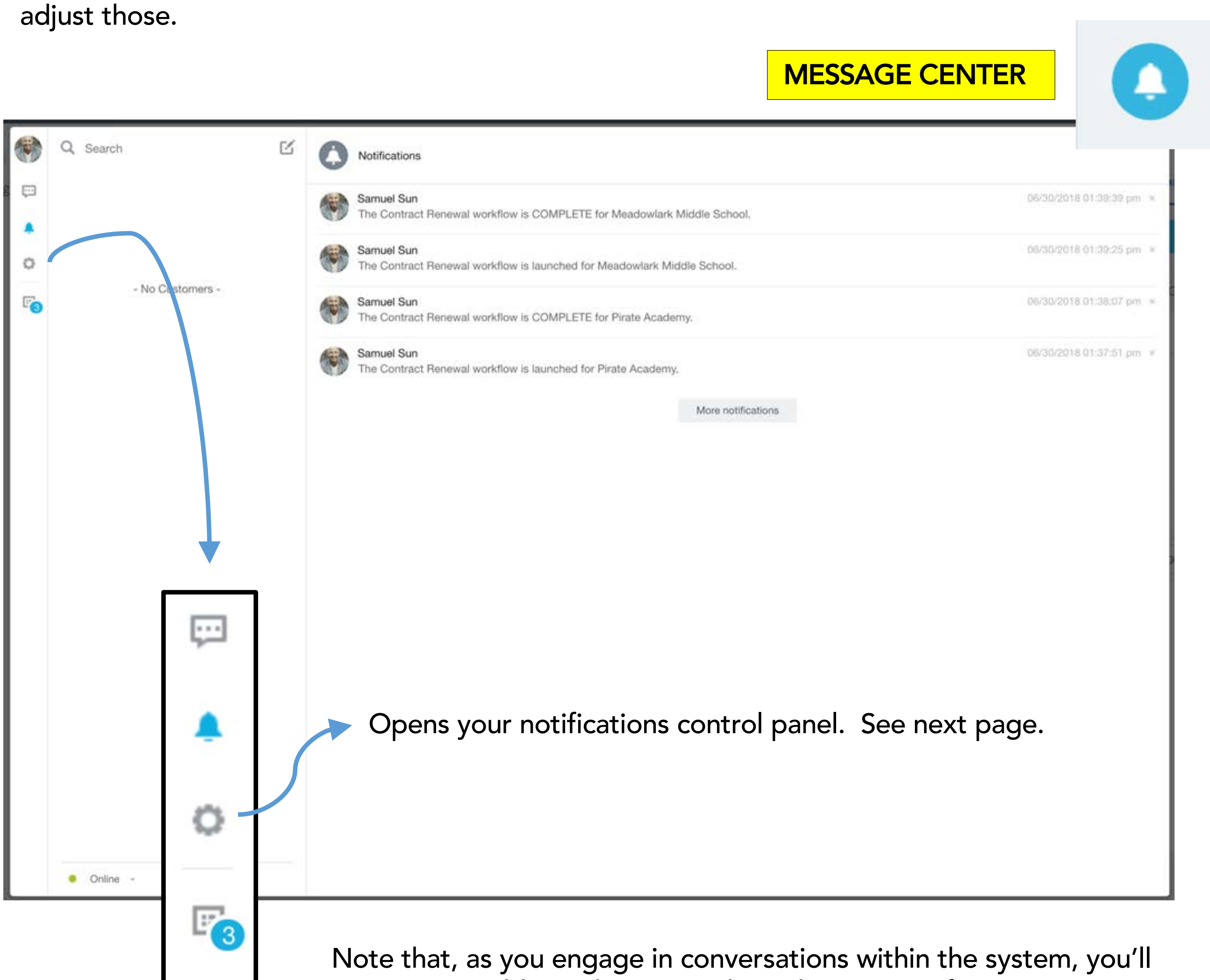
Here's the **PLIC SUPPORT** (Intercom) widget (looks like a molar on the bottom of the screen). Click it to open a ticket or get live help.



Getting Started: The Interface - Notifications

Click the little bell icon on the top right of your screen to open the communication and notification module.

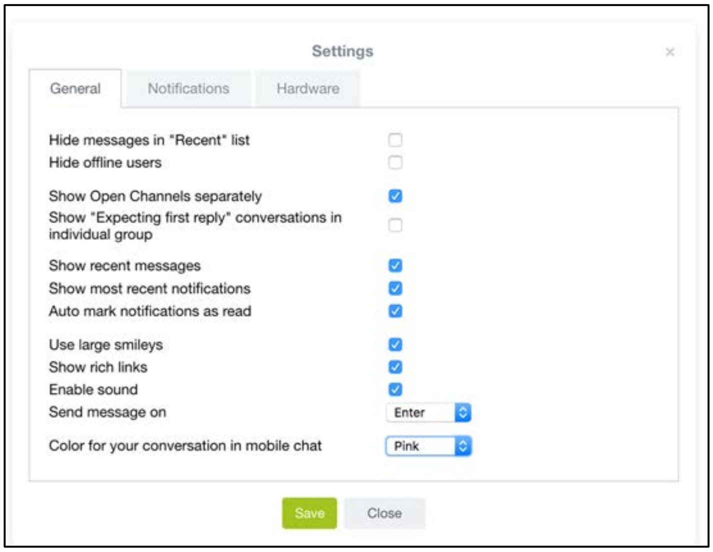
Your chats / conversations will show up in the main part of the module. We'll spend more time talking about that later (in the team module). For now though, this is also where you can find and control your system notifications. Click the gear icon to adjust those.



Note that, as you engage in conversations within the system, you'll start to see additional icons on the right portion of your screen. That will show you when you have chat updates. You can right-click on those extra icons to send a message or remove the icon. This is super handy for active threads!

Getting Started: The Interface - Notifications

NOTIFICATION SETTINGS

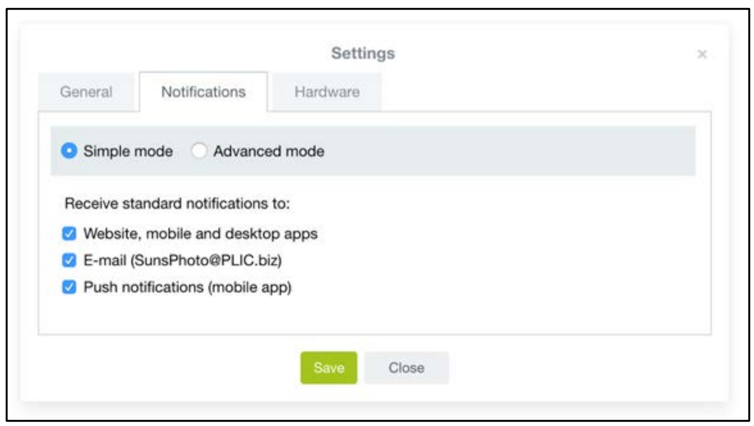


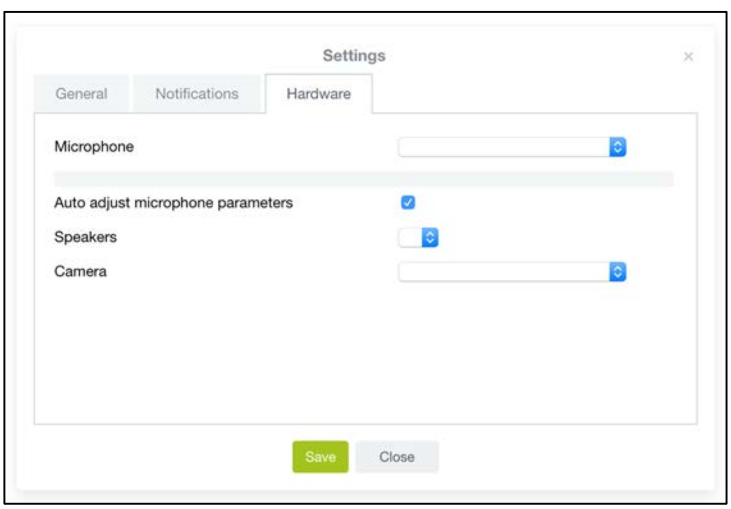
The settings panel has three sections – general, notifications, and hardware.

The general section lets you control general communication preferences.

The notifications section lets you control how and when the system lets you know that something happened.

Note that you'll see some options pertaining to our app and other components that are currently in development. The main notification you want to make sure is active is email.



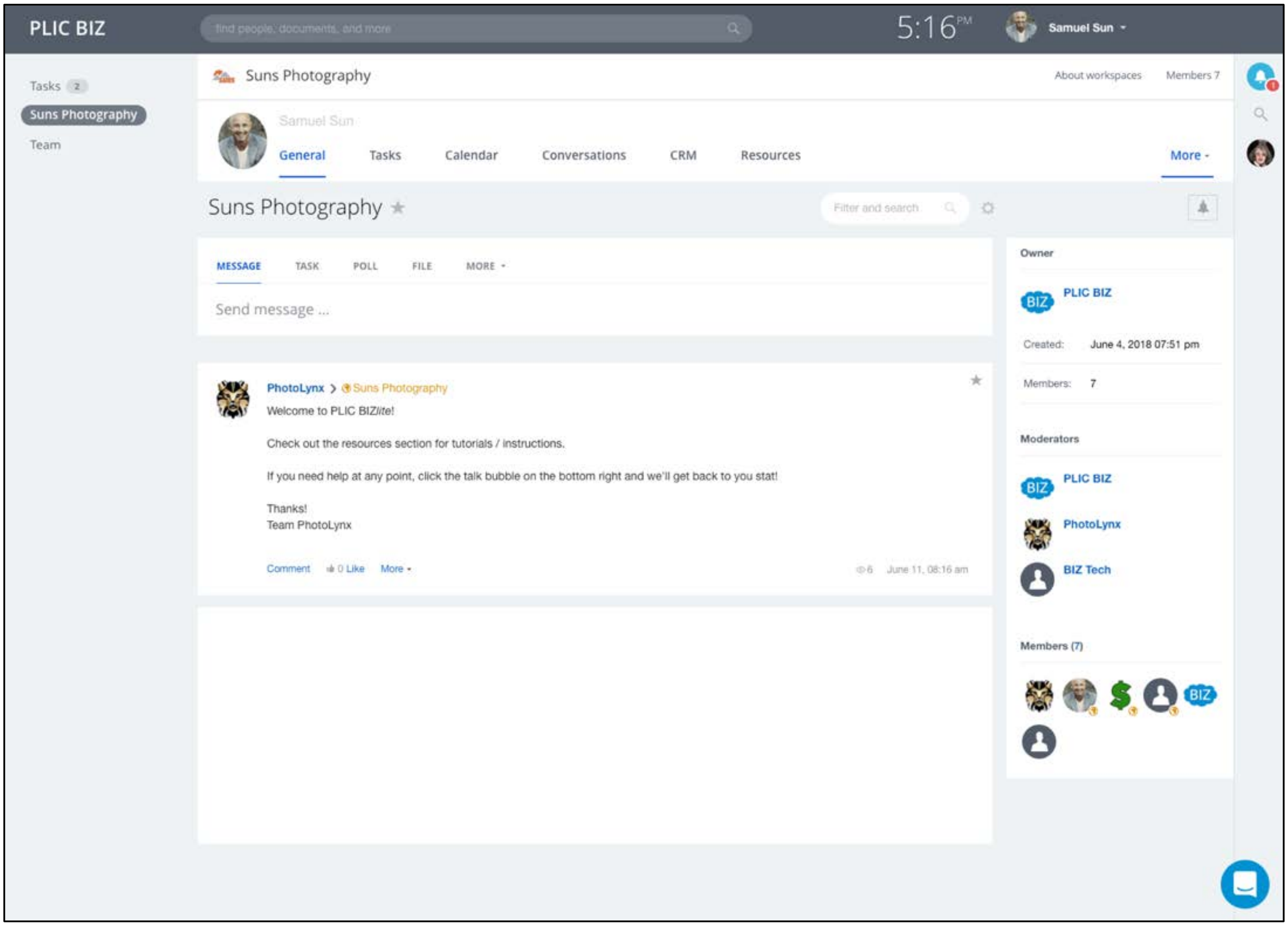


The Hardware section lets you connect your microphone and webcam. This is mainly if you want to take advantage of the video-conference feature. AND, it requires CHROME for full functionality.

Getting Started: The Interface – Your Workspace

Your team will share a workspace that looks something like this. Access by clicking your company name on the left menu.

TEAM WORKSPACE



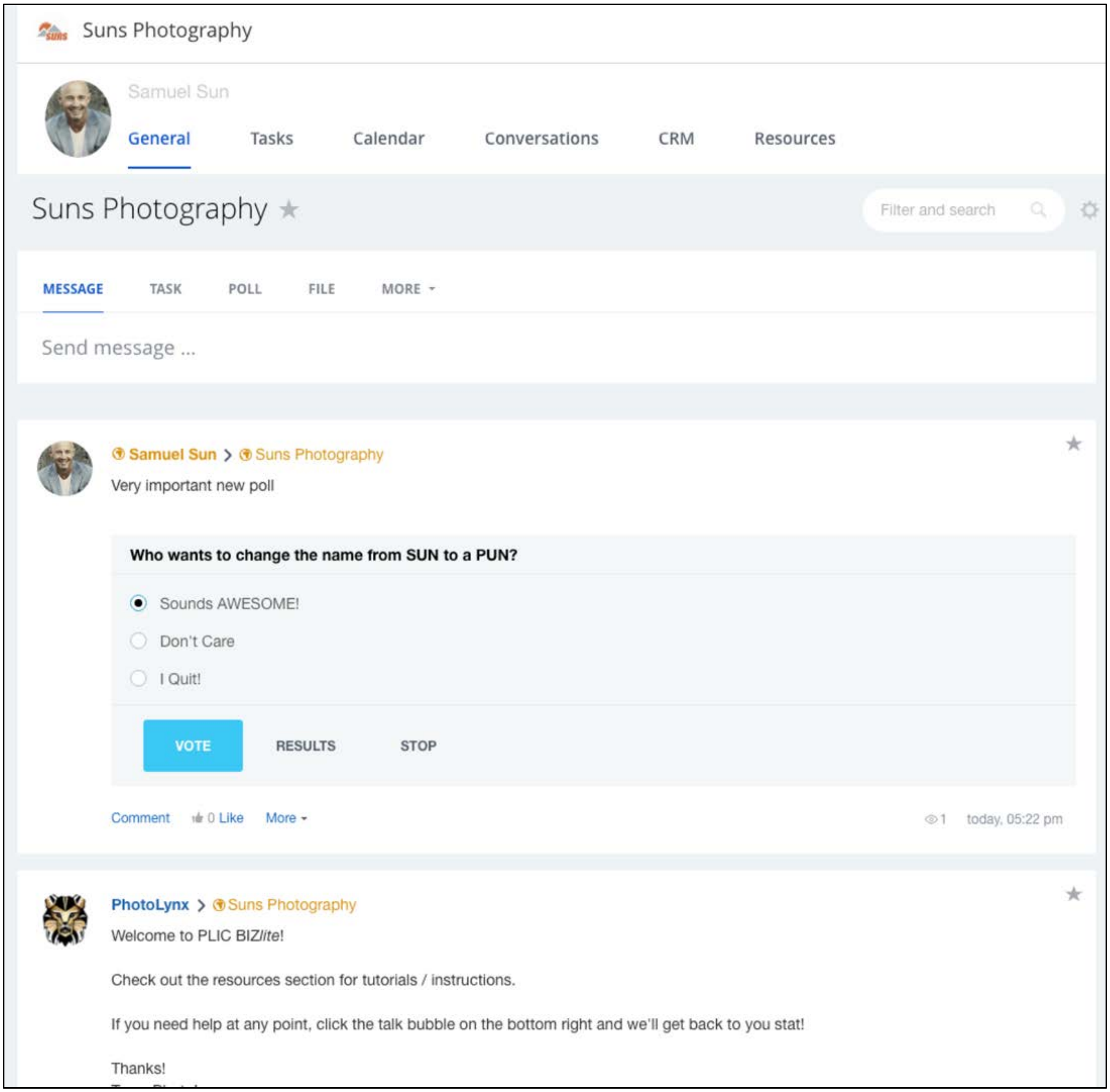
Your team workspace has six primary sections (sub-modules / operational extensions) – General, Tasks, Calendar, Conversations, CRM, and Resources. We'll dig in to these menu items on the following pages (and then throughout the rest of the manual).

TEAM WORKSPACE MENU

Getting Started: The Interface – Your Workspace

The "General" section shows you an activity stream – aggregating all the various action items within your workspace. We'll explore this space more in the team / communication section of the manual.

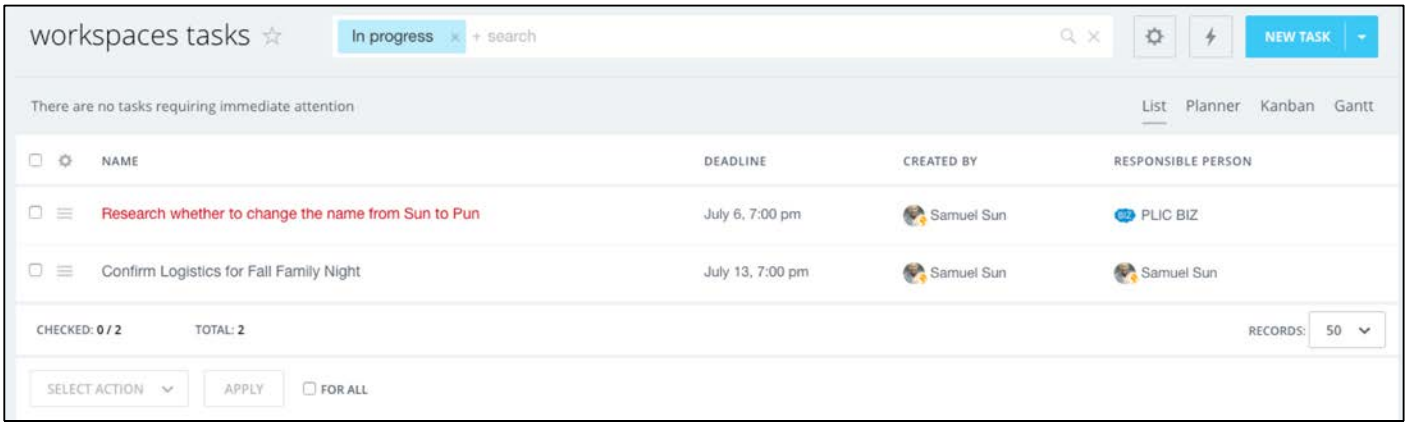
GENERAL ACTIVITY



Getting Started: The Interface – Your Workspace

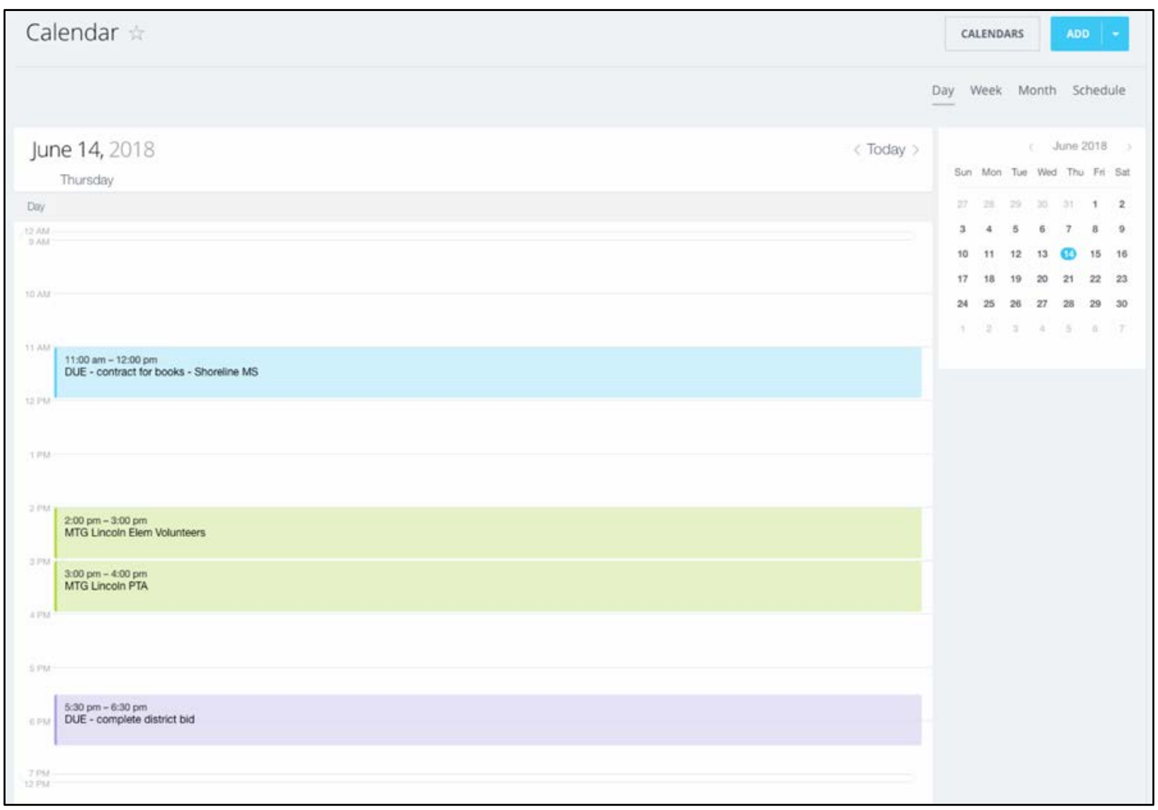
The "Tasks" section shows all the tasks for the team. This is different than the tasks you landed on. We'll explain more in the tasks section of the manual.

