

Keep It Easy Software

Cloud

User Manual



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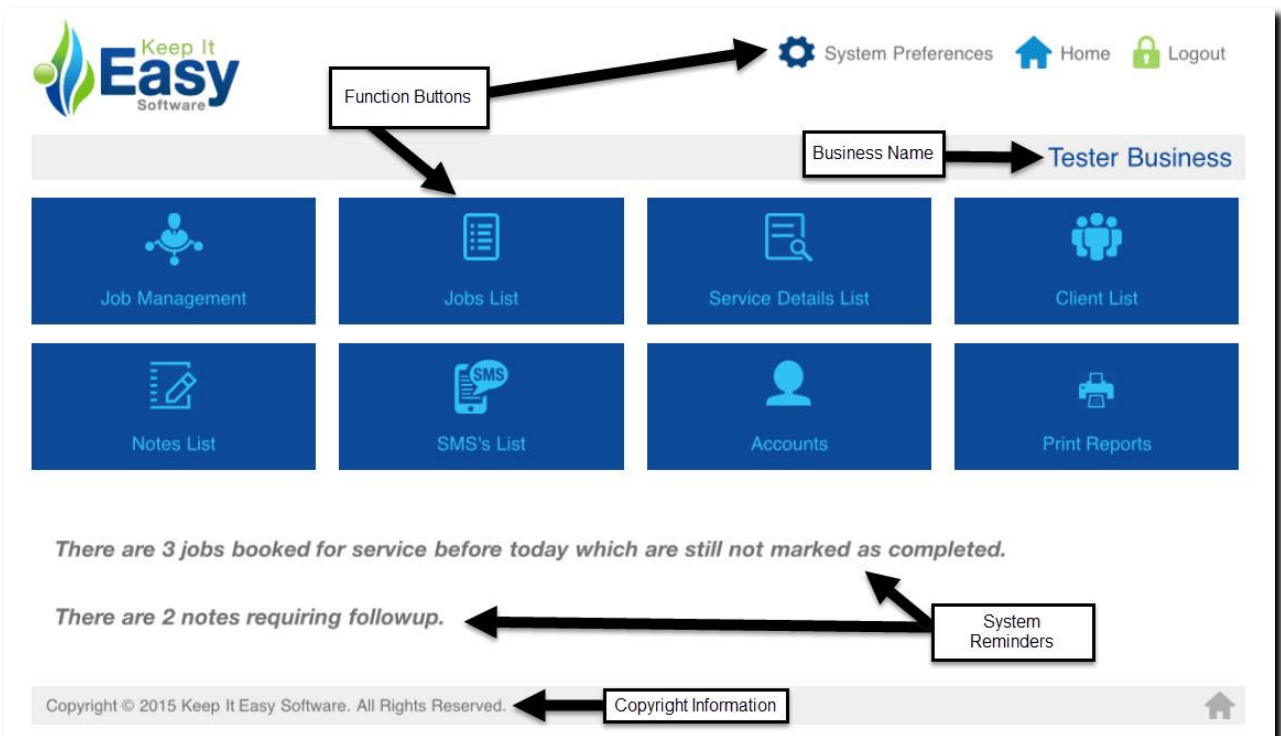
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How to Login

1. Open your web browser and in the URL bar type the following:
www.keepeasy.com.au
2. This will now bring up the Keep It Easy Software website, select the Cloud link.
3. Type in your username and password, fill in the captcha and press the Login button, now you are logged in and ready to start!

Functions

Once you have successfully logged in, you will see the home page as shown below.

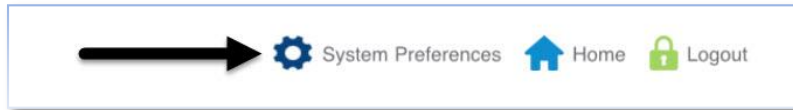


The screenshot displays the Keep It Easy Software Cloud home page. At the top left is the logo. The top right contains navigation links: 'System Preferences' (with a gear icon), 'Home' (with a house icon), and 'Logout' (with a lock icon). Below the logo, a box labeled 'Function Buttons' has arrows pointing to the 'Jobs List' button and the 'System Preferences' link. A box labeled 'Business Name' has an arrow pointing to the text 'Tester Business'. The main area features eight blue buttons in a 2x4 grid: 'Job Management', 'Jobs List', 'Service Details List', 'Client List', 'Notes List', 'SMS's List', 'Accounts', and 'Print Reports'. Below the buttons, there are two status messages: 'There are 3 jobs booked for service before today which are still not marked as completed.' and 'There are 2 notes requiring followup.'. A box labeled 'System Reminders' has an arrow pointing to the second message. At the bottom, a box labeled 'Copyright Information' has an arrow pointing to the footer text: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.'.

System Preferences

Once you have logged into Keep It Easy Software Cloud, you will need to set up the System Preferences. These are specific to your business, such as your Service Categories, Payment Options, the Names of your Operators and so forth.

To set up the System Preferences, click on the **System Preferences** icon as shown below.

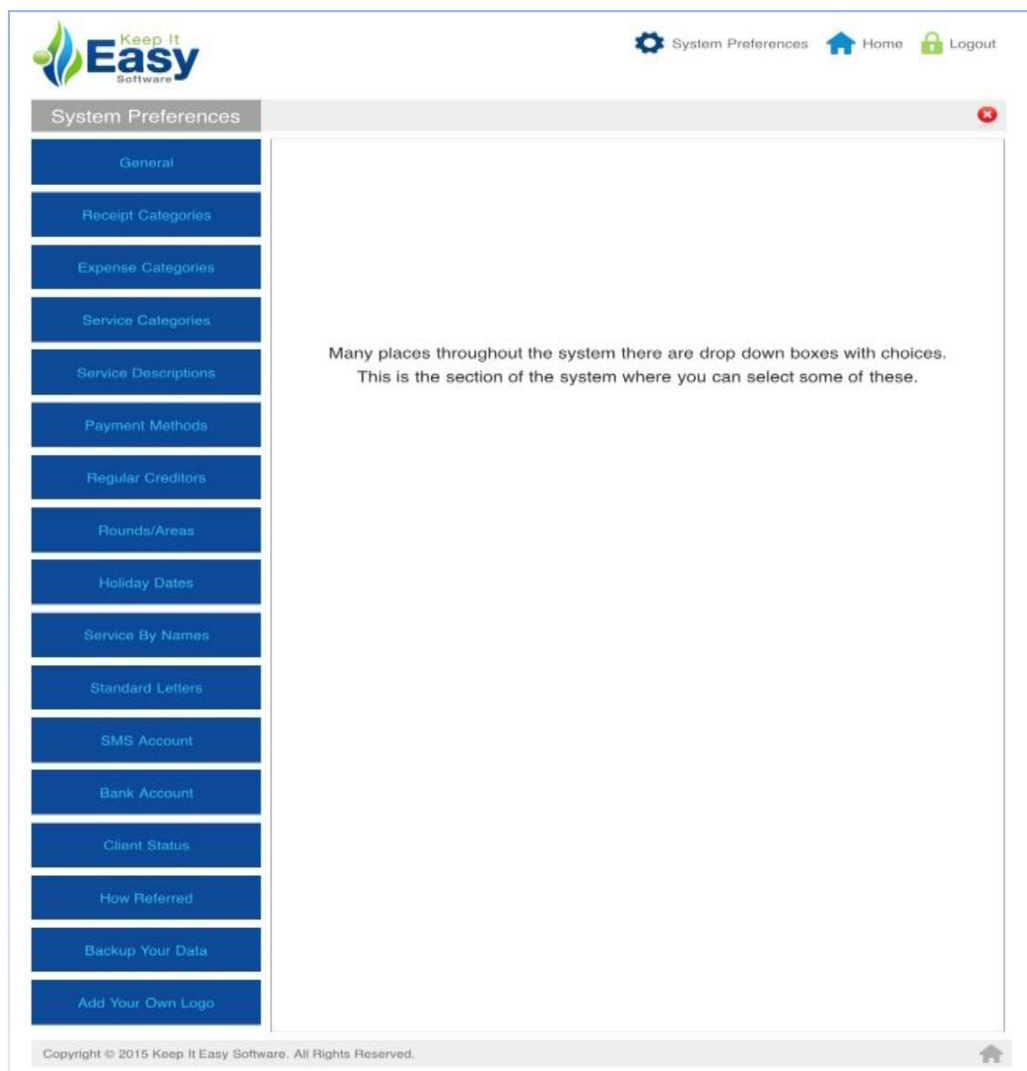


The System Preferences page opens and will display 16 links to help set up Keep It Easy Cloud with your business data.


Please ensure you set up **EVERY** link to avoid any issues later on.

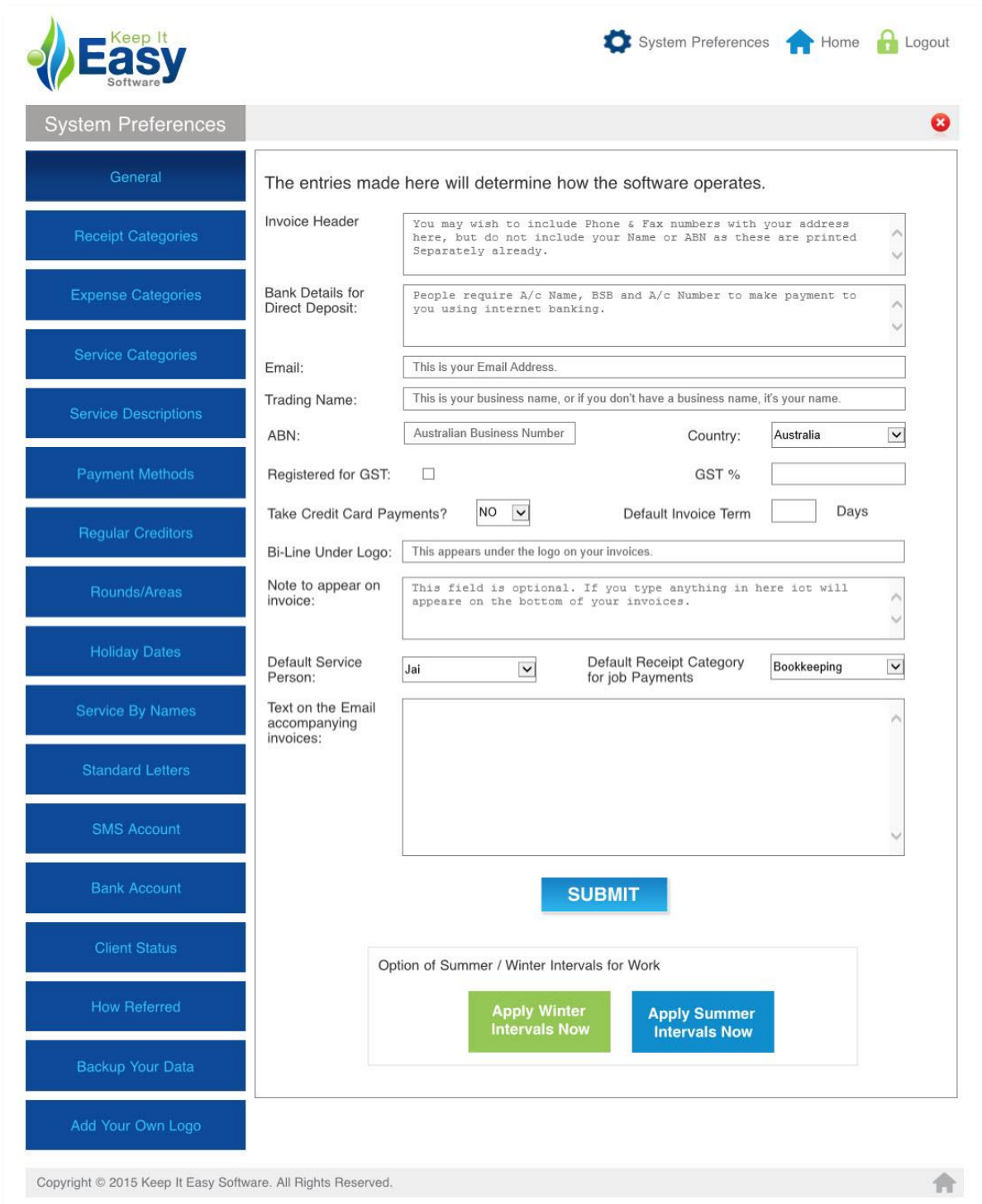
To set your preferences, click the corresponding button on the left to open the corresponding screen and enter the necessary data.

To leave the **System Preferences** screen and return to the **Main Menu** click the **Home** icon on the top right of the screen.



General

Click the **General** link on the left to edit your Software Preferences. The settings on this screen determine how your software operates. After you have filled out **ALL** the information, click the **SUBMIT** button to save the information entered and then press the  button to close the screen and return to the **System Preference** page.



The screenshot shows the 'System Preferences' page with a sidebar on the left containing various settings categories. The 'General' category is selected. The main content area contains a form for general system preferences. At the top of the form is a 'SUBMIT' button. Below the form is a section for 'Option of Summer / Winter Intervals for Work' with two buttons: 'Apply Winter Intervals Now' and 'Apply Summer Intervals Now'. The footer of the page contains the copyright notice and a home icon.

System Preferences

General

Receipt Categories

Expense Categories

Service Categories

Service Descriptions

Payment Methods

Regular Creditors

Rounds/Areas

Holiday Dates

Service By Names

Standard Letters

SMS Account

Bank Account

Client Status

How Referred

Backup Your Data

Add Your Own Logo

The entries made here will determine how the software operates.

Invoice Header: You may wish to include Phone & Fax numbers with your address here, but do not include your Name or ABN as these are printed Separately already.

Bank Details for Direct Deposit: People require A/c Name, BSB and A/c Number to make payment to you using internet banking.

Email: This is your Email Address.

Trading Name: This is your business name, or if you don't have a business name, it's your name.

ABN: Australian Business Number

Country: Australia

Registered for GST: ☐

GST %

Take Credit Card Payments? NO

Default Invoice Term Days

Bi-Line Under Logo: This appears under the logo on your invoices.

Note to appear on invoice: This field is optional. If you type anything in here it will appear on the bottom of your invoices.

Default Service Person: Jai

Default Receipt Category for job Payments: Bookkeeping

Text on the Email accompanying invoices:

SUBMIT

Option of Summer / Winter Intervals for Work

Apply Winter Intervals Now

Apply Summer Intervals Now


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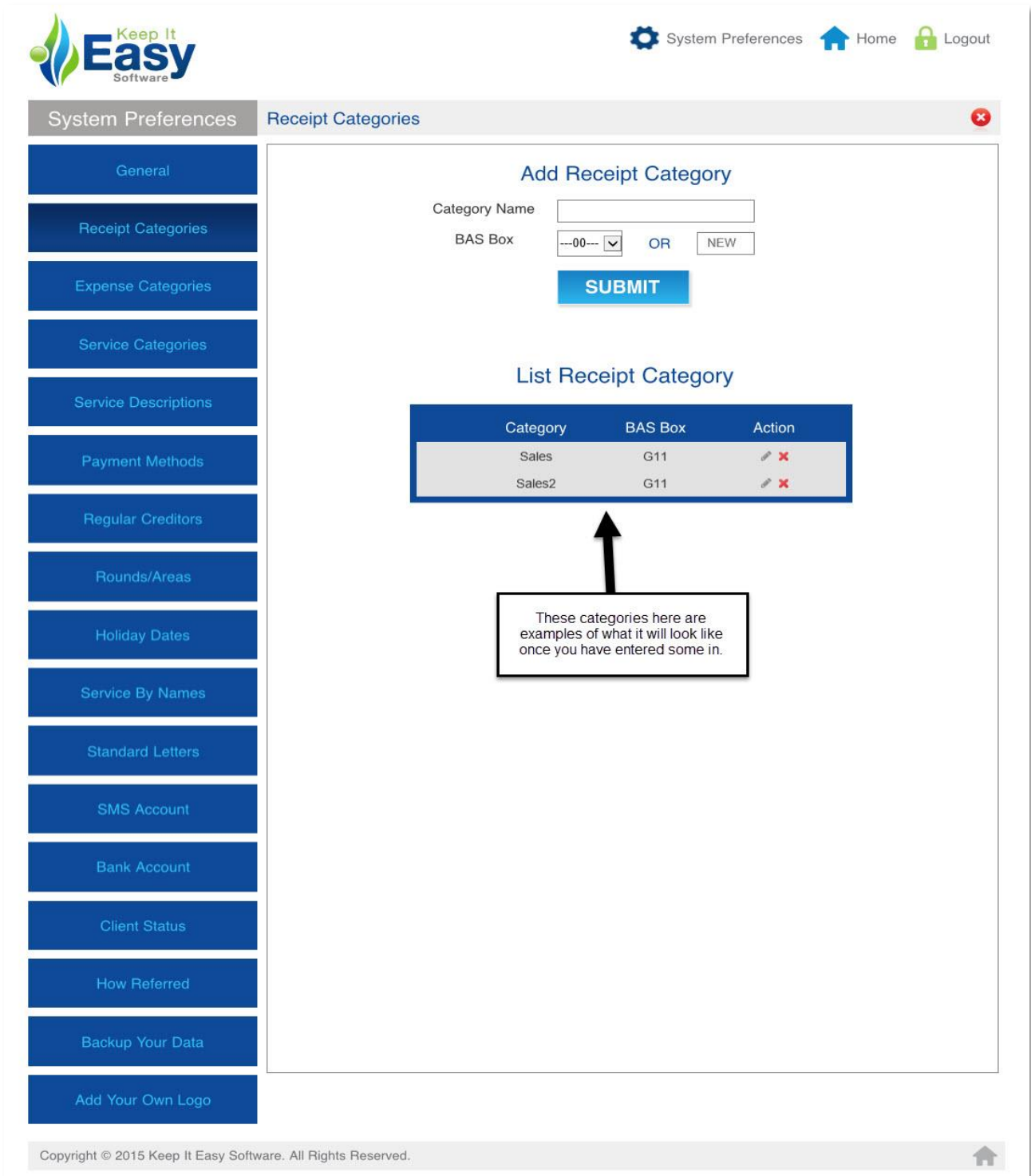
NOTE: Each field explains what type of text should be entered


Print letterhead	<p>Yes: Select yes to print your letters with a letterhead. Details from the field below will be used.</p> <p>No: Select no if you don't want your letters printed with a letterhead.</p>
Address to appear on letterhead	Fill out the address you would like to have printed on your letterhead. Remember to select Yes for the Print letterhead option above.
Invoice header	The details you would like to have shown on your invoices, such as phone and fax numbers
Bank details for Direct Deposit	If your customers want to make payments to you by direct deposit, you will have to provide them with A/c Name, BSB, and A/c number and a reference if applicable.
Take Credit Card Payments?	Select Yes or No
Default Service Person	If you have a default service person, or someone who is responsible for handling most of the work, then select that person here. The name of that person will default whenever you book a new job for a client using the Book Job button on the Client Details screen.
Default Receipt Category for job Payments	Enter your default category for job payments here. When you enter a payment for a job on the Receipt Details screen, the category will default to what you enter here. This saves you the work of having to enter it for every payment/receipt.
Default Invoice Term	The Keep It Easy software uses the default invoice term to calculate the date due and adds the default term to the date invoice issued.
Return Address on Envelope	Will print a return address on the envelope when you print envelopes.
Email	Your business e-mail address.
Bi-Line under Logo	The text you enter here will appear under the logo on your invoices and letters. (Often a catchy phrase).
Note to appear on invoice	The text you enter here will be printed at the bottom of your invoices (e.g special offer).
Trading Name	The official name of your business.
ABN	Your Business Number.
Reg GST?	<p>If you are registered for Goods and Services Tax (GST) then tick the box.</p> <p>GST will not be calculated if you leave this box unticked.</p>
GST percentage	Enter your GST percentage.
Country	Select Australia or New Zealand
Hide suspended clients by default	Select Yes if you want to hide suspended clients by default. Select No if you want to show them.

Receipt Categories

Click the **Receipt Categories** link to setup your receipt categories and their corresponding BAS Boxes. Receipt categories are used on the Job Details page and the Receipt List page.

To exit this screen, click the **SUBMIT** button to save any data entered and then press  to close the screen and return to the **System Preference** page.



System Preferences | **Receipt Categories** 





Add Receipt Category

Category Name


BAS Box OR

SUBMIT

List Receipt Category

Category	BAS Box	Action
Sales	G11	 
Sales2	G11	 

These categories here are examples of what it will look like once you have entered some in.

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Add Receipt Category

To add a new receipt category, type in the Category Name, select a BAS Box or Enter in a new BAS Box and press **SUBMIT**

You will now see your Receipt Category under **List Receipt Category**.


