



User Guide

Version 1.30

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Sign On And User Logins



CLARITY Core users have a CLARITY login ID and password that they must enter to access the system. The CLARITY login ID is often the user's initials or email address but can be any uniquely identifying ID.

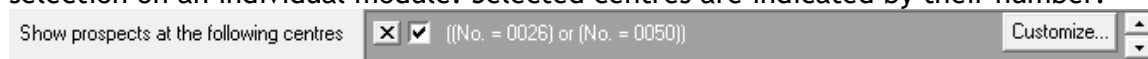
Once a user is correctly signed into CLARITY CORE they will see the CLARITY Control Bar on the left of their screen (see opposite). The Control Bar is where all the different modules of CLARITY are launched from.

Modules are launched/opened by clicking the appropriate icon in the Control Bar. Most of the modules that are launched from the Control Bar will remain active throughout the lifetime of a user's session and will appear in the task bar for re-selection if hidden. However, clicking the icon of an already launched module will bring it to the front of your screen again, even if it has previously been hidden.

Modules are grouped by category in the Control Bar so click on each section to reveal the modules within it.

N.B. Each user is part of a user group that defines which modules they have access to in the system (so you probably won't see all the different modules shown opposite, just a subset).

Most modules in CLARITY CORE will only show a user data from the (Cost) Centres that they have been given permission to view. If a user has access to more than one centre then there is often a panel at the top of a module that allows the user to select which centres to show (see below). Click the 'Customize' button to change the centre selection on an individual module. Selected centres are indicated by their number.




N.B. When CLARITY is accessed via the Citrix hosting platform users will have an initial Citrix user account that will probably have a different ID and password.

Prospects And Leads

The Prospects module is designed to record details of new leads, and then allow the management of that lead through qualification and the resultant sales process, leading to the eventual conversion of the enquiry into a customer account.

The Prospects module lists prospect names grouped by their status and filters those lists based on their type, i.e. 'Lead', 'Office (Enquiry)', 'Conference', 'Virtual', etc. The details of the selected prospect in the list are displayed adjacent to the list (see below).

 Prospects

File Edit View Reports Tools

Show prospects at the following centres ☒ ((No. = 0026) or (No. = 0050))

Previous Next Import

Prospects (Office - QUALIFIED) - Selected Cen

- Enquiry
 - Blue Gene (0050)
- Viewing Arranged
- Viewed
- Proposal Issued
- In Negotiation
- On Hold
- Pending Authorisation
- Approved Awaiting Contract
- Awaiting Signature
- Confirmed/Signed
- Lost

Company Details (269873) at Unknown Centre

Name

Address

Postcode

Contact Details

Title Forename

Surname

Tel

Mobile Fax

Like many of the modules in CLARITY CORE, the Prospects module will have a main menu bar across the top of the form. This menu will have various display options and options for other module specific processes that can be accessed from it.

(Office) Leads

Initial enquiry contacts are generally logged into the Prospects module with a Type of 'Lead'. Leads can either be imported automatically into the system via a monitored Inbox or entered manually by the user. Leads will have an initial status of 'Pre-enquiry' and can either be rejected or followed up and converted into a qualified enquiry with status 'Enquiry Received'.

Lead Auto-importing

CLARITY can be configured to monitor an email Inbox for prospect details emailed by agents to a centre's generic sales address. Prospect leads will be automatically imported into the system from entries in the Inbox, providing they have a valid file attached, usually in the form of a LeadDADI file, or other .CSV or .XML file.

Manually Inserting a New Lead

When a new enquiry makes initial contact directly, either by email, via the website or over the phone, the first task should be to record all known contact details.

Company Details (269873) at Unknown Centre

Name: Blue Gene

Address: Science And Innovation Park
Unit 3
Parkfordshire

Postcode: S41 9FG

Contact Details

Title: Dr Forename: J

Surname: Gene

Tel:

Mobile: Fax:

Job Title:

E-mail: richard.fowler@ra-is.co.uk

Website:

Details | Details 2 | Details 3 | Lifecycle | Addresses | Notes | Value | Interests

Initial Enquiry: 07/03/2023 Type: Office - QUALIFIED

Required WS: 1 SQ FT Centre: (0050) ra Information

Source of Enquiry: Centre Website Status: Enquiry

Sector: Owner: Richard Fowler

Buying Motivation: ☐ Gateway Policy Met

Insert Amend Remove Reason

Source of Enquiry (Compulsory field)

Sector

Type (Lead, Office, Virtual, Conference, etc)

Cost Centre

Status (Compulsory field)

This is achieved by inserting a new lead record, as follows:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Click on the **Insert** button, which will bring up a new Prospect record form.
3. Fill in as much information as is known about the new lead, including at least the following details:
 - a. Company Name
 - b. *Type* - Must be set to 'Lead'
 - c. *Status* - Should be set to 'Pre-Enquiry'
 - d. Source of Enquiry
4. If the *Source of Enquiry* has been specified as one requiring further information, e.g. an agent, then select the additional detail from the displayed lists, e.g. agent company, branch and contact name.
5. Click on the **Update** button

Before the new lead is added, the system will search the database for any potential matches, and report back on any found. This search will include all current and former leads, enquiries, and current and former customers, across all centres. If no potential matches are found, then a new lead record will be created.

If any potential matches are found, then these will be displayed in a list, with the most likely matches at the top of the list, for review. The search is conducted not only on the new company name, but also on postcode, telephone number and contact name. If any such matches are found, the warning message "Possible conflicts have been detected" will be displayed. The following options are available:

Prospect Conflict Options:

- **Ignore** - none of the displayed options are actual matches, proceed to create new lead record.
- **Cancel** - one of the displayed options is a current lead or qualified enquiry at the selected centre, cancel the addition of a new lead.
- **Use Existing** - use the selected match as the basis for a new lead record, with further options to use the existing address and contact details. Care should be taken when selecting this option, as it will link the new lead to the selected record, which would then create a linked customer account in the accounting system, which may not always be desired. If in doubt, please consult with the accounts team.

Following-up Leads

Leads should be contacted as soon as possible, to determine whether they are valid. This includes checking whether they meet the entry criteria for the centre, and whether they are generally a good fit, or are looking for the type and standard of accommodation on offer.

Qualified Leads

If a lead meets the required criteria to be pursued as a genuine enquiry, then it should be transferred to the (Qualified) Enquiries list. This can be achieved by:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. If not already selected, switch the prospects list to the 'Lead' type, by clicking on the **View** option in the main menu, and selecting **Type -> Lead**.
3. Select, and if necessary, expand the 'Pre-Enquiry' status from the list of statuses.
4. Select the appropriate prospect name from the list of records.
5. Click on the **Amend** button.
6. Select 'Office (Enquiry)' from the *Type* drop-down list. If the lead is actually for a type other than Office, select the required type from the list.
7. Update any other missing contact details relating to the enquiry.
8. Select the appropriate *Sector* from the drop-down list.
9. Click on the **Update** button.

10. The lead will be moved to the (Qualified) Enquiries list for the select type.
11. If the system is configured to do so, it will prompt to book in a viewing - see the section later for further details. If the system is not configured for Viewings then you can ignore that section of this guide.

Unsuitable Leads

Unsuitable leads should be marked as Lost, in order that they don't impact on the centre's sales statistics. To mark a lead as Lost, follow these steps:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. If not already selected, switch the prospects list to the 'Lead' type, by clicking on the **View** menu, and selecting **Type -> Lead**.
3. Select, and if necessary expand, the 'Pre-Enquiry' status from the list of statuses.
4. Select the appropriate prospect name from the list of records.
5. Click on the **Amend** button.
6. Select 'Lost' from the *Status* list.
7. A *Non-conversion Reason* must be selected, from the drop-down list of options, and the associated notes entered by clicking on the notes button to the right of the list, giving reasons why the customer has decided not move.
8. Click on the **Update** button.
9. The lead will be moved to the Lost Leads list, where no further action is necessary.

Manually Inserting a New (Qualified) Enquiry

If a new enquiry has already been contacted, possibly outside of CLARITY CORE, it can be added to the system as a (Qualified) enquiry, without having to be a Lead first.

This is achieved by inserting a new (Qualified) prospect record, as follows:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Make sure the type of the new prospect is being viewed in the list. If it isn't, change the displayed type via the **View** option in the module's main menu.
3. Click on the **Insert** button, which will bring up a new Prospect record form.
4. Fill in as much information as is known about the new lead, including at least the following details:
 - a. Company Name and contact details
 - b. *Type* - Should be set to the required (Qualified) type, i.e. Office, Virtual, Conference, etc.
 - c. *Status* - Should be set to 'Enquiry (Received)'
 - d. Source of Enquiry
5. If the *Source of Enquiry* has been specified as one requiring further information, e.g. an agent, then select the additional detail from the displayed lists, e.g. agent company, branch and contact name.
6. Click on the **Update** button

Before the new enquiry prospect record is added, the system will search the database for any potential matches, and report back on any found. This search will include all current and former leads, enquiries, and current and former customers, across all centres. If no potential matches are found, then a new enquiry prospect record will be created. If the system is configured to do so, you may be prompted to arrange a viewing.

If any potential matches are found, then these will be displayed in a list, with the most likely matches at the top of the list, for review. The search is conducted not only on the new company name, but also on postcode, telephone number and contact name. If any such matches are found, the conflicts process will begin, as described earlier.

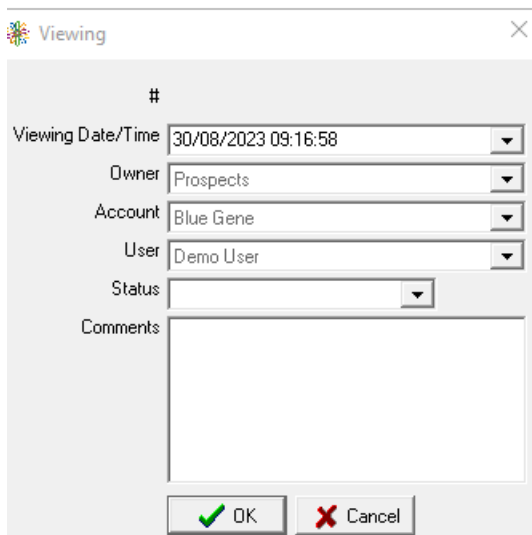
Viewings

Viewings can be booked on the system, via a defined task type. This allows the viewing booking to be recorded against the centre's sales statistics and allows upcoming viewings to be monitored via the CLARITY Portal (if available).

Booking a Viewing

When a Lead is converted to a (Qualified) Enquiry, the system will automatically prompt to book in a viewing, if configured to do so. If this prompt is confirmed by the user, then a new Viewing task will open up, allowing the details of the viewing to be set, as follows:

1. Specify the *date* and *time* of the proposed viewing.
2. If required, set the viewing *duration*.
3. Add *notes* by clicking on the notepad button.
4. If the viewing is to be assigned to another user, select the user's name from the *Assigned For* drop-down list.
5. Finally, click the **Save** button.



Once the viewing task has been generated, the prospect status will be automatically updated to 'Viewing Arranged', to reflect the booked viewing, and the centre viewing stats will be updated.

Otherwise, to manually book in a viewing, follow this procedure:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select, and if necessary expand, the appropriate prospect status from the list of statuses.
3. Select, and if necessary expand, the appropriate prospect name from the list of records.
4. Select the **Tasks** node related to the appropriate prospect record.

5. Right-click on the displayed *Task Actions* list displayed.
6. Select the **Schedule** option from the pop-up menu, and then select 'Meeting' from the displayed list.
7. Select 'Viewing' from the drop-down list.

Then just enter the viewing details, as per the automatic viewing prompt details above.

Rescheduling a Viewing

Should a viewing need to be rescheduled, this can be recorded on the system by simply marking the viewing task as 'Not Held' and scheduling a follow-up viewing task:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select, and if necessary expand, the appropriate prospect status from the list of statuses.
3. Select, and if necessary expand, the appropriate prospect name from the list of records.
4. Select the **Tasks** node related to the appropriate prospect record.
5. Select the Viewing task from the displayed list of tasks.
6. Double-click on the selected task to open the task record.
7. Select 'Not held' from the *Results* options.
8. Click on the 'Finish' button to mark the task as completed, with the selected Result.
9. You will be prompted to record a follow-up task, Click on 'Yes' to record the details of the new viewing.
10. Specify the *date* and *time* of the rescheduled viewing.
11. If required, set the viewing *duration*.
12. If required, update the *notes* by clicking on the notepad button.
13. If the viewing is to be assigned to another user, select the user's name from the *Assigned For* drop-down list.
14. Finally, click the **Save** button.