TASKS



The "Calendar" allows your team to share events. This will be explored in greater detail in the calendar section of the manual.

CALENDAR

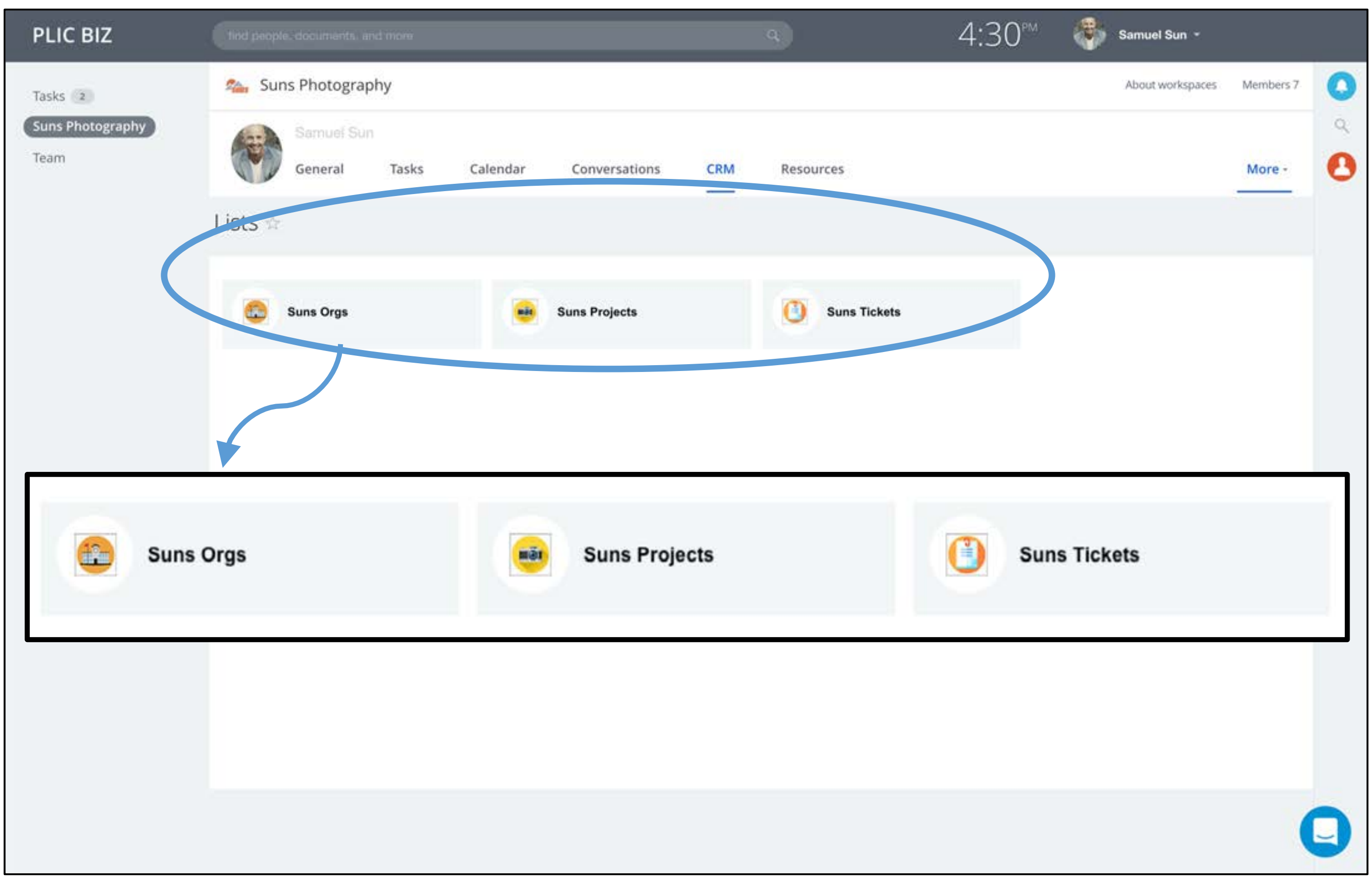


CONVERSATIONS

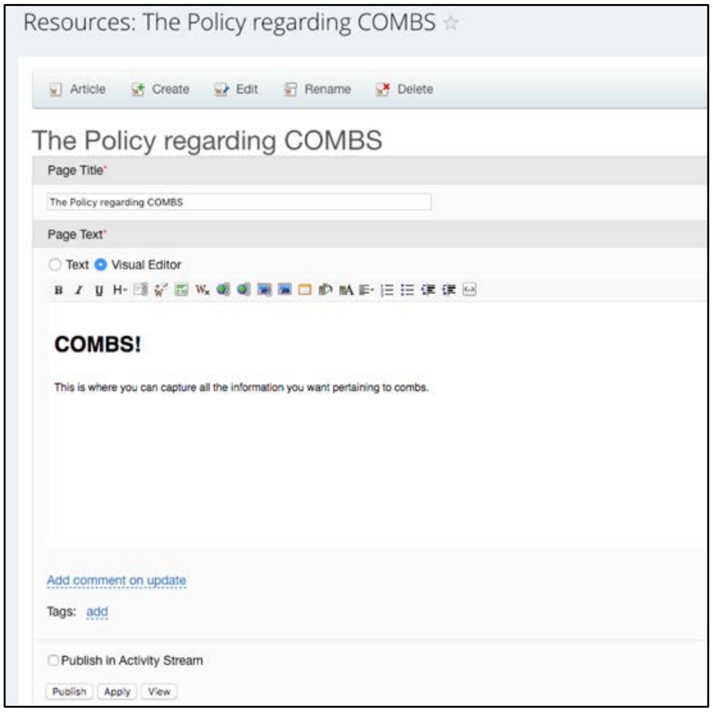
The "Conversations" section shows team communication items.

The CRM has three primary components – Accounts (Organizations), Projects, and Customer Service Tickets.

CRM



Getting Started: The Interface – Your Workspace



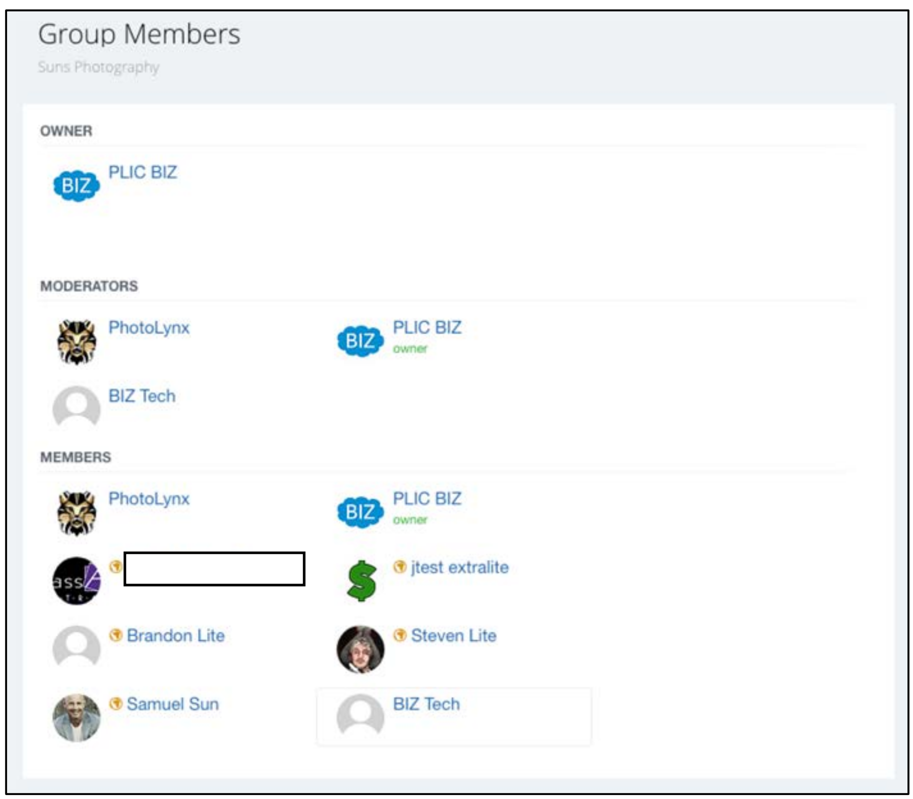
RESOURCES

The "Resources" section allows you to create FAQs or share info with the group. It functions like a Wiki and will be outlined in more detail in the team / communication section of the manual.

TEAM MEMBERS

The final main component of your BIZ interface is the Members menu item. This is where you'll be able to manage and communicate with team members. We'll look at this in the Team section of the manual.

This panel will open when you click "Members" from the top right of the General Activity Section of your Team Workspace.



Getting Started: Launch Sequence

1. **BIZ WIZ SESSION 1:** After you decide to get BIZy, you'll schedule (at least) TWO sessions with a BIZ WIZ. Each session will last approximately 1 hour. During the first session, you'll-

   ACCESS YOUR BIZ: Once you finalize payments, you're new BIZ system will be activated.

   INVITE ADMINS: The key stakeholders / admins will be invited to access the system.

   REVIEW / CUSTOM CRM PROFILES: You'll look through the default CRM Profile and compare it to whatever you're currently using or whatever other information you need to capture. Then, together with your BIZ WIZ, you'll customize the fields in the profiles.

   HOMEWORK: It is unlikely that you'll finish customizing all sections of the CRM during the first session. If there's more to do, then you'll be able to collaborate to complete the changes offline… via tasks within your new system.

   IMPORT ORGS: If you are transitioning from a different CRM system, you should be able to migrate your ORGs via CSV or EXCEL. Your BIZ WIZ will provide instructions or help facilitate that process.

2. **BIZ WIZ SESSION 2:** The second session includes-

   REVIEW / CUSTOM WORKFLOWS: Biz allows for automated operational workflows. It comes with some default / standard workflows but you'll be able to work with a BIZ WIZ to make minor modifications.

   Depending on your preferences with regard to pushing your active accounts to PLIC.io, this session may include some custom configuration for that workflow.

   HOMEWORK: It is unlikely that you'll finish all customizations during the live session. Your BIZ WIZ will help you coordinate completion of the workflows

3. **LAUNCH!**

   PREP / TRAINING: Before you invite the rest of your team into BIZ, you may want to consider creating a training resource for their reference. You can use the Team's Resources tool or create a series of tasks or make a video… whatever you prefer.

   INVITE: Your BIZ WIZ will show you how to invite other Team Members by entering their emails into the Team Member panel. Only the lead admin(s) will be able to invite or change membership.

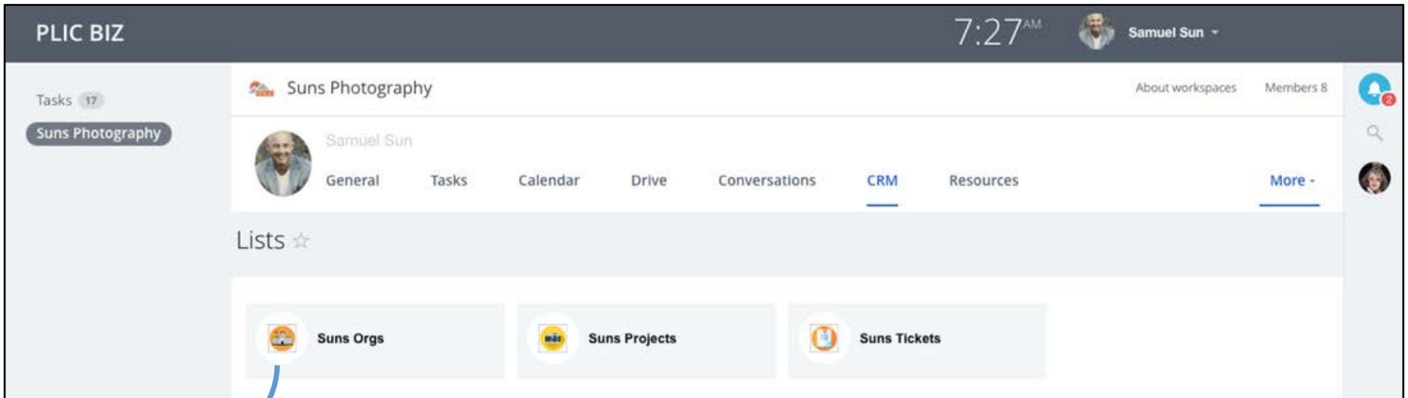
Now that you're familiar
with the general BIZ interface,
let's start exploring
the various modules
(operational extensions)
in greater detail.

ORGANIZATIONS
&
ACCOUNTS

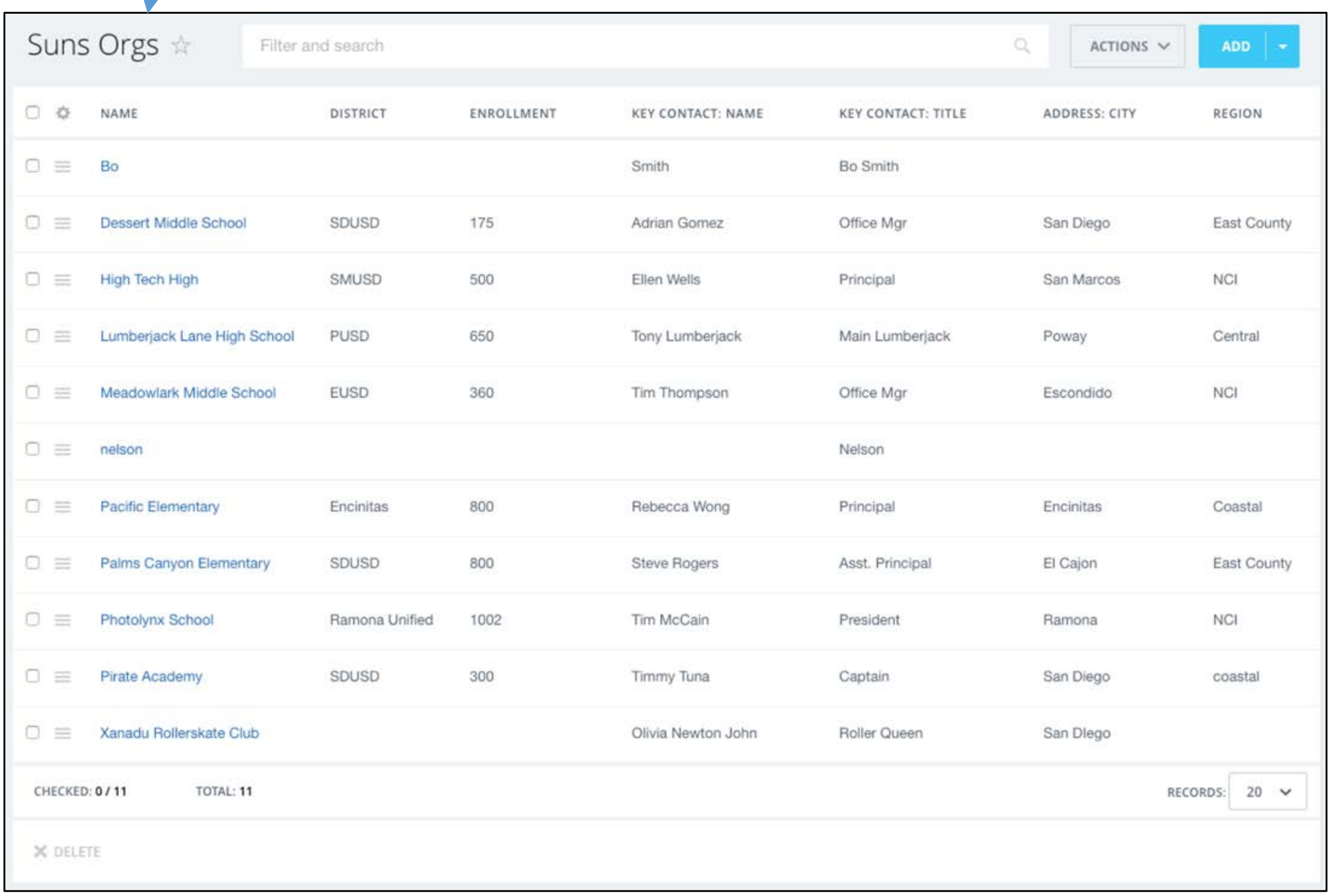
Organizations & Accounts

The CRM has three primary components – Accounts (Organizations), Projects, and Customer Service Tickets. This section of the manual focuses on your accounts… the heart of your operations.

ACCOUNTS / ORGs



Click ORGs from the CRM menu to open the Accounts Dashboard



Suns Orgs

Filter and search | ACTIONS | ADD

NAME	DISTRICT	ENROLLMENT	KEY CONTACT: NAME	KEY CONTACT: TITLE	ADDRESS: CITY	REGION
Bo			Smith	Bo Smith		
Dessert Middle School	SDUSD	175	Adrian Gomez	Office Mgr	San Diego	East County
High Tech High	SMUSD	500	Ellen Wells	Principal	San Marcos	NCI
Lumberjack Lane High School	PUSD	650	Tony Lumberjack	Main Lumberjack	Poway	Central
Meadowlark Middle School	EUSD	360	Tim Thompson	Office Mgr	Escondido	NCI
nelson				Nelson		
Pacific Elementary	Encinitas	800	Rebecca Wong	Principal	Encinitas	Coastal
Palms Canyon Elementary	SDUSD	800	Steve Rogers	Asst. Principal	El Cajon	East County
Photolynx School	Ramona Unified	1002	Tim McCain	President	Ramona	NCI
Pirate Academy	SDUSD	300	Timmy Tuna	Captain	San Diego	coastal
Xanadu Rollerskate Club			Olivia Newton John	Roller Queen	San Diego	

CHECKED: 0 / 11 TOTAL: 11 RECORDS: 20

DELETE

Organizations & Accounts

When you first set up BIZ, you'll spend time with a BIZ WIZ configuring your ORG Profile Form… to make sure you're collecting the information you need for managing your accounts.

ORG PROFILE

Click ADD > ADD ORG on the ORG Dashboard to create a new organization / account / Lead.

Click the NAME of the account from the dashboard to open the detail profile.

Don't forget to save whatever changes you make.

SECTIONS

When you click ADD at the top of your accounts dashboard, you'll notice an option to ADD SECTION.

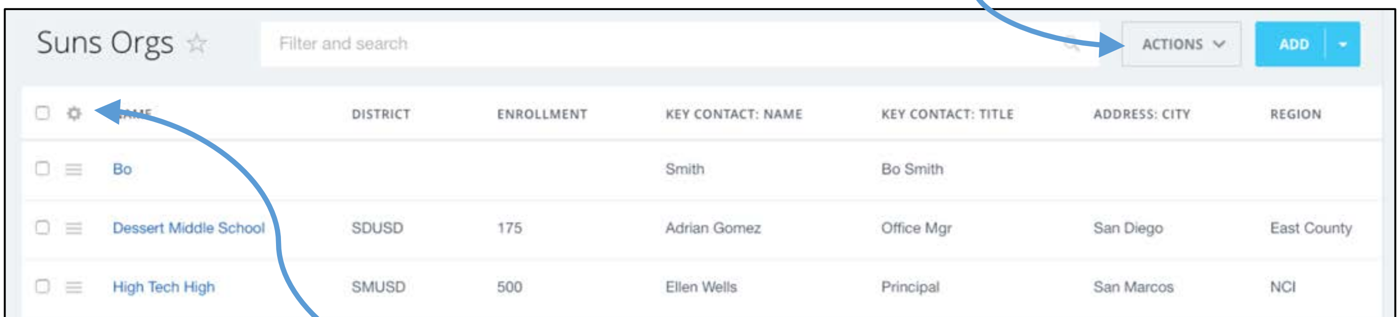
A Section is a grouping for your ORGs.

IMPORTANT NOTE – if you delete a section, you will delete all orgs within that section. We recommend that you consider utilizing the FILTER for grouping.