Delete Receipt Category

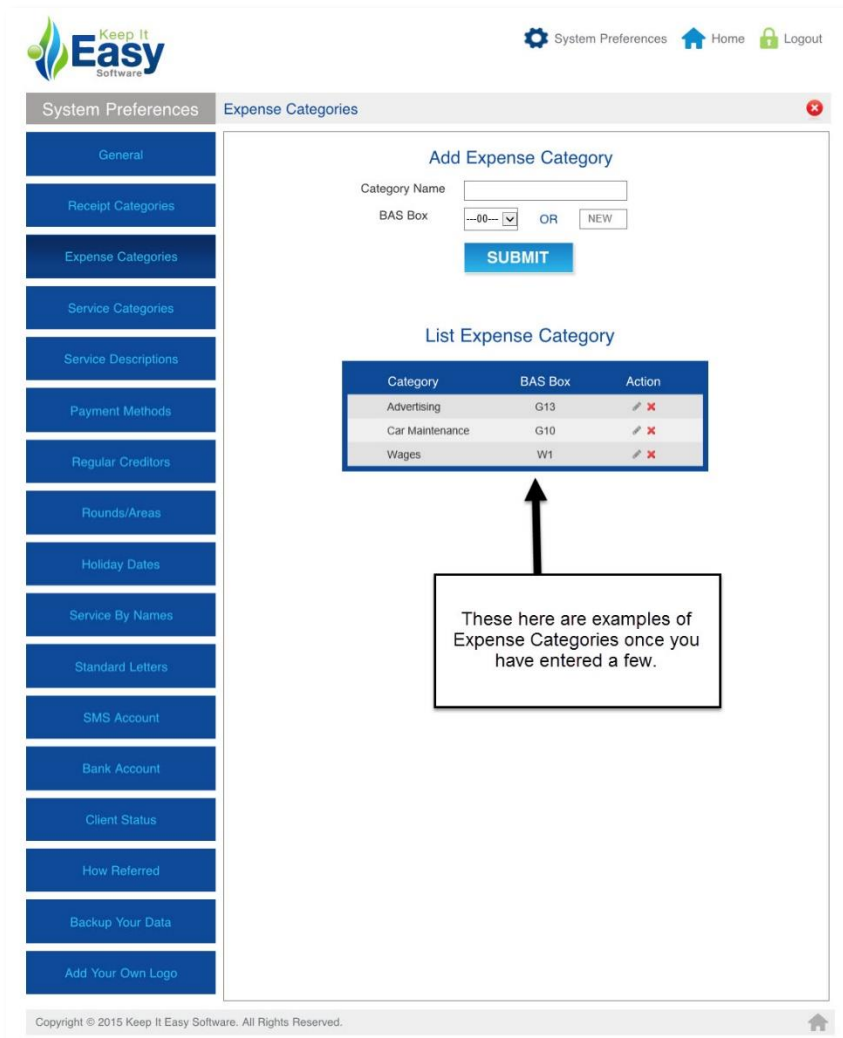
Before you proceed, please read the section on deleting information from your database.


To delete a receipt category, click the  icon next to the category you wish to delete.

Expense Categories

Click the **Expense Categories** button to setup your expense categories and their corresponding BAS Boxes.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



System Preferences | **Expense Categories** 







Add Expense Category

Category Name

BAS Box OR

SUBMIT

List Expense Category

Category	BAS Box	Action
Advertising	G13	 
Car Maintenance	G10	 
Wages	W1	 

These here are examples of Expense Categories once you have entered a few.

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Add Expense Category

To add a new expense category, type in the Category Name, select a BAS Box or Enter in a new BAS Box and press **SUBMIT**

You will now see your Expense Category under **List Expense Category**.


Delete Expense Category

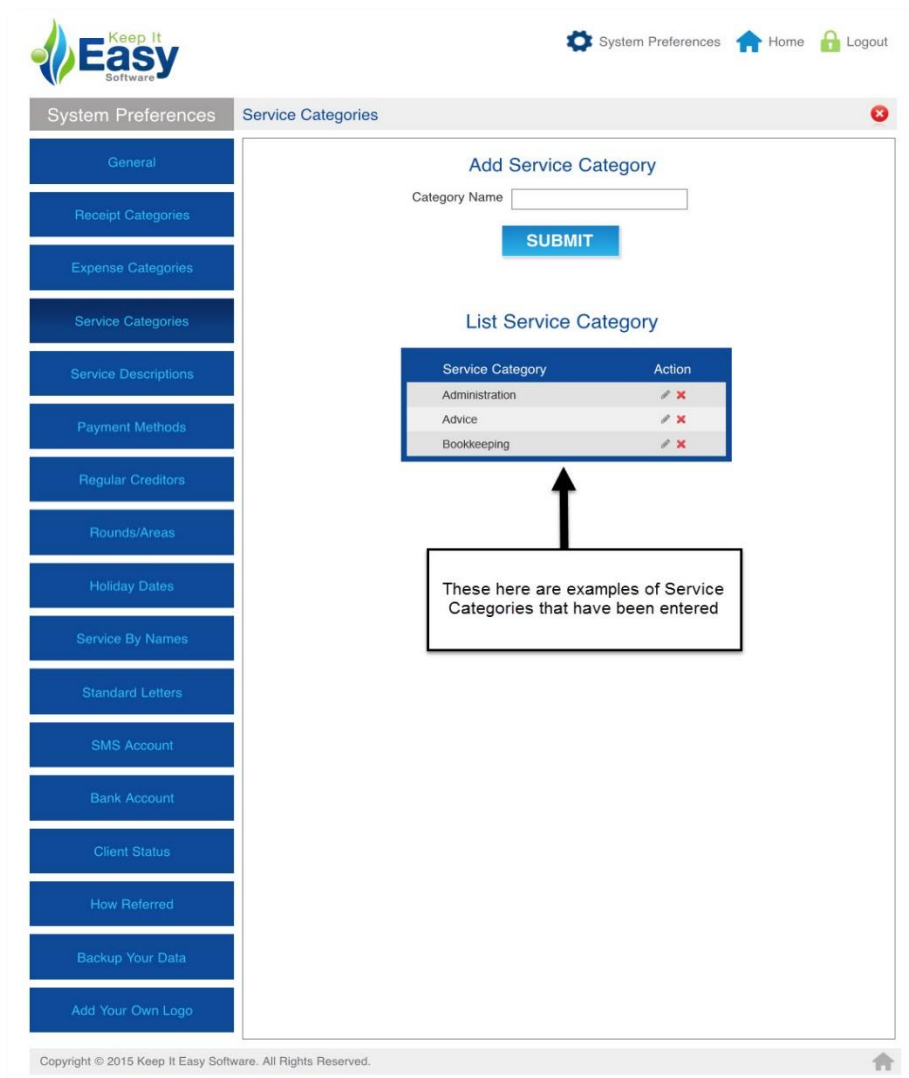
Before you proceed, please read the section on deleting information from your database.

To delete an expense category, click the  icon next to the category you wish to delete.

Service Categories

Click the **Service Categories** button to setup your service categories.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



System Preferences Service Categories

General

Receipt Categories

Expense Categories

Service Categories

Service Descriptions

Payment Methods

Regular Creditors

Rounds/Areas

Holiday Dates

Service By Names

Standard Letters

SMS Account

Bank Account

Client Status

How Referred

Backup Your Data

Add Your Own Logo







System Preferences Home Logout

Add Service Category

Category Name

SUBMIT

List Service Category

Service Category	Action
Administration	 
Advice	 
Bookkeeping	 

These here are examples of Service Categories that have been entered

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Add Service Category

To add a new service category, type in the Category Name and press

SUBMIT

You will now see your Service Category under **List Service Category**.

Delete Service Category

Before you proceed, please read the section on deleting information from your database.


To delete a service category, click the  on next to the category you wish to delete.

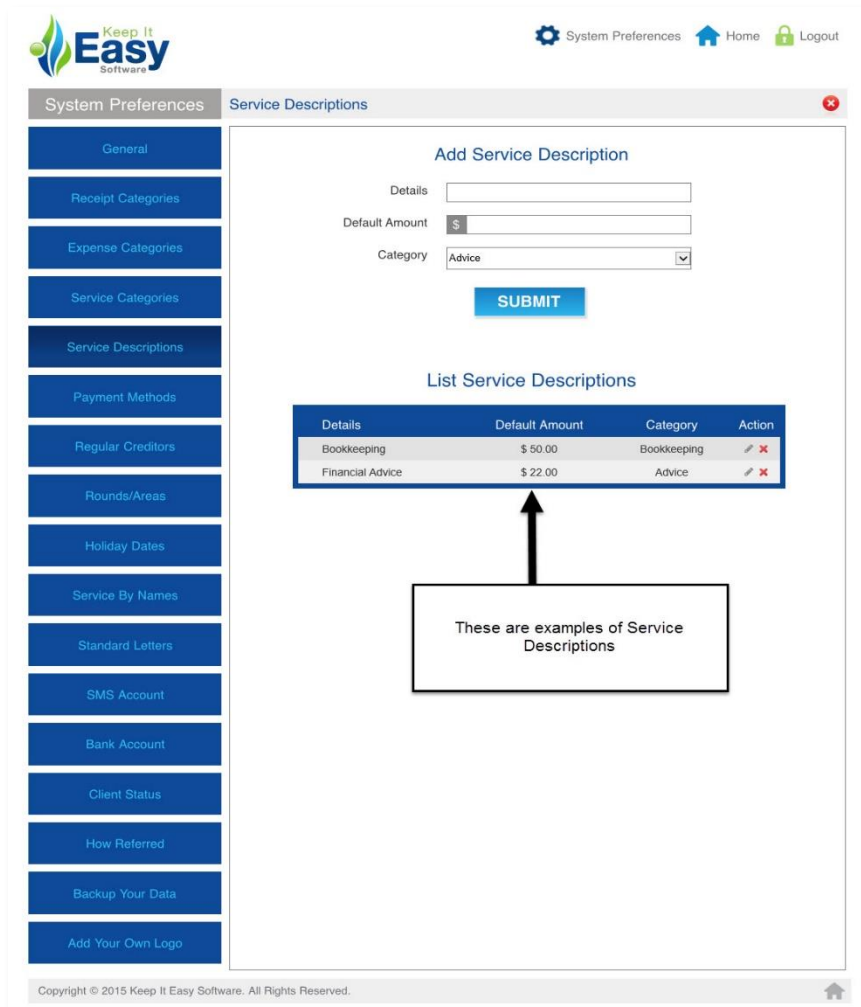
Service Descriptions

Click the **Service Descriptions** link to setup your service descriptions.



Note: The service descriptions you enter here can be used for services as well as for products.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



Add Service Description




Details

Default Amount \$

Category

SUBMIT

List Service Descriptions

Details	Default Amount	Category	Action
Bookkeeping	\$ 50.00	Bookkeeping	 
Financial Advice	\$ 22.00	Advice	 

These are examples of Service Descriptions

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Add Service Description

To add a new service description, type in the Details, Default Amount and the Category. Press **SUBMIT** and it is now saved.

You will now see your Service Descriptions under **List Service Descriptions**.


Delete Service Description

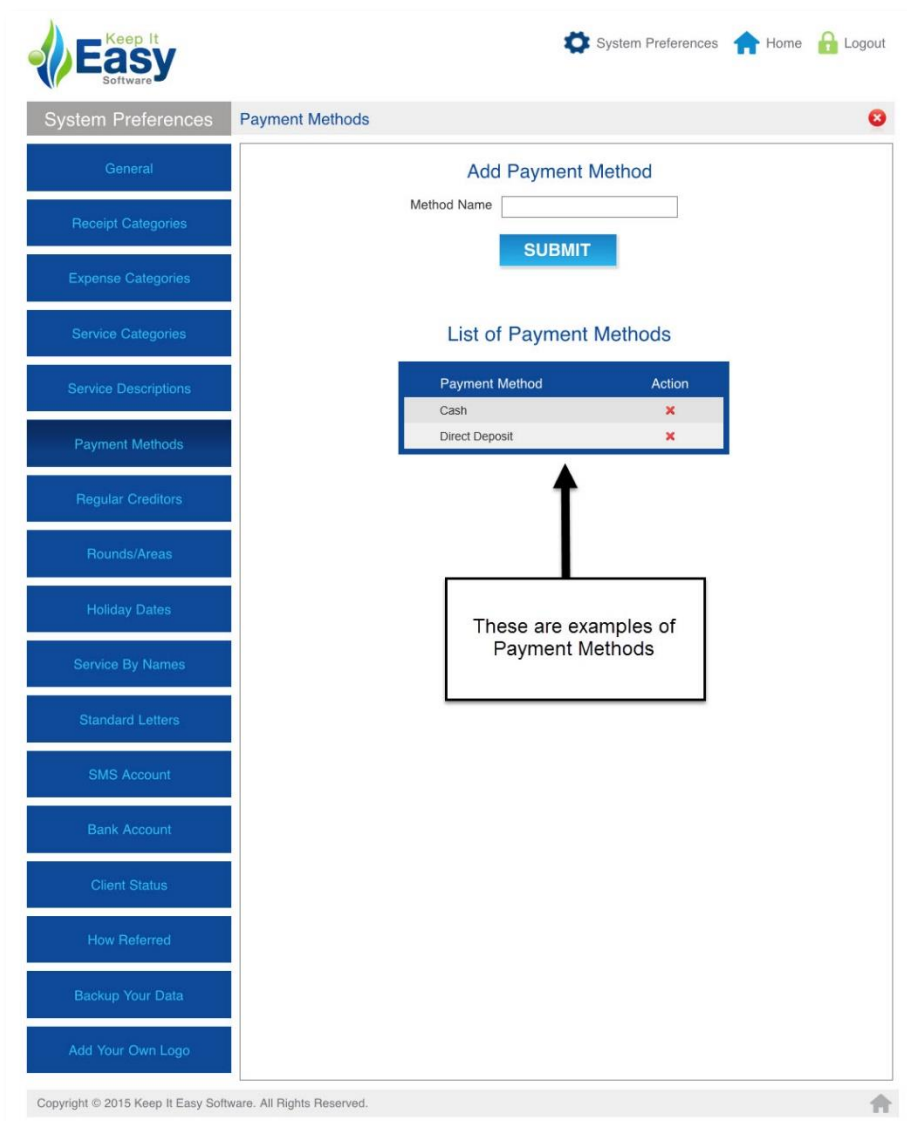
Before you proceed, please read the section on deleting information from your database.


To delete a service description, click the  icon next to the category you wish to delete.

Payment Methods

Click the **Payment Methods** link to setup your accepted payment methods.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.





System Preferences | **Payment Methods** 

Add Payment Method


Method Name

SUBMIT

List of Payment Methods

Payment Method	Action
Cash	
Direct Deposit	

These are examples of Payment Methods

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Add Payment Method

To add a new payment method, enter the Method Name and press

SUBMIT


Delete Payment Method

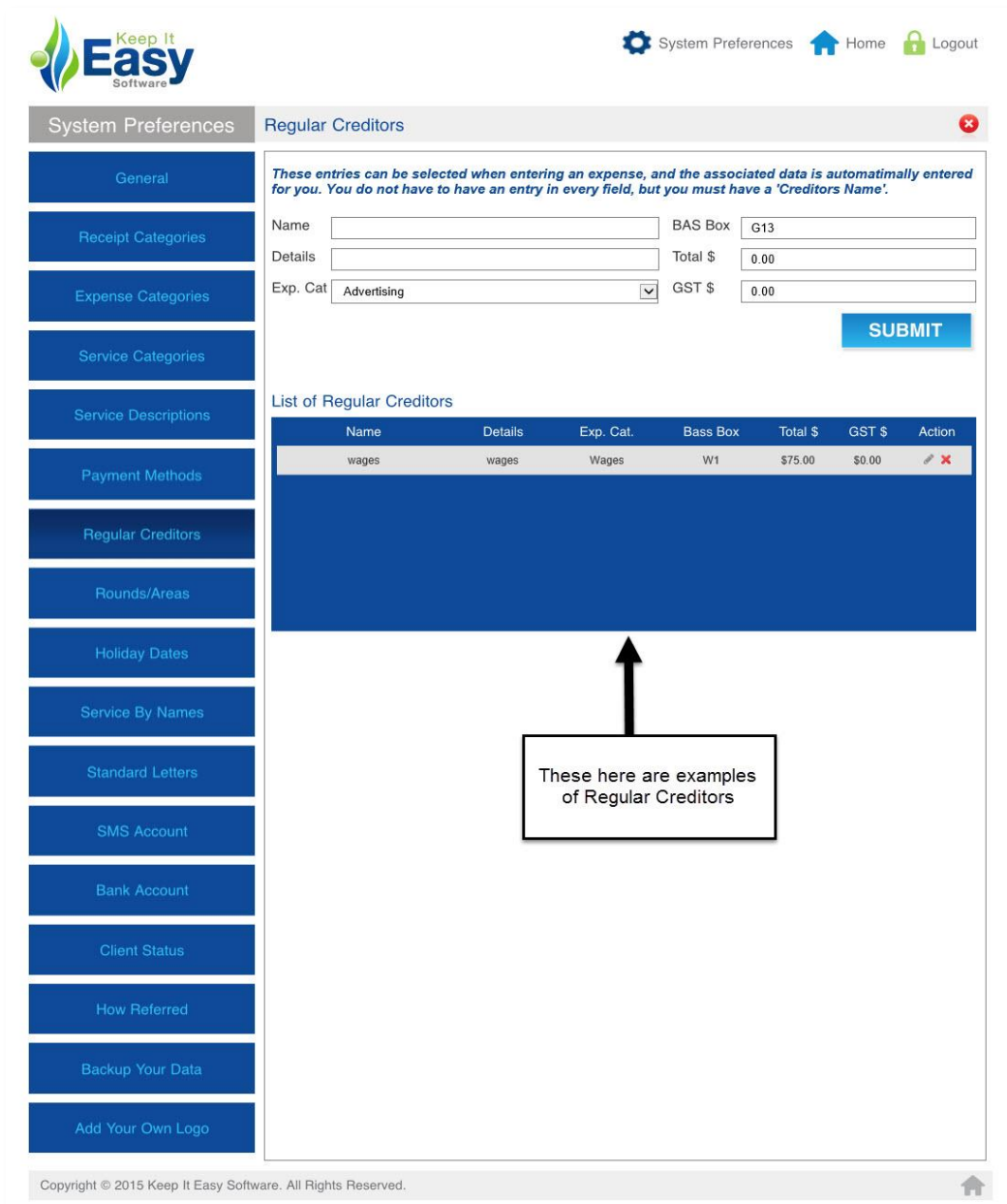
Before you proceed, please read the section on deleting information from your database.


To delete a payment method, click the  icon next to the category you wish to delete.

Regular Creditors

Click the **Regular Creditors** link to setup your regular creditors.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



System Preferences Regular Creditors 

These entries can be selected when entering an expense, and the associated data is automatically entered for you. You do not have to have an entry in every field, but you must have a 'Creditors Name'.



Name BAS Box

Details Total \$

Exp. Cat GST \$

SUBMIT

List of Regular Creditors

Name	Details	Exp. Cat.	Bass Box	Total \$	GST \$	Action
wages	wages	Wages	W1	\$75.00	\$0.00	 

These here are examples of Regular Creditors

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Add Regular Creditor

To add a regular creditor, type in the Name, Details, Expense Category, Total Amount. The BAS Box will be automatically filled out when you select an expense category.

Press **SUBMIT** and your Regular Creditor will be in the **List of Regular Creditors**.


Delete Regular Creditor

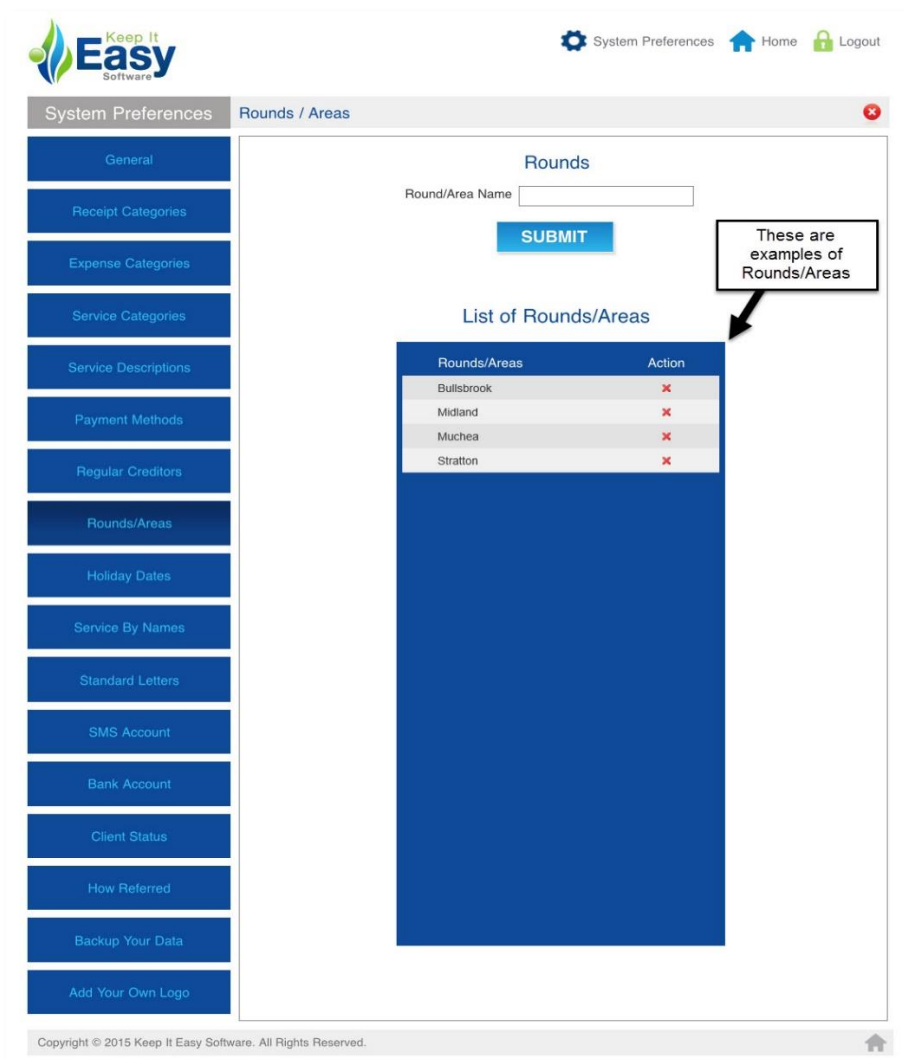
Before you proceed, please read the section on deleting information from your database.