Canceling a Viewing

Should a viewing need to be cancelled, this can be recorded on the system by simply marking the viewing task as 'Not Held':

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select, and if necessary expand, the appropriate prospect status from the list of statuses.
3. Select, and if necessary expand, the appropriate prospect name from the list of records.
4. Select the **Tasks** node related to the appropriate prospect record.
5. Select the Viewing task from the displayed list of tasks.
6. Double-click on the selected task to open the task record.
7. Select 'Not held' from the *Results* options.
8. Click on the 'Finish' button to mark the task as completed, with the selected *Result*.

If the system is configured for it, you will be prompted to record a follow-up task, Click on 'Yes' to record a follow-up phone call, if required:

1. If recording a follow-up, Specify the required *date* and *time*, update the *notes* by clicking on the notepad button and if the follow-up is to be assigned to another user, select the user's name from the *Assigned For* drop-down list, then click the **Save** button.

Otherwise, if the enquiry is no longer live then click on 'No' when prompted for a follow-up, and move the enquiry to the 'Lost' status, as follows:

1. Select the prospect name from the list of records.
2. Click on the **Amend** button.
3. Select **Lost** from the *Status* drop-down list.
4. Select a *Non-conversion Reason* from the drop-down list of options, and the associated notes entered by clicking on the notes button to the right of the list, giving reasons why the customer has decided not move.
5. If known, select a *Destination* from the drop-down list of options.
6. Click on the **Update** button.

Completing a Viewing

Once a viewing has taken place, this can be recorded on the system by simply marking the viewing task as 'Held':

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select, and if necessary expand, the appropriate prospect status from the list of statuses.
3. Select, and if necessary expand, the appropriate prospect name from the list of records.
4. Select the **Tasks** node related to the appropriate prospect record.
5. Select the Viewing task from the displayed list of tasks.
6. Double-click on the selected task to open the task record.
7. Select 'Held' from the *Results* options.
8. Click on the 'Finish' button to mark the task as completed, with the selected *Result*.

The prospect status will be automatically updated to 'Viewed', to reflect the completed viewing, and the centre viewing stats will be updated. The system will then prompt to start creating a proposal for the enquirer.

Proposal Creation

All the details relating to a new proposal, from contract type and duration to occupancy details and pricing, recurring and setup charges, deposit required, notice periods and break clauses, notes and documents, are recorded on a single Proposal Details. The key sections of this screen are highlighted in the figure below :-

The Proposal Details Screen

The screenshot shows the 'Proposal Details' window with several tabs: 'Details', 'Conflicts', and 'Audit'. The 'Details' tab is active. The window is divided into several sections:

- Summary Tab:** Indicated by a yellow box around the 'Details' tab and the 'General' section.
- Initial Information:** Includes fields for 'Contract Name' (Connecticut Na [CON030]), 'Centre' (0000 Arcu Inc. Centre), 'Owner' (Helpdesk), 'Created' (13/11/2020 09:16:00), 'Request' (//), 'Authorized' (//), 'Signed' (//), and 'Authorized' (//).
- Status message:** A red message box stating 'Start Date Not Selected'.
- Details List:** A large area at the bottom containing the text 'No room steps/periods configured. Click Here To Add...'.
- Details Tab:** Indicated by a yellow box around the 'Details' tab and the 'Details List' area.

Annotations with arrows point to these specific areas: 'Summary Tab' points to the 'Details' tab; 'Initial Information' points to the 'General' section; 'Status message' points to the red message box; 'Details List' points to the 'No room steps/periods configured...' text; and 'Details Tab' points to the 'Details' tab.

The following needs to be filled in:

- ☐ Contract Type (Licence, Lease, Virtual, etc).
- ☐ Start Date of the contract.
- ☐ End Date of the contract (unless open ended).
- ☐ Rental Accommodation required (unless contract type doesn't require any, i.e. Virtual Office).
- ☐ Recurring Services (i.e. Cleaning, Car Parking, Broadband, etc). Not Mandatory except for 'Virtual Office' type contracts.
- ☐ Deposit amount required (if any).
- ☐ Click the 'Save' button.

Initial Information

First complete the initial information relating to the dates of the occupation, and the type of contract being offered:

1. If the client/prospect account is not pre-populated, click the button adjacent to the 'Account' field and follow the prompts to select an existing client or prospect.
2. The 'Centre' field should already be populated based on the currently selected centre from where the proposal is being created.
3. Select the 'Start Date', using the drop-down calendar.
4. Select the 'Contract Type'; Licence, Lease, Virtual Office, etc
 - a. If Licence (or other similar accommodation type) is selected, the End Date will default to the end of the standard contract period, which, by default, will be the last day of the 11th month after the Start Date. The default licence period can be configured as required. The End date can be amended but cannot be set beyond any maximum specified period for the contract type.
 - b. If Lease (or other similar accommodation type) is selected, next select the End Date of the Lease if the contract is not open-ended.
 - c. If Virtual Office (or other similar virtual type) is selected, the End Date will default to the end of the standard contract period, which, by default, will be the last day of the 11th month after the Start Date. The default licence period can be configured as required. The End date can be amended but cannot be set beyond any maximum specified period for the contract type.
5. The Review Date will automatically be set, based on the End Date but can be overridden.
6. If the contract is to include free meeting room time, set the number of free hours per month in the Free Hours field.

Room Occupancy

Once the Initial Information has been configured, the next step is to configure the room occupancy details. If the selected contract type is 'Virtual Office' or similar, then no room occupancy details are required and this section of the guide can be skipped).

Room Occupancy should include all occupancy of all rooms for the duration of the contract period, including any free of charge periods. No date gaps are allowed in occupancy for any room in the contract. There are two options for configuring single room occupancy, as follows (see section x for information on configuring multi-room occupancy proposals):

Room Rental Details - NEW

Save and Close

Room not selected.

Room	Occupied
Office 0.3	Red
Office 0.4	Red
Office 0.5	Red
Office 1.1	Orange
Office 1.2	Orange
Office 1.3	Orange
Office 1.4	Green
Office 1.5	Green

Billing Details | Assets

Period Charge: 0.00

Area Used (sqft): 0.00

Cost/sqft/annum: 0.00

Workstations: [Spinner]

Billing Pattern: Monthly

Invoiced To: / / [Date Picker] ☐ Composite Invoice Line

Select the Room required.

Set the room rate

Select billing pattern.

1. Single room at a flat rate:
 - a. Click on the message 'No rooms/periods configured. Click Here to Add...'
 - b. Select the required room from the list of rooms - the traffic light system indicates room availability:
 - i. Green - available
 - ii. Amber - included in another proposal
 - iii. Red - occupied
 - c. Specify the Period Charge and Billing Pattern, if different from the default rates.
 - d. Click the 'Save and Close' button to save the occupancy details.
2. Single room with stepped rates:
 - a. Right-click on the message 'No rooms/periods configured. Click Here to Add...'
 - b. Click on the 'Stepped Rates Wizard...' menu option.
 - c. Select the required room from the list of rooms - the traffic light system indicates room availability:
 - i. Green - available
 - ii. Amber - included in another proposal
 - iii. Red - occupied
 - d. Specify the required number of rate steps, including any free periods.
 - e. Click on the 'Include' button to generate a table of equal occupancy periods spanning the contract period.

- f. Adjust the default period lengths and charging values:
 - i. Modify any of the intermediate Start/End Dates directly within the table, using the date pickers - updating one date will automatically adjust the following/preceding date accordingly, to ensure there are no gaps in the date ranges.
 - ii. Specify the required Period Charges for the specified date ranges by entering the value into the appropriate cell, including any free periods, where the Period Charge should be set to 0.00
- g. Click on OK to save the occupancy schedule to the proposal record.

Recurring Charges

Recurring charges refers to any additional fixed charges that need to be added to the proposal, for services such as telephone line rental, broadband access, car parking etc. To add recurring charges:

1. Click on the 'Recurring Services' tab to switch to the Recurring Services list.
2. If adding multiple services Click on the message 'No recurring services configured. Click Here to Add to bring up a list of potential recurring charges. If adding one service right click and select insert on the message box noted above.
3. Expand each relevant service group, by clicking on the '+' icon next to the group name, and click on the check-box to the left of each required individual service.
4. If a quantity greater than 1 is required for a particular service, click on the 'Qty' field and either enter the required quantity manually, or use the up/down scroll buttons to adjust the quantity.
5. If the service is to be offered at a discounted price, click on the 'Price' field and enter the required total price manually.
6. Click on the OK button to record the selected recurring charges against the proposal.

The screenshot shows the 'Recurring Service Details' dialog box. It has two tabs: 'Details' (selected) and 'Audit Log'. The 'Details' tab contains various fields for service configuration. Annotations with arrows point to specific fields:

- Service header:** Points to the 'ID#' field.
- Service Detail:** Points to the 'Service Detail' dropdown menu.
- Start Date:** Points to the 'Start Date' field.
- Termination date:** Points to the 'Termination Date' field.
- Charging method:** Points to the 'Charging Method' dropdown menu.
- Period Charge:** Points to the 'Period Charge' field.
- Billing Pattern:** Points to the 'Billing Pattern' field.

Other visible fields include: Account (Clarity Development (CLA009)), Centre (ra Information Systems), Service (a list of services including Buffet Menus, Car Parking, Carriage and Postage, Catering, Cleaning, Dilapidations, Electricity, and Equipment Rental), Notes, Quantity, Cost, Logged To, Internal Ref, Minimum Contract, Entered Date, Review Date, and checkboxes for 'Special Rate' and 'Pro Rata'. At the bottom are 'Save' and 'Cancel' buttons.

7.

Setup Charges

Setup charges refers to any one-off charges related to the preparation of the contract or configuration of services, which need to be added to the proposal for payment in advance of occupation. To add setup charges:

1. Click on the 'Recurring Costs' tab to switch to the Setup Costs list.
2. Click on the message 'No setup costs configured. Click Here to Add...' to bring up a list of standard setup charges.
3. Expand each relevant service group, by clicking on the '+' icon next to the group name, and click on the check-box to the left of each required individual service.
4. If a quantity greater than 1 is required for a particular setup cost, click on the 'Qty' field and either enter the required quantity manually, or use the up/down scroll buttons to adjust the quantity.
5. If the setup cost is to be offered at a discounted price, click on the 'Price' field and enter the required total price manually.
6. Click on the OK button to record the selected setup costs against the proposal.

Deposit Values

The system has default deposit values configured, based on the type and duration of the proposed contract being offered, and the number of rooms to be occupied. It is possible to view and, if necessary, amend the default deposit values as follows:

1. Click on the 'Deposits' tab to switch to the deposits list.
2. The default deposit values will be displayed in a list, with a deposit specified for each room included in the proposed occupancy.
3. To edit an individual deposit value:
 - a. Select the appropriate row in the deposits list
 - b. Right-click on the entry and select 'Amend Room Deposit' from the pop-up menu.
 - c. Manually enter the required amount into the 'Deposit Value' field.
 - d. Click on the green tick button in the bottom-left corner of the deposits list to save the changes.

Notice Periods

Default notice periods are defined by the system, and allow the correct values to be specified on any proposal and contract documents. It is possible to view and, if necessary, amend the default notice period as follows:

1. Click on the 'Breaks' tab to switch to the breaks list.
2. The standard Break parameters, including the default Notice Period, will be displayed in a list.
3. To edit an individual Notice Period:
 - a. Select the appropriate row in the breaks list
 - b. Right-click on the entry and select 'Amend...' from the pop-up menu.
 - c. In the displayed 'Contract Break' window, manually enter the required number of months into the 'Notice (months)' field.
 - d. Click the OK button to save the change.

Additional Notes

The proposal template includes a section for personalising the document to the prospective customer, in the form of an introductory paragraph or two, setting out the offer and any specific items to note. This text can be entered onto the proposal record as follows:

1. Click on the 'Free Notes' tab to switch to the notes section.
2. Enter the required notes into the notes text box, or paste text from another application via the right-click pop-up menu or usual windows shortcut keys. Please note that there is no spell-checking in this text box, so it is recommended that any text should first be checked in Microsoft Word, or another suitable application.

Summary Values

Once the above steps have been completed, the proposal is ready to be generated. However, before proceeding with this, it is possible to review a summary of the main details of the proposed offer, including any discounts provided. To access the summary information, simply click on the 'Summary' tab at the top of the Proposal Details screen. The following details are available:

- Space Occupancy:
 - Target Total Value
 - Proposed Total Value
 - Discount Offered (if applicable)
- Recurring Charges:
 - Standard Price
 - Proposed Price
 - Discount Offered (if applicable)
- Setup Charges:
 - Standard Price
 - Proposed Price
 - Discount Offered (if applicable)
- Deposit:
 - Default Value
 - Proposed Value
 - Discount Offered (if applicable)
- Full list of Merge Fields available to the Proposal and Contract document templates.