Organizations & Accounts

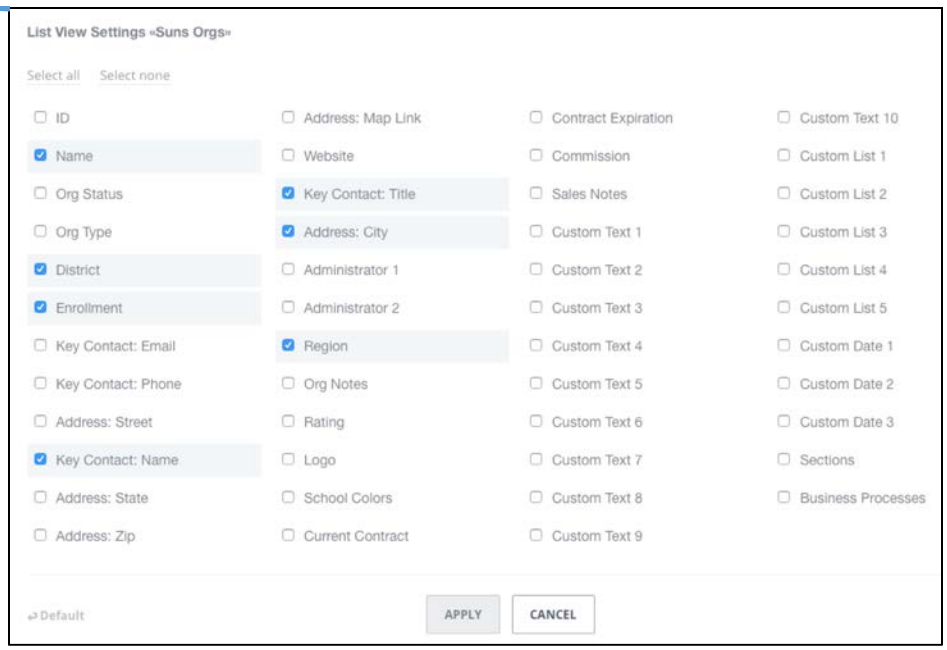
Click the ACTIONS button on the dashboard if you want to export the visible information to Excel.

EXCEL EXPORT



CHANGE DASHBOARD

Click the GEAR icon at the top left of the dashboard to change which columns (information) you see in the dashboard.



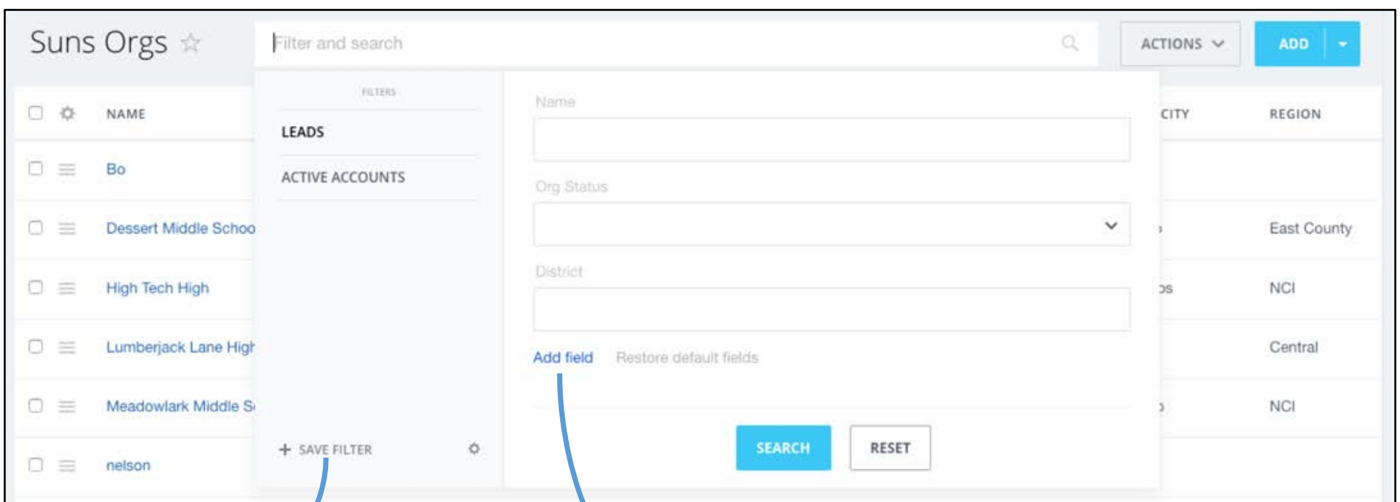
Organizations & Accounts

You can rearrange the order of columns by dragging it left or right. If you click the Column header, you can sort the dashboard based on the values in that field.

REARRANGE COLUMNS

FILTERS

Click into the FILTER bar over the dashboard to create a filter.



Click "Add Field" to include a new layer in your filter.

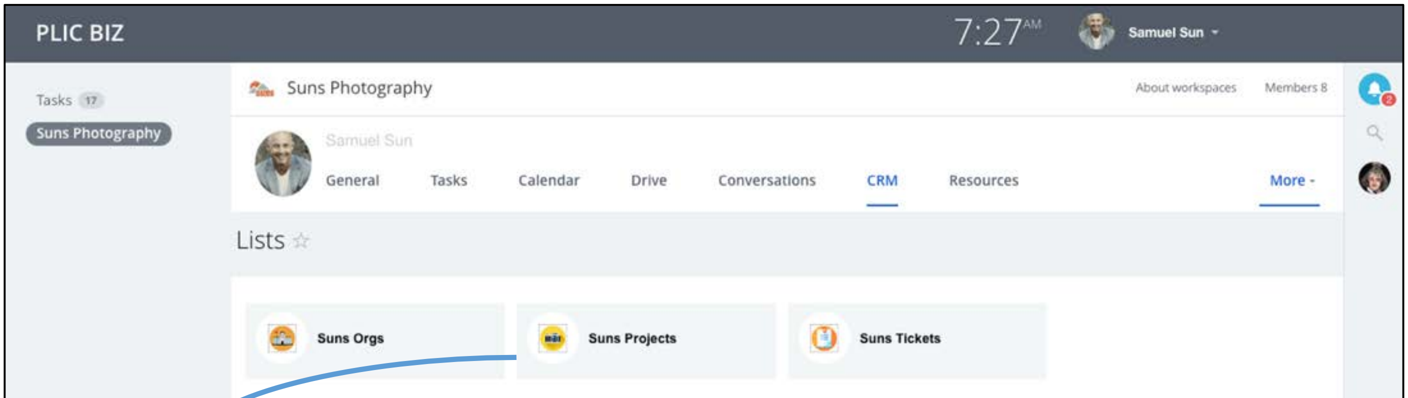
Click "Save Filter" to create quick filter options (like shown above for active vs lead accounts)

PROJECTS

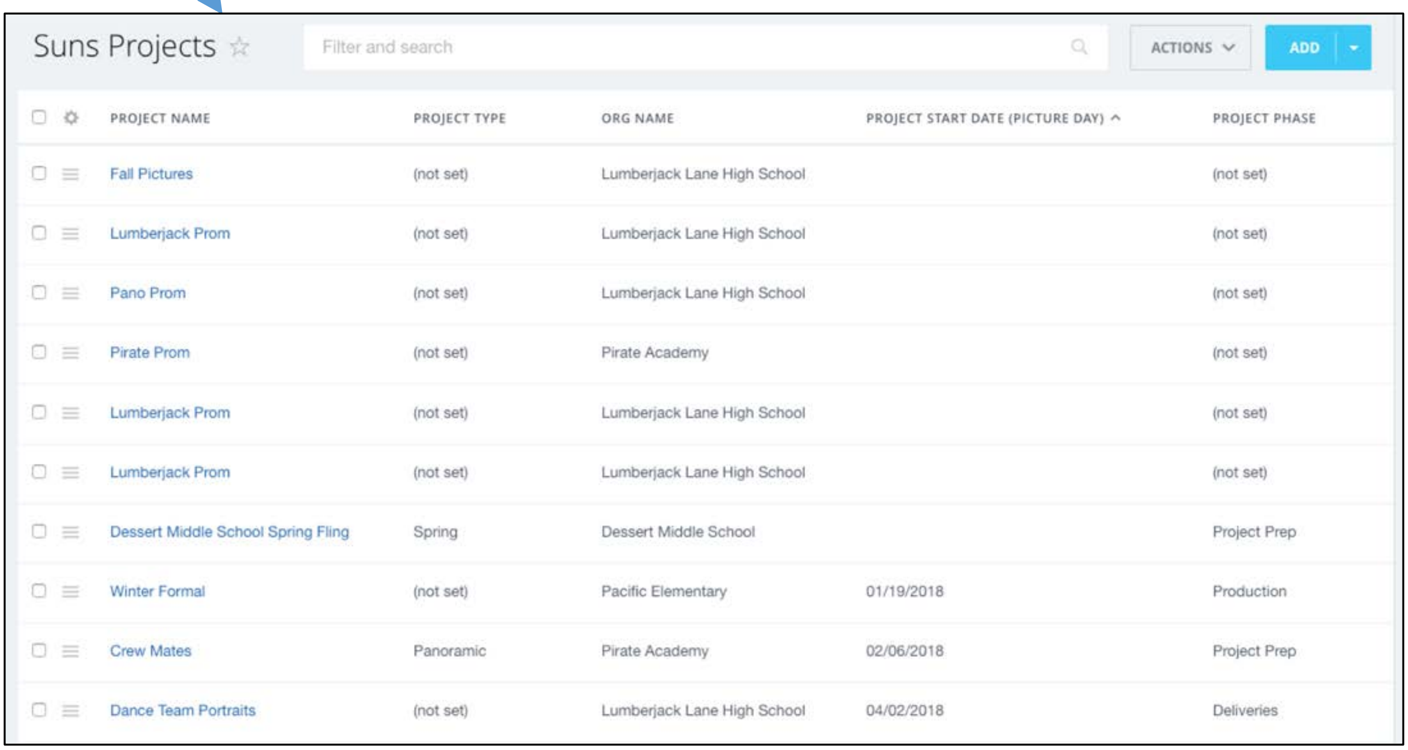
Projects

PROJECTS

The Projects section of your CRM will show information about your projects / jobs.



Click PROJECTS from the CRM menu to open the Projects Dashboard

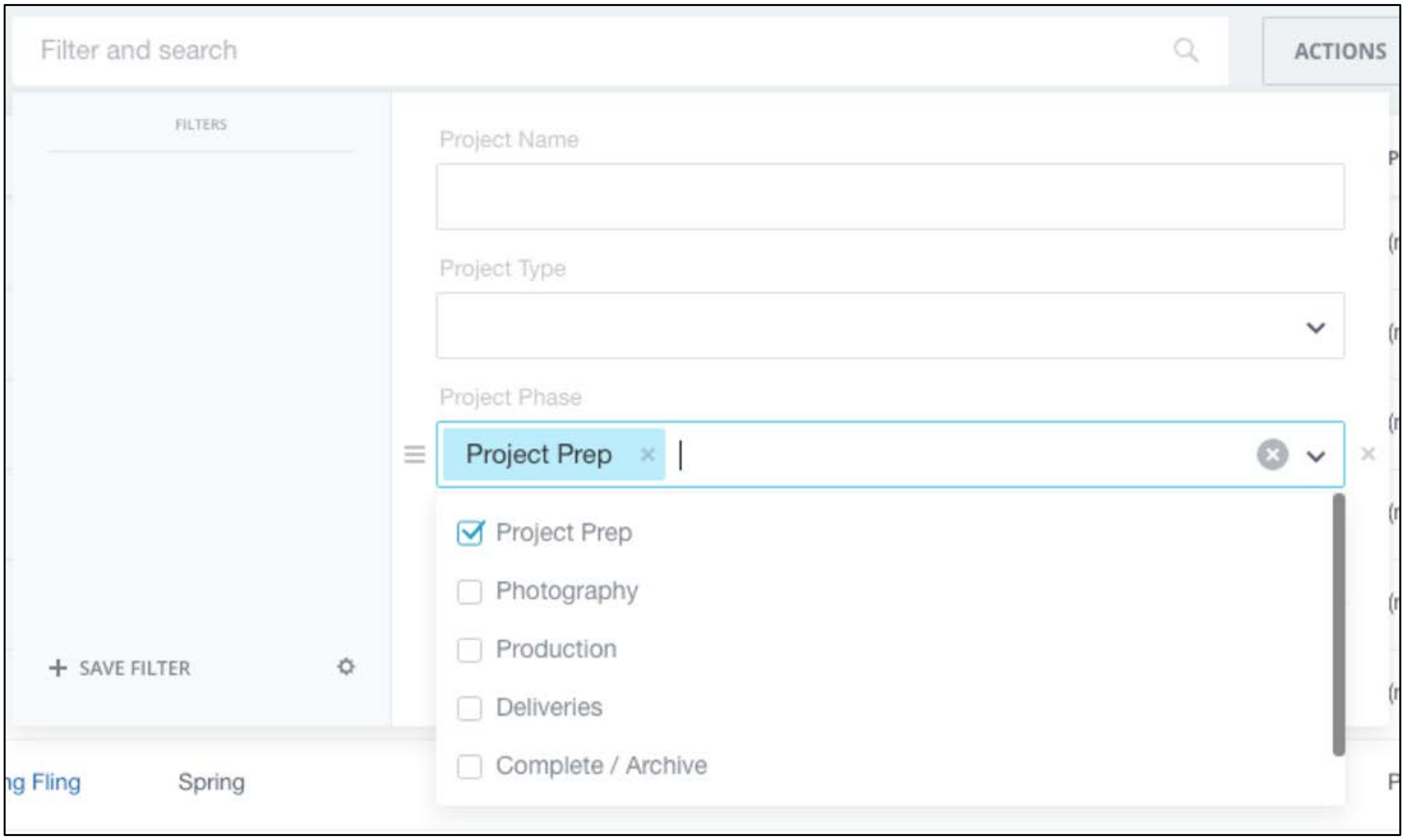


PROJECT NAME	PROJECT TYPE	ORG NAME	PROJECT START DATE (PICTURE DAY)	PROJECT PHASE
Fall Pictures	(not set)	Lumberjack Lane High School		(not set)
Lumberjack Prom	(not set)	Lumberjack Lane High School		(not set)
Pano Prom	(not set)	Lumberjack Lane High School		(not set)
Pirate Prom	(not set)	Pirate Academy		(not set)
Lumberjack Prom	(not set)	Lumberjack Lane High School		(not set)
Lumberjack Prom	(not set)	Lumberjack Lane High School		(not set)
Dessert Middle School Spring Fling	Spring	Dessert Middle School		Project Prep
Winter Formal	(not set)	Pacific Elementary	01/19/2018	Production
Crew Mates	Panoramic	Pirate Academy	02/06/2018	Project Prep
Dance Team Portraits	(not set)	Lumberjack Lane High School	04/02/2018	Deliveries

Note that you can manage this section of the CRM the same way you manage your ORGs – Filters, Dashboard Arrangement, Exports, etc…

Projects

Managing Project Information from the CRM is helpful in two primary ways:



PROJECT STATUS

You can quickly gauge status from the dashboard. Use Filters and sorting functionality to see everything that's happening (or already has).

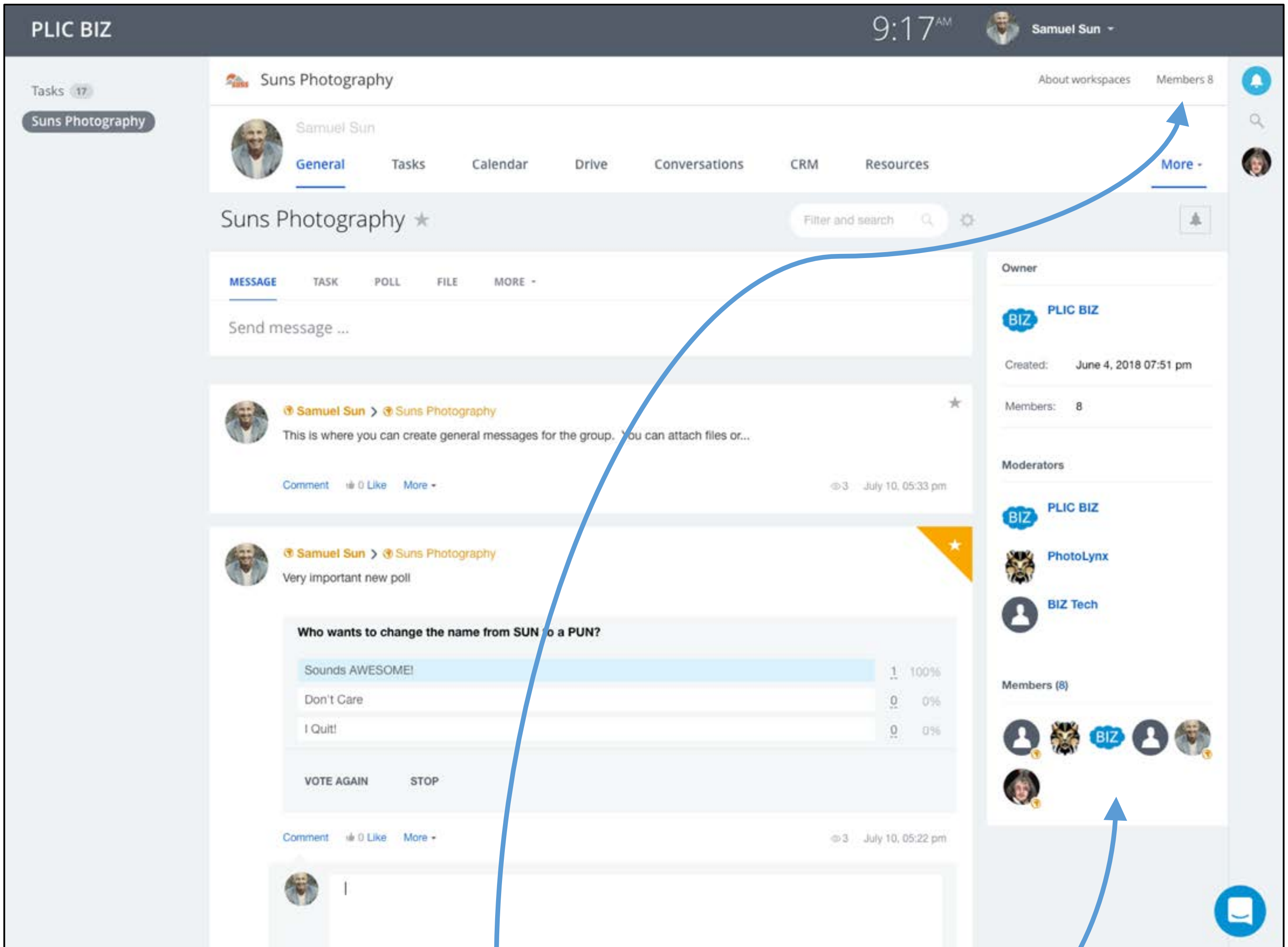
LAUNCH WORKFLOWS

You can launch workflows from Projects in order to include information from the Project Profile in messages, tasks, events, etc. As well as to create links from those operational extensions back to the CRM so it's easy to see what goes with what.

Workflows will be explained in more detail in subsequent sections.

TEAM MANAGEMENT & MESSAGING

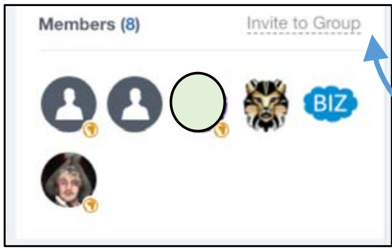
Team Management & Messaging



You can see everyone on your team by going to the Team Workspace and looking on the right Team Panel OR by clicking Members in the upper right corner.