To delete a regular creditor, click the  icon next to the category you wish to delete.

Rounds/Areas

Press the **Rounds/Areas** link to setup the areas you visit.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.







System Preferences **Rounds / Areas**

Rounds

Round/Area Name

SUBMIT


List of Rounds/Areas

Rounds/Areas	Action
Bullsbrook	
Midland	
Muchea	
Stratton	

These are examples of Rounds/Areas


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Add Round/Area

To add a round or area, type in the Round/Area name and press . The Round/Area will be saved and in the **List of Rounds/Areas**.



Delete Round/Area

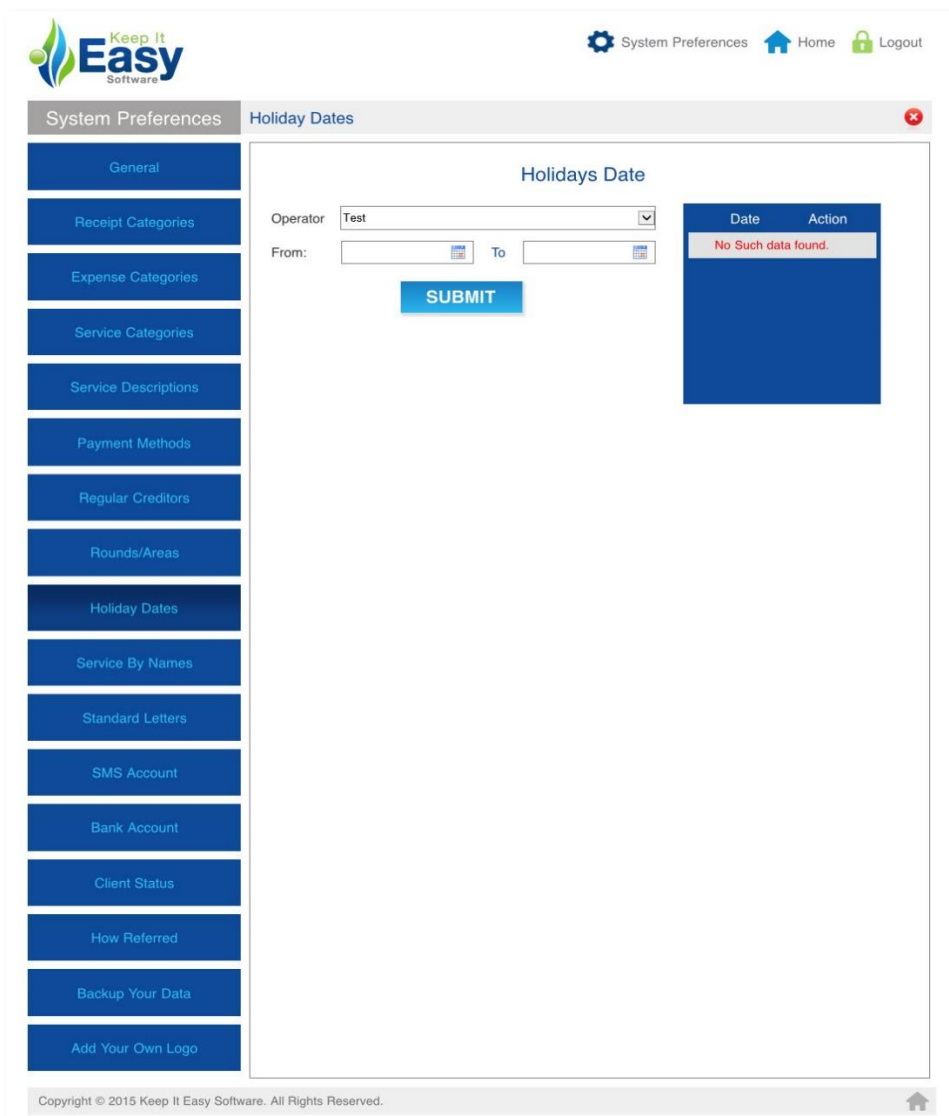
Before you proceed, please read the section on deleting information from your database.

To delete a round/area, click the  icon next to the category you wish to delete.

Holiday Dates

Click the **Holiday Dates** link to setup holidays for your operators for the year. The system will produce a warning when you try to book a job on a day you have marked as a holiday for the specified operator.

To exit this screen, press the  button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



The screenshot shows the 'Holiday Dates' screen within the 'System Preferences' section. The left sidebar contains a list of system preference categories, with 'Holiday Dates' selected. The main content area is titled 'Holidays Date' and features a form with the following elements:

- Operator:** A dropdown menu currently showing 'Test'.
- From:** A date input field with a calendar icon.
- To:** A date input field with a calendar icon.
- SUBMIT:** A blue button to save the data.
- Table:** A table with columns 'Date' and 'Action'. It currently displays the message 'No Such data found.'

At the top right of the interface, there are links for 'System Preferences', 'Home', and 'Logout'. The footer contains the copyright notice: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.'

Add Holiday Date

To add a holiday date, choose an operator and click your cursor on the calendar **From** and **To** field, click on the desired dates and the date/s will appear in the list.

Alternatively, you can type the dates in the **From** and **To** fields.


Delete Holiday Date

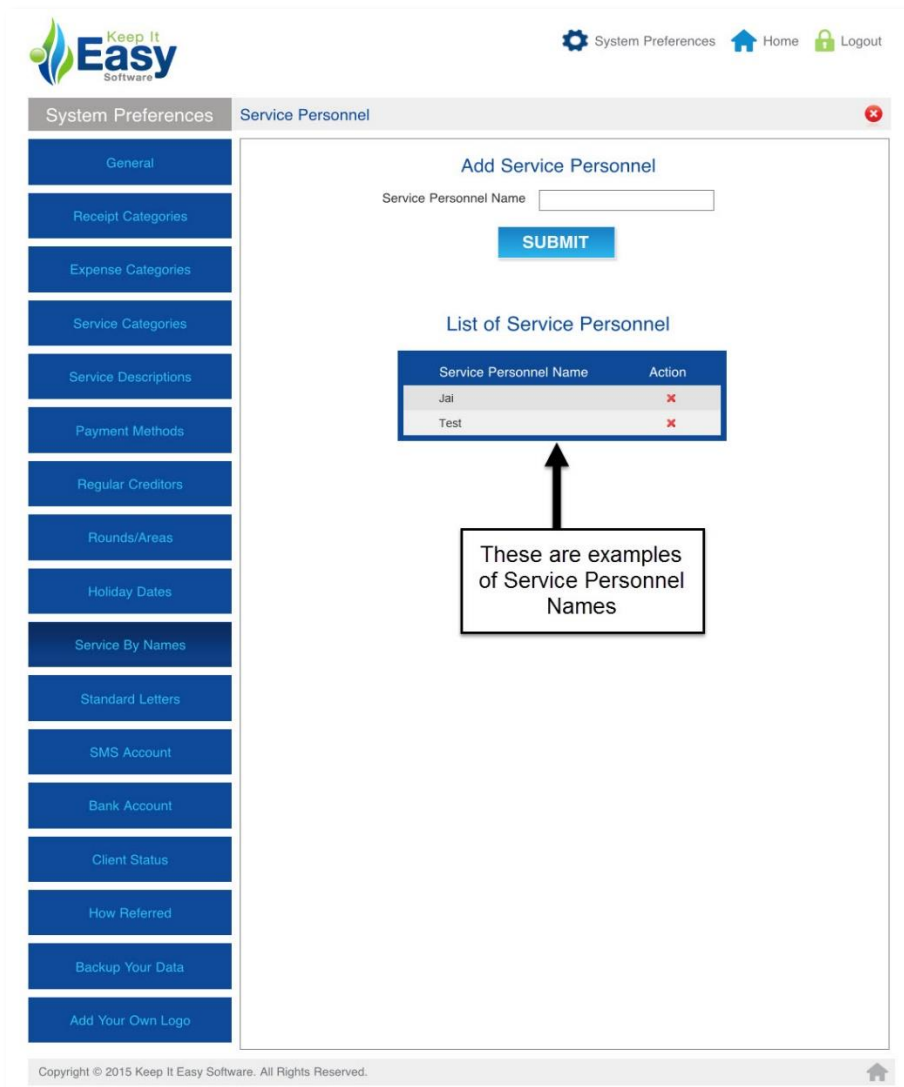
Before you proceed, please read the section on deleting information from your database.

To delete a holiday date, click the  icon next to the category you wish to delete.



Service By Names / Service Personnel

Click the **Service by Names** link to enter the names of your operators / service personnel. Every job you book will need to be booked against an operator.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



The screenshot displays the 'Service Personnel' management interface. On the left is a sidebar with a list of system preferences: General, Receipt Categories, Expense Categories, Service Categories, Service Descriptions, Payment Methods, Regular Creditors, Rounds/Areas, Holiday Dates, Service By Names (selected), Standard Letters, SMS Account, Bank Account, Client Status, How Referred, Backup Your Data, and Add Your Own Logo. The main content area is titled 'Service Personnel' and contains two sections. The first section, 'Add Service Personnel', has a text input field for 'Service Personnel Name' and a blue 'SUBMIT' button. The second section, 'List of Service Personnel', contains a table with two columns: 'Service Personnel Name' and 'Action'.

Service Personnel Name	Action
Jai	
Test	

Below the table, a text box states: 'These are examples of Service Personnel Names'. An arrow points from this text box up to the table.

At the top right of the interface, there are links for 'System Preferences', 'Home', and 'Logout'. At the bottom left, a copyright notice reads: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.'.

Add Service Personnel

To add a name, type the Service Personnel Name and press **SUBMIT**

This Service Personnel Name will be in the **List of Service Personnel**.


Delete Service Personnel

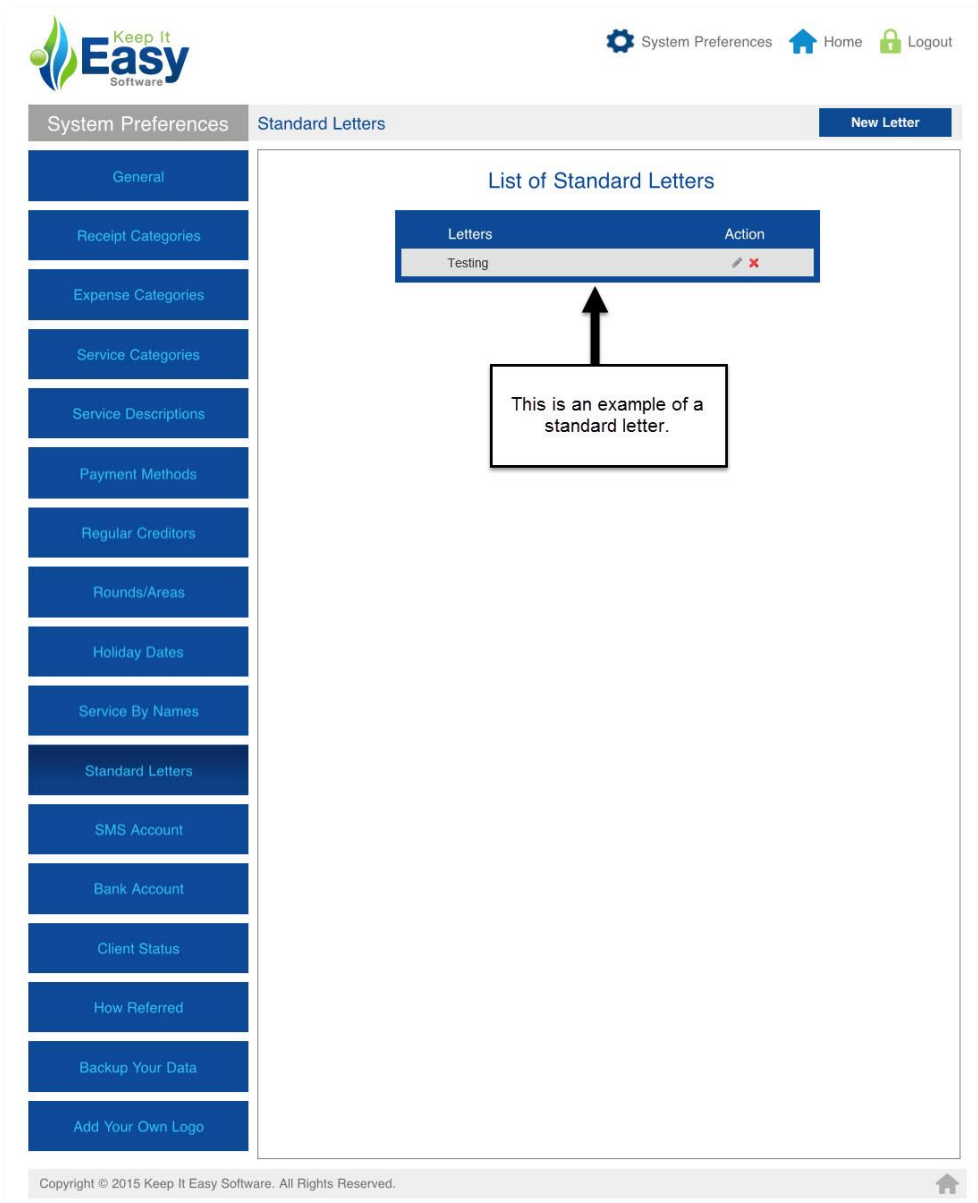
Before you proceed, please read the section on deleting information from your database.

To delete a service personnel name, click the  icon next to the category you wish to delete.

Standard Letters

Click the **Standard Letters** link to create standard letters you send your clients.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.




The screenshot shows the Keep It Easy Software interface. At the top, there is a navigation bar with the logo, 'System Preferences', 'Home', and 'Logout'. Below this is a sidebar with a list of menu items: General, Receipt Categories, Expense Categories, Service Categories, Service Descriptions, Payment Methods, Regular Creditors, Rounds/Areas, Holiday Dates, Service By Names, Standard Letters (highlighted), SMS Account, Bank Account, Client Status, How Referred, Backup Your Data, and Add Your Own Logo. The main content area is titled 'List of Standard Letters' and contains a table with two columns: 'Letters' and 'Action'. The table has one row with the value 'Testing' in the 'Letters' column and a red 'X' icon in the 'Action' column. A callout box with an arrow pointing to the 'Testing' row contains the text: 'This is an example of a standard letter.' At the bottom of the interface, there is a copyright notice: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

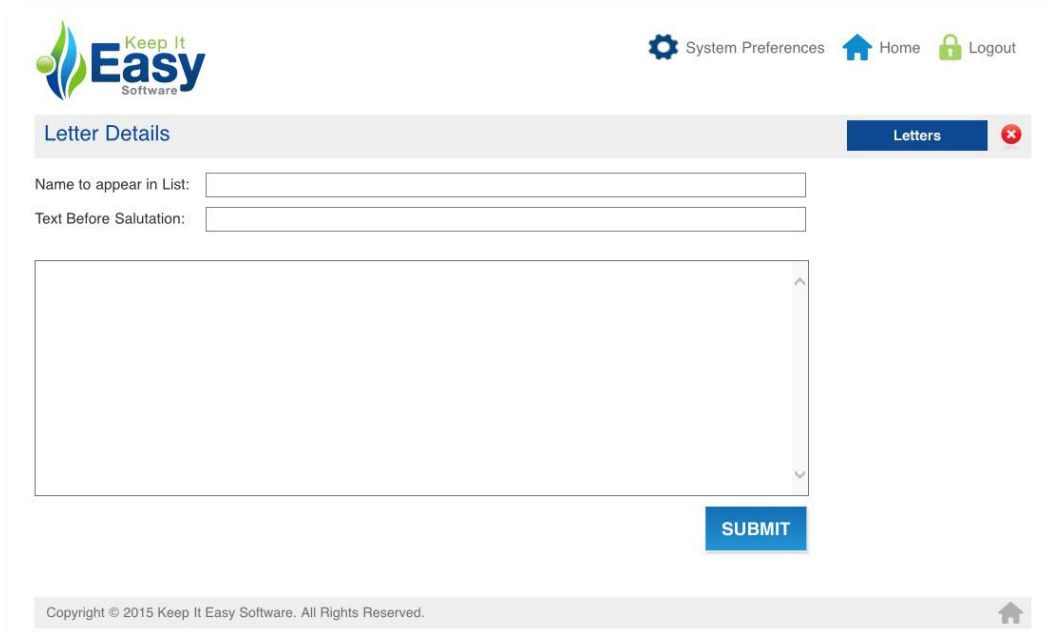
Add Letter

To add a letter, click the **New Letter** button at the top right hand side of the screen. A new screen will open where you can enter the name of the letter, the salutation before the letter and write the letter itself (alternatively, you can copy the text from an existing letter).

NOTE You must decide whether or not to add a salutation to your letters. For generic salutations (e.g. "To all our valued customers") the salutation can be entered here. If you prefer to add a personal salutation to every letter, do not add it here, but instead enter the personal salutation on the Client Details - General tab.





To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



The screenshot shows the 'Letter Details' form. At the top, there is a navigation bar with the 'Keep It Easy Software' logo, 'System Preferences', 'Home', and 'Logout' links. Below the navigation bar, the 'Letter Details' form is displayed. It includes a 'Name to appear in List:' text box, a 'Text Before Salutation:' text box, and a large text area for the letter content. A 'SUBMIT' button is located at the bottom right of the form. In the top right corner of the form, there is a 'Letters' button and a close icon (a red circle with a white X). At the bottom of the page, there is a copyright notice: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

Edit Letter

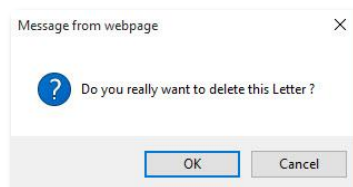
To edit an existing letter, click the  icon next to the letter. The letter will open, allowing you to edit its title and/or contents.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.

Delete Letter

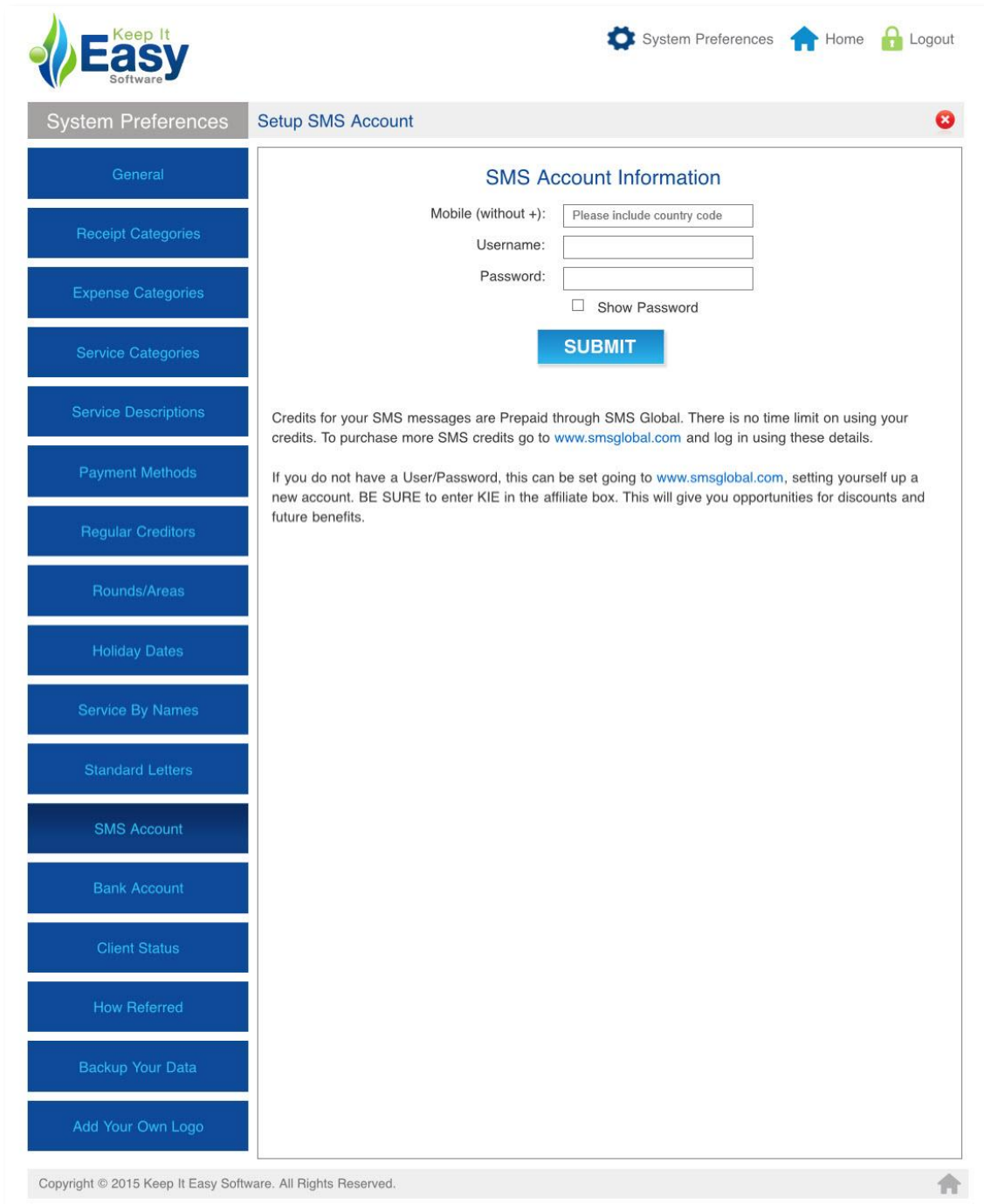
Before you proceed, please read the section on deleting information from your database.