Saving the Proposal

In order to save the proposal:

1. Click on the 'Save' button.
2. If all the required details have been entered, the system will prompt with the message 'Create Proposal Now?' to generate a formal proposal document. If a proposal document isn't required at this time, simply click on 'No' to save the proposal for future editing. Otherwise, click on 'Yes' and read the following section for details of how to generate and issue the proposal document.

Issuing a Proposal Document

Once the required details relating to the proposed contract have been entered into the system, it is possible to generate a digital proposal document, in PDF format, and email this directly to the prospective customer, as follows:

Generating a Proposal Email

1. Open the proposal record if it isn't already open.
2. Either click on the 'Create Proposal' button, or click on the 'Save' button, which will prompt to 'Create Proposal Now?'
3. The 'Summary' tab will first be displayed, to allow you to check the details of the proposal. The status message will also indicate if the proposal will require authorisation, either due to the level of discount offered, or the length of any free periods included.
4. If you are happy with the details as displayed, click on the 'Proceed' button. Otherwise click on the 'Stop' button.
5. If you have selected to proceed, the system will now prepare the required merge fields, open the relevant proposal template, merge the fields and generate a PDF file of the proposal.
6. Once the proposal PDF has been generated, it is saved to the prospects document store for future reference, and then attached to a blank email template, ready to be sent to the enquirer. To send the email, follow these steps:
 - a. Check that the recipient's email address is correct in the 'To' box.
 - b. Add any other required recipients, if required, by clicking on the 'To', 'Cc' or 'Bcc' buttons respectively.
 - c. Amend the Subject, if required.
 - d. Add any other relevant attachments, if required, by clicking on the 'Attachments' button and selecting the required files.
 - e. Type the body of the email into the 'Details' text box. Please note that there is no spell-checking in this text box, so it is recommended that any text should first be checked in Microsoft Word, or another suitable application.
 - f. Pick the required Outlook signature to use from the 'Signature' drop-down list.
 - g. Click on the 'Send' button.
7. The email will then be sent via your standard email application, and the prospect status will change to 'Proposal Issued', and the centre proposal stats will be updated accordingly.

Serviced office proposal Enterprise & Innovation Hub

1 The Proposal

Key details

Unit number:	3214
Unit size:	209 ft ²
Contract type:	Licence agreement
Licence fee:	£503.00
Billing frequency:	
Timescale:	Occupancy can commence 7 days after we have received your completed documentation and cleared funds for the deposit and set up fees.
Length of contract:	The licence agreement is for twelve months.
Notice period:	A written notice period of 3 months is required to vacate.
Deposit:	£1207.20
Set up fees:	£95.00
Payment terms:	The deposit, setup fee and first month's licence fee are required to be paid with cleared funds before occupation can commence. The licence fee and services will be invoiced monthly thereafter.

All prices quoted exclude VAT

Sample proposal document, with the merged fields highlighted in yellow for identification.

Depending on the configuration of your system there may be two Invoice buttons now visible at the bottom of the Proposal Details form. If these are present, they will allow you to generate a Deposit Invoice for the proposed contract and/or an Initial Rent Invoice. Upon generation, these invoices can be emailed immediately to the prospective client but they can also be emailed at a later date if necessary. If the prospect hasn't already been converted to a client account when one of these two invoices is requested then you will be prompted to do so before the first invoice is generated. N.B. if the Invoice buttons are not visible at this stage it means you will have to wait until the contract is signed (see below).

Once the client has returned the signed contract/agreement you can click the 'Signed' button at the bottom of the Proposal Details form. This button will only be available if all other steps, above, have been completed (if they are mandatory). If the new contract wasn't already available for billing, signing it will make it so. It will also automatically convert a prospect to a new client account if this hasn't already been done elsewhere.

Amending a Proposal

Proposals can be amended at any point prior to authorisation. This comprises two distinct activities, first updating the proposal details and secondly generating a revised proposal document.

Updating Proposal Details

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select and if necessary expand the 'Proposal Issued' status from the list of statuses.
3. Select and if necessary expand the appropriate prospect name from the list of records.
4. Select the **Proposals** node related to the appropriate prospect record.
5. Select the required proposal from the displayed list of proposals.
6. Double-click on the selected proposal to open the proposal record.
7. To amend the existing occupancy details:
 - a. Select an occupancy record from the list of rooms and periods.
 - b. Double-click on the record to open the details screen.
 - c. Amend the Room, Start Date, End Date or Period Charge as required.
 - d. Click on the 'Save and Close' button to save the changes.
 - e. Repeat as required.
8. To add another occupancy charging step to the existing occupancy details:
 - a. Right-click on the list of rooms and periods.
 - b. Select 'Insert Detail...' from the pop-up menu.
 - c. Set the Start Date, End Date and Period Charge as required.
 - d. Click on the 'Save and Close' button to save the changes.
 - e. Repeat as required.
9. To add another room to the existing occupancy details:
 - a. Right-click on the list of rooms and periods.
 - b. Select 'Insert Detail...' from the pop-up menu.
 - c. Select a different Room and set the Start Date, End Date and Period Charge as required.
 - d. Click on the 'Save and Close' button to save the changes.
 - e. Repeat as required.
10. To amend the existing recurring services:
 - a. Click on the 'Recurring Services' tab.
 - b. Select a recurring service record from the list.
 - c. Double-click on the record to open the details screen.
 - d. Amend the Start Date, Termination Date or Period Charge as required.
 - e. Click on the 'Save' button to save the changes.
 - f. Repeat as required.
11. To add another recurring service to the list.
 - a. Click on the 'Recurring Services' tab.
 - b. Right-click on the recurring services list.
 - c. Select 'Batch Insert...' from the pop-up menu.
 - d. Expand each relevant service group, by clicking on the '+' icon next to the group name, and click on the check-box to the left of each required additional individual service.

- e. If a quantity greater than 1 is required for a particular service, click on the 'Qty' field and either enter the required quantity manually, or use the up/down scroll buttons to adjust the quantity.
 - f. If the service is to be offered at a discounted price, click on the 'Price' field and enter the required total price manually.
 - g. Click on the OK button to record the selected additional recurring charges against the proposal.
- 12. To amend the existing setup charges:
 - a. Click on the 'Setup Costs' tab.
 - b. Select a setup cost record from the list.
 - c. Double-click on the record to open the details screen.
 - d. Amend the Quantity, Total or Notes as required.
 - e. Click on the 'Update' button to save the changes.
 - f. Repeat as required.
- 13. To add another setup cost to the list.
 - a. Click on the 'Setup Costs' tab.
 - b. Right-click on the setup charges list.
 - c. Select 'Batch Insert...' from the pop-up menu.
 - d. Expand each relevant service group, by clicking on the '+' icon next to the group name, and click on the check-box to the left of each required individual service.
 - e. If a quantity greater than 1 is required for a particular setup cost, click on the 'Qty' field and either enter the required quantity manually, or use the up/down scroll buttons to adjust the quantity.
 - f. If the setup cost is to be offered at a discounted price, click on the 'Price' field and enter the required total price manually.
 - g. Click on the OK button to record the selected setup costs against the proposal.
- 14. To amend the value of the required deposit:
 - a. Click on the 'Deposits' Tab.
 - b. Select the deposit record from the displayed list.
 - c. Right-click on the selected deposit.
 - d. Select 'Amend Room Deposit' from the pop-up menu, to manually set the deposit level.
 - e. Manually enter the required amount into the 'Deposit Value' field.
 - f. Click on the green tick button in the bottom-left corner of the deposits list to save the changes.
 - g. Alternatively, select 'Set Default Room Deposit(s)' to revert to the system default deposit.
- 15. To amend the notice period:
 - a. Click on the 'Breaks' tab to switch to the breaks list.
 - b. Select the appropriate row in the breaks list
 - c. Right-click on the entry and select 'Amend...' from the pop-up menu.
 - d. In the displayed 'Contract Break' window, manually enter the required number of months into the 'Notice (months)' field.
 - e. Click the OK button to save the change.
- 16. To amend the proposal notes:
 - a. Click on the 'Free Notes' tab to switch to the notes section.

- b. Enter the required notes into the notes text box, or paste text from another application via the right-click pop-up menu or usual windows shortcut keys. Please note that there is no spell-checking in this text box, so it is recommended that any text should first be checked in Microsoft Word, or another suitable application.
17. To save the changes to the proposal, click on the 'Save' button.

Generating a Revised Proposal

Once a proposal record has been amended, it is possible to generate a revised proposal document, again in PDF format, and email this directly to the prospective customer, as follows:

1. Open the proposal record if it isn't already open.
2. Click on the 'Create Proposal' button.
3. The 'Summary' tab will first be displayed, to allow you to check the details of the proposal. The status message will also indicate if the proposal will require authorisation, either due to the level of discount offered, or the length of any free periods included.
4. If you are happy with the details as displayed, click on the 'Proceed' button. Otherwise click on the 'Stop' button.
5. If you have selected to proceed, the system will now prepare the required merge fields, open the relevant proposal template, merge the fields and generate a PDF file of the revised proposal.
6. Once the revised proposal PDF has been generated, it is saved to the prospects document store for future reference, alongside the original proposal and identified by a revision number. It is then attached to a blank email template, ready to be sent to the enquirer. To send the email, follow these steps:
 - a. Check that the recipient's email address is correct in the 'To' box.
 - b. Add any other required recipients, if required, by clicking on the 'To', 'Cc' or 'Bcc' buttons respectively.
 - c. Amend the Subject, if required.
 - d. Add any other relevant attachments, if required, by clicking on the 'Attachments' button and selecting the required files.
 - e. Type the body of the email into the 'Details' text box. Please note that there is no spell-checking in this text box, so it is recommended that any text should first be checked in Microsoft Word, or another suitable application.
 - f. Pick the required Outlook signature to use from the 'Signature' drop-down list.
 - g. Click on the 'Send' button.
7. The email will then be sent via your standard email application.

Proposals for Multiple Rooms

There are two distinct scenarios where it might be required to produce proposals for different rooms. One is where a prospective customer is looking at occupying multiple rooms simultaneously, under the same contract. The other is where an enquirer is considering taking one of several available rooms, and wants to see how the options compare.

Multi-room Occupancy

To produce a proposal for the occupancy of multiple rooms, you would first start by entering the initial proposal details relating to the dates of the occupation, and the type of contract being offered as follows:

1. Select the Start Date, using the drop-down calendar.
2. Select the Contract Type, either Licence or Lease
 - a. If Licence is selected, the End Date will default to the end of the standard Licence period, which will be the last day of the 11th month after the Start Date. The End date can be amended, but cannot be set beyond 12 months from the Start Date.
 - b. If Lease is selected, next select the End Date of the Lease.
3. The Review Date will automatically be set, based on the End Date.
4. If the contract is to include free meeting room time, set the number of free hours per month in the Free Hours field.

Once the Initial Information has been configured, the next step is to configure the room occupancy details:

1. Multiple rooms at flat rates:
 - a. To configure the first room's occupancy details, click on the message 'No rooms/periods configured. Click Here to Add...'
 - b. Select the required room from the list of rooms - the traffic light system indicates room availability:
 - i. Green - available
 - ii. Amber - included in another proposal
 - iii. Red - occupied
 - c. Specify the Period Charge and Billing Pattern, if different from the default rates.
 - d. Click on the 'Save and Close' button to save the occupancy details for this room.
 - e. To configure the subsequent rooms, right-click on the rooms list, and select 'Insert Detail...' from the pop-up menu.
 - f. Follow the steps from b-d above for each additional room to be included.
2. Multiple rooms with stepped rates:
 - a. To configure the first room's stepped rates, right-click on the message 'No rooms/periods configured. Click Here to Add...'
 - b. Click on the 'Stepped Rates Wizard...' menu option.
 - c. Select the required room from the list of rooms - the traffic light system indicates room availability:

- i. Green - available
 - ii. Amber - included in another proposal
 - iii. Red - occupied
- d. Specify the required number of rate steps, including any free periods.
- e. Click on the 'Include' button to generate a table of equal occupancy periods spanning the contract period.
- f. Adjust the default period lengths and charging values:
 - i. Modify any of the intermediate Start/End Dates directly within the table, using the date pickers - updating one date will automatically adjust the following/preceding date accordingly, to ensure there are no gaps in the date ranges.
 - ii. Specify the required Period Charges for the specified date ranges by entering the value into the appropriate cell, including any free periods, where the Period Charge should be set to 0.00
- g. Click on OK to save the occupancy charges schedule to the proposal record.
- h. To configure the subsequent rooms, right-click on the rooms list, then follow the steps b-g above for each additional room to be included.