Team Panel

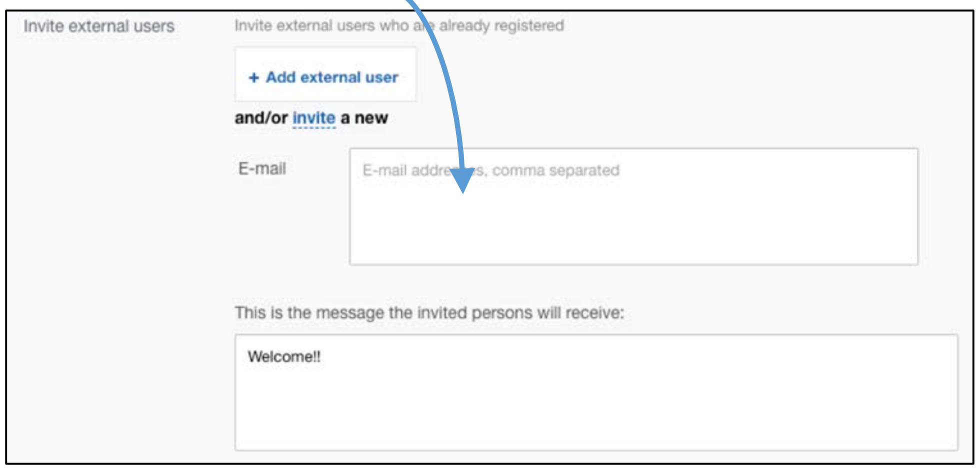
Team Management & Messaging

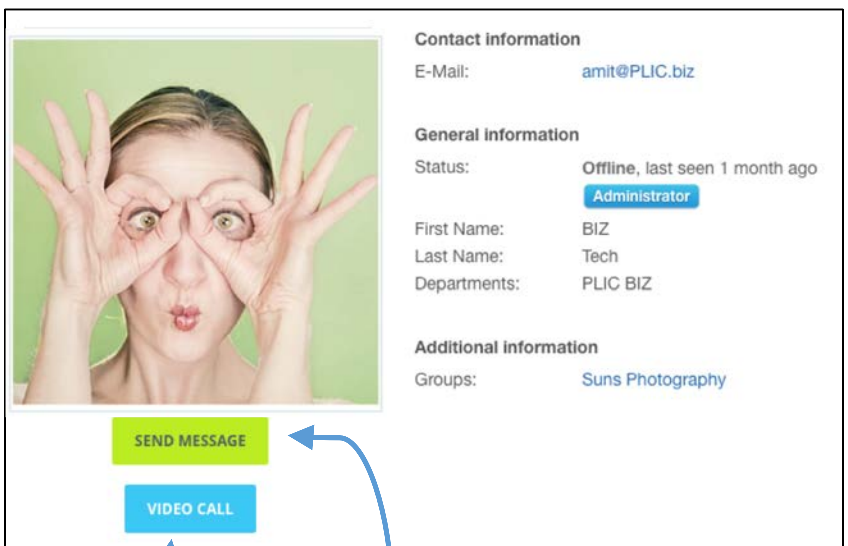


INVITE MEMBERS

Your Team Moderators (admins) will have the ability to INVITE MEMBERS. Just click the button to invite someone and then enter their email.

Note for moderators – you'll need to invite your team as "external users" in order to get them plugged in to the system. Don't worry! It won't impact functionality.





TEAM PROFILE

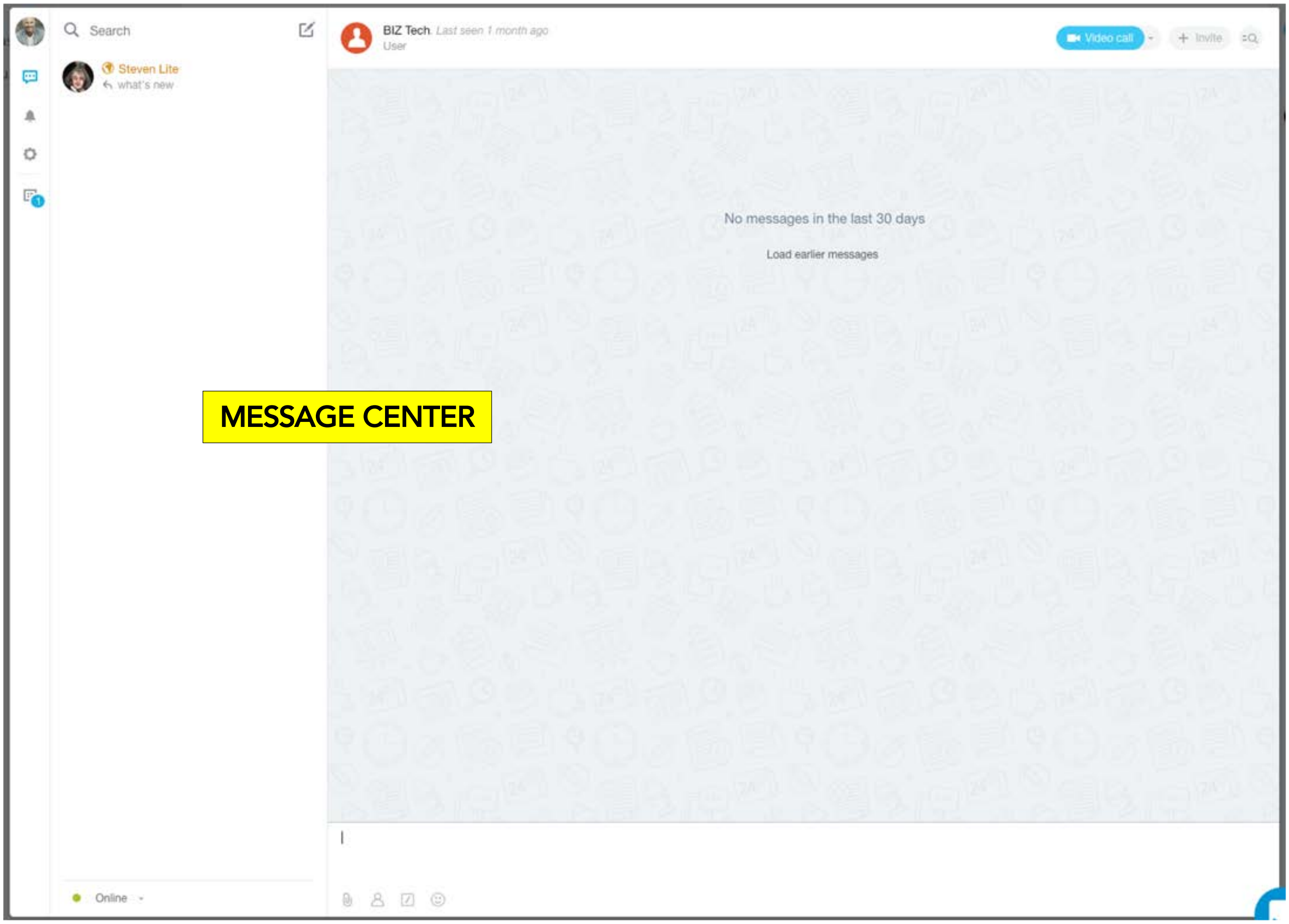
Click on a Team Member's avatar in the Team Panel to open their profile.

MESSAGE & VIDEO CALL

You can send a message to the person by clicking the "Send Message" button. The next page will provide more details about the message center.

To initiative a video conference, click the "Video Call" button. *Note that this feature requires that all members of the video call be using the Google Chrome browser.*

Team Management & Messaging

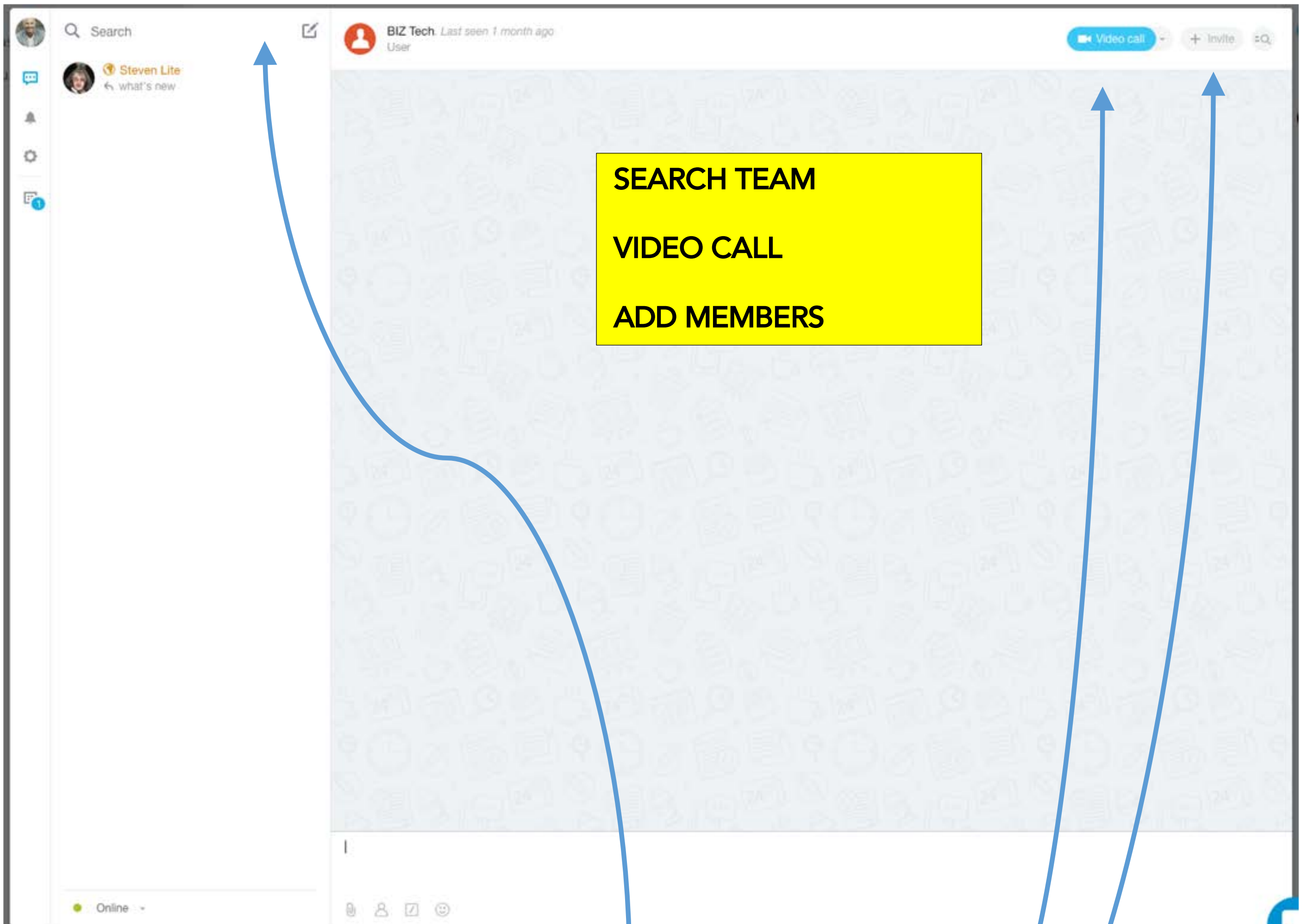


When you send a message to someone, BIZ will open the Message Center and begin a message thread between yourself and that individual.

Type your message into the composition section of the new Conversation Thread.

There are different types of messages in the message center:
1. Person-to-Person = a Private Conversation between you and another member of the team.
2. Group Message = a conversation between yourself and anyone else you invite to the thread.
3. System Notification = a message from the system that something has happened which involves you

Team Management & Messaging

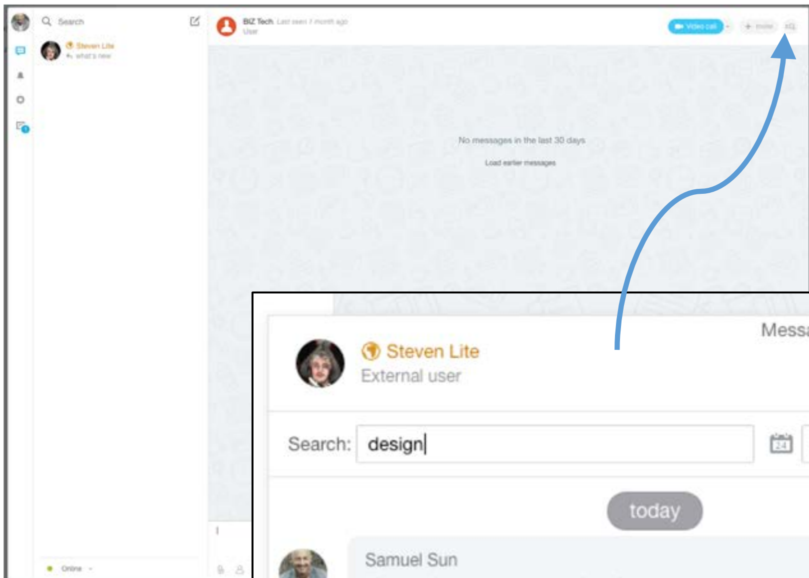


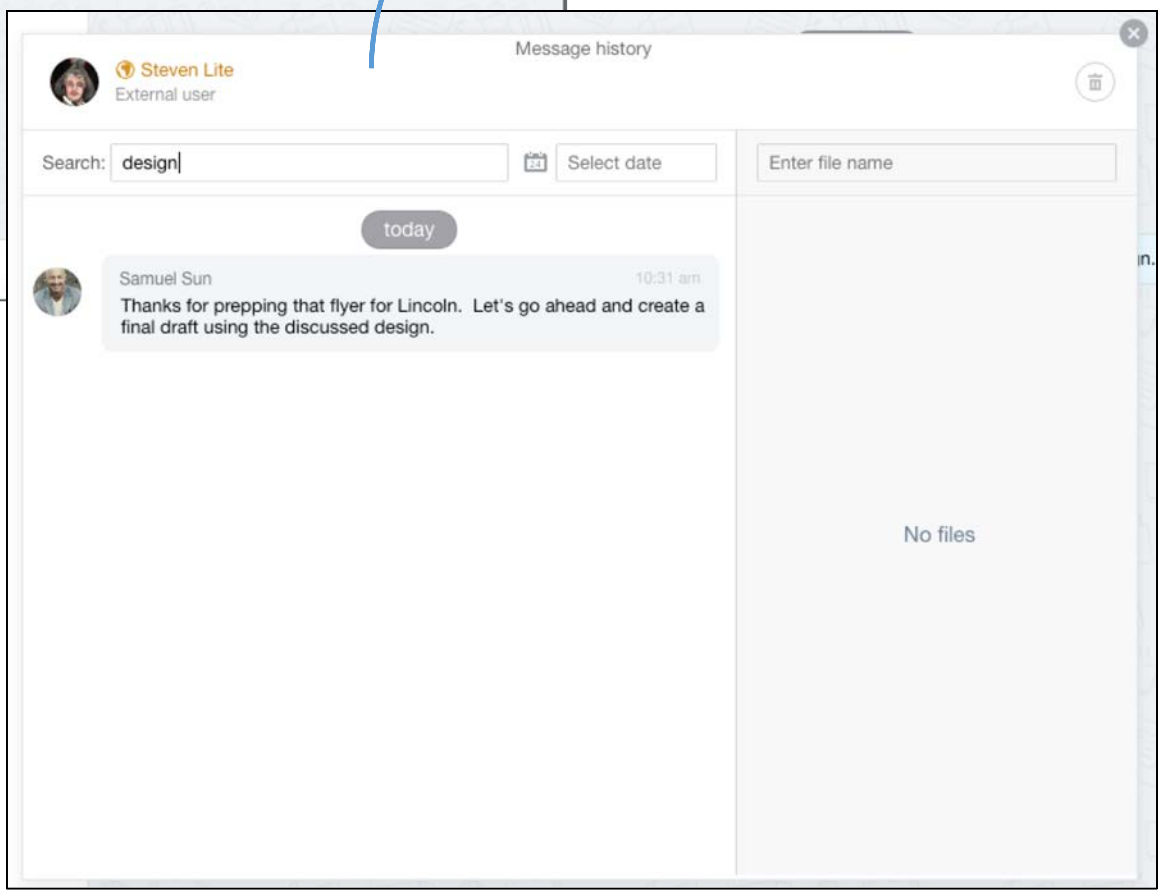
You can search for someone to message from within the Message Center.

You can initiate a Video Call with someone that you're messaging.

You can invite someone to join the conversation thread.

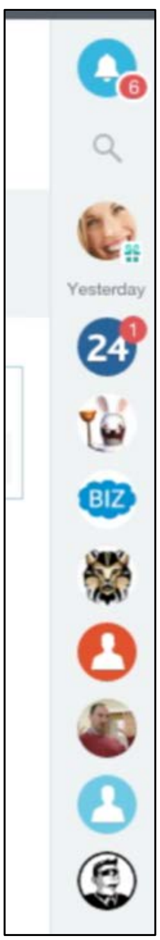
Team Management & Messaging





SEARCH HISTORY

You can search your conversation history by clicking the text search at the top right in the Message Center.



CONVERSATION SHORTCUT

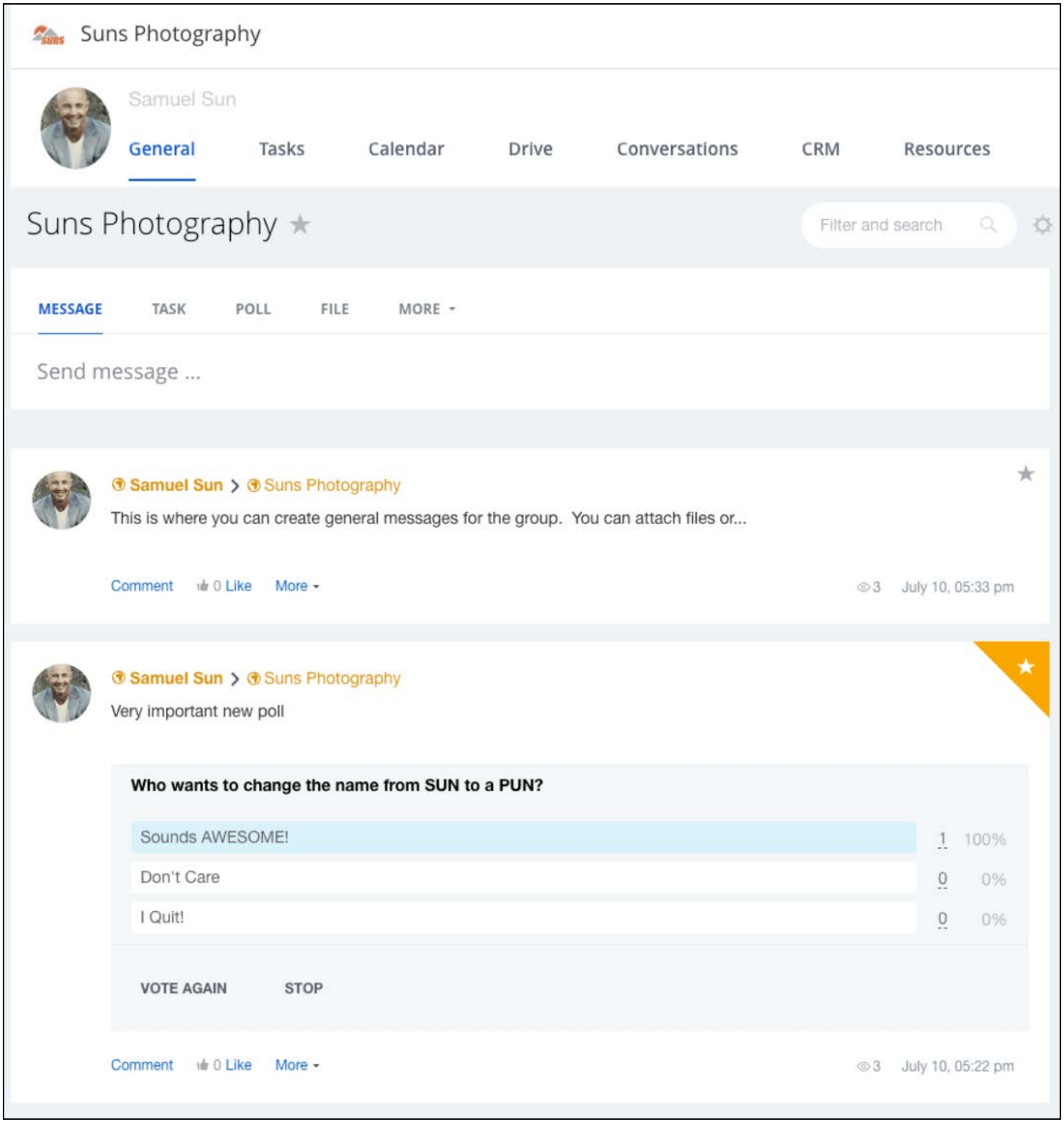
When you start a conversation with someone, their avatar will appear on the right of your screen. This is a shortcut so you can quickly continue to message them.

If they say something, you'll see a popup notification on your screen AND their avatar will have a red flag over it to indicate that there's new/unread activity.