To delete a standard letter, click the  icon next to the category you wish to delete, a confirmation will pop up asking if you wish to delete this letter, press Yes if you wish to proceed or No if you wish to cancel.



SMS Account

Setting up an SMS account will allow you to send text messages to your customers.



The screenshot shows the 'Setup SMS Account' page within the Keep It Easy Software interface. The page has a sidebar on the left with a list of menu items: General, Receipt Categories, Expense Categories, Service Categories, Service Descriptions, Payment Methods, Regular Creditors, Rounds/Areas, Holiday Dates, Service By Names, Standard Letters, SMS Account (highlighted), Bank Account, Client Status, How Referred, Backup Your Data, and Add Your Own Logo. The main content area is titled 'SMS Account Information' and contains the following fields and options:

- Mobile (without +):
- Username:
- Password:
- ☐ Show Password
-

Below the form, there is explanatory text:

Credits for your SMS messages are Prepaid through SMS Global. There is no time limit on using your credits. To purchase more SMS credits go to www.msglobal.com and log in using these details.

If you do not have a User/Password, this can be set going to www.msglobal.com, setting yourself up a new account. BE SURE to enter KIE in the affiliate box. This will give you opportunities for discounts and future benefits.


The footer of the page reads: Copyright © 2015 Keep It Easy Software. All Rights Reserved.

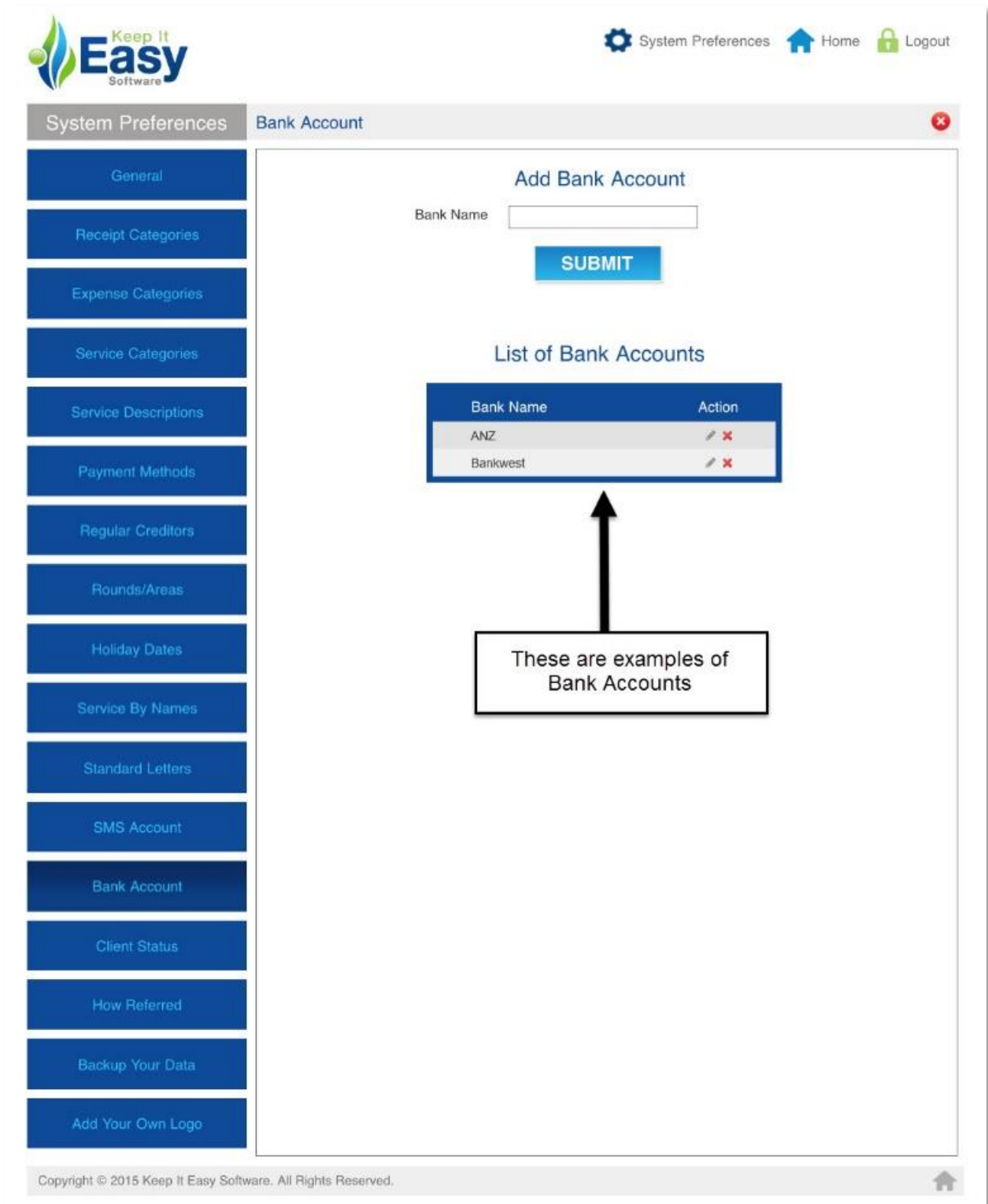
Credits for your SMS are prepaid through SMS Global. There is no time limit on using your credits. To purchase more SMS credits, go to www.msglobal.com.au and log in using these details.


If you do not have a username and password then sign up for a new account on the www.msglobal.com.au website. Be sure to enter KIE in the affiliate box when you sign up. This will give you opportunities for discounts and future benefits.

Bank Accounts

Click the **Bank Account** link to add bank accounts.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.







System Preferences Bank Account 

Add Bank Account


Bank Name

SUBMIT

List of Bank Accounts

Bank Name	Action
ANZ	 
Bankwest	 

These are examples of Bank Accounts

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Add Bank Account

To add a bank account, type in the Name and press

SUBMIT

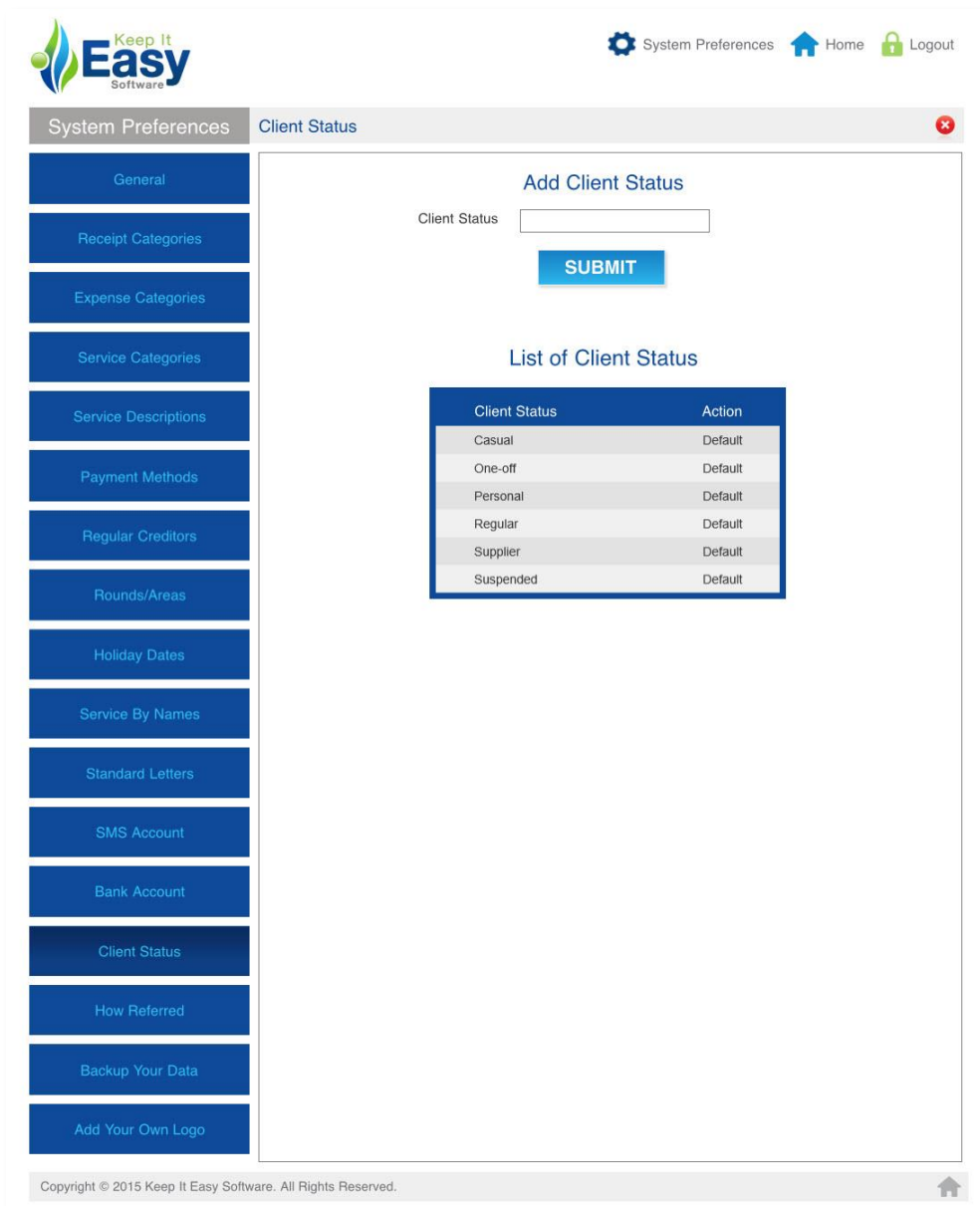
Delete Bank Account

Before you proceed, please read the section on deleting information from your database.

To delete a bank account, click the  icon next to the category you wish to delete.

Client Status

Click the **Client Status** button to setup the different statuses. There are default statuses already in the system.



The screenshot shows the 'Client Status' management page in the Keep It Easy Software interface. The page has a sidebar with various system preference categories, and the main content area is titled 'Client Status'.

System Preferences | **Client Status**

Add Client Status

Client Status

SUBMIT

List of Client Status

Client Status	Action
Casual	Default
One-off	Default
Personal	Default
Regular	Default
Supplier	Default
Suspended	Default

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Add Client Status

To add a client status, type in the client status you wish to add and press

SUBMIT


Delete Client Status

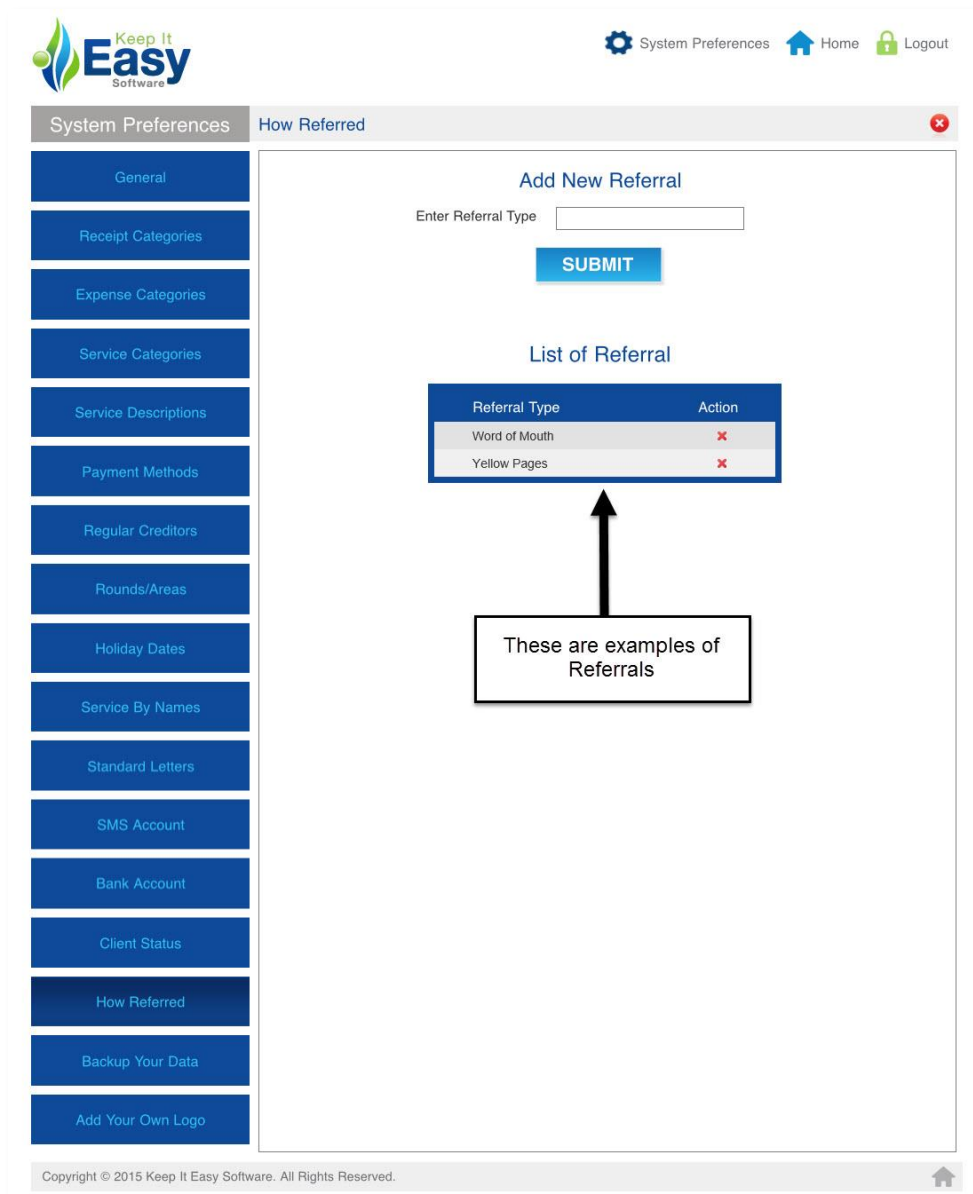
Before you proceed, please read the section on deleting information from your database.


To delete a client status, click the  icon next to the category you wish to delete (You cannot delete defaults).

How Referred

Click the **How Referred** link to setup the types of client referrals.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.





System Preferences | **How Referred** 

Add New Referral

Enter Referral Type


SUBMIT

List of Referral

Referral Type	Action
Word of Mouth	
Yellow Pages	

↑

These are examples of Referrals

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Add Referral

To add a referral type, enter the referral type and press **SUBMIT**


Delete Referral Type

Before you proceed, please read the section on deleting information from your database.

To delete a referral type, click the  icon next to the category you wish to delete.

Add Your Own Logo

Click the **Add Your Own Logo** link to add your logo to the database. Your logo will appear on your letters and invoices if “Print letterhead for your letters and invoices” has been selected on the General screen.

To exit this screen, press the **SUBMIT** button to ensure your data entered is saved and then click the  icon on the top right hand side of the screen.



The screenshot displays the 'Own Logo' configuration page within the Keep It Easy Software application. The interface includes a top navigation bar with links for 'System Preferences', 'Home', and 'Logout'. A sidebar on the left lists various system preferences, with 'Add Your Own Logo' selected. The main content area features a 'Browse Your Logo' button, a 'SUBMIT' button, and an example logo. A message at the top right indicates 'New Logo added Successfully'. A callout box points to the example logo with the text 'This is an example of a logo'.

Add Logo

Click the **Browse** button to locate your logo on your computer. The recommended file types are .jpg or .bmp. The recommended file size is 600Kb or smaller, ideally between 100Kb and 250Kb. The logo will be visually auto-resize and large files will just use up system resources.

If you no longer want to use a logo, you can set “Print letterhead for your letters and invoices” to **No** on the General screen.

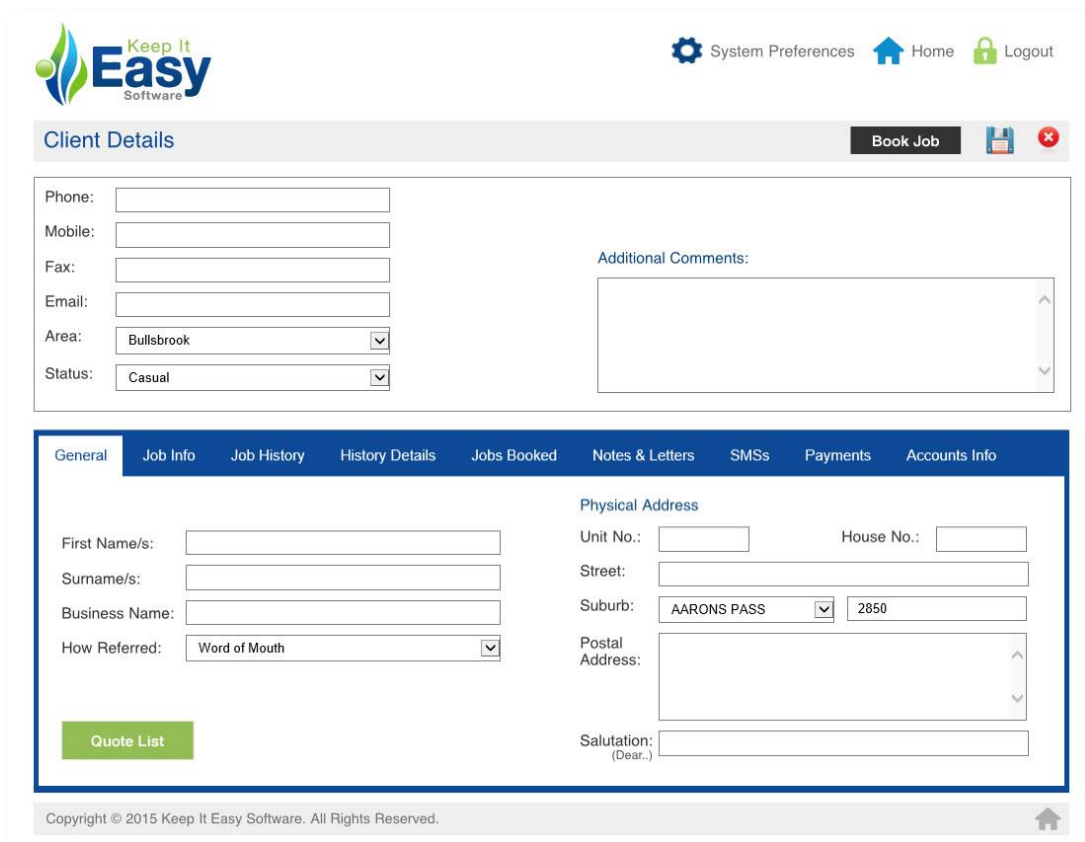
Clients

This section of the manual describes how to add, edit and delete clients.

Add New Client

Main Menu > Client List > New Client

The following screen will open.



The screenshot shows the 'Client Details' screen in the Keep It Easy Software interface. The top navigation bar includes the logo, 'System Preferences', 'Home', and 'Logout'. Below the navigation bar, the 'Client Details' section is active, with a 'Book Job' button and a red 'X' icon. The form is divided into two main sections. The top section contains fields for 'Phone:', 'Mobile:', 'Fax:', 'Email:', 'Area:' (with a dropdown menu showing 'Bullsbrook'), and 'Status:' (with a dropdown menu showing 'Casual'). To the right of these fields is a large text area labeled 'Additional Comments:'. The bottom section is titled 'General' and contains fields for 'First Name/s:', 'Surname/s:', 'Business Name:', and 'How Referred:' (with a dropdown menu showing 'Word of Mouth'). To the right of these fields is a section titled 'Physical Address' containing fields for 'Unit No.:', 'House No.:', 'Street:', 'Suburb:' (with a dropdown menu showing 'AARONS PASS'), 'Postal Address:', and 'Salutation: (Dear:)'. A 'Quote List' button is located at the bottom left of the 'General' section. The footer of the screen displays 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

Enter all the client's details such as name and contact information on this screen. Note: the more information entered the better the system will navigate.

When all details for this client have been entered, continue filling out other details regarding this client such as job info, accounts info, etc.

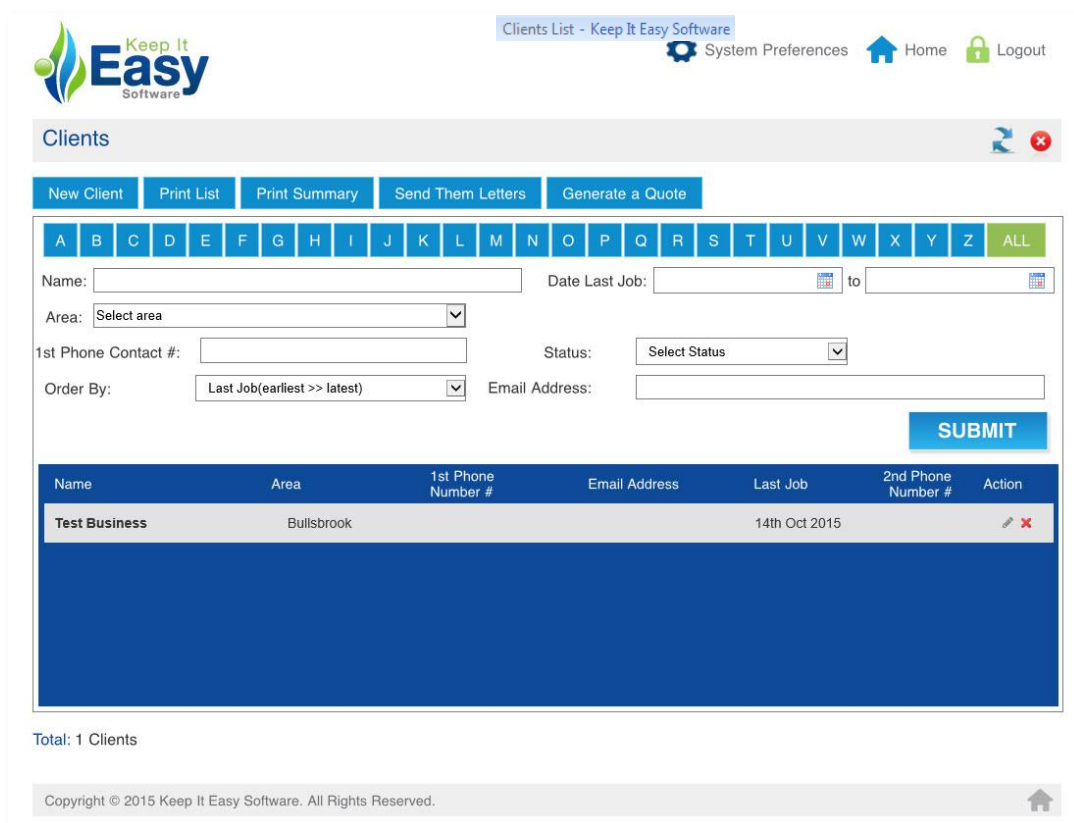
The rest of the tabs on this screen (Job Info, Job History, etc.) are discussed in the View / Edit Client Details section of this manual.