Different Occupancy Options

In the scenario where proposals for different pricing options are required, either to compare different rooms or where a different length of contract might entail a different level of discount, it is necessary to define each option via a separate proposal. In this case, simply follow the procedure for creating a new proposal once for each different scenario that needs to be illustrated.

The only slight difference to the procedure when compared with that for generating a single proposal is that it is not necessary to email each individual proposal document separately - they can all be included as attachments on the same email, as follows:

1. Generate the first proposal as above. When prompted on saving to 'Create Proposal Now?', click on 'No'.
2. Do the same for each additional proposal, as required, declining the option to generate the proposal document, until you get to the last proposal.
3. For the last proposal, click on 'Yes' when prompted to 'Create Proposal Now?'.
4. The system will automatically generate PDF proposal documents for each of the proposal records previously saved, and attach them all to a single email template, ready for sending as pre a single proposal document.
5. Follow the standard procedure to send the proposals via email.

Sales Authorisations

The Sales Authorisation process has been designed to provide individual users the discretion to offer discounts up to a certain level, without the need to obtain formal authority. Beyond this level, the system will then simplify the process of obtaining approval from a more senior authoriser, via a process of submission and approval, with full tracking options. All proposals need to be authorised by a relevant individual prior to the generation of any contract documentation.

Discount Limits & Free Periods

Each user's account will have a defined level of discount percentage that they can apply. The discount percentage is calculated over the duration of the proposed contract, so initial incentives can be offered without necessarily triggering the authorisation process. Recurring charges and deposits are also analysed when determining the level of discount being proposed.

In addition, each user's account will be flagged to indicate whether they need authorisation to offer free periods.

Whenever a proposal is generated or updated, the system will display in the proposal status message whether the current user has the ability to authorise the proposal at the current level of discount.

Proposals can be saved, and proposal documents generated and issued, without any need for authorisation. However, the system will provide warnings at these points to indicate that the level of discount being offered is greater than the user's limit, and the details will therefore need to be passed for authorisation prior to generating any contract documentation. These warnings serve partly as an early notification, but also as a safety check, in case the user wasn't intending to offer a large discount, and has simply entered the price details incorrectly.

Authorising a Proposal

If a proposal has no discounting of prices, or the discounts all fall within the user's permission level, then the user will be able to immediately mark the proposal as authorised, ready for contract generation, as follows:

1. Open the proposal record if it isn't already open.
2. Click on the 'Authorise' button.
3. The proposal is now marked as Authorised, and no further changes can be made to any of the pricing details. The Prospect status will also be updated to 'Approved Awaiting Contract'
4. The system will prompt to 'Create Contract Now?' Click on the 'Yes' button to proceed with the contract document generation, or click on the 'No' button to generate the contract document at a later date. See the section on Generating Contract Documents below for details.

Submitting a Proposal for Formal Authorisation

If a proposal has discounts or free periods that fall outside the user's permission level, then the user will need to submit the proposal for authorisation, as follows:

1. Open the proposal record if it isn't already open.
2. Click on the 'Authorise' button.
3. A warning message will be displayed, indicating that the proposal cannot be authorised by the user, and that authorisation notes should be entered prior to passing it for approval - click 'OK' to open the Authorisation Request window.
4. The default authoriser for the centre will be selected from the Requested Authoriser list - select a different authoriser if required (for example, if the default authoriser is away from the office.)
5. Enter a brief note on the reason for the offered level of discount in the Notes box, and click on the 'Authorise' button.
6. The proposal is now marked as Awaiting Approval, and no further changes can be made to any of the pricing details. The Prospect status will also be updated to 'Pending Authorisation'.
7. An authorisation request is generated for the selected authoriser, and sent to them via email, as well as a task reminder being created in the system.

Formal Authorisation Process

Once an authorisation request has been generated, the selected authoriser will receive notification in the following ways:

- Email - an email with brief details of the proposed contract, including the period of the contract, any free periods and the total discount percentage. This also includes a hyperlink to the CLARITY Portal authorisation page for the proposal, for speed of authorisation.
- Reminder - if they are logged onto the system, they will receive a reminder that a proposal needs authorisation.

The proposal can be authorised by a designated authoriser in one of three ways:

1. CLARITY Portal - suitable authoriser can also authorise the proposal by following the email hyperlink:
 - a. Click on the hyperlink in the authorisation notification email.
 - b. If the authoriser is already logged onto the CLARITY Portal, the authorisation page for the proposal will open in a new browser tab. Otherwise, they will be taken to the CLARITY Portal logon page, and then to the authorisation page.
 - c. The full details of the proposal can be checked, including any included recurring and setup charges, the level of deposit required and the authorisation request notes.
 - d. To authorise the proposal, simply click the 'Authorise' button.
 - e. Otherwise, click the 'Decline' button to prevent the proposal from progressing to a contract at the current discount levels.

Authorise

https://rts1.domain1.local/Contracts/Authorize?ContractID=720&fullscreen=true

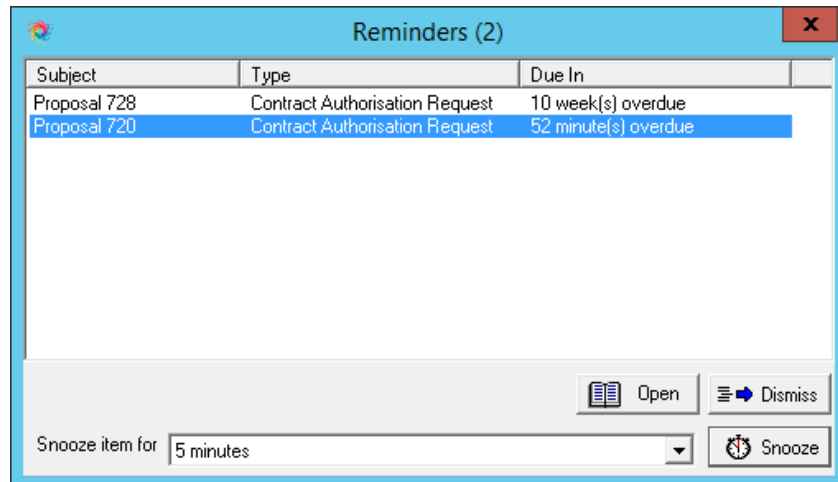
Sales Authorisation

Name	Andrew Manahan	OFFERED	BASE
Centre	(HARB)	£11,443.70	£11,483.87
Contract Type	Licence	DISCOUNT	
Start Date	17/12/2015	0.35 %	
End Date	30/11/2016	Free Period	
Request Date	21/03/2016	0 Days	
Break Date	17/12/2015	Authorise	
		Decline	

Rentals Recurring Services Services Deposits Notes

Start Date	End Date	Room Name	Workstations	Office Size	Period Price	Billing Interval	Actual Total Cost	Base Total Cost	Discount
17/12/2015	16/04/2016	New Office	0	0.00	£990.00	Monthly	£3,977.03	£4,017.20	1.00%
17/04/2016	30/11/2016	New Office	0	0.00	£1,000.00	Monthly	£7,466.67	£7,466.67	0.00%

2. CLARITY Desktop Reminder - a suitable authoriser can authorise the proposal via the CLARITY Desktop reminder:
 - a. When the Proposal Authorisation Request reminder appears in the reminders pop-up window, double-click on the reminder to open the Proposal Details screen.
 - b. Check the displayed Authorisation Request Notes.
 - c. To authorise the proposal, simply click the 'Authorise' button.
 - d. Otherwise, click the 'Decline' button to prevent the proposal from progressing to a contract at the current discount levels.



3. CLARITY Desktop Manual Method - a suitable authoriser can also authorise the proposal manually via the CLARITY Desktop application:
 - e. Open the **Prospects** module for the appropriate centre, by clicking on the **Prospects** option in the **Customers** section of the control panel and selecting the centre from the 'Customize' options.
 - f. Select and if necessary expand the 'Pending Authorisation' status from the list of statuses.
 - g. Select and if necessary expand the appropriate prospect name from the list of records.
 - h. Select the **Proposals** node related to the appropriate prospect record.
 - i. Select the required proposal from the displayed list of proposals.
 - j. Double-click on the selected proposal to open the proposal record.
 - k. Check the displayed Authorisation Request Notes.
 - l. To authorise the proposal, simply click the 'Authorise' button.
 - m. Otherwise, click the 'Decline' button to prevent the proposal from progressing to a contract at the current discount levels.

Checking for Authorisation Updates

Once an authorisation request has been actioned by the authoriser, a notification is triggered back to the original user requesting the authorisation, in the form of a reminder. This reminder will appear alongside the standard set of system reminder prompts, providing the user has the relevant reminder types enabled in their user options - see the section on Reminder Types for more details.

To progress a proposal once it has been authorised:

1. Double-click on the reminder prompt, to open the proposal record.
2. Follow the steps to generate the contract document, as detailed below.

Overselling

The system is also designed to identify any oversell on a proposal, i.e. where the accommodation or services are being offered at a higher price than is standard. This will generate a warning at the point of proposal document generation, but will not prevent the progression of the proposal, or require any authorisation prior to contract generation - it is simply there as a safeguard to ensure that the oversell was intentional, and not the result of mistyping etc.

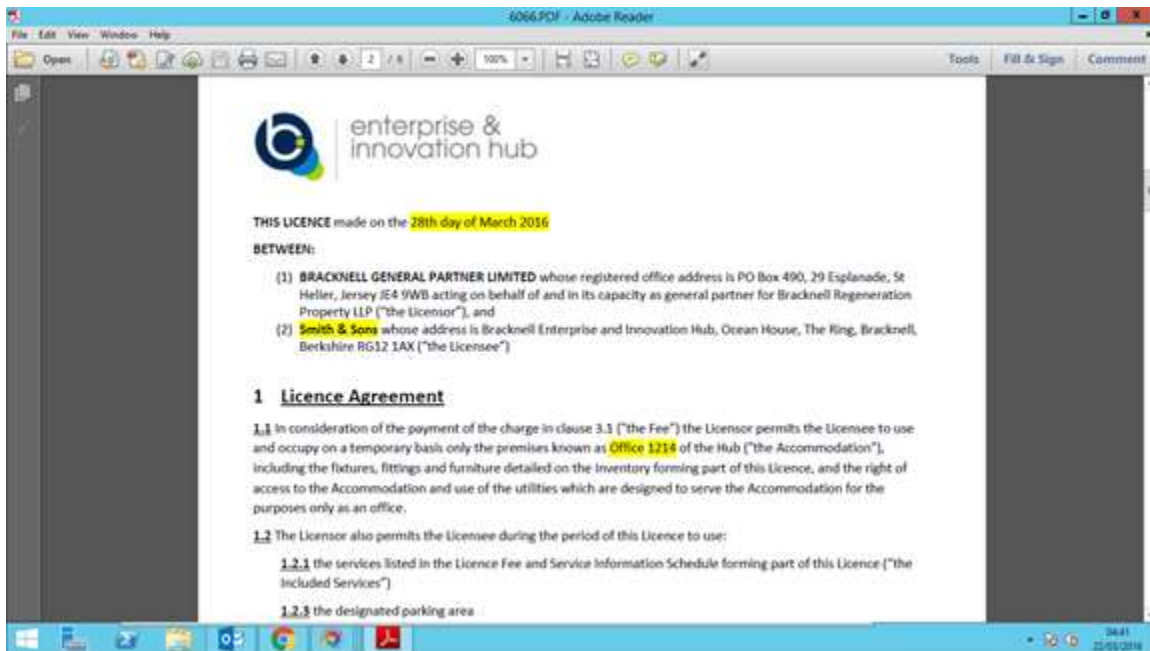
Generating Contract Documents

The system has been configured with contract document templates specific to the individual centre and contract type. The can be used to generate formal contract documents for signing by the relevant parties, where applicable.

Contract documents can only be produced once a proposal has been authorised, either by the user if they have the relevant permissions, or by a designated authoriser - see the section above entitled Sales Authorisations for details on how to authorise a proposal, ready for contract generation.