Team Management & Messaging

ACTIVITY STREAM

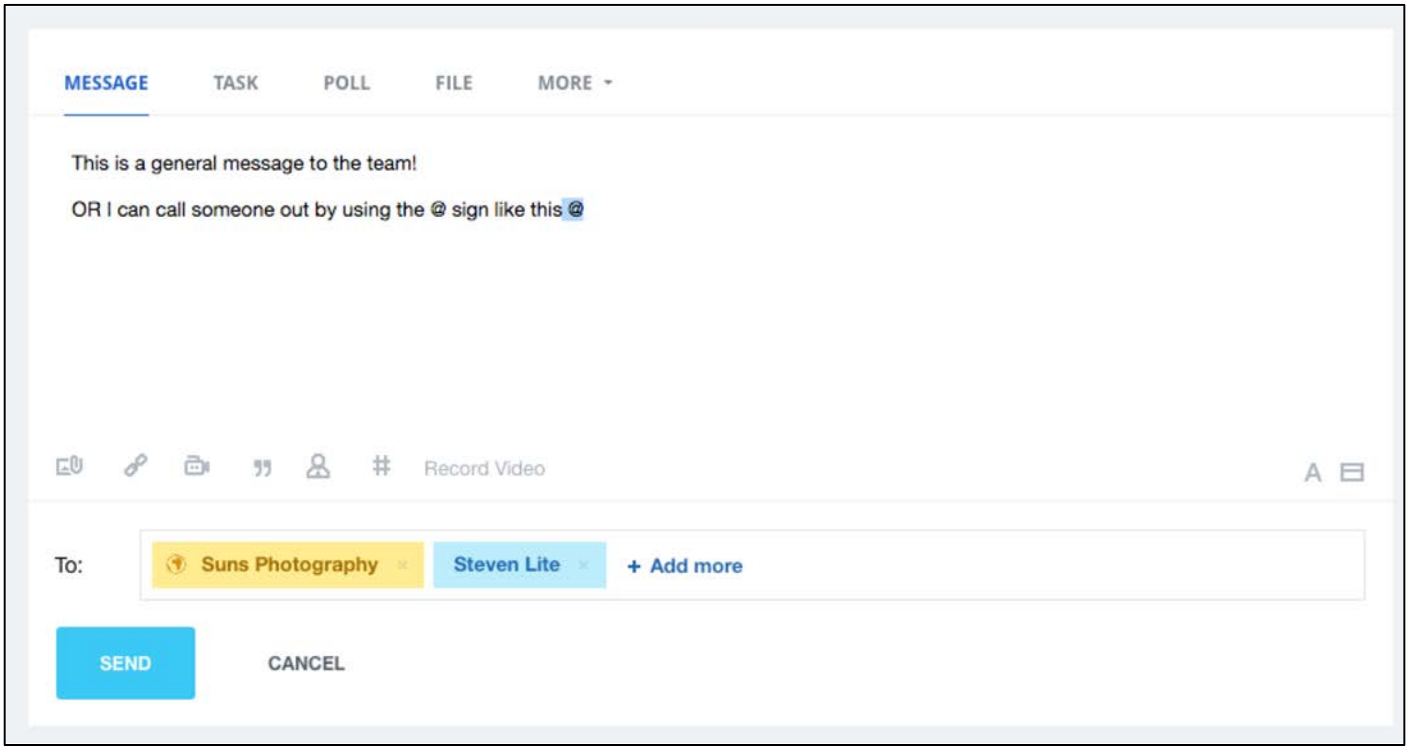
Another way to communicate with the team is in the General Activity Stream OR Conversations section of your Team Workspace.



Team Management & Messaging

ACTIVITY MESSAGE

If you click into the space where it says "Send Message," you'll see a composition box open up. By default, your message will go to the whole team. Alternatively, you can call someone out specifically by using the @ sign or by adjusting the recipient where it says "To:"



MORE TOOLS

There are more actions that you can include in your Activity Message.

There are more actions that you can include in your Activity Message:

- Attach a File – Select a File or simply drag it over the add file zone
- Include a Link
- Link to a Video
- Highlight text by quoting it
- Callout a Team Member
- Add a Tag
- Record a Video (Note that this function requires Chrome and should only be used for short snippets)
- Open the WISIWYG controls for your font and format
- Add a General Topic

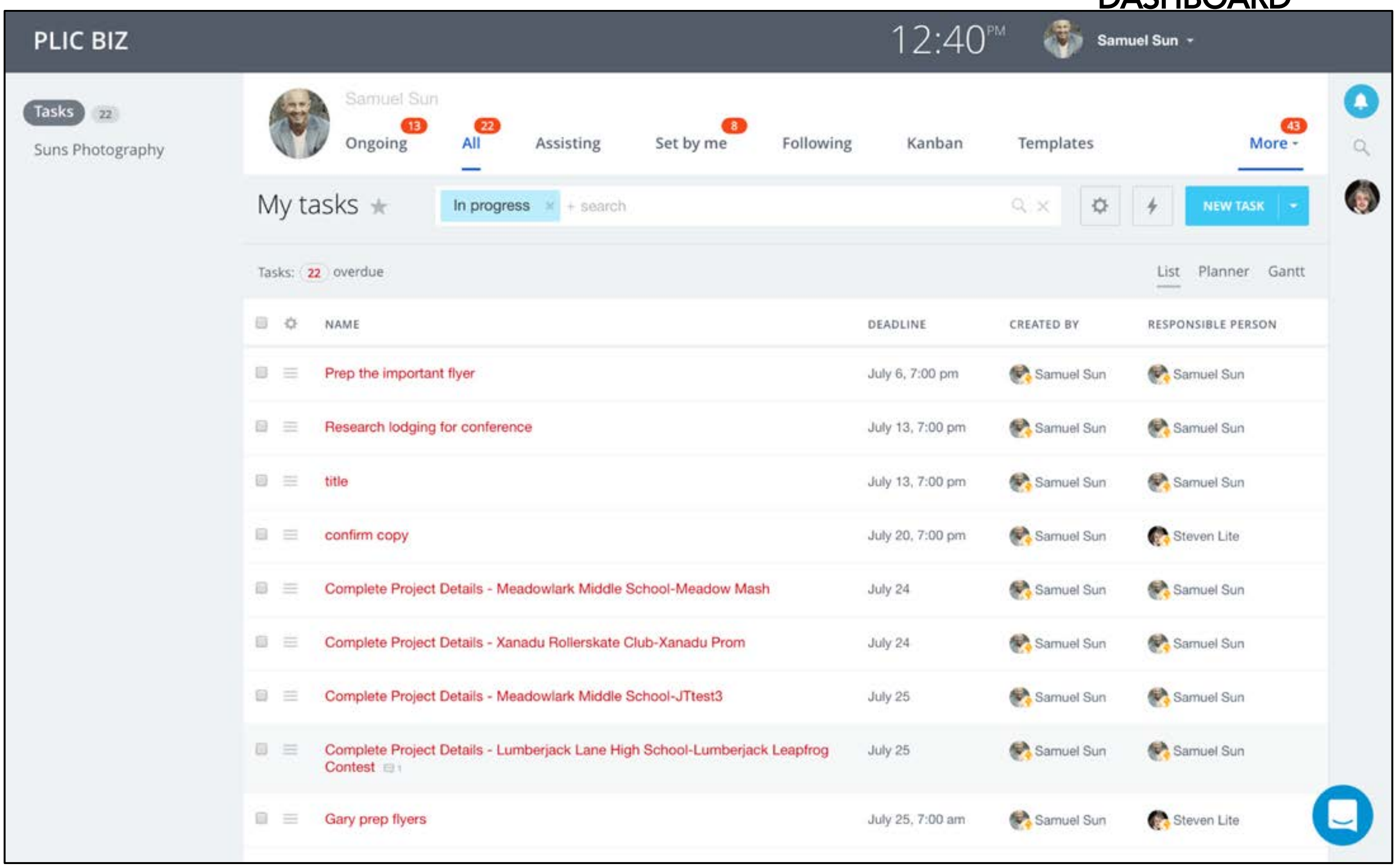
TASKS

TASKS

Tasks are the primary operational module/extension within PLIC BIZ. There are two ways to access tasks – your PERSONAL DASHBOARD and then the TEAM DASHBOARD. There are a couple nuance differences that we'll look at as we go through it.

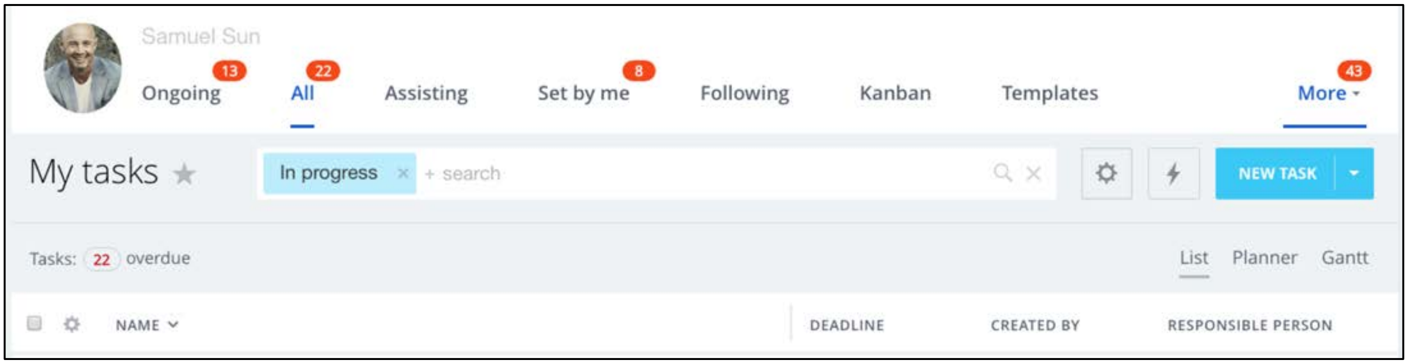
Access your PERSONAL TASK DASHBOARD from the left menu by clicking the "Tasks" button.

TASK DASHBOARD

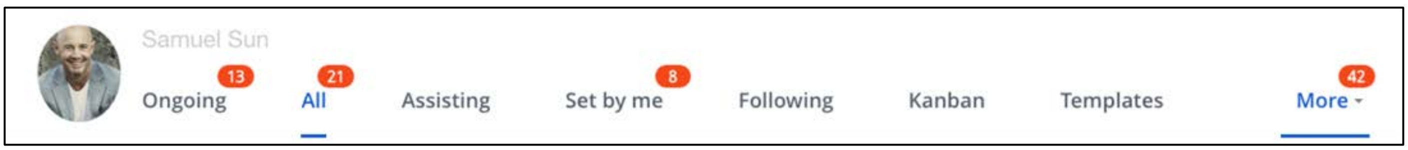


TASKS

TASK CONTROLS



At the top of your Task Module, there are a number of different control options. At the very top of the Task Module is your main view menu. It looks like this.



How to understand the main task module view menu:

- Ongoing: This shows active tasks (not yet complete) for which you are the responsible person.

- All: This shows ALL tasks that you have some degree of involvement in.

- Assisting: These are the tasks that you are part of but not ultimately responsible for. In other words, you're on the team for this task but not the leader of it.

- Set by Me: These are the tasks that you created.

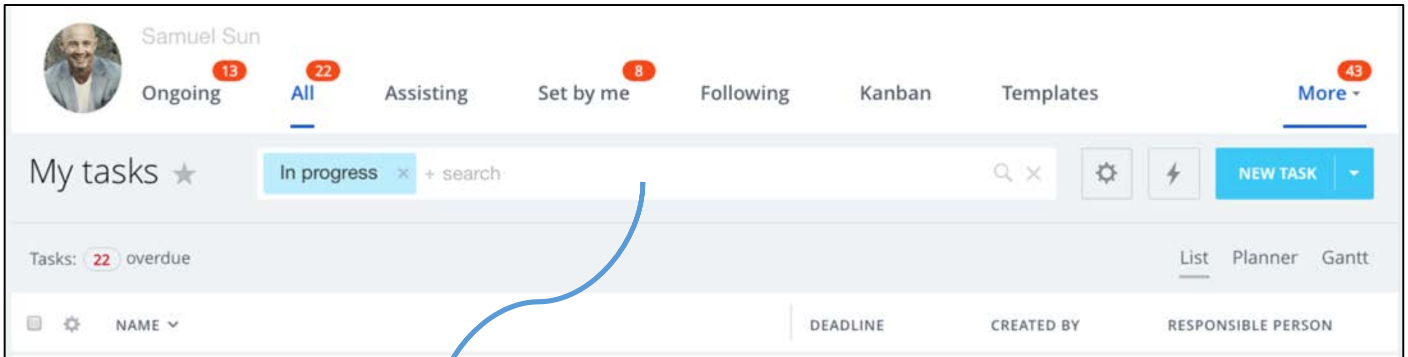
- Following: These are the tasks that you are observing. You're not responsible (or even participating) but whoever created the task thinks you need to be aware of it and respective progress.

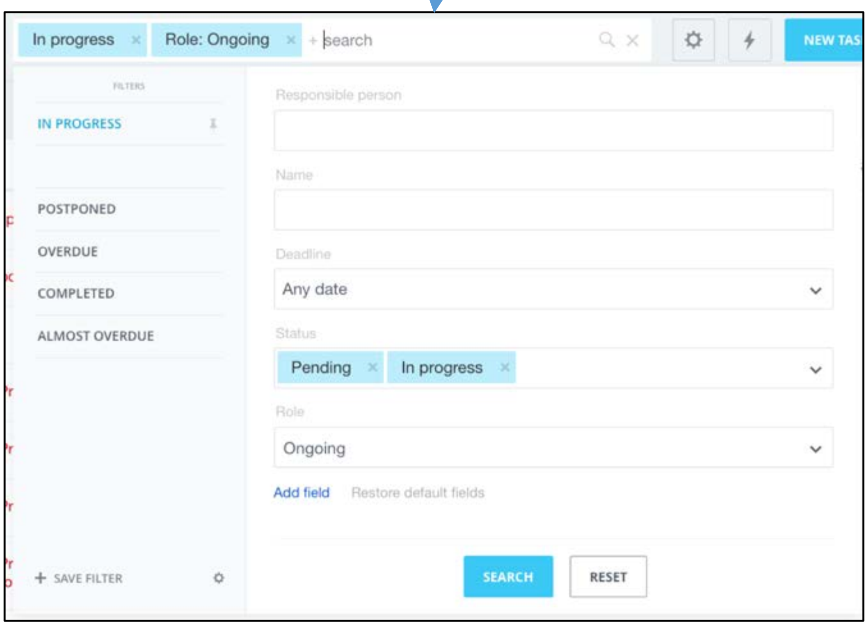
- Templates: We'll spend time focusing on templates in a later section of this manual. Task templates allow you to quickly create a task for a recurring operation. In other words, if there's something (or even a string of somethings) that you do the same way every time you do them, then you can set up a template so all you have to do is click the button and create a new task without having to flesh out all the same details every time.

- More: In the MORE menu, there's an option to open the REPORTS panel. Reports allow you to create reports using the information from your tasks.

TASKS

TASK CONTROLS





In addition to the Task View Options, you have the FILTER CONTROLS and then the new task buttons.

Click in to the task filter bar in order to adjust filter settings. This works the same way as your CRM filter controls.

You can filter your Task Dashboard using any of the information contained within the tasks.

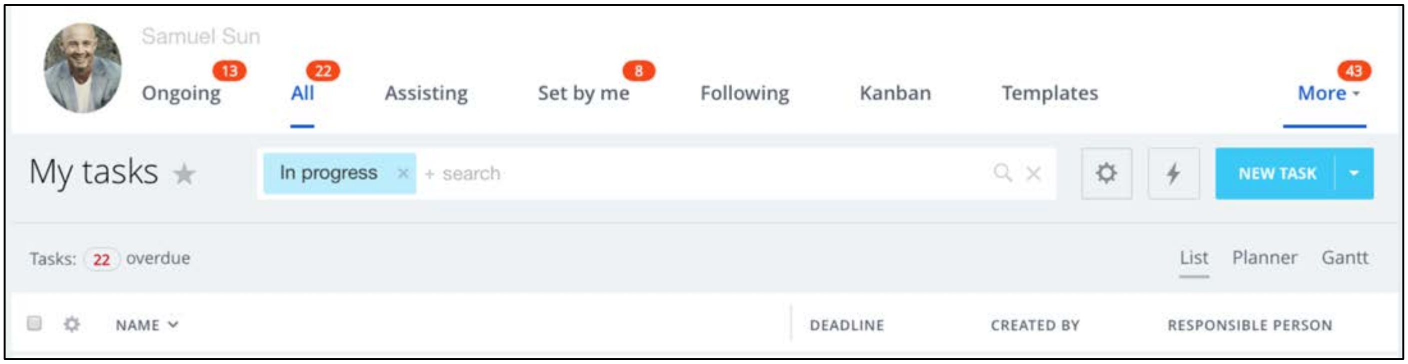
Click "Add Field" to add new filter fields

Typing something directly into the filter bar will add a filter to search for your value in the task name.

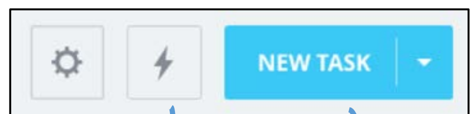
Note – if you generate a task from a workflow, you can program it to include the name of the CRM account or project the task pertains to. Then you can filter tasks specific to accounts or projects by entering that CRM item into the "name" field in the task filter.

TASKS

TASK CONTROLS



Gear Icon: This lets you control grouping, sorting, and exporting. Note that you have to adjust your dashboard contents to include what you want to include in your export. The export will only include values you see in your dashboard.



Lightning: This allows you to create a quick task – useful when there's no need for lots of detailed description.

New Task: Create a new task or launch a task from a Template.

You can adjust the column preferences for your Task Dashboard.

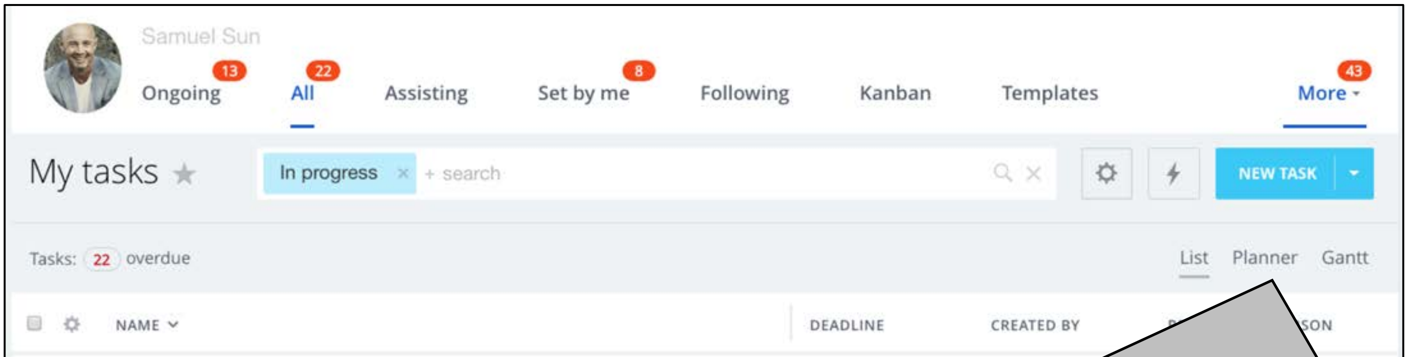
Just like the other dashboards in BIZ, you can click the gear icon next to the column headers to adjust settings and determine what items you want to see in your dashboard.

You can drag columns left or right.

Click a column header to sort the information in your dashboard based on the value of that column.

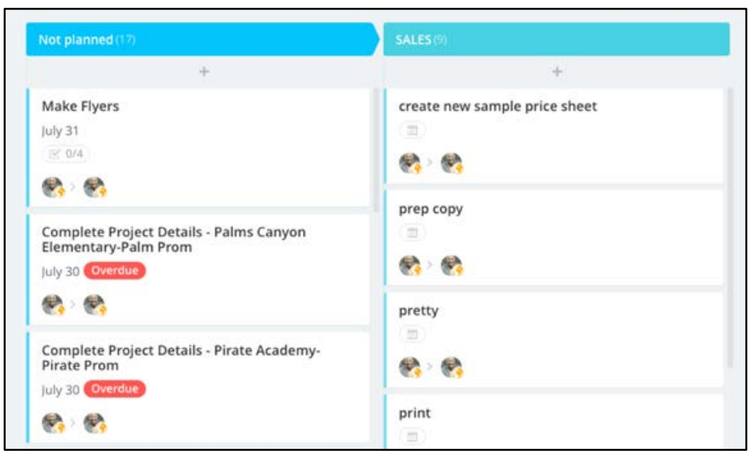
TASKS

TASK CONTROLS



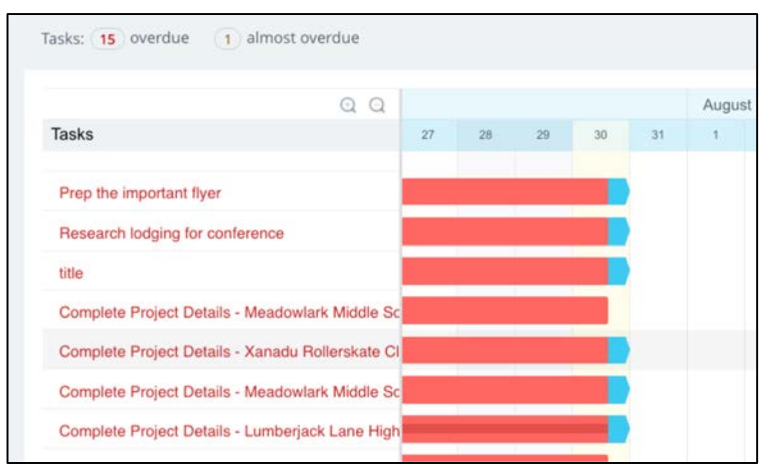
List, Planner, or Gantt preferences can be used to change the way you view the tasks in your dashboard.

List view is the default. It shows you data broken down into columns and rows.



Planner view lets you brainstorm by creating tasks as information blocks that you can drag around.