NOTE You must select the save icon every time you are wanting to navigate to another page, link or tab. It does not automatically save!



View / Edit Client Details

To view a client's details, select the **Client List** button from the Main Menu. The following screen will open.



Clients List - Keep It Easy Software

System Preferences Home Logout

Clients

New Client Print List Print Summary Send Them Letters Generate a Quote

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL



Name: Date Last Job: to

Area:

1st Phone Contact #: Status:

Order By: Last Job(earliest >> latest) Email Address:

SUBMIT

Name	Area	1st Phone Number #	Email Address	Last Job	2nd Phone Number #	Action
Test Business	Bullsbrook			14th Oct 2015		 

Total: 1 Clients

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Select the  icon to open the Client Details to view or edit information.

Job Info

The **Job Info** tab on the **Client Details** screen allows you to specify details regarding the jobs for this client, such as job intervals, the default service description, and default operator.

The approximate per annum value (PA Value) on this tab is used to determine how much income the client generates per year.

Job History

The Job History tab on the Client Screen provides an overview of all jobs that have been booked and completed for this client.



NOTE Future Jobs (booked jobs) and incomplete jobs (jobs not marked complete) are **not** listed on this tab.

General	Job Info	Job History	History Details	Jobs Booked	Notes & Letters	SMSs	Payments	Accounts Info
								</

Click the **Go to Job** link to open the **Job Details** screen.

History Details

The **History Details** tab on the **Client Screen** provides a detailed overview of all work done for or products sold to a client. This means that multiple lines can show for the same date.



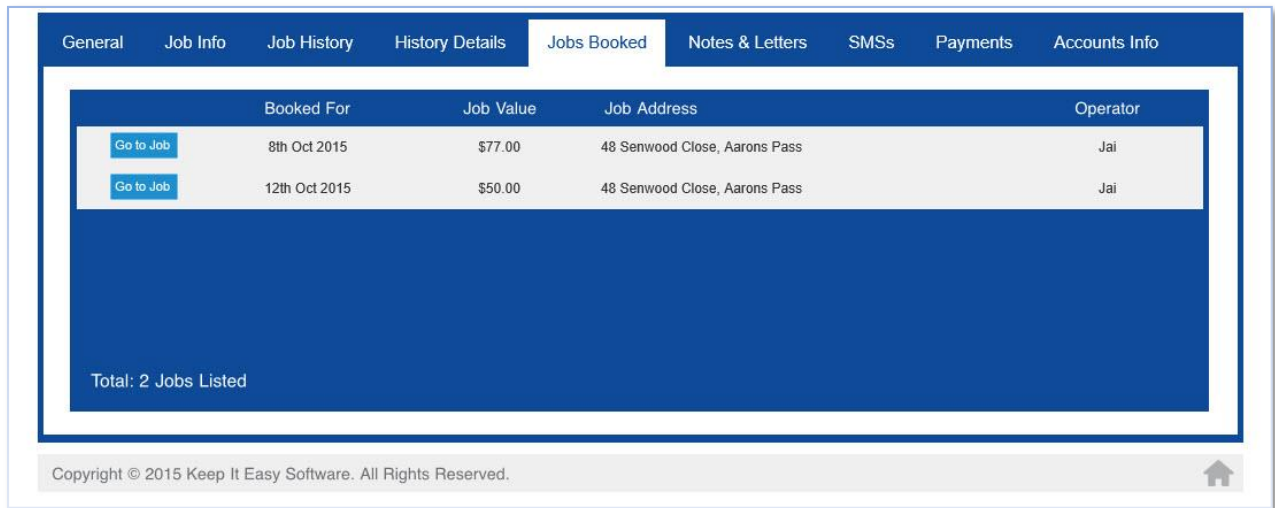
NOTE Future Jobs (booked jobs) and incomplete jobs (jobs not marked complete) are **not** listed on this tab.

General	Job Info	Job History	History Details	Jobs Booked	Notes & Letters	SMSs	Payments	Accounts Info
Date	Service Description	Qty	Amount	GST				
7th Oct 2015	Financial Advice	1	\$1.00	\$0.00				
	Financial Advice	1	\$22.00	\$2.00				
	Bookkeeping	1	\$50.00	\$4.55				
	Financial Advice	1	\$22.00	\$2.00				
8th Oct 2015	Bookkeeping	1	\$77.00	\$7.00				
12th Oct 2015	Financial Advice	1	\$22.00	\$2.00				
12th Oct 2015	Bookkeeping	1	\$50.00	\$4.55				
14th Oct 2015	Financial Advice	1	\$22.00	\$2.00				

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Jobs Booked

The **Jobs Booked** tab provides an overview of *ALL* jobs booked for a customer. This includes any future jobs booked and any past uncompleted jobs booked.



	Booked For	Job Value	Job Address	Operator
Go to Job	8th Oct 2015	\$77.00	48 Senwood Close, Aarons Pass	Jai
Go to Job	12th Oct 2015	\$50.00	48 Senwood Close, Aarons Pass	Jai

Total: 2 Jobs Listed

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Click the **Go To Job** link to open the Job Details screen and view/edit job details.

Click the **Delete Booking** button to delete a job. A dialog box will open asking you to confirm that you want to delete the job.



Confirm Delete?

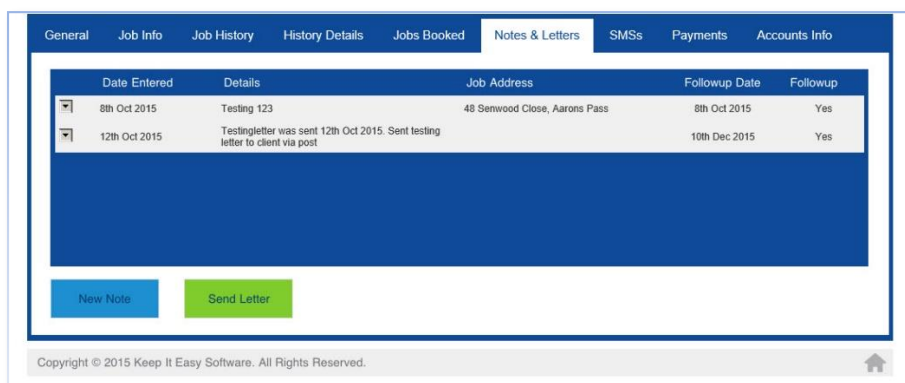
✖ Are you sure you want to delete this job?

Click **Yes** to confirm or **No** to cancel.

If selected Yes, the job will be deleted and you will be taken to the Job Management Page.

Notes & Letters

The **Notes & Letters** tab allows you to store and view any notes regarding customers, as well as keep track of any letters sent.

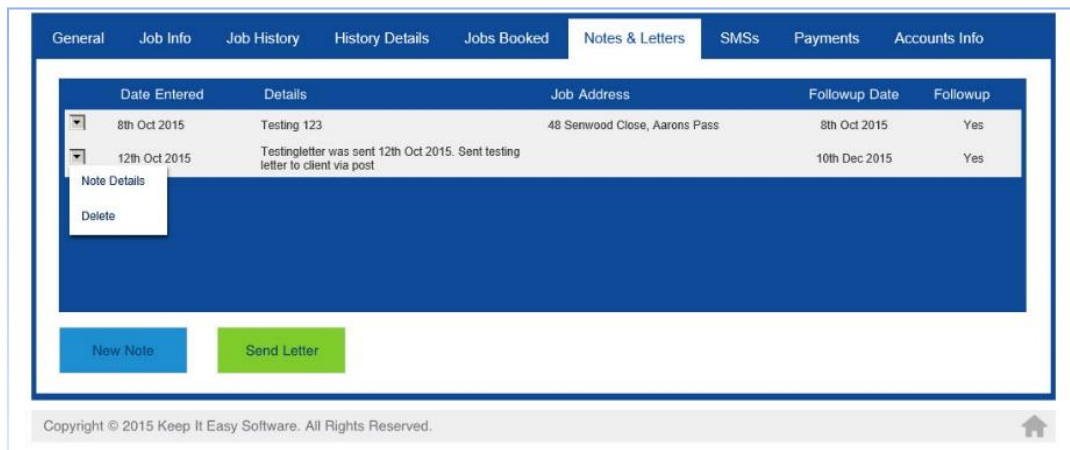


	Date Entered	Details	Job Address	Followup Date	Followup
<input type="checkbox"/>	8th Oct 2015	Testing 123	48 Senwood Close, Aarons Pass	8th Oct 2015	Yes
<input type="checkbox"/>	12th Oct 2015	Testingletter was sent 12th Oct 2015. Sent testing letter to client via post		10th Dec 2015	Yes

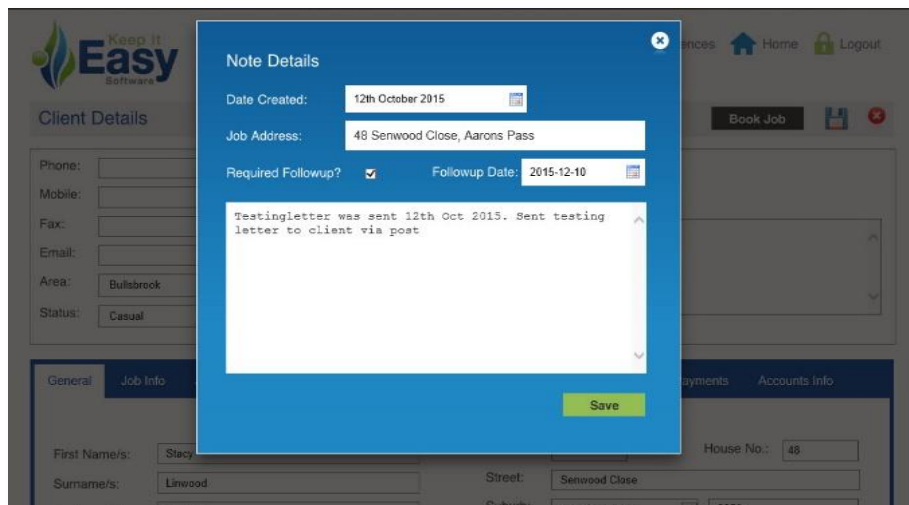
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Edit Note

Click the arrow next to the date of the note to bring up the dropdown shown below.



Clicking **Note Details** will open a dialog with the note details.



Make the required changes to the note and click the **Save** button along the bottom to save and close the dialog.

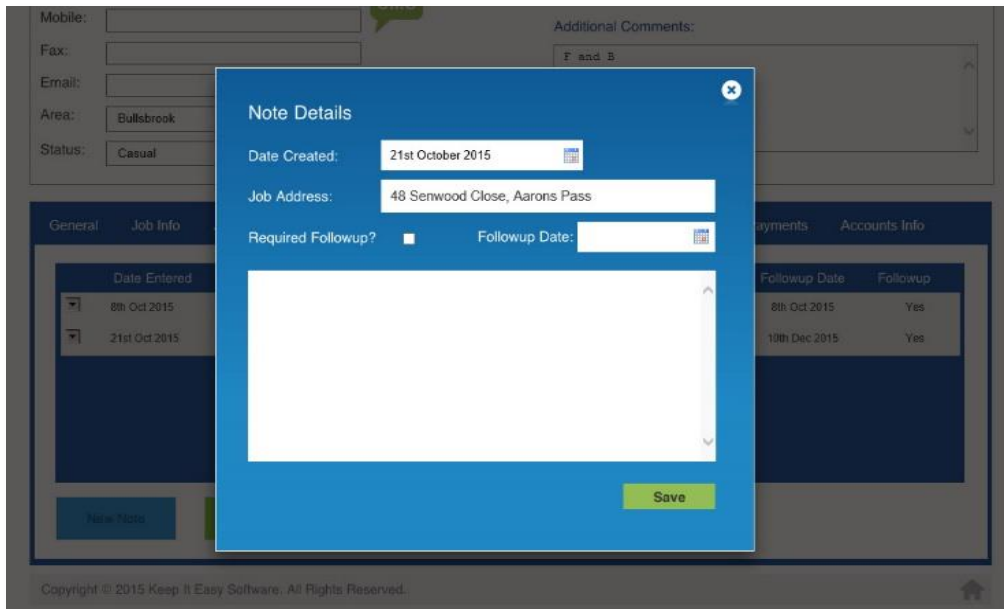
Delete Note

To delete a note click the arrow next to the note's date and select **Delete**.

Add New Note

To enter a new note, click the **New Note** button at the bottom left hand side of the screen of the screen.

A dialog will open with today's date and the name of the client.

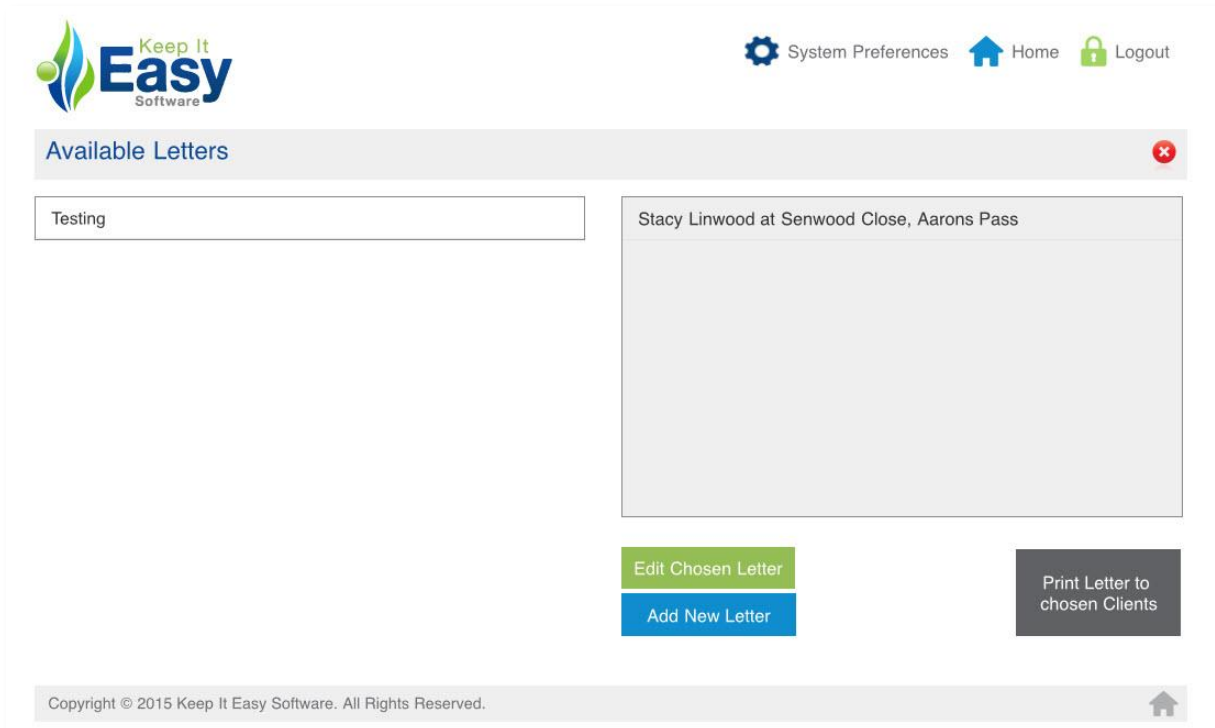


Enter the note details, tick the box if the note requires follow up (if so, also enter a follow up date) and click the **Save** button to save and close the dialog and return to the **Client Details** page.

Send Letter

Client List > Send Them Letters

This allows you to send ALL of your clients a standard letter without printing each one off manually.



On the left, select the letter you would like to send and select **Print Letter to chosen clients**.

Edit Letter

If the letter requires any editing, click the **Edit Chosen Letter** button in the bottom left corner of the screen. This will open the letter for editing.

Add new Letter

If you would like to add a new letter, click the **Add New Letter** button. This will open a new letter for you to define.

Print Letter

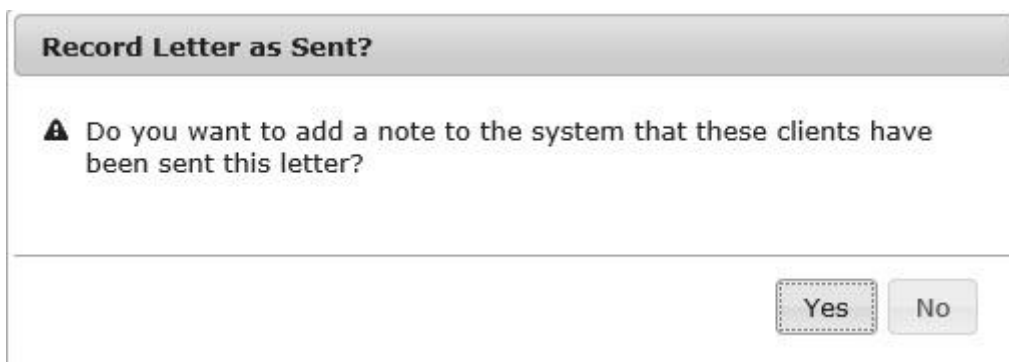
Make sure the client selected for this letter is correct (selected clients are shown on the left side of this screen).

Click the **Print letter to chosen Clients** button to print the letter.

Print Letter

After clicking **Print Letter**, it will ask you to enter a parameter value. This means the date.

It will then ask if you wish to record the letter as sent, press **Yes** or **No** if you do not wish to have a record of sending the letter to the client.



A dialog box titled "Record Letter as Sent?". It contains a warning icon and the text: "Do you want to add a note to the system that these clients have been sent this letter?". At the bottom right, there are two buttons: "Yes" and "No".

If selected **Yes**, it will then ask you to include a follow up date for the letter.

Type in the date you wish to follow up or leave it blank and select **Ok**.

It will ask if you wish to add any additional comment (if you do not type in any additional comment, the system will record the letter as Test Letter was sent today).

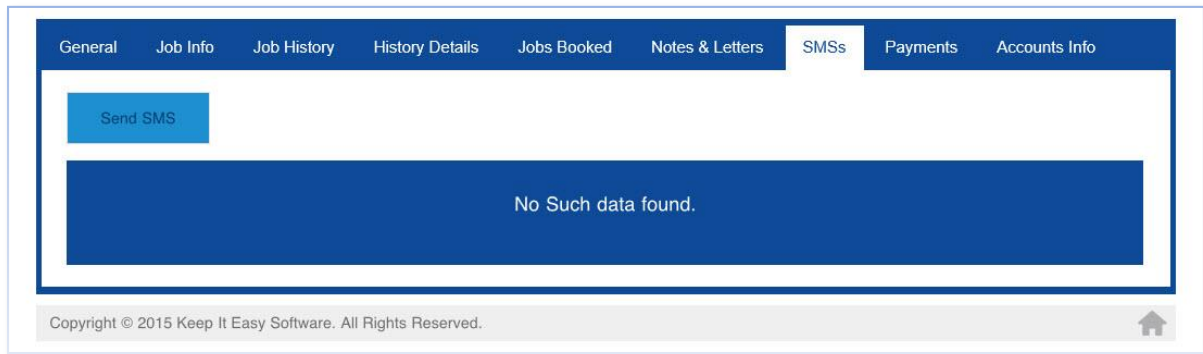
Select **Ok** and allow pop ups from this site, your letter will open with the option to save or print.



A preview of a letter template. It features the "Keep It Easy Software" logo on the left. The text on the right reads: "Tester Jai", "Jaime's Testing Services.", "08 3825699", and "We are here to help not hinder". Below the logo, the text reads: "We are here to help not hinder", "21st Oct 2015", "S Linwood", "48 Senwood Close", and "Aarons Pass 2850". Further down, it says: "We have found recently.", "This is just not working.", "Please call us on 123456892", and "Thanks". At the bottom right, there is a toolbar with icons for print, save, and other actions.

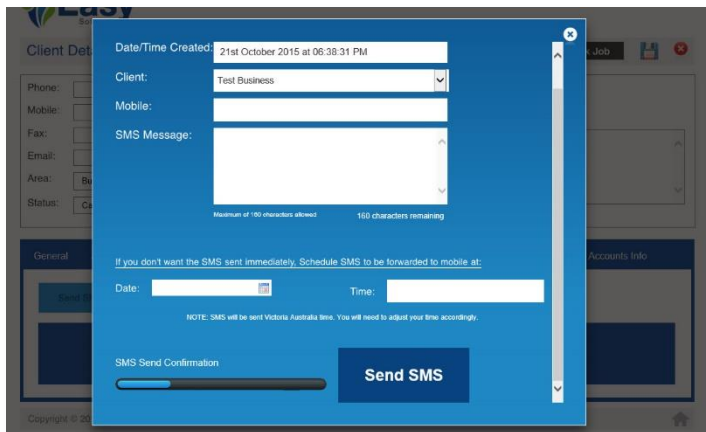
SMS

The SMS tab shows all the history of SMS for the client selected in client details.