To generate a contract document:

1. Open the proposal record if it isn't already open.
2. Click on the 'Create Contract' button.
3. The 'Summary' tab will first be displayed, to allow you to check the details of the proposal for a final time before proceeding to the contract.
4. If you are happy with the details as displayed, click on the 'Proceed' button. Otherwise click on the 'Stop' button.
5. If you have selected to proceed, the system will now prepare the required merge fields, open the relevant contract template, merge the fields and generate a PDF file of the contract.
6. Once the contract PDF has been generated, it is saved to the prospects document store for future reference, and then attached to a blank email template, ready to be sent to the enquirer. To send the email, follow these steps:
 - a. Check that the recipient's email address is correct in the 'To' box.
 - b. Add any other required recipients, if required, by clicking on the 'To', 'Cc' or 'Bcc' buttons respectively.
 - c. Amend the Subject, if required.
 - d. Add any other relevant attachments, such as floor plans, if required, by clicking on the 'Attachments' button and selecting the required files.
 - e. Type the body of the email into the 'Details' text box. Please note that there is no spell-checking in this text box, so it is recommended that any text should first be checked in Microsoft Word, or another suitable application.
 - f. Pick the required Outlook signature to use from the 'Signature' drop-down list.
 - g. Click on the 'Send' button.
7. The email will then be sent via your standard email application, and the prospect status will change to 'Awaiting Signature', and the centre stats will be updated accordingly.



Sample licence contract document, with the merged fields highlighted in yellow for identification.

Licence/Lease Completion

The final stage in the process of converting an enquiry into a client is to indicate that the contract has been signed and returned. This will then trigger the generation of the initial invoices for the agreed deposit amount and the initial occupancy and advance recurring charges.

Marking the Contract as Signed

Once the contract document has been signed and returned, the corresponding proposal needs to be updated to indicate this, as follows:

1. Open the proposal record if it isn't already open.
2. Click on the 'Contract Signed' button.
3. Several process now occur:
 - a. The prospect's Status is updated to 'Converted'
 - b. A customer account is created for the prospect (unless one already exists in the system)
 - c. The proposal record is modified to be a contract record.
 - d. All the relevant room occupancy details are created ready for billing, and the occupancy reporting is updated accordingly.
 - e. All the specified recurring service are created, and the advance charges are logged to the customer account ready for billing.
 - f. Any setup charges are logged to the customer account, ready for billing.
4. The system will now prompt to proceed with the required initial billing, as below.

Generating the Deposit Invoice

Once the contract has been marked as signed, and the details automatically logged to the customer account, the system will prompt to raise the deposit invoice - proceed as follows:

1. When the system prompts with the option to 'Create Deposit Invoice?', click on the 'Yes' button.
2. Click 'OK' to specify today's date as the invoice date.
3. The invoice preview screen will be displayed, with the details of the required deposit invoice populated accordingly, a line for each occupied room.
4. Check the invoice header details of address, contact name, reference, invoice date and due date.
5. The system automatically calculates the amount of deposit to be invoiced, based on the proposal details.
6. Once the invoice line is correct, click on the **Create Invoice** button.
7. The system will now prompt to verify this, and then guide the user through the process of printing first the customer's copy of the invoice and then the accounts copy.
8. The system will then prompt to generate the initial occupancy and advance charges invoice. Click 'Yes' to proceed.

Generating Advance Occupancy & Recurring Charges Invoice

1. Click 'OK' to specify today's date as the invoice date.
2. The invoice preview screen will be displayed, with the details of the required occupancy, advance recurring and setup charges populated accordingly.
3. Check the invoice header details of address, contact name, reference, invoice date and due date.
4. Check that the invoice lines correctly describe the proposed charges, including *room name* and *start date*.
5. The system automatically calculates the amount to be invoiced in advance to cover the remainder of the initial month plus a pre-determined number of additional months. To manually amend the end date of this initial period:
 - a. Click on the **Edit Line** button
 - b. Amend the *Billed To* date
 - c. Click on the **Update Line** button
6. Once the invoice lines are all correct, click on the **Create Invoice** button.
7. The system will now prompt to verify this, and then guide the user through the process of printing first the customer's copy of the invoice and then the accounts copy.

N.B. When editing the invoice line on a rental invoice, the system will automatically calculate the amount to bill for this new period, and amend the values and the invoice line description automatically. **Do not** amend the goods value or the invoice line description manually.

Creating & Assigning Tasks

Tasks can be manually allocated to the enquiry record, to indicate additional actions required to progress the enquiry. To allocate a task to a Prospect, follow these steps:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select and if necessary expand the appropriate prospect status from the list of statuses.
3. Select and if necessary expand the appropriate prospect name from the list of records.
4. Select the **Tasks** node related to the appropriate prospect record.
5. Right-click on the displayed *Task Actions* list displayed.
6. Select the **Schedule** option from the pop-up menu, and then select the appropriate task category from the displayed list.
7. Specify the *date* and *time* to set as the task deadline
8. Select the *task topic* from the drop-down list.
9. If required, set the *task duration*, *priority* and *progress*.
10. Add *notes* by clicking on the notepad button.
11. If the task is to be assigned to another user, select the user's name from the *Assigned For* drop-down list.
12. Finally, click the **Save** button.

Task Management & Reminders

Once a task has been allocated, it can either be managed through the **Tasks** node of the associated Prospect record in the **Prospects** module, or via the **Task Scheduler** module. The advantage of the **Task Scheduler** is that it pulls together all outstanding tasks in one place. To manage task using the **Task Scheduler**, first start the module, by clicking on the **Task Scheduler** option on the control panel.

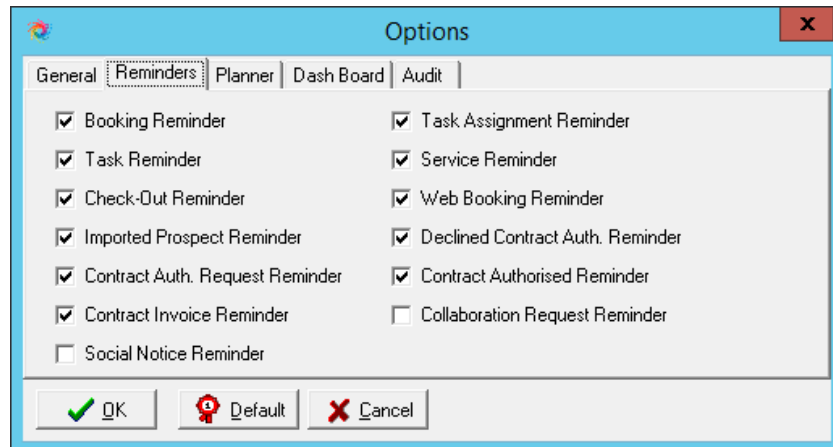
The default view of the tasks shows all tasks due in the next 7 days, plus all overdue tasks. Tasks are displayed in descending order, by due date.

To mark a task as complete:

1. Select the task from the list and Double-click on the task to open the **Task Action Details** window.
2. Select the appropriate *Result*, from the available options.
3. If any additional notes are required:
 - a. Click on the *Add to Notes* button.
 - b. Enter the additional notes in the bottom box, below the timestamp.
 - c. Click on the *Append* button.
 - d. Click on the *Save & Exit* button (floppy-disk icon) on the toolbar.
4. Click on the *Save* button.
5. If no follow-up task has been recorded against the enquiry, the system will prompt to create a follow-up task - select the appropriate action to proceed.

Reminder Types

There are a number of different reminder types within the system, in addition to the standard reminders generated from user-defined tasks. As can be see from the figure below, it is possible to customise a user's account options to only display the required reminders. This can be performed by the user, if they have the relevant permissions, otherwise it is a job for a system administrator.



The function of each of the reminder types can be described as follows:

- Booking Reminder - prompts when a meeting room booking is due to start
- Task Reminder - prompts when a standard task is due to be completed
- Task Assignment Reminder - Prompts when a task is assigned by another user
- Service Reminder - Prompts when a meeting room service flagged for reminders is due to be delivered
- Check-out Reminder - Prompts when a meeting room booking is due to end
- Web Booking Reminder - prompts when a meeting room booking is requested via the customer web portal
- Imported Prospect Reminder - prompts when a new prospect has been automatically imported from an email
- Contract Auth. Request Reminder - prompts when a contract authorisation has been requested
- Declined Contract Auth. Reminder -prompts when a contract authorisation request has been declined
- Contract Authorised Reminder - prompts when a contract authorisation request has been approved
- Contract Invoice Reminder - prompts when a signed contract is available for initial invoicing
- Social Notice Reminder - n/a
- Collaboration Request Reminder - n/a

Linking Prospect Documents

Documents can be linked to individual Prospect's record, allowing the creation of a central repository of information relating to an enquiry, including email communications and other relevant documents.

All the standard Windows document types are supported, including:

- MS Word Documents (.doc and .docx)
- MS Excel Spreadsheets (.xls and .xlsx)
- Adobe Portable Document Format (.pdf)
- MS Outlook Email Message (.msg)
- HTML Document (.html)

To link a document to a Prospect, follow these steps:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select and if necessary expand the appropriate prospect status from the list of statuses.
3. Select and if necessary expand the appropriate prospect name from the list of records.
4. Select the **Documents** node related to the appropriate prospect record.
5. Click on the **Link** button.
6. Click on the **Select Document** button.
7. Navigate to the relevant folder, and select the document to link from the folder directory.
8. Click on the **Open** button to select the document.
9. If you wish to preview the document before it is linked to the prospect, click on the **View Document** button to open it.
10. To link the selected document, click on the **OK** button.
11. This will create a separate internal copy of the document, ensuring that it can't be accidentally deleted or amended.

To view a linked document, follow these steps:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select and if necessary expand the appropriate prospect status from the list of statuses.
3. Select and if necessary expand the appropriate prospect name from the list of records.
4. Select the **Documents** node related to the appropriate prospect record.
5. Select the required document from the displayed list of linked documents.
6. Either click on the **View Document** button, or double-click on the document name in the list.
7. The document will open for viewing in the appropriate application.

Progressing a Prospect

When a prospect has been saved as a new enquiry, there are different stages that the prospect may progress through before it becomes a confirmed customer.

The default stages are:

- Viewing Arranged - a viewing has been scheduled, but hasn't yet taken place.
- Viewed - Prospect has had a viewing of the centre.
- Proposal Issued - proposal has been issued to the prospect.
- In Negotiation - negotiating with the prospect.
- On Hold - awaiting further decision-making process
- Pending Authorisation - proposal submitted for authorisation
- Approved Awaiting Contract - authorised, no contract generated.
- Awaiting Signature - contract issued but not yet returned
- Confirmed/Signed - the prospect has signed their contract
- Lost - prospect decided not to take the proposed contract

The status of the prospects doesn't need to be changed in any particular order. To manually change the status of a customer, follow these steps:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. Select and if necessary expand the appropriate prospect status from the list of statuses.
3. Select the appropriate prospect name from the list of records.
4. Click on the **Amend** button.
5. Select the new *Status* of the prospect from the list.
6. If the status is being changed to **Lost**, a *Non-conversion Reason* must be selected, from the drop-down list of options, and the associated notes entered by clicking on the notes button to the right of the list, giving reasons why the customer has decided not move.
7. Click on the **Update** button.

Managing Agent Details

To add or edit an agent record, follow these steps:

1. Open the **Prospects** module, by clicking on the **Prospects** option in the **Customers** section of the control panel.
2. From the menu bar select **Tools** and then **Source Selection**.
3. From the *Prospect Source* drop down list select the agent type that you want to maintain.
4. To add a new agent company;
 - a. Click on the **Insert** button.
 - b. In the Details section, enter the agent's company *Name* and head-office *Address*, *Postcode* and contact numbers.
 - c. Click on the **Save** button.
 - d. Add site and contact information, as per step 5.
5. To maintain the sites and contacts list of an existing agent:
 - a. Select the agent record from the displayed list of agents.
 - b. Click on the **Sites** button.
 - c. To insert a new office record for the selected agent, Right-click on the left-hand *Sites* list, and select **Insert** from the pop-up menu. Then enter as much information as is known and click on the **Update** button.
 - d. To amend an office record for the selected agent, select the required office from the left-hand *Sites* list, right-click and select **Amend** from the pop-up menu. Then amend the information as required and click on the **Update** button.
 - e. To insert a new contact record for the selected agent, first select the office the contact is to be associated with from the left-hand *Sites* list. Then Right-click on the right-hand *Contacts* list and select **Insert** from the pop-up menu. Then enter as much information as is known and click on the **Update** button.
 - f. To amend a contact record for the selected agent, select the required office from the left-hand *Sites* list. Then select the contact record to amend from the right-hand *Contacts* list, right-click and select **Amend** from the pop-up menu. Then amend the information as required and click on the **Update** button.
6. To finish maintaining the agent details, click on the **Close** button.