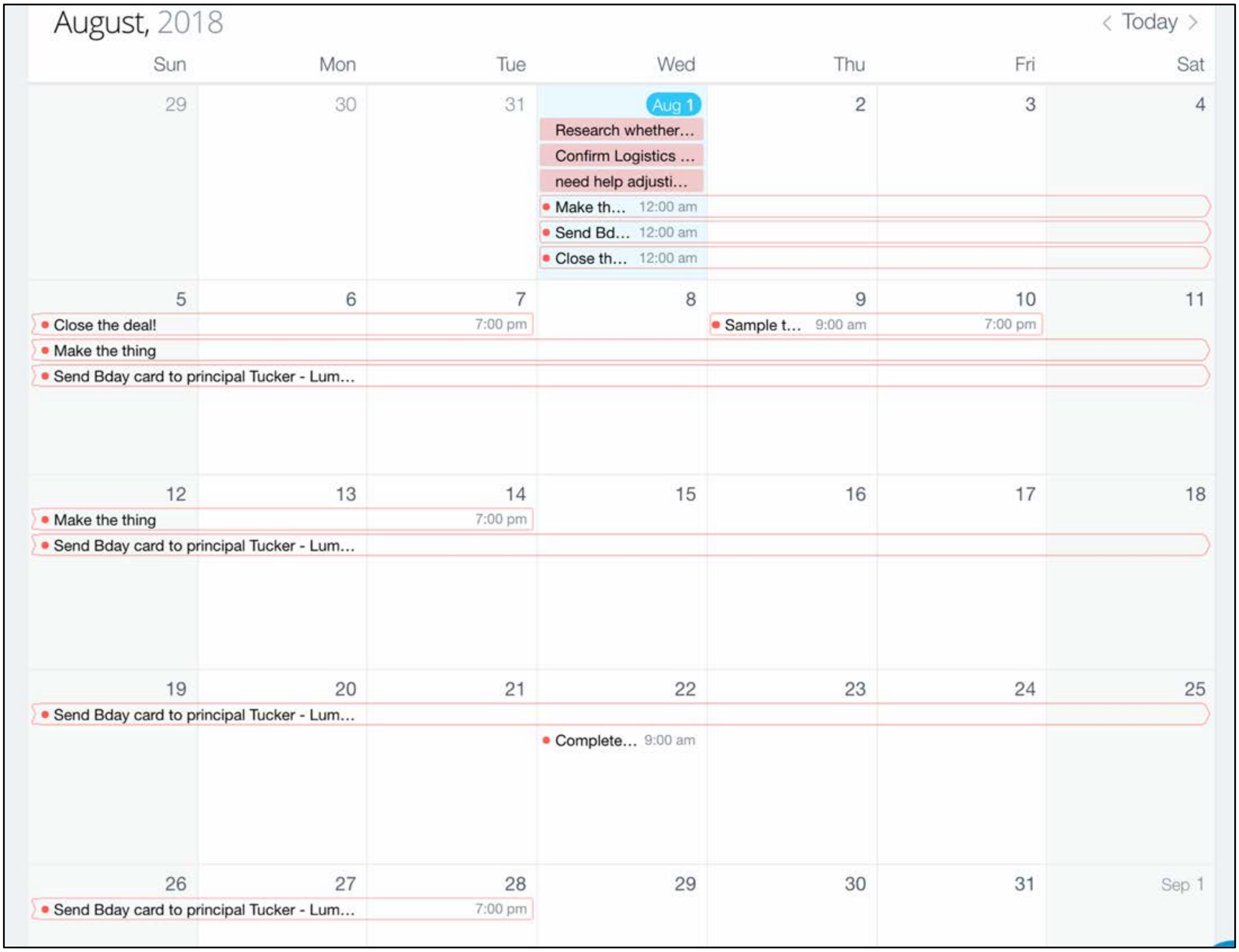
Gantt view lets you see your dashboard in a timeline format. You can drag deadlines and milestones.



TASKS

CALENDAR TASKS

Speaking of viewing tasks in a timeline – you can activate the Tasks layer of your Team Calendar to see tasks which are created in the Team Space. Note that this (and visibility to other team members) is the biggest difference between the Team Task workspace and the personal Tasks.



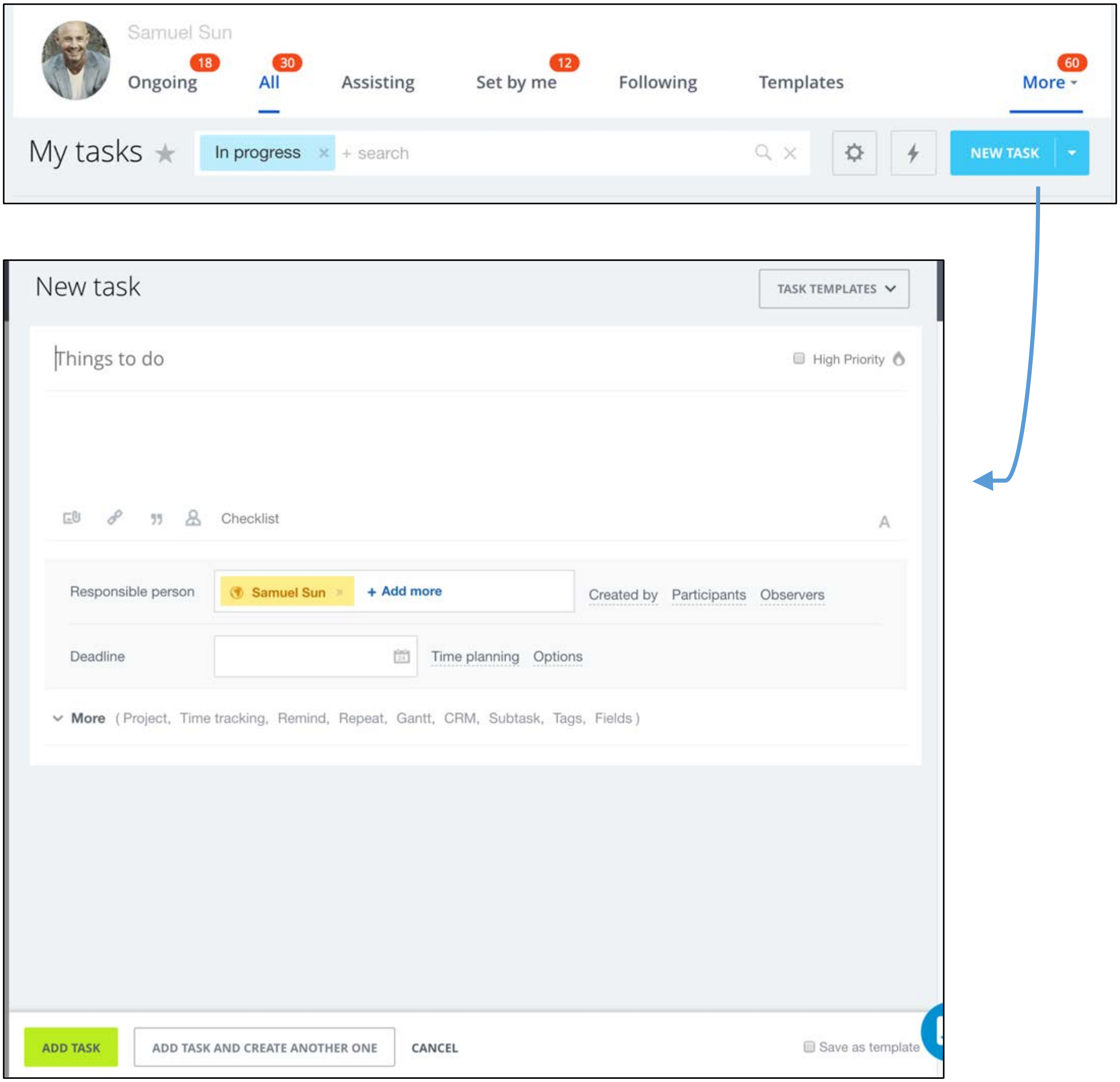
Note that tasks on your calendar will start when they're created and end at the deadline. You can change that by adding a Task Start Date in your task creation panel.

TASKS

MAKING TASKS

There are THREE WAYS TO MAKE TASKS:
1. Manually by clicking "New Task"
2. From a Task Template
3. From an Automated Workflow (which we'll look at in another section)

Let's start by manually creating a Task via the "New Task" button on your Task Dashboard. When you click "New Task", you'll see the Task Detail Panel.



TASKS

TASK DETAIL PANEL

The key components of the Task Detail Panel are:

- **Task Title**: Like the subject of an email, you want this to capture the essence of the task as much as possible… since this is what you'll show in your Task dashboard.

- **Task Description**: You can elaborate on the task as much as you'd like. Attach files, include checklists, etc.

- **High Priority**: check the box to distinguish this as a high prioroty action item. Note that you'll want to include Priority in your dashboard if you decide to utilize this convention.

- **Responsibilities**: Assing the primary responsible person. By default the system chooses yourself (as creator and responsible). If you're not responsible, click the box to change assignment. You can also add participants or observors.

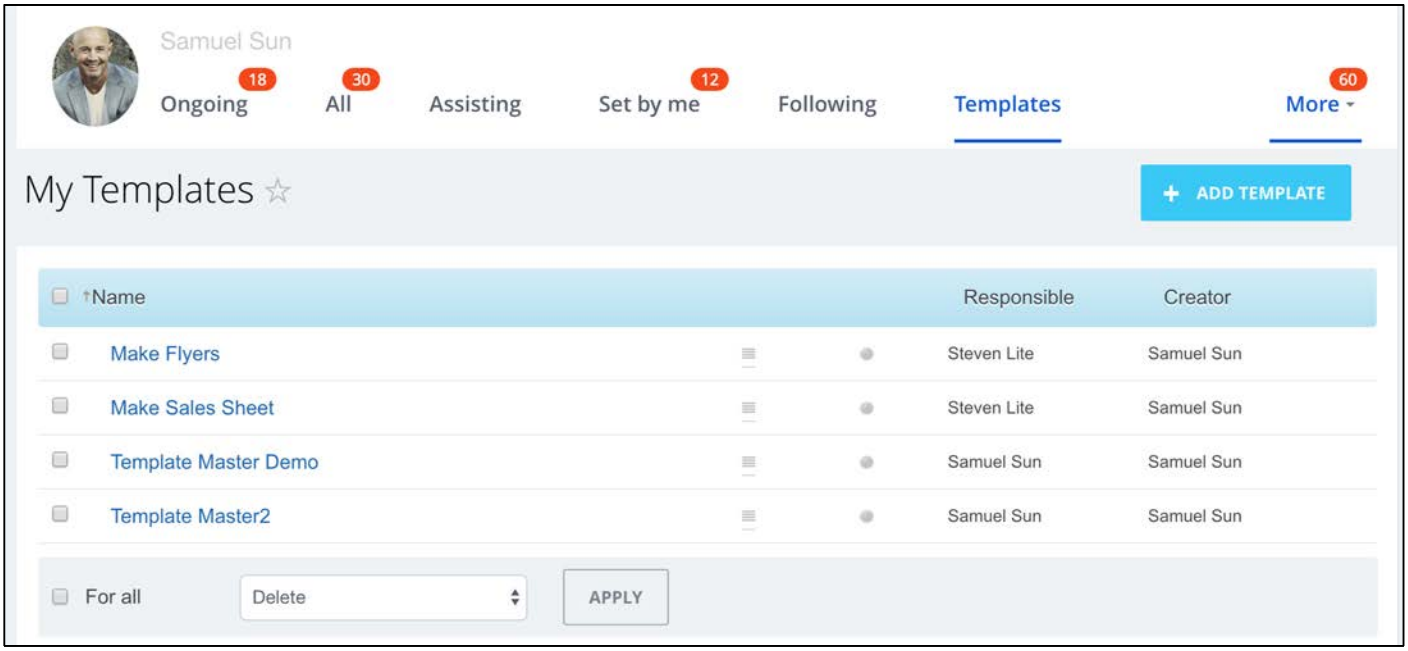
- **Deadline and Time Planning**: Set a deadline by clicking in to the deadline space. Note that we recommend setting a deadline for every task since the default sort method in the dashboard is deadline (what's due first often dictates priority).
  - **Time Planning** allows you to set a start date (on the off chance that it matters when this task begins). Duration and Finish is primarilly for resource loading... to see who's doing what and how long they're estimated to be busy.
  - **Options** will show you checkboxes to control things like whether or not the responsible person can edit deadline, etc.

- **More**: This dropdown gives you more options for your task…
  - **Project**: This is NOT one of your projects, this is lets you determine whether the task is a personal one or a team one. Having your team in this space means two things - 1) that the task will show up (be visible) to all members of your team via the Team Task Dashboard and 2) that it will show up in the Team Calendar Task layer.
  - **Time Tracking**: Check the box if you want the responsible person to be able to start and stop time on the task. The hours and minutes are for estimation purposes.
  - **Reminder**: Allows you to create a reminder (via internal message or external email) either on a specific date or dynamically based on the deadline.
  - **Gantt**: This is one way to create task associations and task-based triggers. Note that we recommend using the subtask logic for creating dependency relationships.
  - **CRM**: This option is only available in the BIZ+ version.
  - **Subtask**: Make this task a child of a different parent task. This is useful for task grouping and associations
  - **Tags**: You can create Tags that are useful primarilly for filtering/sorting in the dashboard to show task groups.
  - **Custom Fields**: This option is only available in the BIZ+ version.
  - **Dependent Tasks**: Another task association tool to show child tasks off this parent.

TASKS

Another way to create tasks is via Templates. If you've got tasks that need to be done mostly the same way every time they're done, then a Task Template can be created so you don't have to build the task out the same way over and over.

MAKING TASK TEMPLATES



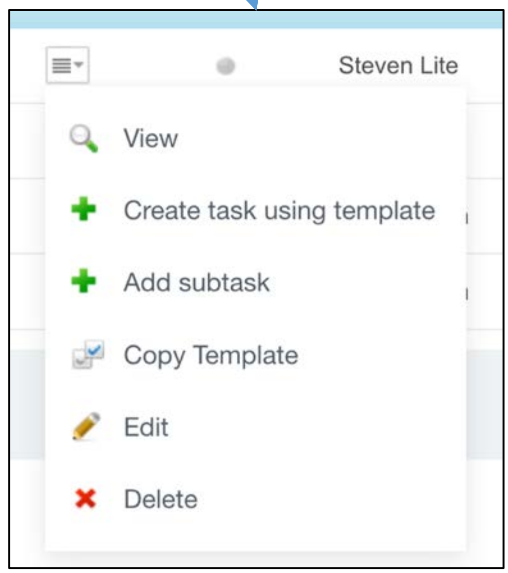
Creating a task template is the same process as creating a task. The only noticeable difference is the deadline which asks you to set a relative deadline based on the time/date you launch the task.

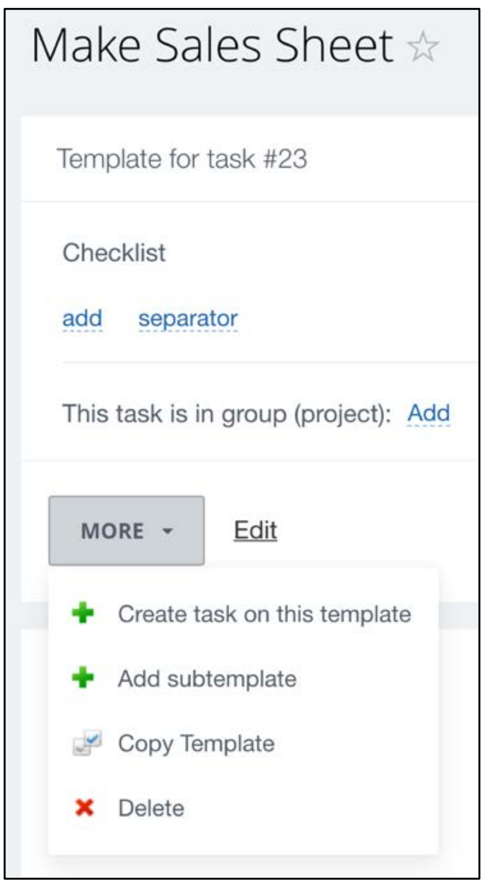
TASKS

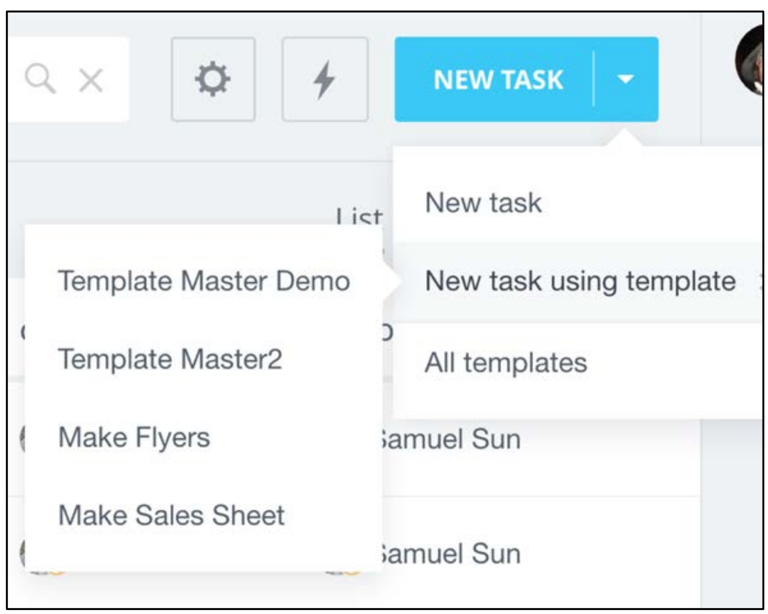
There are three ways you can launch a task from a template:

LAUNCH TASK FROM TEMPLATE

- Open the template and click the MORE menu
- From the template dashboard, click the micro-menu
- From your New Task pull-down menu, hover over "New Task Using Template" and then select the template you want to launch a task from







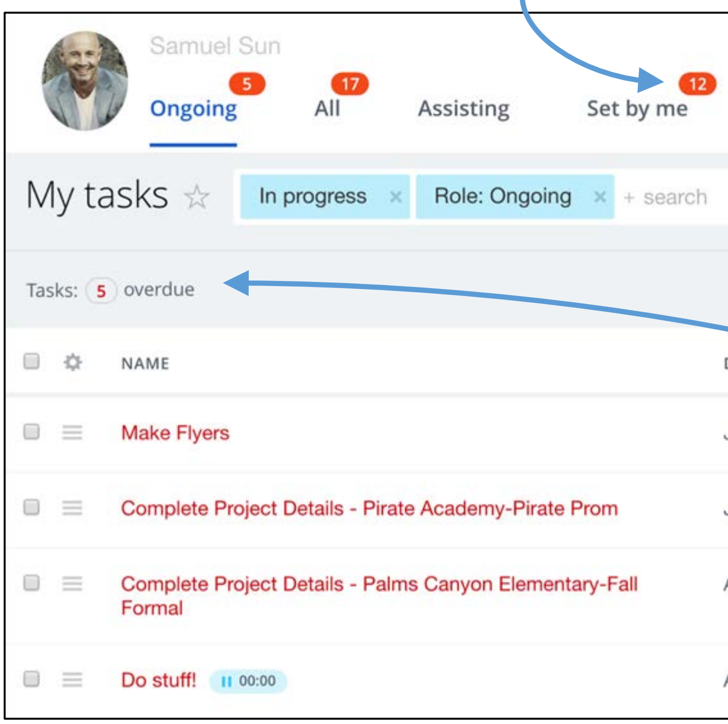
TASKS

The system sends all sorts of notifications. The most common one is for task activity. From your notification settings, you can determine whether you want to receive internal messages, system generated emails, or both. See the section on interface – notifications.

TASK NOTIFICATIONS

One of the most important reasons to use an operations mgmt system like BIZ is to make sure things don't slip through the cracks. Notifications are great for that. The deadline-based alerts (those little red warning icons over your task filter menu items) are also phenomenally helpful.

TASK ALERTS



If you click on the "overdue" warning in your task dashboard, you will see only the tasks which are overdue.

Note – we recommend that you always set a deadline for a task so that you can take advantage of the built in alert functionality. As things get chaotic, you're less likely to ever notice those tasks that aren't overdue or coming up.

TASKS

WORKFLOW GENERATED TASKS

We will cover workflows in more detail later. In the meantime, there are a couple task related notes worth reviewing in this section…

- We recommend that your tasks pertaining to CRM items (accounts, projects, and customer service tickets) be generated from workflows. This will help you filter tasks based on information from the CRM. An example would be to see if there are any outstanding tasks for a particular project OR filter all tasks pertaining to a specific account.

- When tasks are generated from workflows out of the CRM, you can include any information from the CRM item in the task. For example:
    - Task deadlines can be based on project dates
    - Task descriptions can include logistics contained within the CRM item details

- A convenient convention when generating tasks from CRM items via workflows is to include the name of the account in the task name. Example Task Title - "Assign Photographers for Pirate Academy" (where the name of the account was pulled from the CRM through the workflow). This allows you to quickly spot who the task is for AND it allows you to filter your tasks by adding "Pirate" to the name field in your filter settings.