Send SMS

To send an SMS to a customer (e.g. to remind the customer of a scheduled service appointment), via the client details page, click the **Send SMS** link. The client's name and phone number will be copied to the dialog shown below.



Enter the message you would like to send in the **SMS Message** field. To make sure you don't exceed the maximum allowed number of characters (160).

Schedule SMS

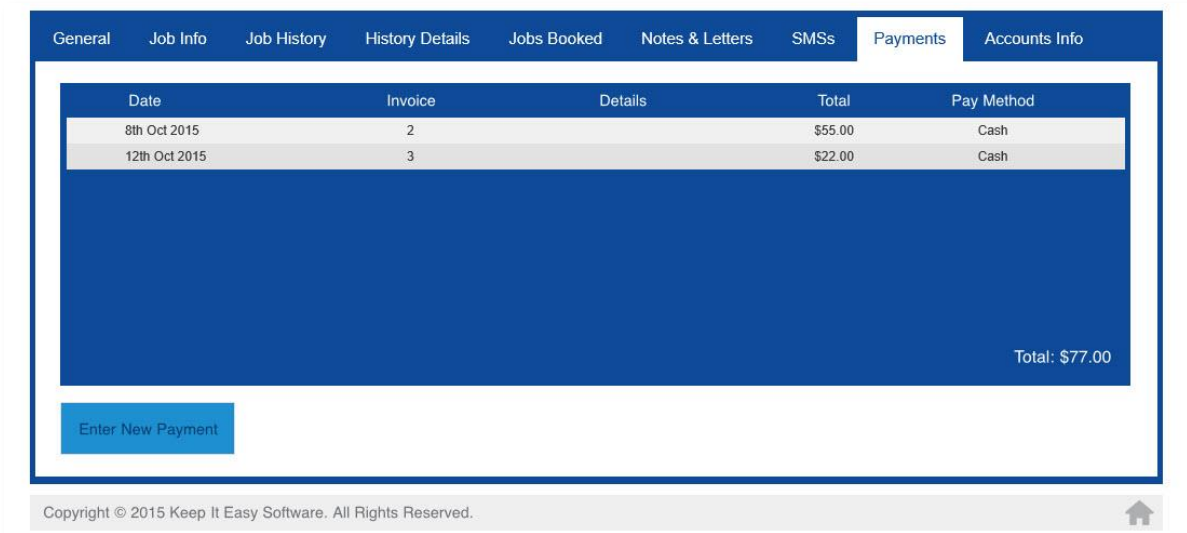
If you would like to schedule sending the SMS instead of sending it instantly, enter a date and time. Then click the **Send SMS** button. The SMS will be sent to the SMS provider who will forward it on at the scheduled time.

Send SMS instantly

Click the **Send SMS** button to send the SMS instantly. Click the **Close** button to close the dialog and return to the Client Details screen.

Payments

The payments link provides information regarding all payments made.

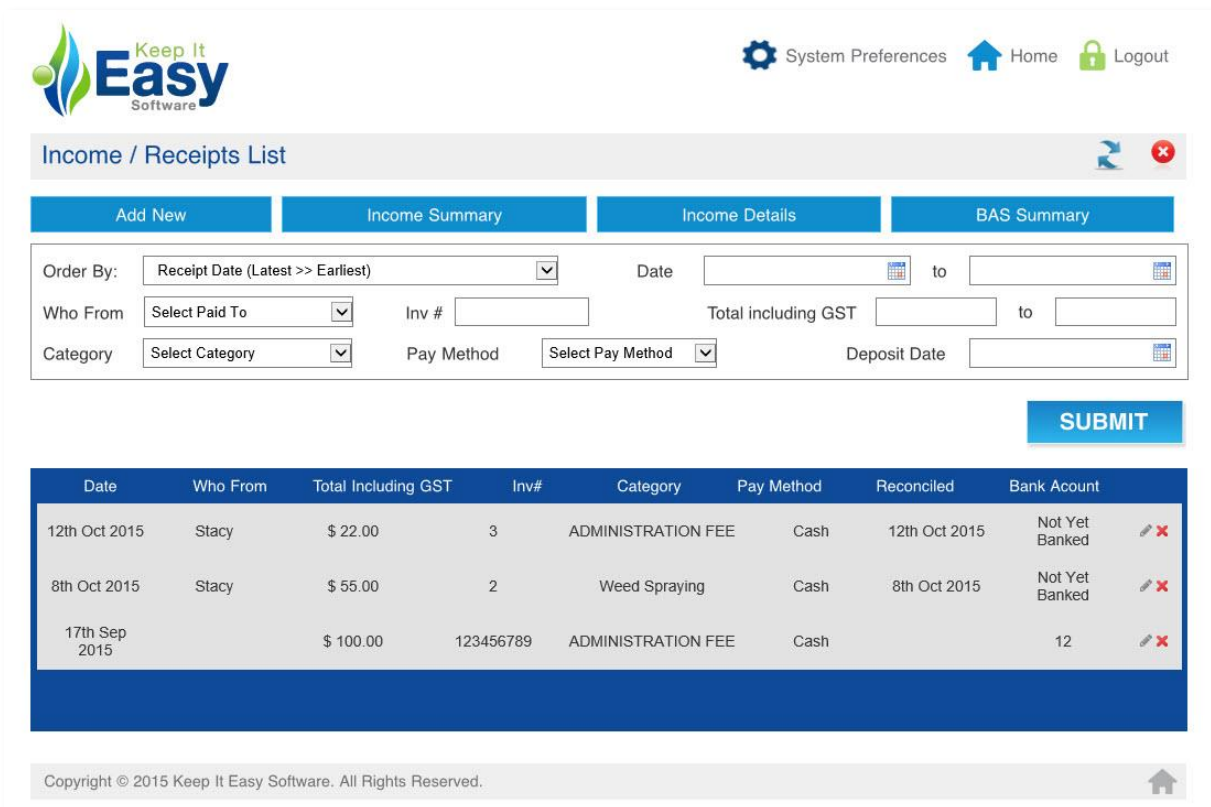


The screenshot shows the 'Payments' tab selected in the top navigation bar. Below the navigation bar is a table with the following data:

Date	Invoice	Details	Total	Pay Method
8th Oct 2015	2		\$55.00	Cash
12th Oct 2015	3		\$22.00	Cash

Below the table, there is a large blue area with the text 'Total: \$77.00' in the bottom right corner. At the bottom left of this area is a button labeled 'Enter New Payment'. The footer of the screen displays 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

View / Edit Receipt Details









The screenshot shows the 'Income / Receipts List' screen. At the top, there is a navigation bar with the 'Keep It Easy Software' logo and links for 'System Preferences', 'Home', and 'Logout'. Below the navigation bar is a tabbed interface with four tabs: 'Add New', 'Income Summary', 'Income Details', and 'BAS Summary'. The 'Income Details' tab is currently selected.

Below the tabs is a form with the following fields:



- Order By: (dropdown)
- Date: to (calendar icons)
- Who From: (dropdown)
- Inv #:
- Total including GST: to
- Category: (dropdown)
- Pay Method: (dropdown)
- Deposit Date: (calendar icon)

At the bottom right of the form is a blue button labeled 'SUBMIT'.

Below the form is a table with the following data:

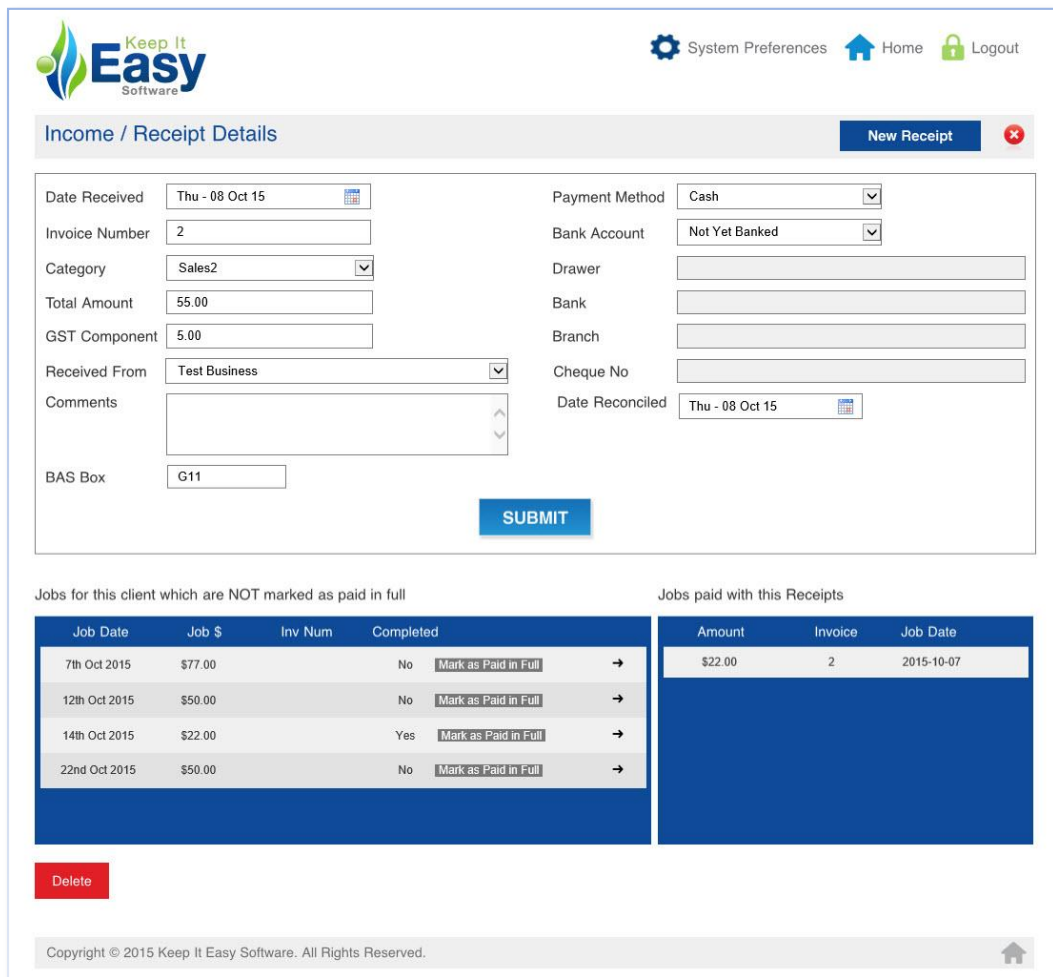
Date	Who From	Total Including GST	Inv#	Category	Pay Method	Reconciled	Bank Account	
12th Oct 2015	Stacy	\$ 22.00	3	ADMINISTRATION FEE	Cash	12th Oct 2015	Not Yet Banked	 
8th Oct 2015	Stacy	\$ 55.00	2	Weed Spraying	Cash	8th Oct 2015	Not Yet Banked	 
17th Sep 2015		\$ 100.00	123456789	ADMINISTRATION FEE	Cash		12	 

The footer of the screen displays 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

On this screen you can make any changes (if required) to the receipt details, just select the  icon and edit the details. When you are done, click **SUBMIT** to save any changes and select the  icon to exit the screen and return to the Income/Receipts List page.

To mark a receipt as paid from this tab, enter all payment details for the job and click the black arrow next to the job you want to mark as paid in full.

The moment you click the button, the job disappears from the list of unpaid jobs and is moved to the area called **Jobs Paid with this Receipt** on the right.



Income / Receipt Details New Receipt

Date Received: Thu - 08 Oct 15
 Invoice Number: 2
 Category: Sales2
 Total Amount: 55.00
 GST Component: 5.00
 Received From: Test Business
 Comments:
 BAS Box: G11

Payment Method: Cash
 Bank Account: Not Yet Banked
 Drawer:
 Bank:
 Branch:
 Cheque No:
 Date Reconciled: Thu - 08 Oct 15

SUBMIT

Jobs for this client which are NOT marked as paid in full


Job Date	Job \$	Inv Num	Completed	
7th Oct 2015	\$77.00		No	Mark as Paid in Full →
12th Oct 2015	\$50.00		No	Mark as Paid in Full →
14th Oct 2015	\$22.00		Yes	Mark as Paid in Full →
22nd Oct 2015	\$50.00		No	Mark as Paid in Full →

Jobs paid with this Receipts

Amount	Invoice	Job Date
\$22.00	2	2015-10-07


Delete

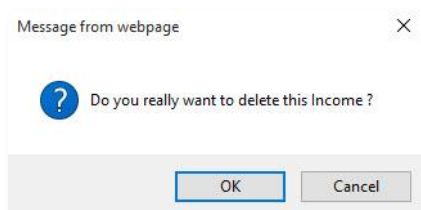
Copyright © 2015 Keep It Easy Software. All Rights Reserved.

To remove a job from the list of paid jobs, click the  icon next to the job you wish to delete on the right. You will be asked to confirm and the job will be moved back to the list of unpaid receipts.

If you click the **Mark as Paid in Full** button but the total amount you have entered is not sufficient, the system will let you know there is not enough. Enter the correct total amount, or wait marking the job as paid until the full payment has been received.

Delete Receipt

To delete a receipt from the system, open the income/details screen and select the  icon. You will be asked to confirm.



Click **Ok** to delete the receipt. Click **Cancel** to keep the receipt.

Enter New Payment

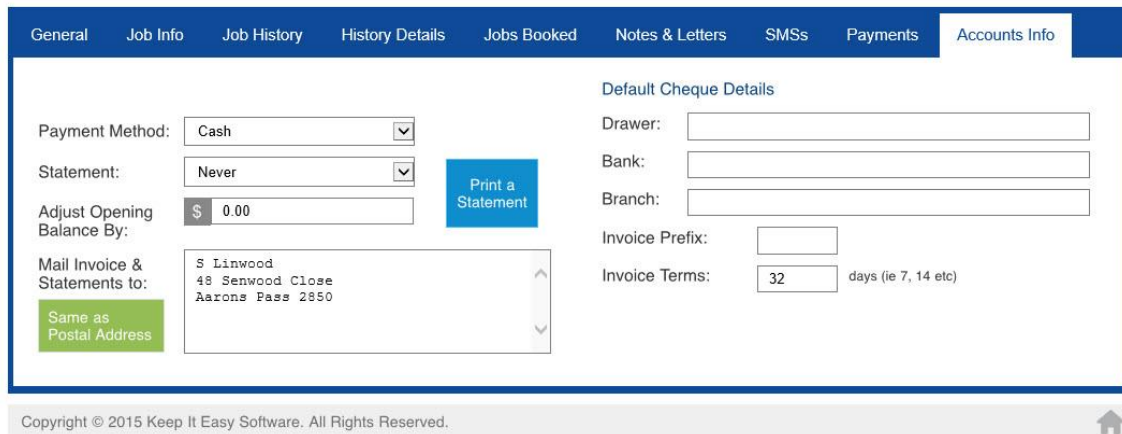
Click the **Enter a New Payment** button on the **Payments** tab to enter a new payment for the client. A new screen will open.



NOTE You can also enter payments by processing a job from the [Job Details](#) screen.

Accounts Info

The Accounts info allows you to set default values for a client, such as the default payment method and default cheque details.

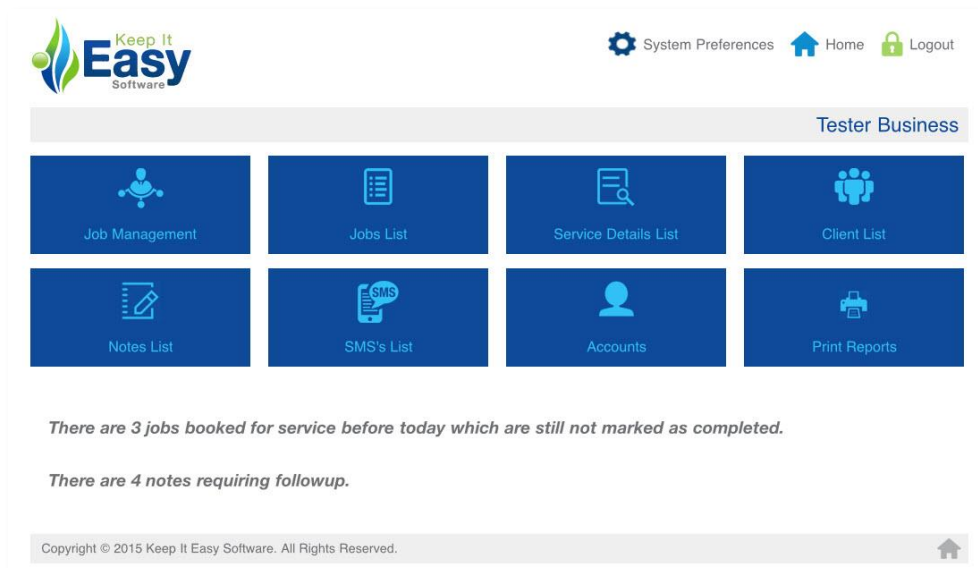


The address in the **Mail Invoices & Statements to:** field is used on the invoices & statements you send this client.

Main Menu

The **Main Menu** is your starting point for your daily activities, such as managing your jobs and your clients.

Clicking the **Logout** button along the top of this screen to log out of the software.



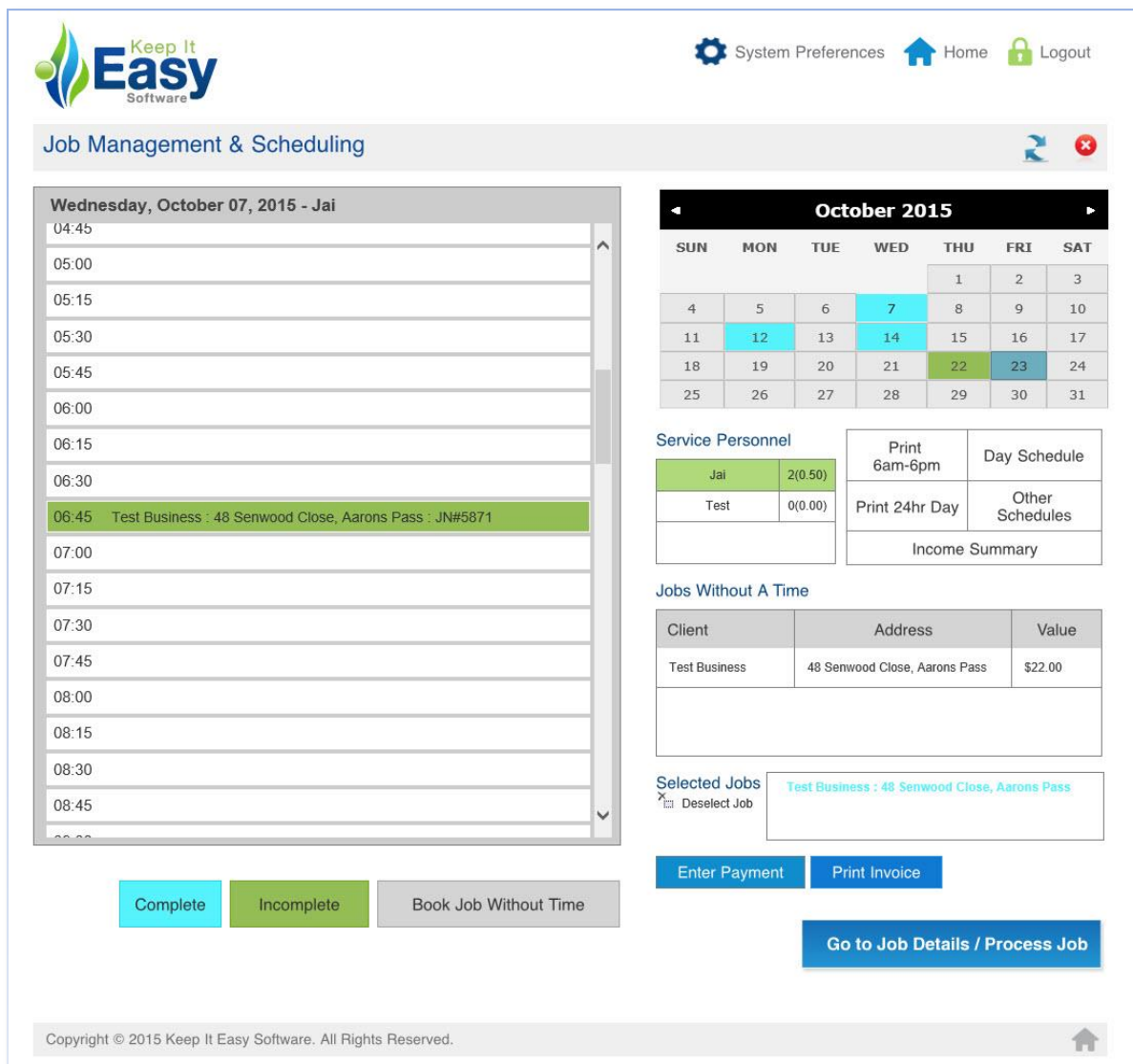
The buttons on the main menu provide quick access to

- Job Management
- Jobs List
- Service Details List
- Client List
- Note List
- SMS List
- Accounts
- Print Reports

Job Management

To manage and schedule jobs, click the **Job Management** button on the **Main Menu** screen.

To exit this screen and return to the **Main Menu**, click the **Home** button along the top of the screen.