Reporting

All reporting related to the Prospects data is accessed through the **Prospects** module. To Access the wide variety of available Prospects reports, select the *Reports* menu option, and then select the required report and options.

Available reports include the following selection:

- Enquiries by Date Range.
- Converted by Date Range.
- Source of Enquiry Analysis.
- Non-conversion Analysis.
- Required Space Analysis.
- Individual Agent Analysis.
- Demand Profile.
- Vacant Offices.

Customers

Customers refers to any company that uses the services of the centre, whether they are resident in the centre, occupying offices, virtual customers using post-handling and call-handling services, or non-residents who only use conference or other services on an occasional basis.

Maintaining Addresses & Contact Details

Once a new customer account has been created, the first task should be to check that that the correct invoicing address and accounts contact details are present. By default all transactions created by the system will use the account's main address, as shown on the customer details screen.

To configure a different invoice address:

1. Select the customer record from the customers list
2. Expand the list of additional details associated with the customer record, by clicking on the 'plus' sign to the left of the customer's name in the list, or by double-clicking on the customer's name.
3. Select **Additional Addresses** from the list of options.
4. Click on the **Add Address** button.
5. Select Invoice Address from the list of *Address Types*
6. Enter the company name, as it should appear on the invoice, in the *Name* field
7. Enter the additional address lines as required.
8. If customer statements should also be sent to this address, check the *Statements* box.
9. Click on the **Update** button.

To check the accounts contact details, select **Contacts** from the list of options. If the contact showing as the *Accounts* contact is not the correct, or if there is no *Accounts* contact showing, add a new contact as follows:

1. Click on the **Add Contact** button.
2. Select the contact's *Title* from the list of options.
3. Enter the contact's *Forename* and *Surname*.
4. Select *Accounts* from the list of contact *Types*
5. Enter any additional contact information
6. Click on the **OK** button.

To amend the existing accounts contact details;

1. Click on the **Edit Contact** button.
2. Amend the details as required.
3. Click on the **OK** button.

N.B. each customer record should have one associated ***Accounts Contact*** record.

Amending Individual Recurring Charges

Recurring charge are maintained from the *Recurring Services* section of the customer account details in the **Customers** module. To view or amend a recurring charge configured against a particular customer account:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. Select the customer record from the customers list
3. Expand the list of additional details associated with the customer record, by clicking on the 'plus' sign to the left of the customer's name in the list, or by double-clicking on the customer's name.
4. Select **Recurring Services** from the list of options.
5. Select the appropriate recurring charge from the displayed list and either double-click or click on the *Amend* button.

To terminate the recurring charge:

1. Set the *Termination Date*, using the calendar control.
2. Click on the **Save** button.
3. If the termination date falls within the current charging period then the corresponding logged service entry for this service will be amended to reflect this termination date, with the dates on the service description and the price (if charged pro rate) being updated accordingly.

To change the quantity or otherwise amend the price of the recurring charge **with effect from the start of the current charging period**:

1. Change the *Quantity* and/or *Period Charge* values as required.
2. Click on the **Save** button.
3. A warning message will appear, indicating that the changes will affect the logged prices to be charged for the current billing period, as well as any future periods.
4. If required, click the **Yes** button to continue with these changes.
5. The recurring charge will be updated for the current and future charging periods.

To change the quantity or otherwise amend the price of the recurring charge **with effect from a specified date**:

1. Click on the **Change** button, which will load a new Recurring Service Details form, copying all the details from the existing recurring service, and setting the Start Date to the day following the last day of the current charging period.
2. Amend the Notes, Start Date, Quantity, Period Charge etc. as required to reflect the new charging details for this service charge.
3. Click on the **Save** button.
4. The previous recurring charge will now be terminated on the day prior to the new charge coming into effect, and any unbilled services will be updated accordingly.

Applying Global Recurring Charge Price Changes

From v1.14 onwards, prices changes for recurring charges can be managed automatically on a building-wide basis, rather than requiring user intervention for each instance of the recurring charge.

To maintain pricing on a recurring-type services, simply follow this procedure:

1. Open the **Services Maintenance** module, by clicking on the **Services Maintenance** option in the **Rooms & Services** section of the control panel.
2. If necessary, select and expand the appropriate *Service Group* from the list of service groups.
3. Select and expand the appropriate service category header from the services list for the selected service group.
4. Select the required service from the services list.
5. Click on the **Edit** button associated with the service detail, at the bottom of the window.
6. Amend the service *Price* as required.
7. Click on the **Update** button.
8. The system will now check whether there are any existing recurring services configured against this service, and if so prompt with a ***Recurring Service Global Price Update*** dialog, indicating the number of recurring services affected by this price change, based on a price-change date of the 1st day of the current charging period.
9. To view a list of all those recurring services potentially affected by this price change, ensure that the date the new price is to be applied from is set in the *From Date* field, and then click on the **Print** button.
10. To view a list of all those recurring services logged to this service with non-standard or *special* prices, that won't be affected by this global price change, click on the **Ignored** button.
11. To automatically apply the new price to all those services indicated in the first report, click the **OK** button.
12. To proceed **without** automatically applying the new pricing to existing recurring services, click on the **Cancel** button.

Contract Renewals

All contract renewals are dealt with in the same way as new enquiries, by first generating a new proposal and, if necessary, going through the authorisation process. However, most of the work can be removed from configuring renewal contracts by using the renewal wizard.

Renewal Wizard

To create a renewal proposal based on the existing contract terms, simply follow this process:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. Select the customer record from the customers list
3. Expand the list of additional details associated with the customer record, by clicking on the 'plus' sign to the left of the customer's name in the list, or by double-clicking on the customer's name.
4. Select *Contract Management* from the list of options.
5. Right-click on the contract to be used as the basis of the renewal proposal.
6. Select 'Renewal...' from the pop-up menu.
7. Enter the requested details on the Contract Renewal Details screen, as follows:
 - a. Start Date - this will default to the day following the end date of the selected contract. If a gap is required between the previous contract and the new one, then adjust the Start Date accordingly.
 - b. End Date - this will default to the end of the period that corresponds to the duration of the selected contract. If the renewal proposal is to be for a different duration, then adjust the End Date accordingly.
 - c. Uplift % - this will default to 0%, if an uplift is to be applied to the selected contract's occupancy charges then specify the uplift percentage, either by entering the value directly or by using the scroll buttons.
 - d. Price/sq ft/annum - if the renewal price is to be based on a set price per square foot, then select this option, and enter the annual price.
 - e. Stepped Rates - in the unlikely event that the proposed renewal is to mimic the selected occupancy in terms of stepped rates, then select this option to copy the occupancy step periods to the renewal proposal.
 - f. Setup Services - if the setup charges applied to the original contract are also to be applied to the renewal, then select this option to copy the setup charges to the renewal proposal.

8. A new proposal record is generated for the customer, based on the original contract selected, and values defined above. A prompt is displayed, showing the new proposal number, and offering the option to open the new proposal for editing or issuing of the initial documentation. Click 'Yes' to open the new proposal, or 'No' to view it at a later date.
9. The new proposal should now be handled just like any proposal from a new enquiry, following the process:
 - a. Edit proposal details as required.
 - b. Issue proposal document via email.
 - c. Authorise proposal.
 - d. Issue contract document via email.
 - e. Mark contract as signed on return.
 - f. Issue new deposit invoice.
 - g. Issue new advance occupancy charges invoice, if required.
 - h. Credit back previous deposit invoice.

Manual Renewal

It is also possible to treat a renewal in exactly the same way as a new enquiry, if the proposed new contract is to be greatly different than the existing one, either in terms of room occupancy, duration or type of contract being offered. This can be achieved by either creating a new enquiry, and linking it to the existing customer details, or by creating a new proposal from the existing customer account, as follows:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. Select the customer record from the customers list
3. Expand the list of additional details associated with the customer record, by clicking on the 'plus' sign to the left of the customer's name in the list, or by double-clicking on the customer's name.
4. Select *Contract Management* from the list of options.
5. Right-click anywhere on the contracts list.
6. Select 'Insert...' from the pop-up menu.
10. Enter the details of the proposed new contract as per a new enquiry, following the process:
 - a. Enter all the proposal details as required, occupancy, recurring charges etc.
 - b. Issue proposal document via email.
 - c. Authorise proposal.
 - d. Issue contract document via email.
 - e. Mark contract as signed on return.
 - f. Issue new deposit invoice.
 - g. Issue new advance occupancy charges invoice, if required.
 - h. Credit back previous deposit invoice

Contract Termination

Terminating a contract prior to the agreed termination date is achieved by amending the End Date on the contract record, as follows:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. Select the customer record from the customers list
3. Expand the list of additional details associated with the customer record, by clicking on the 'plus' sign to the left of the customer's name in the list, or by double-clicking on the customer's name.
4. Select *Contract Management* from the list of options.
5. Double-click on the contract to be terminated.
6. Specify the agreed termination date, either by picking a date from the Termination Date drop-down calendar, or typing the date into the field.
7. When prompted to 'save and proceed' with the termination, click on the 'Yes' button.
8. If the contract has rate steps commencing after the specified termination date, then the system will remove these from the contract, to ensure no billing takes place for these future periods.
9. The system will terminate any associated recurring services with the same termination date.
10. The system will also prompt to credit back the customer's deposit, at your discretion.

Contract Viewer

The Contract Viewer module provides an overview of all contracts on the system, both current and historic. It can be accessed via an icon on the main CLARITY control bar (on the left).

The Contract Viewer allows you to see what stage each proposal has reached and which contracts are approaching their end and will require renewal negotiations.

[illegible]

Right-clicking the grid will show you a popup menu with options for inserting, amending or renewing contracts and proposals. N.B. double-clicking an entry in the grid will automatically open the Proposal / Contract form populated with the details of the entry highlighted in the Contract Viewer grid.

The popup menu also has options for filtering the contents of the grid. For instance, by default the grid doesn't show contracts that have expired but there is a filter option to show them if required.

The content of the grid can be ordered differently by clicking one of the column headers. This will order the contents of the grid in the ascending order of the content of the column you clicked. To reverse the order, to descending, simply click the column header again. This can be useful to help you search for a specific contract ID (column 1) or to show all contracts grouped together by client name (column 2).

Contract Viewer

Contracts | Plans | Rooms | Cap Halls

#	Name	Start Date	End Date	Authorized	Signed	Earliest Move Out Date	Type	Review Date	Overdue	Expired	Next Bre	Room	Floor	Proposal/Issue
684	RRK	01/05/2015	31/03/2016			31/04/2016	Licence	31/03/2016				1b	1st floor	
685	Experience Elite	01/08/2015	31/10/2016			31/04/2016	Licence	31/08/2016				1b	ground floor	27/11/2015
691	Avencia Foods Ltd	01/11/2015	31/10/2016			31/04/2016	Licence	31/10/2016						06/10/2015
692	Avencia Foods Ltd	02/11/2015	31/10/2016			31/04/2016	Licence	31/10/2016				11	ground floor	06/10/2015
694	Judge And Jay LLP	01/11/2015	01/01/2016			31/04/2016	Licence	31/10/2016				20	1st floor	14/10/2015
695	Cebu Global Exports Ltd	01/11/2015	31/10/2016			31/04/2016	Licence	31/10/2016				33	1st floor	14/10/2015
698	Knowledge Angel	01/11/2015	31/10/2016			31/04/2016	Licence	31/10/2016				10	ground floor	
700	Lawson West Commercial	16/10/2015	30/09/2016			31/04/2016	Licence	14/10/2016						16/10/2015
701	Code String Limited	01/10/2015	30/09/2016			31/04/2016	Licence	30/09/2016				9a	ground floor	03/11/2015
702	Make A Material Difference	05/11/2015	31/10/2016			31/04/2016	Licence	06/11/2016				56	second floor	02/11/2015
704	Growth Path Planning LLP	01/12/2015	30/11/2016			31/04/2016	Licence	30/11/2016				53	second floor	05/11/2015
714	RA Helpdesk	07/12/2015	30/11/2016			31/04/2016	Licence	06/12/2016				25	1st floor	26/11/2015
715	RA Helpdesk	07/12/2015	30/11/2016			31/04/2016	Licence	06/12/2016				19	1st floor	26/11/2015
720	Andrew Mahanah	17/12/2015	30/11/2016			31/04/2016	Licence	16/12/2016				New Office	second floor	24/02/2016
723	Jay LLP	18/01/2016	17/01/2017			31/04/2016	Licence	31/01/2017				9a	ground floor	21/12/2015
730	Vision And Sound	08/02/2016	31/01/2017			31/04/2016	Licence	31/01/2017				12	ground floor	15/01/2016
731	Fast Partnership Ltd	01/02/2016	01/02/2017			31/04/2016	Licence	31/01/2017				13	ground floor	15/01/2016
733	Frank	01/02/2016	31/01/2017			31/04/2016	Licence	31/01/2017				14	ground floor	
734	Frank	02/02/2016	28/02/2017			31/04/2016	Licence	31/01/2017						
736	Frank	01/03/2016	28/02/2017			31/04/2016	Licence	28/02/2017				20	1st floor	21/01/2016
737	Frank	01/01/2017	31/12/2017			01/03/2017	Licence	31/12/2017			01/01/2017	11	ground floor	21/01/2016
738	Judge And Jay LLP	01/03/2016	29/02/2017			31/04/2016	Licence	29/02/2017				34	1st floor	23/02/2016
742	Judge And Jay LLP	01/01/2016	31/12/2016			31/04/2016	Licence	31/12/2016				Ch	1st floor	22/02/2016
743	Judge And Jay LLP	01/02/2016	31/01/2017			31/04/2016	Licence	31/01/2017				ch2	ground floor	
744	Judge And Jay LLP	01/01/2017	31/12/2017				Licence					Ch	1st floor	
747	MJ Company	01/04/2016	31/03/2017			01/05/2016	Licence	31/03/2017			01/04/2016	21	1st floor	28/02/2016
748	Honey & Co	01/03/2016	28/02/2017			31/04/2016	Licence	28/02/2017				26	1st floor	24/02/2016
749	Vision Test & Equity	02/03/2016	28/02/2017			31/04/2016	Licence	28/02/2017						24/02/2016
750	CH Textiles	02/05/2016	30/04/2017			02/06/2016	Licence	30/04/2017			02/05/2016	17	1st floor	24/02/2016
751	Vision Test & Equity	01/03/2017	28/02/2018			01/04/2017	Licence	28/02/2018				3c	ground floor	24/02/2016
696	Henderson Architecture	01/11/2015				31/04/2016	Virtual Office					VirtualRoom_104	Virtual Floor	
697	Imagize Innovation Studios	01/11/2015				31/04/2016	Virtual Office					VirtualRoom_105	Virtual Floor	
699	Hampel Properties	26/10/2015				31/04/2016	Virtual Office							