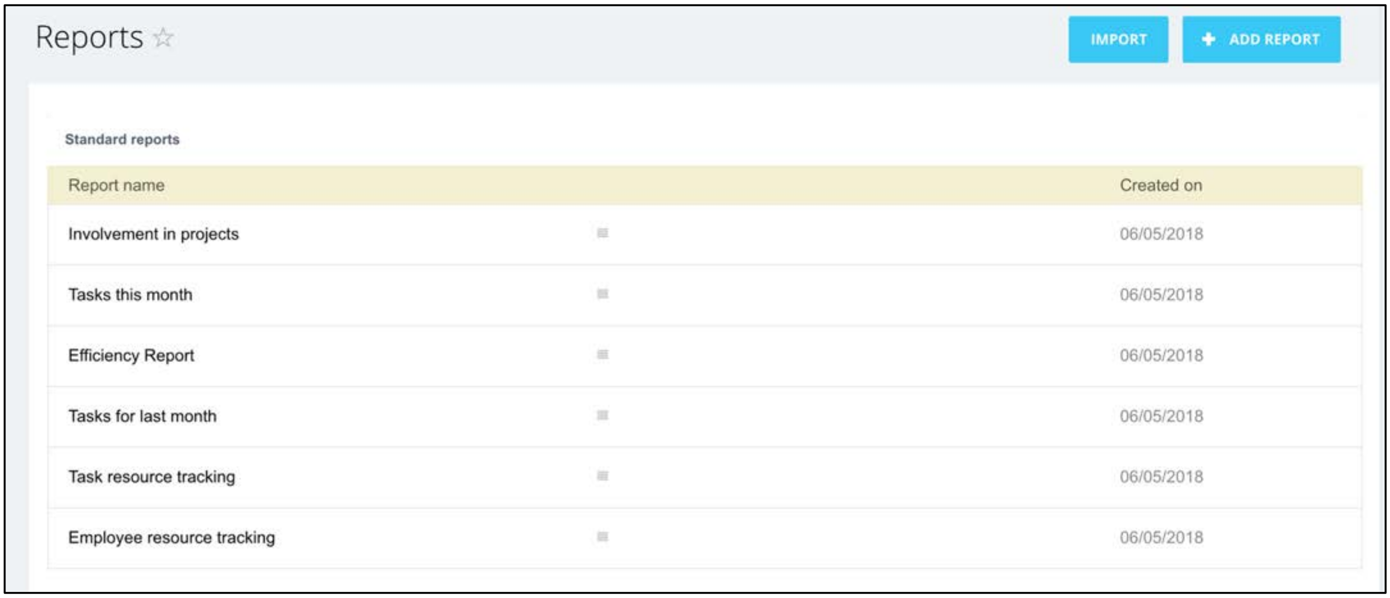
- If you decide to lean on workflow generated tasks, you may consider setting up saved filters so you can quickly see all incomplete tasks for your different accounts.

- *Just a note that the PLUS version of BIZ handles CRM Tasks differently. There are deeper connections between the CRM and activities in the PLUC version. Feel free to ask a BIZ WIZ for more information.*

TASKS

In the task menu, select REPORTS to see the menu of available task reports OR to create your own.

TASK REPORTS



Available reports include:

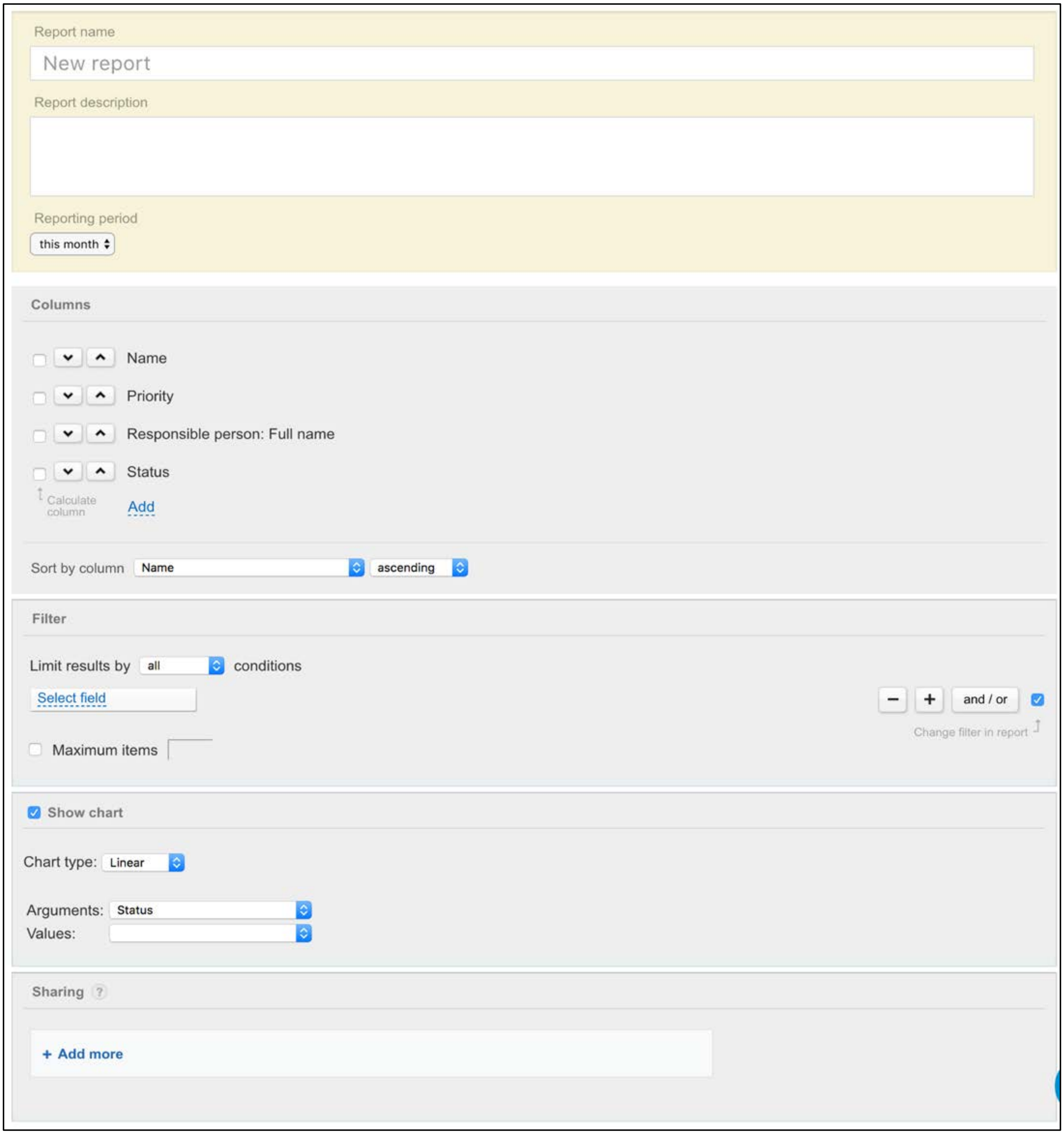
- Involvement – Shows the task info for your team
- Tasks this month – Shows task info where the default date range is one month
- Efficiency Report – is good for seeing completion stats / percentages
- Tasks for last month – shows task info where the date range is set to last month
- Task Resource Tracking – shows time spent on tasks. THIS is the report that may be most beneficial to you for tracking your team hours.

For all reports, we recommend either specifying a specific individual or checking all the boxes in the report detail screen – my tasks, subordinates' tasks, group tasks.

TASKS

ADD REPORT

If you click "Add Report" in the reports module, you'll see the report builder. This lets you create your own report based on values in tasks.



TASKS

Elements of the Task Report Builder:

ADD REPORT

- Report Name and Description

- Reporting Period – select a starting point date range for the report. This value will be adjustable when the reports are generated.

- Columns – these are the results of your report (the values you want to show in the grid). The most common / useful values are:
  - Name – Task Name
  - In Status > In Progress
  - In Status > Completed
  - Completed On
  - Deadline
  - Time Spent
  - Responsible Person > Full Name

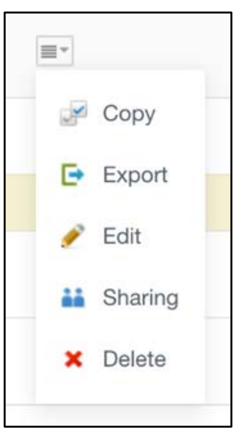
  - Note that you can check the box next to your column in order to create a calculation based on the value of that column. For example, you could figure the total Time Spent on Tasks within a certain date range.

  - Set the default sort preference

- Filter – add or manage values that you want to include for filtering your report data. These filters are available to you on the report interface to update included data

- Show Chart – include a visual representation of your report data (chart) in your report

- Sharing – decide who on your team will have access to your new report.



From your report dashboard, you can click the micro-menu to see options – including the ability to export your report to CSV format.

You can also export a report from the open/generated report by clicking the gear icon at the top of the report.

AUTOMATED WORKFLOWS

WORKFLOWS

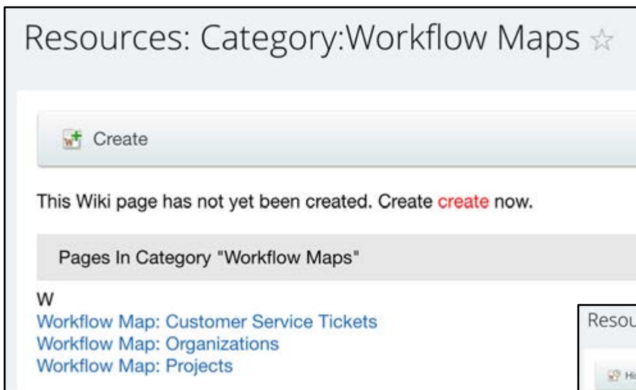
Automated Workflows are a way to:

1. Manage recurring processes efficiently and consistently

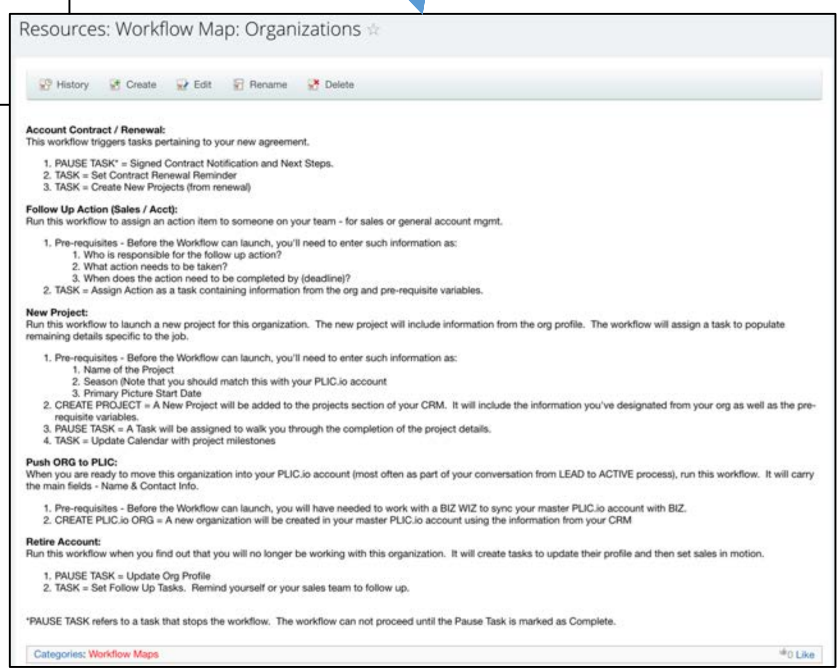
2. Create associations with CRM items by pulling information from your CRM into biproducts of the workflow – like tasks or messages…

3. Create action-items based on trigger events – like project dates or the completion of predecessor actions…

BIZ has some standard workflows built in. You can see a map of these in your RESOURCES module so you know what to expect when you launch a workflow.



WORKFLOW MAPS



Resources: Workflow Map: Organizations

History Create Edit Rename Delete

Account Contract / Renewal:
This workflow triggers tasks pertaining to your new agreement.

1. PAUSE TASK* = Signed Contract Notification and Next Steps.
2. TASK = Set Contract Renewal Reminder
3. TASK = Create New Projects (from renewal)

Follow Up Action (Sales / Acct):
Run this workflow to assign an action item to someone on your team - for sales or general account mgmt.

1. Pre-requisites - Before the Workflow can launch, you'll need to enter such information as:
   1. Who is responsible for the follow up action?
   2. What action needs to be taken?
   3. When does the action need to be completed by (deadline)?
2. TASK = Assign Action as a task containing information from the org and pre-requisite variables.

New Project:
Run this workflow to launch a new project for this organization. The new project will include information from the org profile. The workflow will assign a task to populate remaining details specific to the job.

1. Pre-requisites - Before the Workflow can launch, you'll need to enter such information as:
   1. Name of the Project
   2. Season (Note that you should match this with your PLIC.io account
   3. Primary Picture Start Date
2. CREATE PROJECT = A New Project will be added to the projects section of your CRM. It will include the information you've designated from your org as well as the pre-requisite variables.
3. PAUSE TASK = A Task will be assigned to walk you through the completion of the project details.
4. TASK = Update Calendar with project milestones

Push ORG to PLIC:
When you are ready to move this organization into your PLIC.io account (most often as part of your conversation from LEAD to ACTIVE process), run this workflow. It will carry the main fields - Name & Contact Info.

1. Pre-requisites - Before the Workflow can launch, you will have needed to work with a BIZ WIZ to sync your master PLIC.io account with BIZ.
2. CREATE PLIC.io ORG = A new organization will be created in your master PLIC.io account using the information from your CRM

Retire Account:
Run this workflow when you find out that you will no longer be working with this organization. It will create tasks to update their profile and then set sales in motion.

1. PAUSE TASK = Update Org Profile
2. TASK = Set Follow Up Tasks. Remind yourself or your sales team to follow up.

*PAUSE TASK refers to a task that stops the workflow. The workflow can not proceed until the Pause Task is marked as Complete.

Categories: Workflow Maps 0 Like

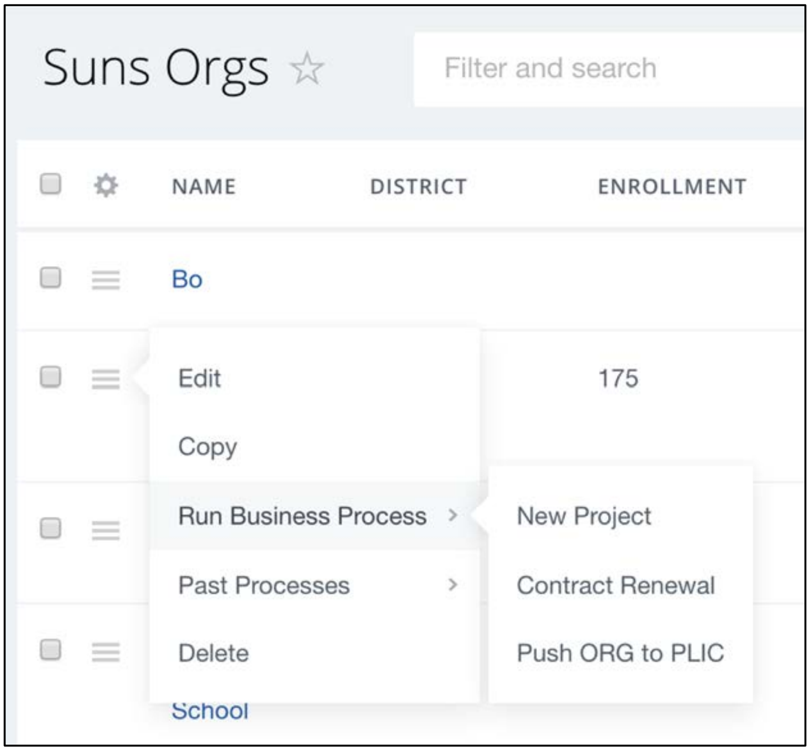
A note about workflow actions - because the workflows require programming and have implications across the system, building and managing workflows is not something you'll have direct access to.

Rather – you can make requests to customize workflows to/through your BIZ WIZ. As with all customizations, minor requests are included in your regular support but anything requiring substantial development efforts will be treated as a project.

WORKFLOWS

LAUNCH WORKFLOWS

Launching a workflow can be done in one of two ways:



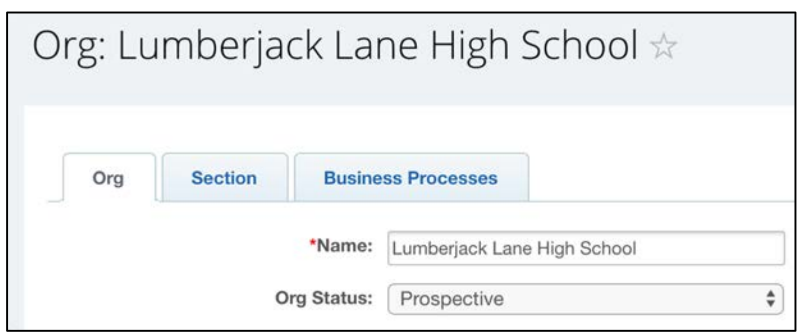
From the CRM dashboard:

1. Click on the micro-menu next to the item you want to launch a workflow for
2. Hover over "Run Business Process"
3. Select the Workflow you want to launch.

Note that you can also see workflows that have already been launched for that CRM item by looking at "Past Processes" in the micro-menu.

From the CRM item profile (details):

1. Click on the "Business Process" tab at the top of the profile
2. Click "Run New Business Process"
3. Select the workflow you want to launch



Note that some workflows may include some pre-launch questions – this is information that has to be filled out before the workflow can launch. This pre-launch requirement is also customizable to suit your preferences.

WORKFLOWS

WORKFLOW CONSIDERATIONS

Workflows can be used for a LOT of different things but some of the primary applications include:

- Creating Tasks
- Scheduling Dates
- Sending Messages
- Updating Information within the CRM

Actions can be triggered in one of three ways:

1. Manually (by launching the workflow)
2. Based on a trigger date like photo day or delivery day
3. Based on a trigger event such as completion of a preceding workflow action. For example – Complete Task A in order to activate Task B

Workflow Strategy:

Think of a workflow as an assistant who will perform a task exactly the way you prescribe and immediately upon receiving the command. On the very positive side – that means things are happening consistently the way you want them to. On the potentially annoying side – once the command has been given, the deed is done.

In other words, if you tell your workflow assistant to schedule a date, it's scheduled. It's done. It's in the calendar. If you based your instruction on a deadline in a project and things change, you will need to go to the calendar and make that change separately.

This means that you need to be aware of the workflow process and bi-product in case things change.

We built our standard processes to make it easy to manage change but the more complex workflows become, the more complex change mgmt becomes.

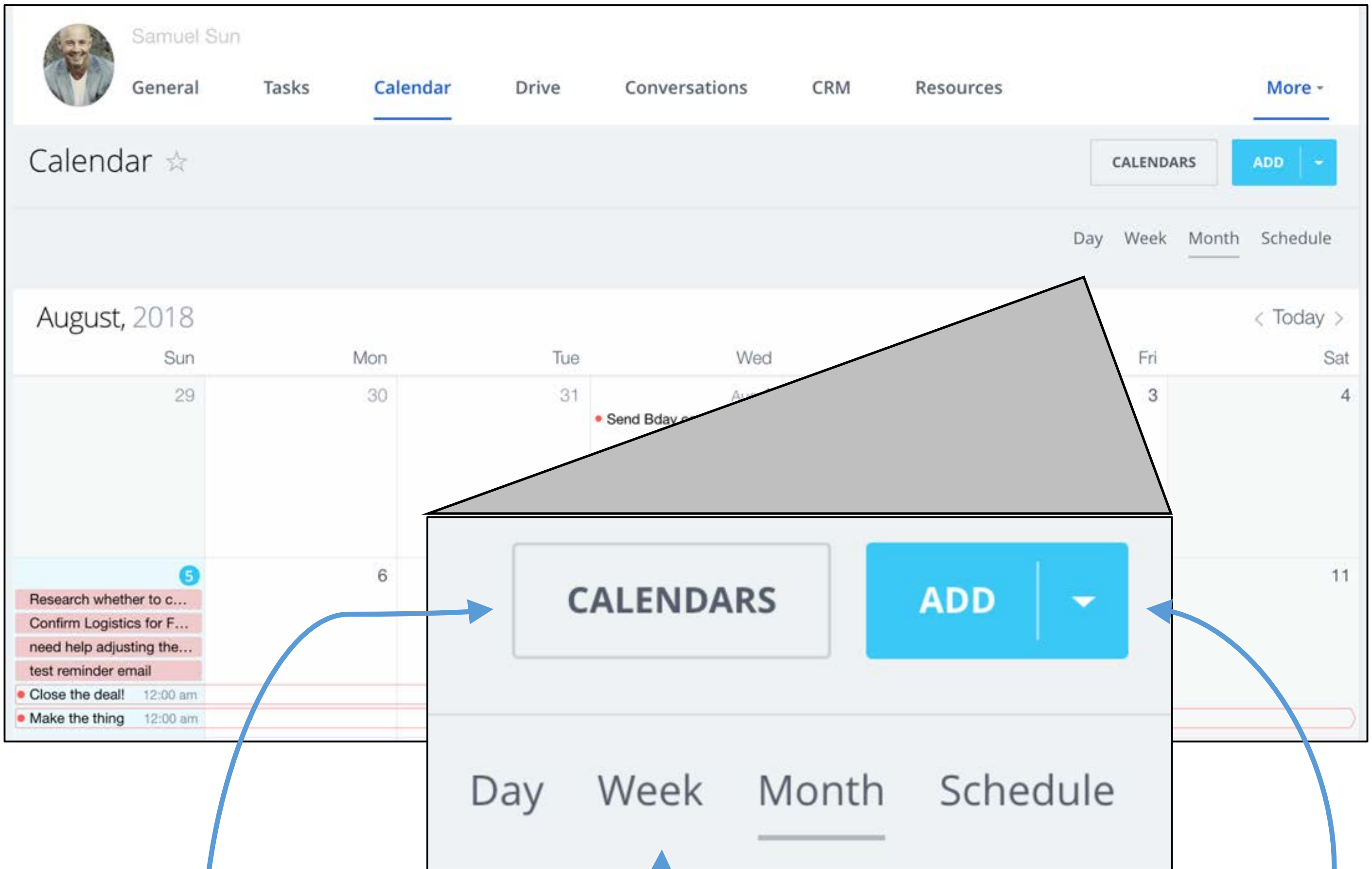
Your BIZ WIZ will keep this in mind when teaching about workflows and when consulting on customizations.