The screenshot shows the 'Job Management & Scheduling' screen. At the top, there's a navigation bar with the 'Keep It Easy Software' logo, 'System Preferences', 'Home', and 'Logout' buttons. Below this, the title 'Job Management & Scheduling' is displayed. The main area is divided into two columns. The left column shows a list of time slots for 'Wednesday, October 07, 2015 - Jai'. The right column features a calendar for 'October 2015' and a 'Service Personnel' table. Below the calendar, there's a 'Jobs Without A Time' table. At the bottom, there are buttons for 'Complete', 'Incomplete', 'Book Job Without Time', 'Enter Payment', 'Print Invoice', and 'Go to Job Details / Process Job'.

Wednesday, October 07, 2015 - Jai

04:45
05:00
05:15
05:30
05:45
06:00
06:15
06:30
06:45 Test Business : 48 Senwood Close, Aarons Pass : JN#5871
07:00
07:15
07:30
07:45
08:00
08:15
08:30
08:45

October 2015

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Service Personnel

Jai	2(0.50)
Test	0(0.00)

Print 6am-6pm
Day Schedule
Print 24hr Day
Other Schedules
Income Summary

Jobs Without A Time

Client	Address	Value
Test Business	48 Senwood Close, Aarons Pass	\$22.00

Selected Jobs
Deselect Job
Test Business : 48 Senwood Close, Aarons Pass

Complete Incomplete Book Job Without Time

Enter Payment Print Invoice

Go to Job Details / Process Job

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Job Schedule

The left side of this screen, the job schedule, defaults to today's date. Note that the schedule displays the jobs for one operator only—the operator selected in the **Service Personnel** box. Switch to the job schedule for another operator by clicking that operator.

Use the scroll bar on the in the middle of the screen to move up and down through the job schedule. For a one-page overview of all jobs for an operator on a date, use the print functions on the right.

Jobs marked blue have been completed, Jobs marked green are incomplete.

Calendar

You can view bookings for other days by selecting a date from the calendar on the right.

October 2015						
SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

- Change the month and day simply by clicking the arrow next to the month (left to go back and right to go forward).

Print Buttons

The buttons next to the operator names allow you to print work schedules and an income summary. Note that these schedules apply to the operator selected. To print schedules for another operator, select that operator first.

Service Personnel		Print 6am-6pm	Day Schedule
Jai	2(0.50)	Print 24hr Day	Other Schedules
Test	0(0.00)	Income Summary	

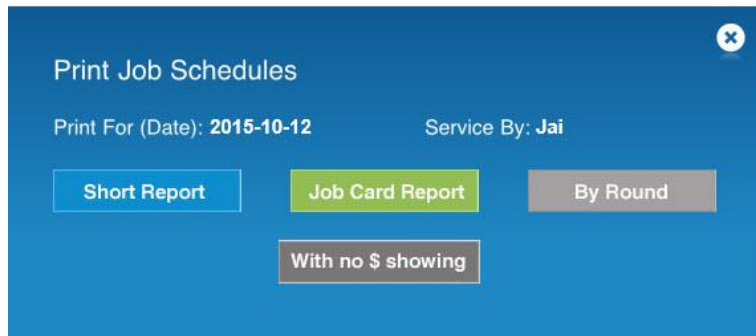
Examples of all these reports have been included in the **Reports & Printing Manual**, in the **Job Scheduling Reports** section.

Print 6am-6pm: This prints an overview of all appointments between 6am and 6pm.

Print 24hr Day: This prints an overview of all appointments (24 hours) for a day.

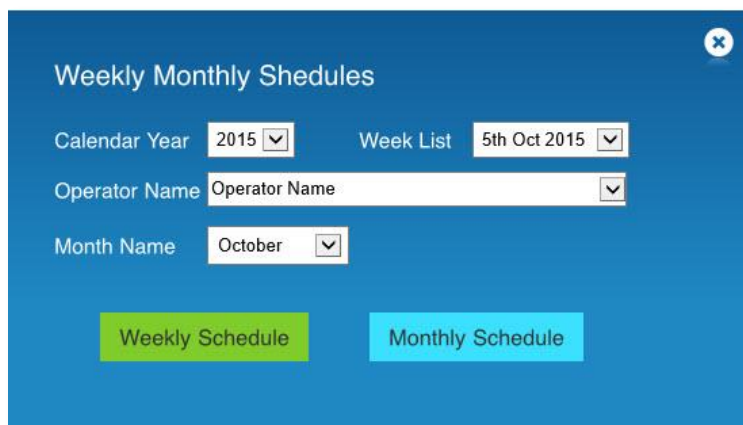
Income Summary: This prints an income summary for the date selected. Shows all jobs that have been processed in the system and marked as paid.

Day Schedule: This allows you to print several reports for any of your service operators: Short Report, Job Card Report, and a Round Report. The dialog box shown below will pop up for you to make your selection of report for the day already selected in the calendar.



The dialog box titled "Print Job Schedules" has a blue background and a close button in the top right corner. It displays "Print For (Date): 2015-10-12" and "Service By: Jai". Below this are three buttons: "Short Report" (blue), "Job Card Report" (green), and "By Round" (grey). At the bottom, there is a grey button that says "With no \$ showing".

Allows you to print weekly and monthly reports for your operators. The dialog box shown below will pop up for you to make your selections (calendar year, week list, month name) which the reports can be previewed and printed.

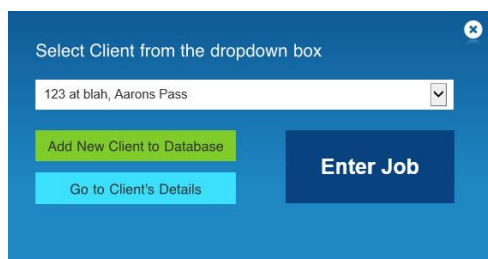


The dialog box titled "Weekly Monthly Schedules" has a blue background and a close button in the top right corner. It contains four dropdown menus: "Calendar Year" (set to 2015), "Week List" (set to 5th Oct 2015), "Operator Name" (set to Operator Name), and "Month Name" (set to October). At the bottom are two buttons: "Weekly Schedule" (green) and "Monthly Schedule" (blue).

Book a new job for an existing client

To schedule a new job, click your cursor in the time slot you want to book.

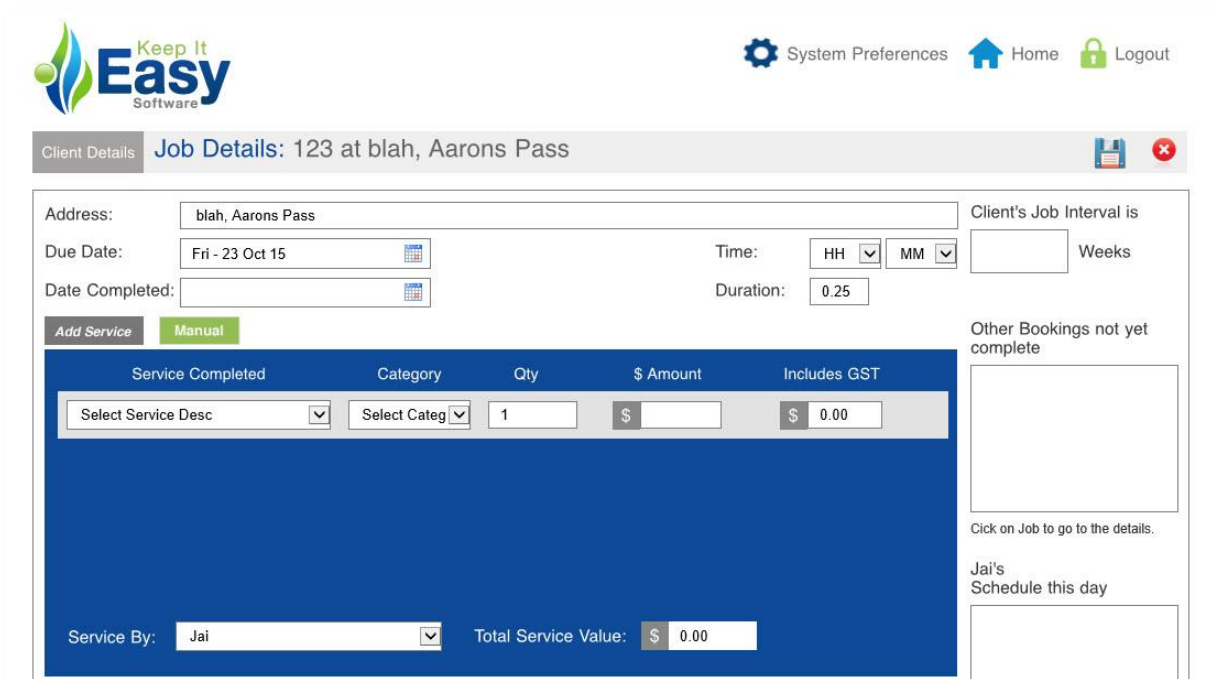
A dialog box will open.



The dialog box titled "Select Client from the dropdown box" has a blue background and a close button in the top right corner. It features a dropdown menu showing "123 at blah, Aarons Pass". Below the dropdown are three buttons: "Add New Client to Database" (green), "Go to Client's Details" (blue), and "Enter Job" (dark blue).

Select the client you want to book the job for from the dropdown list and select **Enter Job**.

The **Job Details** screen will open.



The screenshot shows the 'Job Details' screen for a client named '123 at blah, Aarons Pass'. The interface includes a top navigation bar with 'System Preferences', 'Home', and 'Logout' links. The main form contains fields for 'Address', 'Due Date' (Fri - 23 Oct 15), 'Date Completed', 'Time' (HH and MM dropdowns), and 'Duration' (0.25). There are buttons for 'Add Service' and 'Manual'. A table lists services with columns: 'Service Completed', 'Category', 'Qty', '\$ Amount', and 'Includes GST'. The table currently shows one service with a value of \$0.00. Below the table, there is a 'Service By' dropdown set to 'Jai' and a 'Total Service Value' field showing \$0.00. On the right side, there are sections for 'Client's Job Interval' (in weeks) and 'Other Bookings not yet complete'.


Verify that the **Date Due**, **Job Time & Duration** and **Service By** fields are all showing the correct values. The job duration defaults to 15 minutes (a quarter of an hour) but can be changed here if needed.

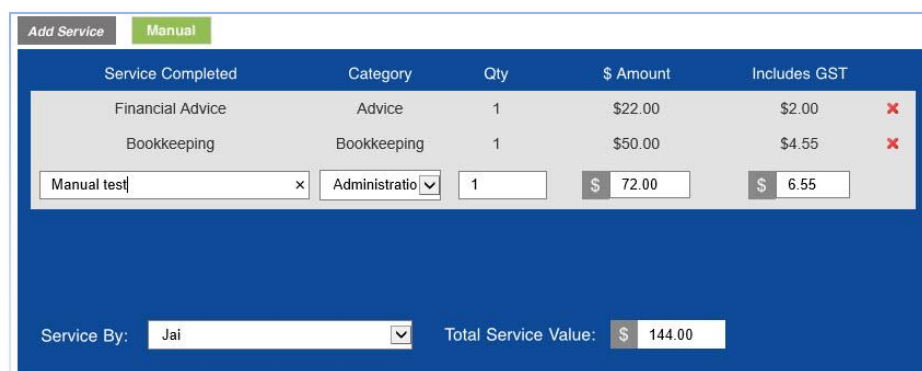
Add Service or Product to Job

Add the services by clicking the **Add Service** button and selecting the service that will be provided on this job.

To add another service, click the **Add Service** button again. Note that the **Total Service Value** field is instantly updated. If you need to write in the Service Description select **Manual** and this will allow you to enter text manually.

Delete Service or Product from Job

To delete a service from the job details, click the  button next to that service. Instead of deleting a service, you can also update it by selecting another value from the dropdown list.



This screenshot shows the 'Job Details' screen after adding multiple services. The 'Add Service' button is highlighted. The table now contains three rows: 'Financial Advice' (\$22.00), 'Bookkeeping' (\$50.00), and a 'Manual test' entry (\$72.00) created by selecting 'Manual' from the dropdown. The 'Total Service Value' at the bottom has been updated to \$144.00. Each row in the table has a red 'X' button for deletion.

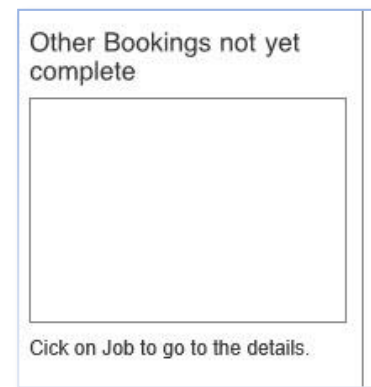
Add Other Job Information

Add any relevant information regarding the job such as a customer reference and comments.

Other Bookings

The right side of this screen shows other bookings not yet completed for this client.

Click any of the jobs in the list to open the job details for that job.



Job Status

The status of a job is displayed at the bottom of the screen.

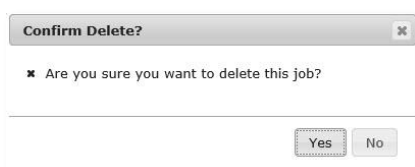
Job Recorded as NOT Complete, Not Invoiced & NOT Paid

As soon as you mark a job a complete, invoiced or paid, the status at the bottom of this screen will change accordingly.

When you are done filling out all the details for this job, click the **SUBMIT** button and then the **Home** link to return you to the Main Menu.

Delete Job

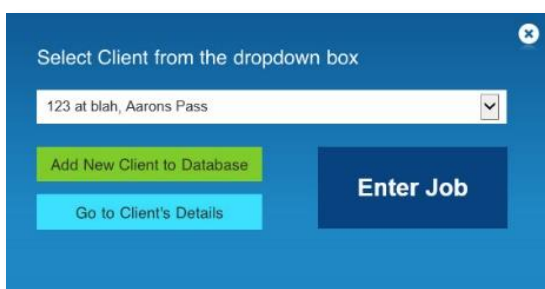
If you have made a mistake (e.g. wrong client) while booking this job, you may wish to delete it. Click the **Delete** button in the bottom left-hand corner of the screen to delete the job. You will be asked to confirm as deletion cannot be undone.



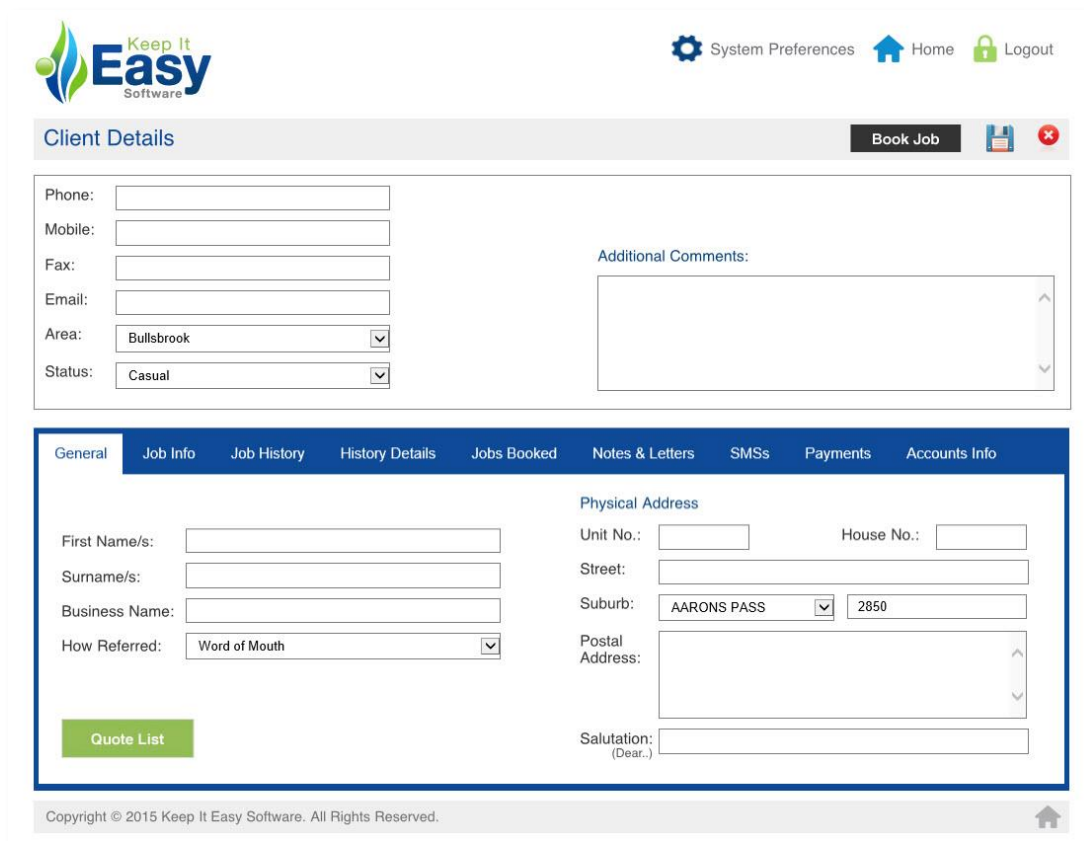
Book a new job for a new client (client is not in the system yet)

To schedule a new job for a new client, click your cursor in the time slot you want to book.

A dialog box will open.



Click the **Add New Client to Database** link. The Client Details screen will open.



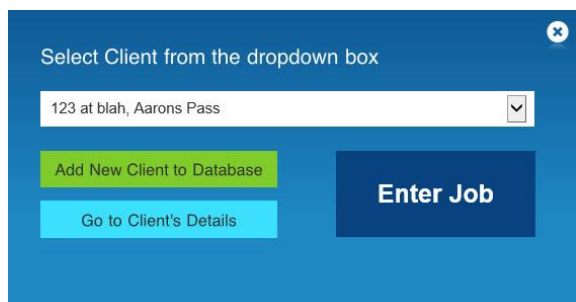
The screenshot shows the 'Client Details' screen. At the top, there's a navigation bar with 'System Preferences', 'Home', and 'Logout'. Below this, the 'Client Details' header includes a 'Book Job' button and a close icon. The main form is divided into two sections. The top section contains fields for 'Phone:', 'Mobile:', 'Fax:', 'Email:', 'Area:' (with a dropdown menu showing 'Bullsbrook'), and 'Status:' (with a dropdown menu showing 'Casual'). To the right of these fields is a large text area for 'Additional Comments:'. The bottom section is a tabbed interface with tabs for 'General', 'Job Info', 'Job History', 'History Details', 'Jobs Booked', 'Notes & Letters', 'SMSs', 'Payments', and 'Accounts Info'. The 'General' tab is active, showing fields for 'First Name/s:', 'Surname/s:', 'Business Name:', 'How Referred:' (with a dropdown menu showing 'Word of Mouth'), 'Physical Address' (including 'Unit No.:', 'House No.:', 'Street:', 'Suburb:' with a dropdown menu showing 'AARONS PASS' and a text field for '2850', 'Postal Address:', and 'Salutation: (Dear.):'). A green 'Quote List' button is located at the bottom left of the 'General' tab. The footer of the screen displays 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

Enter all necessary data as explained earlier on in this manual.

Book Job Without Time

To book a job without time, click the **Book Job Without Time** button at the bottom of the **Job Management & Scheduling** screen.

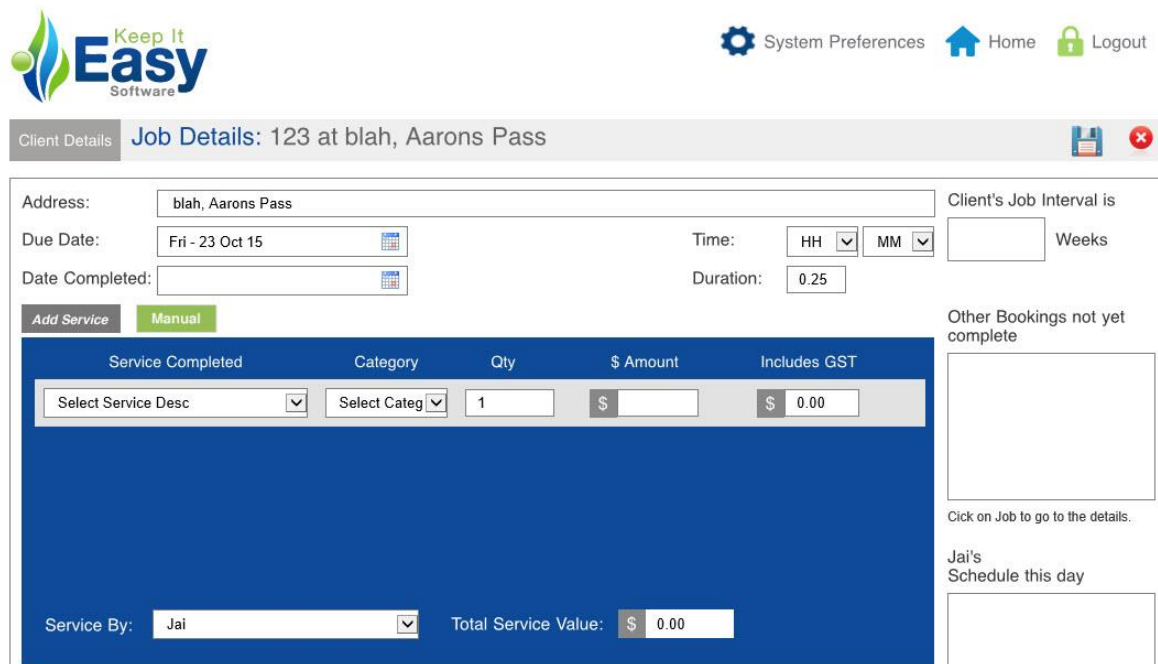
A dialog will open for you to select the client.