Server: RST1 Database: IBCSOData\InnovationApp\Users: CHN1 (20161)

Version: 1.27.1.37

CAPS: RUM

25/03/2016 14:29

Sorting

The list can be sorted on any of the columns, simply by clicking on the relevant column heading - once to sort in ascending order, again to sort in descending order.

Filtering

To filter the list by a particular column or group of columns, click on the down-arrow to the right of the column heading(s), and either pick one of the options presented in the drop-down list, or select '(Custom...)' and then define a custom filter option using the following form:

Custom Filter

Show rows where:

End Date

is greater than or equal to 30/06/2016

☒ AND ☐ OR

OK Cancel

Linking Customer Documents

Documents can be linked to individual Customer accounts, allowing the creation of a central repository of information relating to a customer, including email communications and other general documents.

All the standard Windows document types are supported, including:

- MS Word Documents (.doc and .docx)
- MS Excel Spreadsheets (.xls and .xlsx)
- Adobe Portable Document Format (.pdf)
- MS Outlook Email Message (.msg)
- HTML Document (.html)

To link a document to a Prospect, follow these steps:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. Select and if necessary expand the appropriate customer category from the list of categories.
3. Select and if necessary expand the appropriate customer name from the list of records.
4. Select the **Documents** node related to the appropriate customer record.
5. Click on the **Link** button.
6. Click on the **Select Document** button.
7. Navigate to the relevant folder, and select the document to link from the folder directory.
8. Click on the **Open** button to select the document.
9. If you wish to preview the document before it is linked to the customer, click on the **View Document** button to open it.
10. To link the selected document, click on the **OK** button.
11. This will create a separate internal copy of the document, ensuring that it can't be accidentally deleted or amended.

To view a linked document, follow these steps:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. Select and if necessary expand the appropriate customer category from the list of categories.
3. Select and if necessary expand the appropriate customer name from the list of records.
4. Select the **Documents** node related to the appropriate customer record.
5. Select the required document from the displayed list of linked documents.
6. Either click on the **View Document** button, or double-click on the document name in the list.
7. The document will open for viewing in the appropriate application.

Rooms & Services

Meeting room hire and any other ad-hoc chargeable services are managed via two main modules, the **Room Bookings Diary** and the **Customer Service Logging** module, both located in the **Rooms & Services** section of the control panel.

Booking Meeting Rooms

To record a new meeting room booking:

1. Open the **Room Bookings Diary** module, by clicking on the **Room Bookings Diary** option in the **Rooms & Services** section of the control panel.
2. Select the date of the booking from the drop-down calendar on the toolbar, to display the meeting diary for that date.
3. Identify the column relating to the required meeting room, and double-click on the row corresponding to the desired start time.
4. If the system has been configured to allow different room rates for different types of usage, then select the appropriate usage type from the displayed list, and click on the **OK** button.
5. The *Conference Booking* form is now displayed, ready to be filled in with the details of the booking:
 - a. *Location* - this shows the room selected from the diary, but can be amended at this stage, if required.
 - b. *Layout* - this will default to the standard layout configuration, but can be altered to suite the customer's requirements.
 - c. *Start Time* - this will be set according to the date and time selected on the diary, but again can be altered if necessary.
 - d. *End Time* - this will default to 15 mins after the start time. Amend to indicate the desired end time of the booking.
 - e. *Customer* - Select the name of the company making the booking from the drop-down list of the centre's customers.
 - f. *Booked By* - enter the name of the person from the customer company requesting the booking (not the name of the user taking the booking!)
 - g. *Attendees* - if desired, specify the number and/or names of the attendees.
 - h. *Rates* - the system will pick up the default hourly and daily rates for the booking, based on the type of usage of the room, the customer's resident status and any standard discounts that the customer receives. For users with the appropriate level of permission, these rates can be overridden where special deals have been agreed.
 - i. *Status* - the booking status will default to *Confirmed*, but can be set to *Provisional* or *Reserved*, as appropriate.
 - j. *Customer Ref* - any reference that the customer would like to appear on their invoice (such as a purchase order number) can be entered here.

6. Finally, any additional services or equipment required, whether chargeable or not, can be selected from the *Additional Services* list as follows:
 - a. Identify and select the required service.
 - b. Double-click on the selected service.
 - c. From the *Service Requirements* prompt, specify either the *Quantity* required or the *Cost Price* of the service, depending on whether the service has a unit price or is charged at a mark-up percentage.
 - d. If a pop-up reminder is required for this service, tick the *Reminder* check-box, and specify the reminder date and time.
 - e. Ensure that the *Notes* contain as much detail as possible regarding the exact nature of the service requested.
 - f. Click on the **Update** button.
 - g. If any further services are required, repeat this process.
7. Click on the **Save & Close** button to record the booking.
8. The system will now display a *Meeting Booking Confirmation* report, which contains full details of the booking recorded, including a full breakdown of the standard terms and conditions, and an optional section for the customer to sign and date. This report can be printed or converted to *pdf* format and emailed to the customer.

Amending Meeting Room Bookings

To amend an existing booking, simply locate the booking on the diary and double-click on the entry. Any of the details can then be amended, providing the booking hasn't already been checked-out (see below for details.)

Checking Out Meeting Room Bookings

Before a meeting booking is ready for billing, it must be checked-out, as follows:

1. Select the completed booking from the diary and double-click on the entry.
2. Ensure that all the details of the booking are correct, including the end time, where the meeting may have run beyond its scheduled end time, and the list of additional services used.
3. Click on the **Check Out** button.
4. At the confirmation prompt, click the **Yes** button to proceed with the check-out.
5. If the booking is to be transferred to the customer's account, for billing as part of their monthly service invoice, click on the *No* button when prompted to '*Create an Instant Invoice for this Booking?*'
6. The booking is now marked as completed and awaiting billing.

Checked-out bookings are marked as read-only, and cannot be amended. To amend a booking once it has been checked-out, the check-out must first be reversed, as follows:

1. Select the checked-out booking from the diary and double-click on the entry.
2. Click on the **Undo** button.
3. The check-out has now been reversed, and the booking can be amended as required.

Logging Services

Ad-hoc services, such as faxing or photocopying, can be logged against a customer's account as and when they are used, allowing a complete history of service usage to be included with the customer's service invoice.

To log a service charge against a customer, use the following procedure:

1. Open the **Customer Service Logging** module, by clicking on the **Customer Service Logging** option in the **Rooms & Services** section of the control panel.
2. Identify and locate the appropriate general service type, and then, if appropriate, the specific sub-category of service from the displayed list.
3. Double-click on the required service description to open the logging section to the right of the services list.
4. Select the *Customer* account from the drop-down list of customers.
5. Specify the price accordingly:
 - a. If the selected service has a price per unit, then specify the number of units to be charged for in the *Quantity* field, either by using the up/down arrows, or keying in the value.
 - b. If the selected service is charged as a marked-up percentage, then enter the *Cost Price* in the upper currency field and allow the system to work out the total charge to the customer.
 - c. If the selected service has no fixed pricing, then specify the *Quantity* (if appropriate) and then key in the *Total* value in the currency field.
6. If the service charge relates to a specific date, then ensure that the *Include Date* check-box is ticked, and that the specified date is correct. Otherwise, un-tick the check-box.
7. Ensure that the *Notes* give a full and precise description of the service provided, as these will appear on the customer's service charge documentation.
8. Click on the **Log** button.
9. To log another service of the same type to another customer, repeat the procedure from step 4.
10. When all services of the specified type have been logged, click on the **Close** button, and then repeat the procedure, from step 2, for the next service type.

Once a service charge has been logged in this manner, the details of the service appear in the *Last Entry* notes field, directly above the logging section of the screen. This identifies that the previous entry has been successfully logged to the customer's account, and also provides a visual 'bookmark' in the scenario where a number of charges are being logged from a separate list.

N.B. The system has been designed to simplify the logging of similar services to multiple customers, such as when logging photocopying charges from a report generated by the photocopying machine. Therefore, once a service has been logged, the system will remain in the logging section, anticipating the logging of a further service of the same type. To log a different type of service, first click on the **Close** button before selecting the new service type.

Viewing & Amending Logged Services

Once a service has been logged, there are two additional methods of viewing the details of the service, to ensure that it has been logged correctly.

1. The *Services* section of the **Customers** module displays all unbilled services logged against a customer's account.
2. The **Services Log** module, located in the **Rooms & Services** section of the control panel, displays a full list of all unbilled services across the entire centre.

Both of these lists are displayed in descending chronological order, in order to facilitate the location of recently-logged items. They also both provide options to amend and delete logged services prior to billing.

Checking Services

Other than the visual means of checking the details of logged services, detailed above, there are several reports that enable the cross-checking of logged services against any external sources.

1. The *Unbilled Services* report, which can be run either from the **Business Centre Reports** module or from the **Print** button on the **Services Log** module, lists all unbilled services, categorised by services type.
2. The *Meeting Room Monthly Listing* report, accessed from the **Business Centre Reports** module gives full details of all meeting room bookings taken in the specified month.

Maintaining Room Details

Each room record stores various parameters relating to its size and various charging rates. To view details of a room:

1. Open the **Room Bookings Diary** module, by clicking on the **Room Bookings Diary** option in the **Rooms & Services** section of the control panel.
2. Select and expand the node relating to the type of room to be viewed.
3. If the room is an Office, select and expand the node relating to floor on which the room is located.
4. Select and expand the node relating to the specific room.
5. Click on the **Room Details** node related to the selected room.
6. Details of the room can now be viewed in the right-hand panel and, depending on user permissions, can be amended.

To add a new room to the centre:

1. Open the **Room Bookings Diary** module, by clicking on the **Room Bookings Diary** option in the **Rooms & Services** section of the control panel.
2. Right-click on the left-hand rooms list, and click on **Add Room** from the pop-up menu.
3. Enter the room details and click on the **Update** button to save.

Invoicing

Invoicing can be divided into two main categories, *Rental* and *Service* invoicing.