CALENDAR

CALENDAR

The calendar module can be shared with the whole team or private layers can be activated.

CALENDAR CONTROLS



Calendar Layer Controls

Change your View Preference

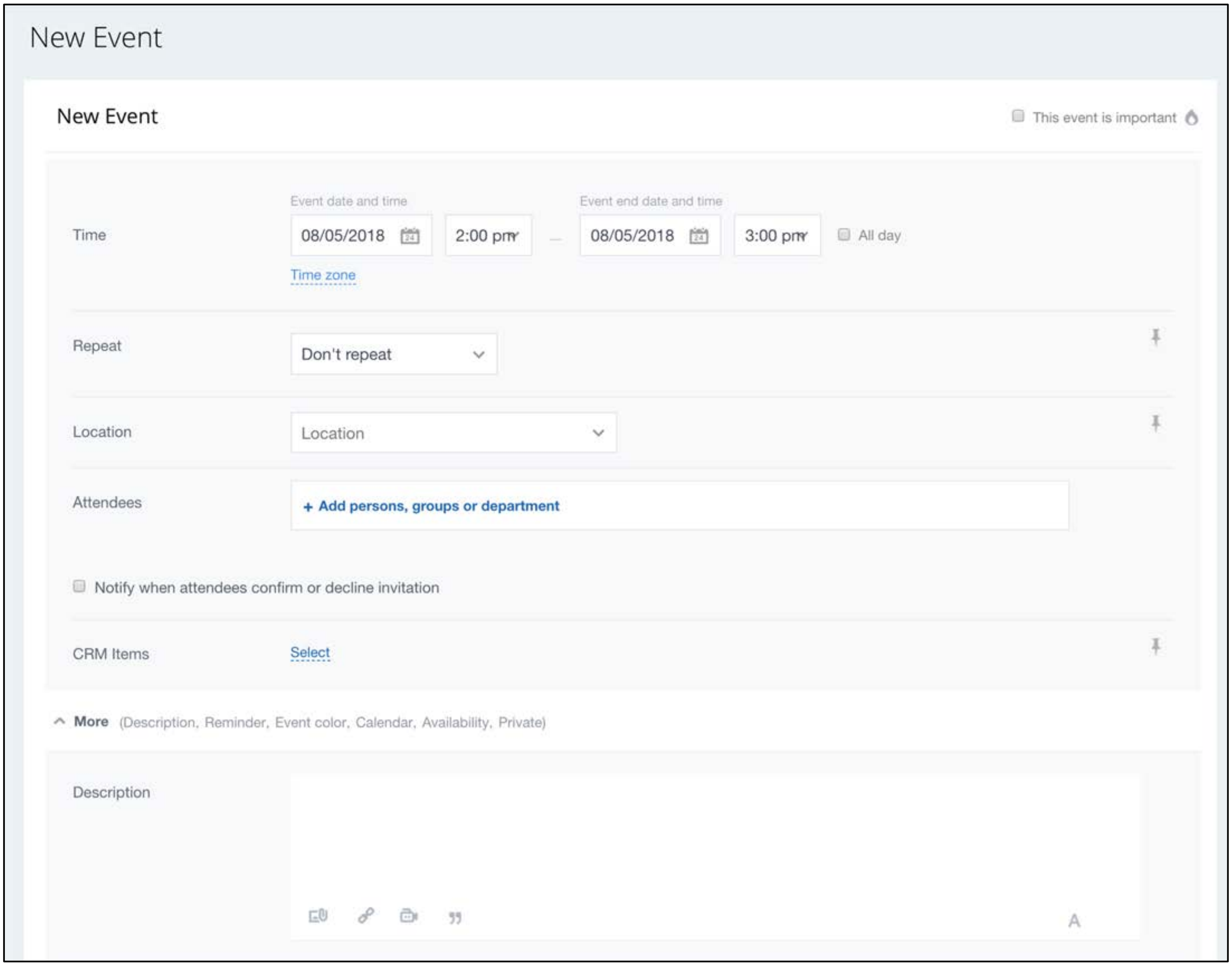
Manually Add Events or Tasks

Note that tasks added through the calendar, will show up in the Team Task dashboard as well as the personal dashboard of anyone assigned to the task.

CALENDAR

NEW EVENT

When you click the ADD button to create a new event, you'll see the event detail panel.



Creating a new event is intuitive but for reference sake, the options are detailed on the next page.

CALENDAR

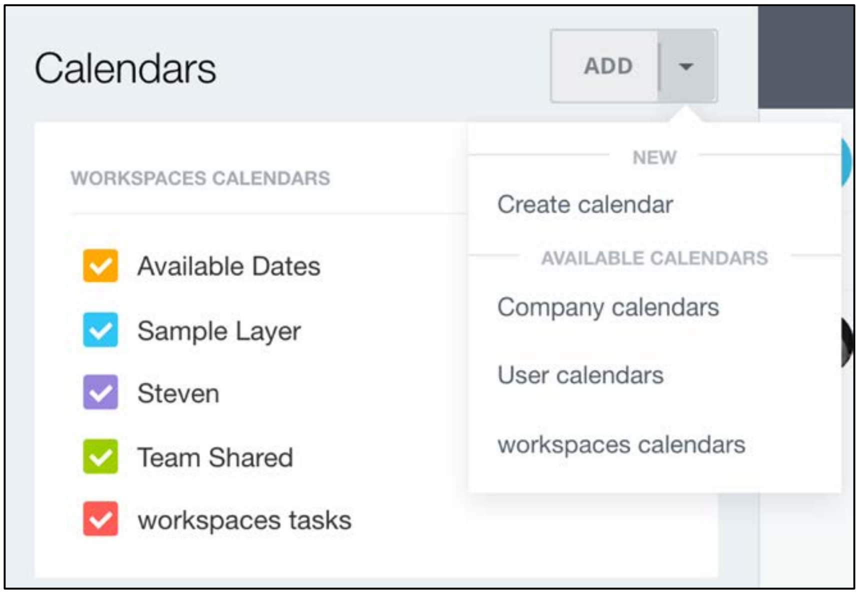
Elements of the Event Detail Panel:

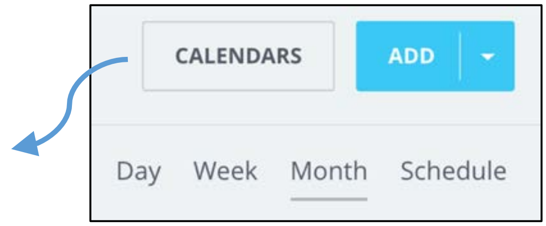
NEW EVENT

- Title of your Event – We suggest that you make this as all-encompassing as possible so that you don't have to drill into an event to understand what it is.
- Priority – Mark this event as high priority. Note that priority only shows in the detail view.
- Time – Set the start and end time for your event. Note that time zone will default to your user settings.
- Repeat – Set recurring events
- Attendees – Invite other people from your team to the event. You'll receive a message when they accept your invitation. You can also see status of your invitations in the event detail view.
  - Note that this is one possible way to manage photographers / team assignments.
- MORE > Description – Add a description to the event
- MORE > Reminder – Give yourself a reminder for the event
- MORE > Event Color – If you don't want to use the color of the calendar layer, then assign a unique color here
- MORE > Calendar – Select which calendar you want to schedule this event in
- MORE > Availability – What do you want others to see if they're not part of the event
- MORE > Private – allows others to see that there's an event but can't see any details

CALENDAR

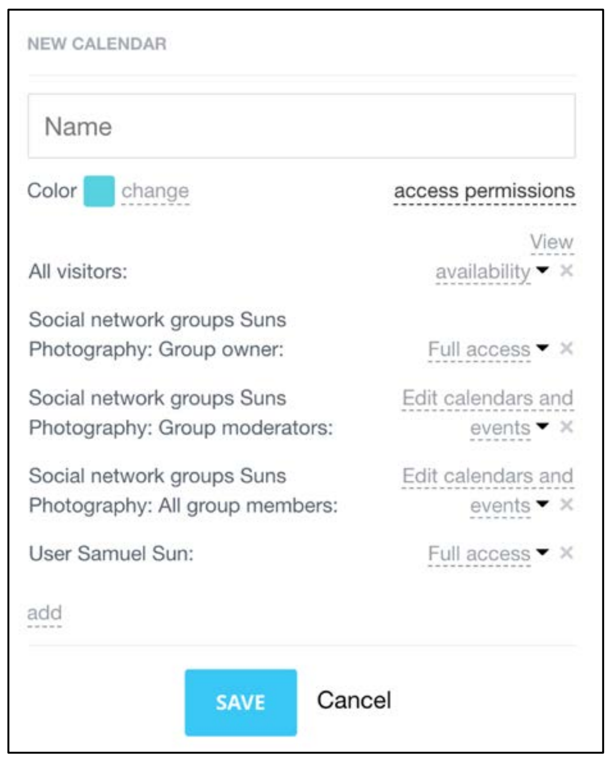
CALENDAR LAYERS





Click "Calendars" to see the list of layers. Then "Create Calendar" to make a new layer.

Click "Access Permissions" to change the rules for your new calendar layer – who can do what.

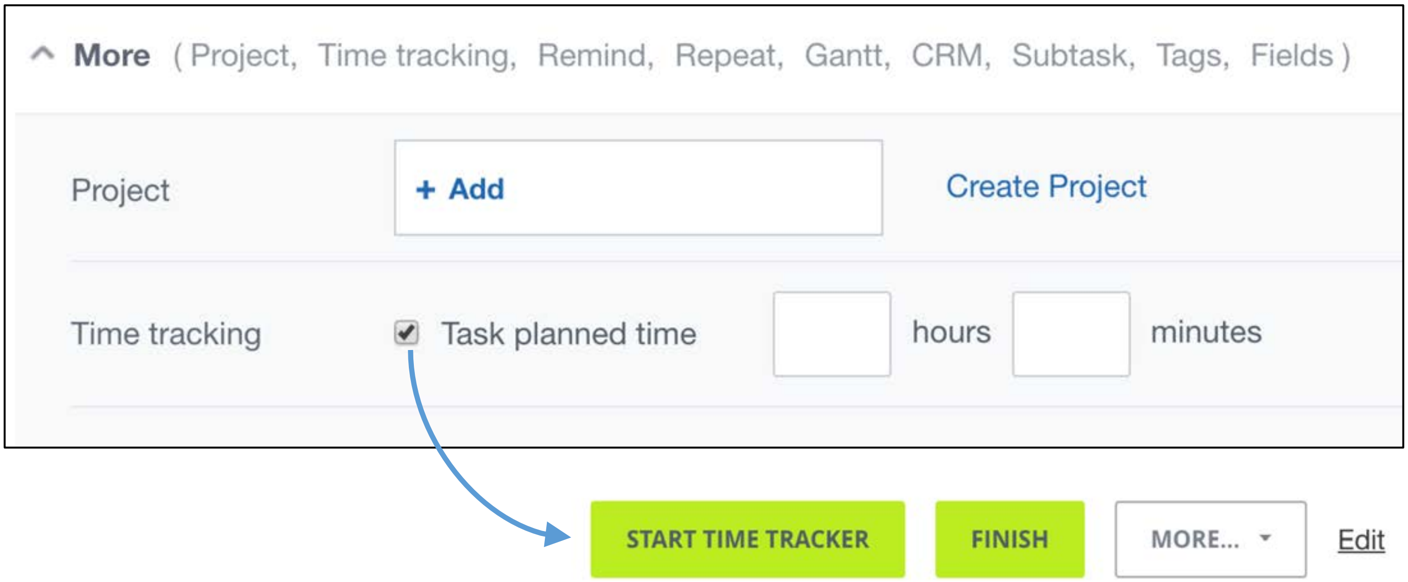


TIME TRACKING

TIME TRACKING

TIME TASKS

Formal Time Tracking is easier to accomplish in BIZ PLUS but there are some things that can be done here through managing tasks.

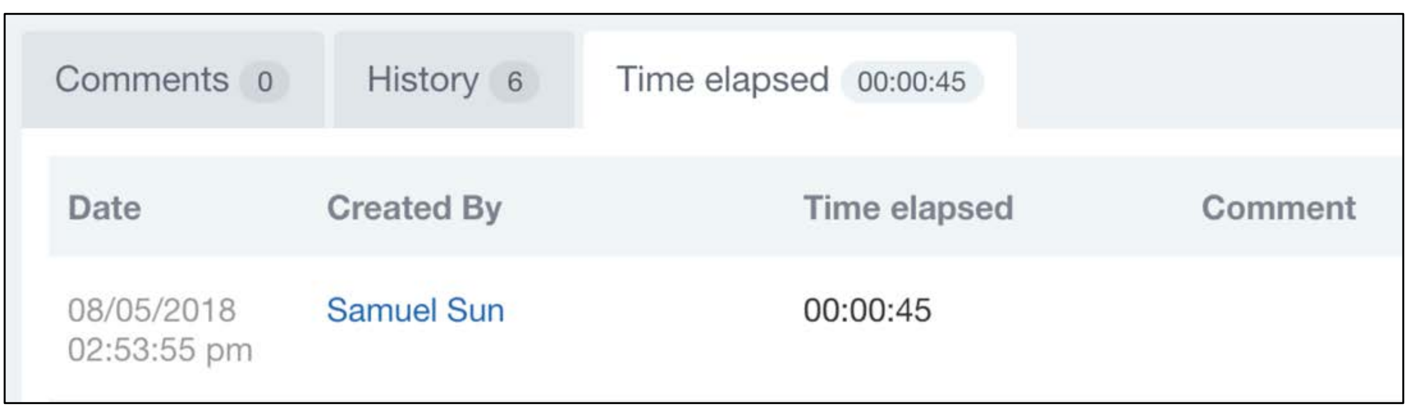


When you create a task, and you want to be able to track time for that task, check the box labeled "Time Tracking" under the MORE options section of the task.

When you do, the new task will include a time tracker stopwatch (shown above).

This way – the clock can be started and paused throughout the duration of the task.

Cumulative time will show in the task detail panel (shown below).



TIME TRACKING

VIEW TIME

You can view the amount of time spent on a task in several places.

Add it as a column in your task dashboard.

Add it as a data point to return in a task report.

View the task detail page and click the "Time Elapsed" tab.

SUPERVISOR TIME TRACKING

Note – in BIZ PLUS, it's possible to create a supervisor time tracking page that allows your event supervisors to control time tracking for the other team members.

COLLABORATION

COLLABORATION

PRIVATE PORTAL

The collaboration module is exclusive to the BIZ PLUS system.

It allows you to create a private portal that you can access with your team or contractors or customers (school admins).

Within a private collaboration portal, you can share documents, manage tasks, manage events, etc…

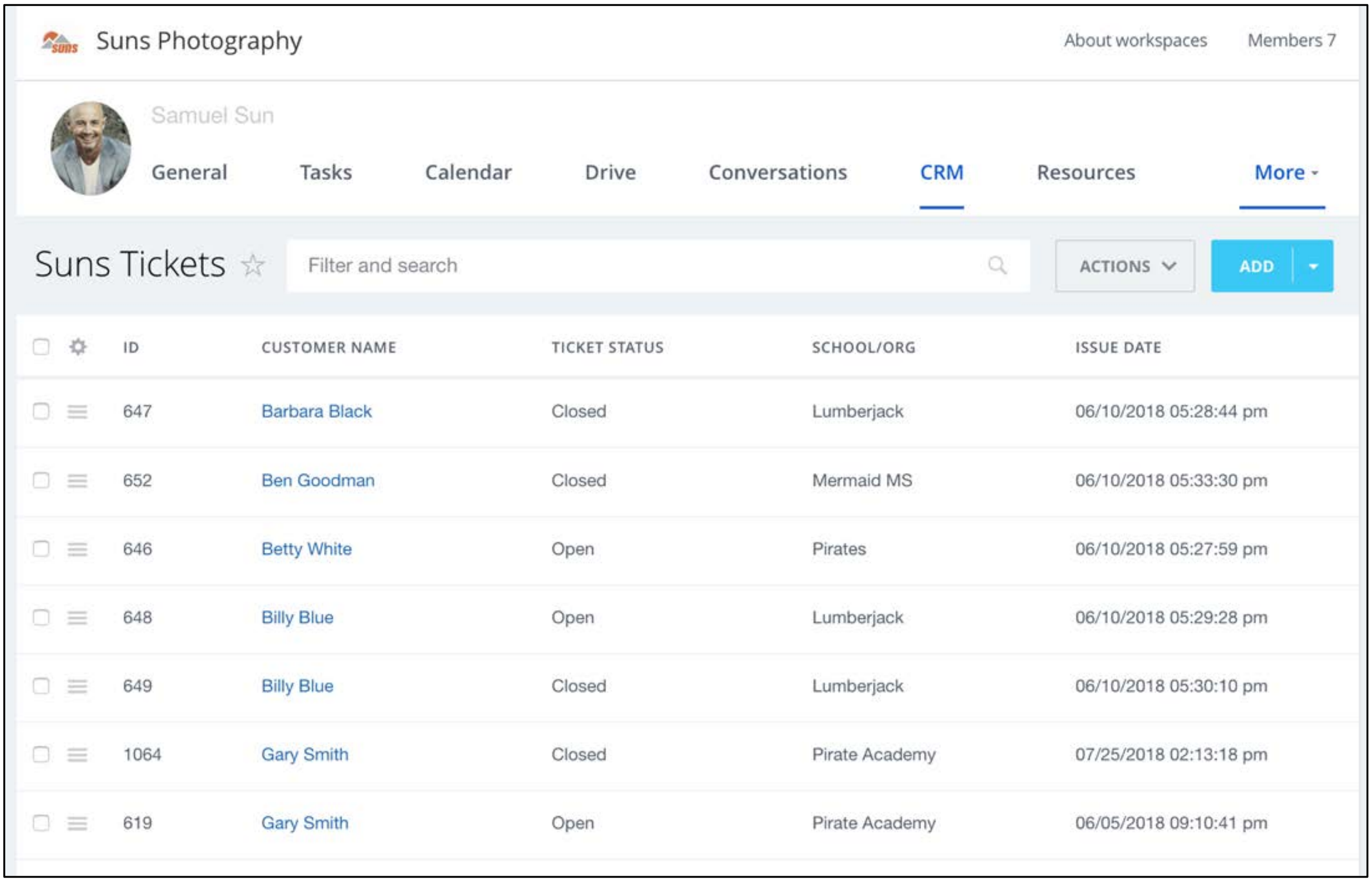
Contact a BIZ WIZ for more information.

CUSTOMER SERVICE

CUSTOMER SERVICE

The Customer Service Module is in the CRM and allows you to manage trouble tickets for your customers (namely those end-users purchasing their picture products).

TRACK TICKETS



Just like the other sections of the CRM, you can control what fields show in the dashboard by clicking the gear icon to the left of the columns.

Also – you can use the filter to show any information that you capture in the form.

We recommend using saved filters to show OPEN and CLOSED tickets (based on ticket status)

You can add a new ticket by clicking the ADD button.

You can run a workflow to assign an action based on one of your tickets.

Contact us if you have any other questions.

We're always here to help!

FUN@PLIC.BIZ