Rental Invoicing

Customer's office rental is charged in advance. Rental invoices are normally raised on a monthly basis and dated the first of the month. Rental invoice can be raised several days in advance of the actual invoice date, providing all office rental details for the forthcoming month have been correctly configured, as follows:

1. Open the **Rental Invoices** module, by clicking on the **Rental Invoices** option in the **Invoicing** section of the control panel.
2. When prompted for the *Rental Invoice Date*, ensure that the default date specified is the *first* day of the month in which the invoices are being raised. If not, then select the appropriate date. The invoice date **must** be the *first* day of the month.
3. Details of customers requiring rental invoices for the following period are calculated, and the details are shown in the *Rental Invoices* screen.
4. The options available at this point are as follows:
 - a. **Change Address** - this allows the default invoice address to be changed on a one-off basis. Any additional address specified on the customer's record can be selected, or a one-off address can be entered.
 - b. **Centre's Address** - if the invoice is to be hand-delivered to the customer's office, then the invoice address can be changed to the centre's address by clicking on the **Centre's Address** button.
 - c. **Customer Ref** - the *Customer Ref* field will default to 'Rental', but can be changed to include any specific detail that the customer requires, such as a purchase order number, by modifying the contents of this field.
 - d. **FAO** - the *FAO* field will default to the customer's specified *Accounts Contact*. This can be changed by modifying the contents of this field.
 - e. **Delete Invoice** - the **Delete Invoice** button will remove the current invoice from the batch of rental invoices. This should only be used to allow this invoice to be raised at a later date. Where a customer is no longer resident, and therefore no longer requires a rental invoice, this should be specified by putting an End Date against the customer's licence details(s).
 - f. **Preview** - This option displays a fully-formatted preview of the invoices to be included in the batch, for checking purposes.
 - g. **Next/Previous** - the large arrow buttons below the invoice details will change the current invoice details accordingly.
5. If any errors are identified in the displayed invoice details for any customer, then click on the **Cancel Invoices** button to cancel the creation of the rental invoices. Then make the necessary changes to the customer's licence details before re-running the **Rental Invoices** module.
6. Once all invoice details have been verified, click on the **Create Invoices** button to finalise the invoices. The system will then prompt to print the customer's copies of the invoices, followed by the accounts copies, as required.

Service Invoicing

To run the monthly service invoices:

1. Open the **Services Invoices** module, by clicking on the **Services Invoices** option in the **Invoicing** section of the control panel.
2. Select all accounts for invoicing, regardless of whether every customer has used any services within the past month, by clicking on the **Select All** button.
3. Click on the Extract New Invoice Details button
4. When prompted for the *Service Invoice Date*, ensure that the default date specified is the *last* day of the month for which the invoices are being raised. If not, then select the appropriate date. N.B the invoice date **must** be the *last* day of the month.
5. The system will first check for any meeting room bookings within the specified period that have not been checked-out, ready for billing. If any are found then these will be displayed in a report and the system will prevent any further steps from being taken until all such exceptions have been taken care of.
6. The system then extracts the details of all services and meeting room usage logged in the past month into a temporary table, which can then be used to generate the invoices.
7. Prior to getting to the invoice details screen, it is possible to run a preview of the invoice backing sheets, by clicking on the **Backing Sheet Preview** button. This allows a final check of the logged services to be performed prior to generating the invoices.
8. If at this point any errors or omissions are identified, these can be rectified by amending or adding to the current set of unbilled services. However, please note that performing any such amendments or additions will require the **re-extraction** of the invoice details (from point 3. above) in order for these changes to be reflected in the current invoice batch.
9. Once all the logged services have been verified, click on the **Create Invoices** button, which will accumulate all similar services for each customer, and generate a standard invoice layout summarising each service type, with the details of the first invoice being displayed in the *Service Invoices* screen.
10. The options available at this point are as follows:
 - a. **Change Address** - clicking on the **Change Address** button allows the default invoice address to be changed on a one-off basis. Any additional address specified on the customer's record can be selected, or a one-off address can be entered.
 - b. **Centre's Address** - if the invoice is to be hand-delivered to the customer's office, then the invoice address can be changed to the centre's address by clicking on the **Centre's Address** button.
 - c. **Customer Ref** - the *Customer Ref* field will default to 'Service', but can be changed to include any specific detail that the customer requires, such as a purchase order number, by modifying the contents of this field.
 - d. **FAO** - the *FAO* field will default to the customer's specified *Accounts Contact*. This can be changed on a one-off basis by modifying the contents of this field.

- e. **Delete Invoice** - the **Delete Invoice** button will remove the current invoice from the batch of service invoices. This should only be used to allow this invoice to be raised at a later date.
 - f. **Preview** - This option displays a fully-formatted preview of the invoices to be included in the batch, for checking purposes.
 - g. **Next/Previous** - the large arrow buttons below the invoice details will change the current invoice details accordingly, allowing the invoices to be viewed and checked individually.
11. If any errors are identified in the displayed invoice details for any customer, then click on the **Cancel Invoices** button to cancel the creation of the service invoices. Then make the necessary changes to the customer's unbilled services details before re-extracting the service invoices.
 12. Once all invoice details have been verified, click on the **Create Invoices** button to finalise the invoices. The system will then prompt to print the customer's copies of the invoices, followed by the accounts copies, as required.

Credit Notes

The system has a means of automating the production of credit notes based on previously-issued invoices. Credit notes can either correspond to single lines on an invoice, or to the whole invoice. Additionally, where an invoice is being credited back in full, there is the option to restore all the services that made up the invoices value to the customer's *Unbilled Services* list, thus allowing any errors to be corrected and a new invoice to be raised with the correct values.

To credit an invoice in full, simply:

1. Open the **Credit an Invoice** module, by clicking on the **Credit an Invoice** option in the **Invoicing** section of the control panel.
2. Select and expand the appropriate customer type from the list, to show the customers list.
3. Select and expand the required customer detail from the customers list, to show all invoices previously issued to this customer, displayed in descending order.
4. Select the line corresponding to the invoice to be credited.
5. Click on the **Credit Invoice** button.
6. At the prompt 'Mark the Services as Unbilled, Ready for Re-invoicing?', respond as follows:
 - a. **Yes** - if the invoice is being credited because some or all of the service values were incorrect, and a new invoice is to be issued.
 - b. **No** - if the invoice was raised in error, and no new invoice is required for these services.
 - c. **Cancel** - if no credit note is to be created against this invoice.
7. In the lower portion of the screen will now be displayed a list of all the lines to be inserted on the credit note, corresponding to the lines on the selected invoice. If these details are as required then click on the **Create Credit** button at the bottom of the screen.
8. When prompted for the credit note date, either specify today's date or, if the credit note is being raised soon after the invoice, specify the date of the invoice as the credit note date.
9. The system will then prompt to print the customer's copy of the credit note, followed by the accounts copy.

To credit individual lines of an invoice:

1. Open the **Credit an Invoice** module, by clicking on the **Credit an Invoice** option in the **Invoicing** section of the control panel.
2. Select and expand the appropriate customer type from the list, to show the customers list.
3. Select and expand the required customer detail from the customers list, to show all invoices previously issued to this customer, displayed in descending order.
4. Select and expand the invoice to be credited.
5. Select the invoice line to be credited.
6. Click on the **Credit Line** button.
7. In the lower portion of the screen will now be displayed the details of the credit note line to be created, based on the selected invoice line. To credit the invoice line in full, leave the *Goods* value at the full amount. To produce a part-credit, amend the *Goods* value to reflect the amount to be credited back.
8. If the invoice line is being credited in full, but the services are not to be re-invoiced at a different amount, then remove the tick from the *Re-invoice* check-box.
9. In the lower portion of the screen will now be displayed a list containing the line to be inserted on the credit note. If these details are as required then click on the **Create Credit** button at the bottom of the screen. Otherwise, if further lines are required on the credit note then repeat the process from stage 5.
10. When prompted for the credit note date, either specify today's date or, if the credit note is being raised soon after the invoice, specify the date of the invoice as the credit note date.
11. The system will then prompt to print the customer's copy of the credit note, followed by the accounts copy.

Credit Control

The system enables the debtor situation at the centre to be monitored and acted upon in a number of standard ways, using the following procedures.

Viewing Outstanding Transactions

Customer debt can be viewed from the **Customers** module main screen, where the *Age of Debt* box in the top right-hand side shows the current outstanding amount on the customer's account, and how this figure is aged, along with the date of the last payment received.

To view the transactions that make up this debt, simply double-click anywhere on the *Age of Debt* box. This will display a list of outstanding transactions.

Debtors Reporting & Statements

For a detailed breakdown on the current debtor situation across the entire centre, run the **Debtors Report**, as follows:

1. Open the **Business Centre Reports** module, by clicking on the **Business Centre Reports** option in the **Customers** section of the control panel.
2. Double-click on the **Debtors Report** option.
3. At the prompt, select **Yes** to age the debt by due date, as opposed to transaction date, on the report.
4. The report will now be displayed in a preview window, and can either be printed or exported to a file for further manipulation.

Customer statements can be produced at any point. Statements can either be produced for an individual customer or for all customers currently having an outstanding debt.

To generate a statement for a single customer:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. Select the required customer from the list of the centre's customers.
3. From the **Credit Control** menu, select the **Account Statement** option.

To generate a statement for all the centre's debtors:

1. Open the **Customers** module, by clicking on the **Customers** option in the **Customers** section of the control panel.
2. From the **Credit Control** menu, select the **All Statements** option.

Reporting

The main suite of centre reports are to be found in the **Business Centre Reports** module, located in the **Customers** section of the control panel. These reports cover all aspects of the centre, with the exception of the Prospects, reports, which are accessed via the **Prospects** module.

The reports can be classified into three main categories.

Occupancy Reports

There are several reports concerning office and meeting room occupancy within the centre, as detailed below:

- **Occupancy Report** - this is a short term report that calculates total and percentage office occupancy on a week-by-week basis, along with average rates being achieved. This report can be run for any 4-week period, starting from any given Monday.
- **Occupancy Forecast** - this report gives a longer-term view of office occupancy over the next 6 months, based upon known licence details.
- **Meeting Room Occupancy Forecast** - this report summarises total meeting room hours booked, on a room-by-room basis, over the next 6 months, based on current bookings.

Sales Reports

There are a number of reports that detail sales income for the different categories of services offered:

- **Rental Income by Office** - summary of actual office income, office-by-office and month-by-month over a 12 month period.
- **Room Hire by Meeting Room** - this report provides a listing of every meeting room booking occurring in the selected month, with durations, prices and subtotals for individual rooms.
- **Conference Summary Report** - this report give a monthly breakdown of actual and potential meeting room income for a 12-month period, categorised by booking status, based on current bookings.
- **Sales By Category** - this is the primary sales report, detailing all income in the selected period, categorised by service type.
- **Invoice Listing** - this report gives a detailed breakdown of all invoices raised in the selected period, categorised by invoice type (Service, Rental, and Deposit) and can be used to check against an external accounting system, where appropriate.
- **Invoices/Credits Raised** - this report gives details of all income invoiced in the selected period, categorised by customer and then by service type. This can be used to see who the most valuable customers are.

Checking Reports

There are a number of reports that can be useful when verifying that various services have been logged correctly.

- **Unbilled Services Report** - this is the primary month-end checking report, to allow logged services to be compared to any external service charge reports, e.g. photocopier reports. This report gives details of all unbilled services logged against customer accounts, categorised by service type.
- **Unknown Cost Price Report** - this report provides a listing of all marked-up services that have been logged prior to the cost price being known, where the *Unknown Cost Price* tick-box has been checked. Such services will not be invoiced until they have been updated with the correct cost price, so this report should be checked periodically to ensure that no services have been omitted.
- **Recurring Services Report** - this report details all recurring service charges currently configured on the system. N.B. this is not necessarily an accurate reflection of unbilled services for the current month, but rather an indication of what recurring service charges will be logged for next month, based on the current configuration.
- **Meeting Room Monthly Listing** - a listing of all meeting room bookings for the selected month, categorised by booking status, with the option to restrict the report to un-confirmed bookings. Useful for checking booking details and for chasing-up provisional bookings.
- **Booking Exceptions Report** - a listing of all meeting room bookings that have finished, but have yet to be checked-out. Useful for ensuring the diary is kept up-to-date once meetings have finished.
- **Daily Tasks/Bookings** - details all meeting room bookings for a selected date, including all requirements for room layout, number of attendees, additional equipment and catering. Useful for anyone involved in the preparation of meeting rooms or associated catering.
- **Services Schedule** - details of the current prices configured in the system. Useful for checking prices or issuing to customers.

General Reporting

The remainder of the reports in the **Business Centre Reports** module relate to credit control.

- **Deposits Held Report** - total deposit amount held, on a customer by customer basis.
- **Credit Limits Report** - current customer credit limit values.

Clarity Core Support & Assistance

For general support and assistance please call or email our Helpdesk using the below details.

Clarity Core Support

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Clarity User Forum

www.clarityuserforum.com