The screenshot shows a dialog box titled 'Select Client from the dropdown box'. It features a dropdown menu with the text '123 at blah, Aarons Pass'. Below the dropdown are three buttons: 'Add New Client to Database' (green), 'Go to Client's Details' (blue), and 'Enter Job' (dark blue).



Select the client you want to book the job for from the dropdown list.

After selecting the client, click the **Book Job** button on the dialog. The **Job Details** screen will open.



The screenshot shows the 'Job Details' screen for a client named '123 at blah, Aarons Pass'. The interface includes a top navigation bar with the 'Keep It Easy Software' logo, 'System Preferences', 'Home', and 'Logout' links. Below the navigation bar, the 'Client Details' section shows the client's name and a 'Book Job' button. The main form area contains fields for 'Address' (blah, Aarons Pass), 'Due Date' (Fri - 23 Oct 15), 'Date Completed', 'Time' (HH and MM dropdowns), 'Duration' (0.25), and 'Client's Job Interval' (Weeks). There is a table for 'Add Service' with columns for 'Service Completed', 'Category', 'Qty', '\$ Amount', and 'Includes GST'. The table has one row with 'Select Service Desc', 'Select Categ', '1', '\$', and '\$ 0.00'. Below the table, there is a 'Service By' dropdown (Jai) and a 'Total Service Value' field (\$ 0.00). On the right side, there is a section for 'Other Bookings not yet complete' with a 'Click on Job to go to the details.' link and a 'Jai's Schedule this day' link.

The **Time** and **Duration** fields are empty, but apart from that, this booking is like any other job booking for a client.

After you have filled out all the details for this job, click the  icon and then select the  icon. You will be returned to the **Job Management & Scheduling** screen where all jobs without time are listed separately on the right.

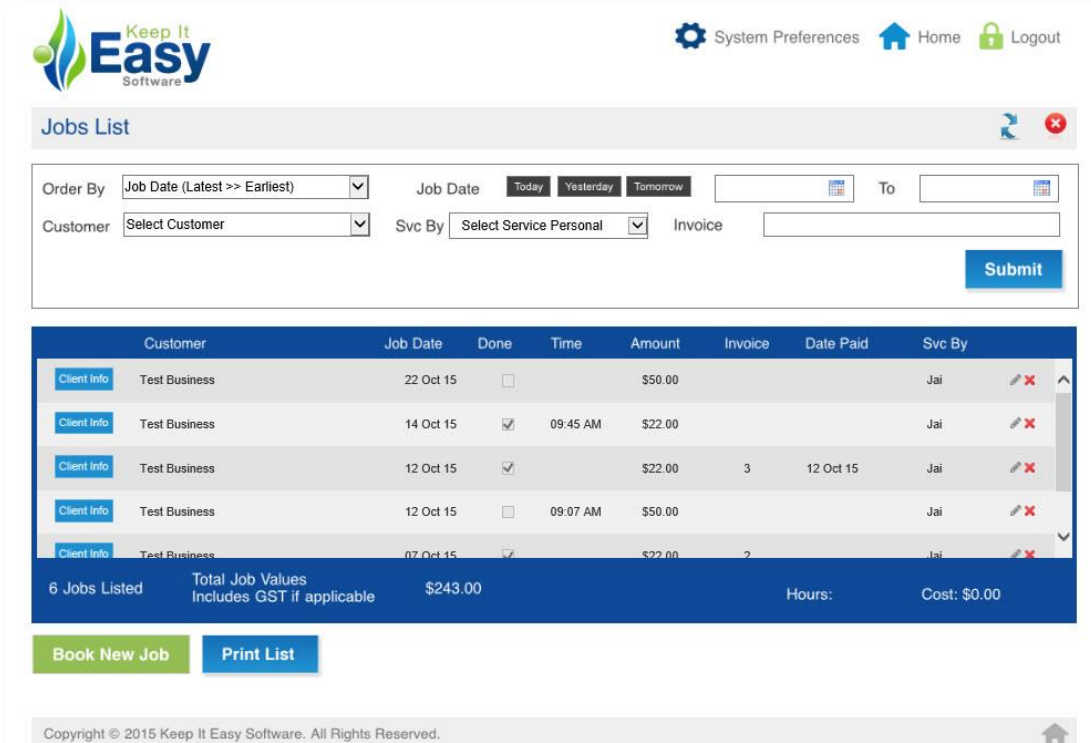
Jobs Without A Time		
Client	Address	Value
Test Business	48 Senwood Close, Aarons Pass	\$22.00

Jobs List

Open the **Jobs List** screen by clicking the **Jobs List** link on the Main Menu screen.

The **Jobs List** screen provides an overview of *all* jobs in the database. This includes history and future jobs, paid and unpaid jobs, completed and incomplete jobs.

To return to the Main Menu, select **Home**.



The screenshot shows the 'Jobs List' interface. At the top, there's a navigation bar with 'System Preferences', 'Home', and 'Logout'. Below this is the 'Jobs List' header with a refresh icon and a close button. The main area contains filter fields: 'Order By' (Job Date (Latest >> Earliest)), 'Job Date' (Today, Yesterday, Tomorrow), 'Customer' (Select Customer), 'Svc By' (Select Service Personal), and 'Invoice'. A 'Submit' button is at the bottom right of the filter section. Below the filters is a table with columns: Customer, Job Date, Done, Time, Amount, Invoice, Date Paid, and Svc By. The table lists 6 jobs for 'Test Business'. The first job is on 22 Oct 15 for \$50.00. The second is on 14 Oct 15 for \$22.00. The third is on 12 Oct 15 for \$22.00. The fourth is on 12 Oct 15 for \$50.00. The fifth is on 07 Oct 15 for \$22.00. The sixth job is partially visible. At the bottom of the table, it says '6 Jobs Listed', 'Total Job Values Includes GST if applicable', '\$243.00', 'Hours:', and 'Cost: \$0.00'. Below the table are 'Book New Job' and 'Print List' buttons. At the very bottom, there's a copyright notice: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.'

Customer	Job Date	Done	Time	Amount	Invoice	Date Paid	Svc By
Test Business	22 Oct 15	<input type="checkbox"/>		\$50.00			Jai
Test Business	14 Oct 15	<input checked="" type="checkbox"/>	09:45 AM	\$22.00			Jai
Test Business	12 Oct 15	<input checked="" type="checkbox"/>		\$22.00	3	12 Oct 15	Jai
Test Business	12 Oct 15	<input type="checkbox"/>	09:07 AM	\$50.00			Jai
Test Business	07 Oct 15	<input checked="" type="checkbox"/>		\$22.00	2		Jai

General information about this screen

- At the bottom of the screen the total number of jobs and their value is displayed.
- Jobs with a tick in the **done** column, mean they have been completed.



TIP

Combine filter fields (make use of multiple filter fields at the same time) to further limit the number of results displayed in this list.



TIP

When you use a filter and have the feeling that certain jobs are missing from the list, then check to make sure no other filters have been applied. Remove the contents of any filter fields you do not want to use.

Print Job List

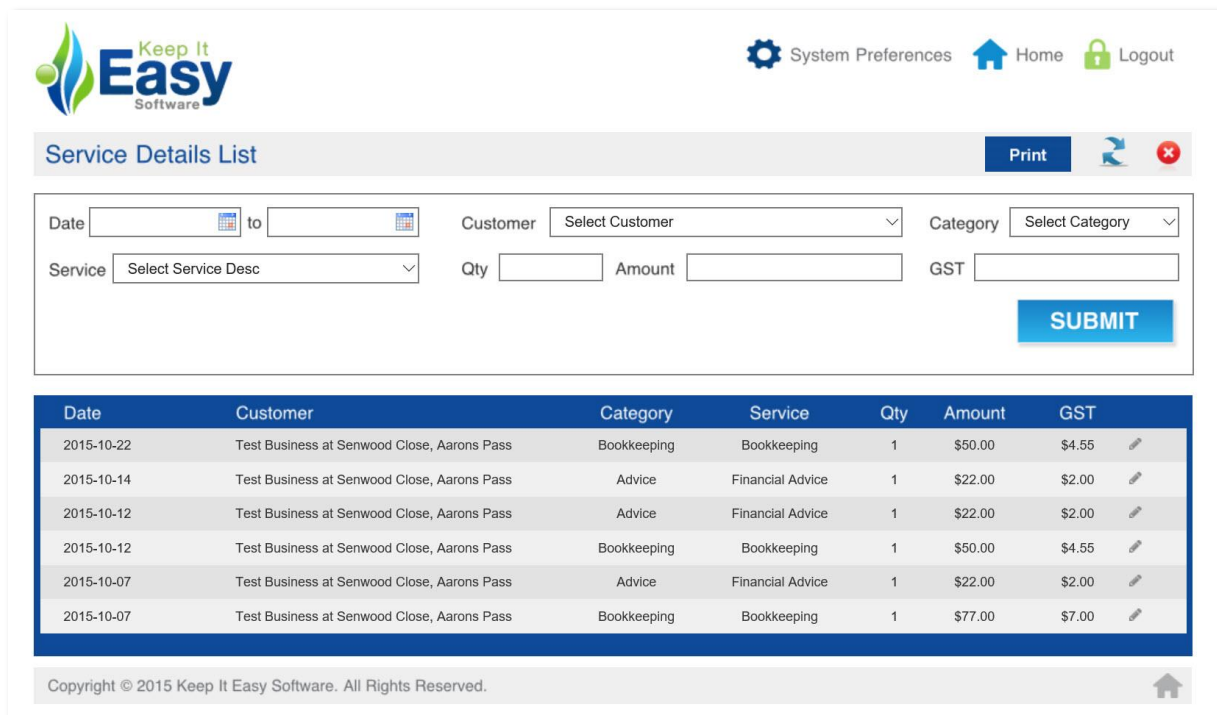
To print the Job List, click the **Print List** button at the bottom of the screen. A new window will open with the report.

Service Details List

Open the **Service Details List** screen by clicking the **Service Details List** button on the Main Menu screen.

The **Service Details List** screen provides an overview of *all* services provided or products sold. That means that a job consisting of three parts (e.g. 1. remove leaves/debris, 2. brush floor/sides, 3. sale of a bottle of cleaning agent) will generate three lines in the Service Details List.

To return the **Main Menu**, selected the Home icon.




The screenshot shows the 'Service Details List' screen. At the top, there's a navigation bar with the 'Keep It Easy Software' logo, 'System Preferences', 'Home', and 'Logout' icons. Below this, the title 'Service Details List' is displayed next to a 'Print' button and a refresh icon. The main area contains a filter section with fields for 'Date' (with a calendar icon), 'Customer' (a dropdown menu), 'Category' (a dropdown menu), 'Service' (a dropdown menu), 'Qty' (a text input), 'Amount' (a text input), and 'GST' (a text input). A 'SUBMIT' button is located at the bottom right of the filter section. Below the filter section is a table with the following data:

Date	Customer	Category	Service	Qty	Amount	GST
2015-10-22	Test Business at Senwood Close, Aarons Pass	Bookkeeping	Bookkeeping	1	\$50.00	\$4.55
2015-10-14	Test Business at Senwood Close, Aarons Pass	Advice	Financial Advice	1	\$22.00	\$2.00
2015-10-12	Test Business at Senwood Close, Aarons Pass	Advice	Financial Advice	1	\$22.00	\$2.00
2015-10-12	Test Business at Senwood Close, Aarons Pass	Bookkeeping	Bookkeeping	1	\$50.00	\$4.55
2015-10-07	Test Business at Senwood Close, Aarons Pass	Advice	Financial Advice	1	\$22.00	\$2.00
2015-10-07	Test Business at Senwood Close, Aarons Pass	Bookkeeping	Bookkeeping	1	\$77.00	\$7.00

At the bottom of the screen, there is a copyright notice: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

General information about this screen

- The list of services is ordered by date (newest first).
- You can open a service by clicking the  icon.

TIP Combine filter fields (make use of multiple filter fields at the same time) to further limit the number of results displayed in this list.

TIP When you use a filter and have the feeling that certain jobs are missing from the list, then check to make sure no other filters have been applied. Remove the contents of any filter fields you do not want to use.

Print Job Services List

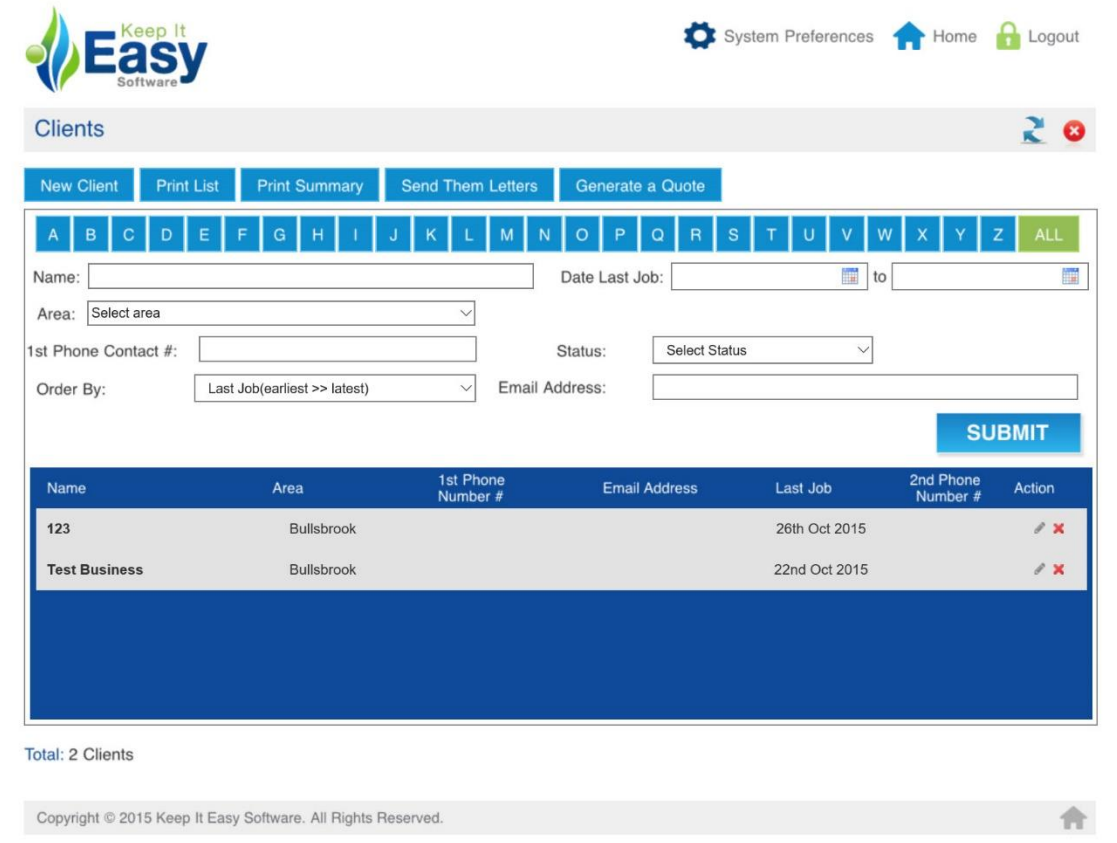
To print the Job Services List, click the **Print** icon along the top right hand side of the screen. Note that if filters have been applied to the **Service Details List** screen, the same filters will also be applied to the printed list.

For a preview of this report and detailed instructions on how to print from the system, please refer to the Reports & Printing Manual.

Client List

To access the client list, click the **Client List** link on the **Main Menu**. This will show all your clients in the system.


To return to the **Main Menu**, select the **Home** icon.



The screenshot shows the 'Clients' page in the Keep It Easy Software interface. At the top, there's a navigation bar with the logo, 'System Preferences', 'Home', and 'Logout'. Below this is a 'Clients' header with a refresh icon and a close button. A row of action buttons includes 'New Client', 'Print List', 'Print Summary', 'Send Them Letters', and 'Generate a Quote'. A filter bar contains alphabet tabs (A-Z) and an 'ALL' tab. Below the filter bar are search and filter fields: 'Name', 'Date Last Job' (with a date range), 'Area' (dropdown), '1st Phone Contact #', 'Status' (dropdown), 'Order By' (dropdown), and 'Email Address'. A 'SUBMIT' button is to the right. The main area is a table with columns: Name, Area, 1st Phone Number #, Email Address, Last Job, 2nd Phone Number #, and Action. Two clients are listed: '123' and 'Test Business', both in the 'Bullsbrook' area. The 'Action' column contains edit and delete icons for each client. At the bottom, it says 'Total: 2 Clients' and a copyright notice for 2015.

Name	Area	1st Phone Number #	Email Address	Last Job	2nd Phone Number #	Action
123	Bullsbrook			26th Oct 2015		
Test Business	Bullsbrook			22nd Oct 2015		

View Client Details

To view a client's details, select the  icon next to the client details you wish to open.

Action Buttons

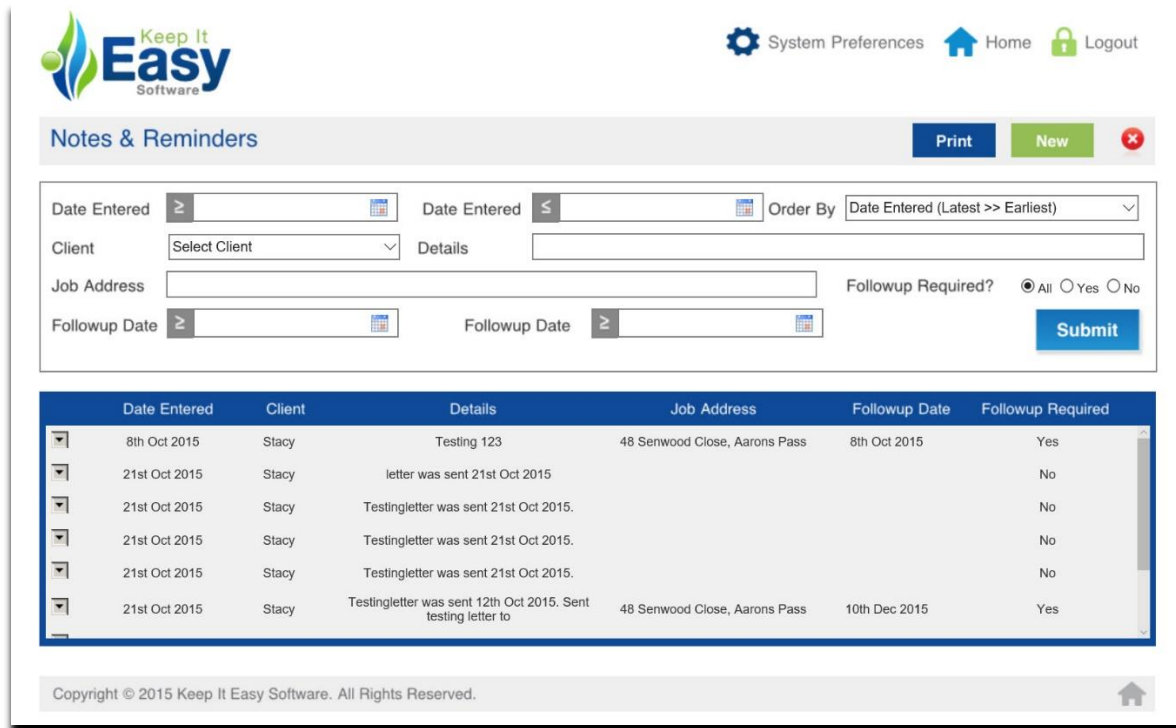
The buttons along the top of this screen allow you to perform various actions, some of which have been described in other sections of this manual.

- **New Client** To add a new client to the system.
- **Print List** To print the client list.
- **Print Summary** To print a summary of the clients.
- **Send Them Letters** To send your clients letters.
- **Generate a Quote** This generates a quote for your client/s.

Notes List

To access the Notes and Reminders List, select the **Notes List** link on the **Main Menu**. This will show all Notes and Reminders.

To return to the **Main Menu**, select the **Home** icon.



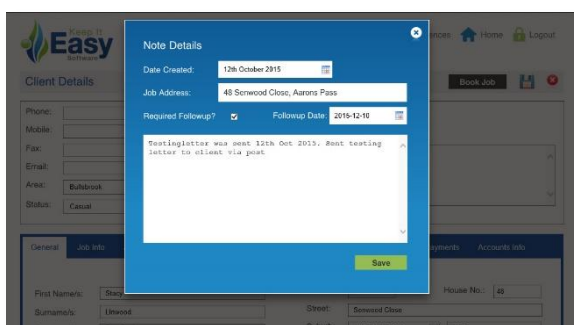
	Date Entered	Client	Details	Job Address	Followup Date	Followup Required
▼	8th Oct 2015	Stacy	Testing 123	48 Senwood Close, Aarons Pass	8th Oct 2015	Yes
▼	21st Oct 2015	Stacy	letter was sent 21st Oct 2015			No
▼	21st Oct 2015	Stacy	Testingletter was sent 21st Oct 2015.			No
▼	21st Oct 2015	Stacy	Testingletter was sent 21st Oct 2015.			No
▼	21st Oct 2015	Stacy	Testingletter was sent 21st Oct 2015.			No
▼	21st Oct 2015	Stacy	Testingletter was sent 12th Oct 2015. Sent testing letter to	48 Senwood Close, Aarons Pass	10th Dec 2015	Yes

Actions

The arrow next to the note (on the left hand side) next to the date allows you to access the Client Details, Note Details, Book a Job or Delete the note.

Note Details

Open a note by selecting **Note Details** from the dropdown options (on the left hand side, next to the date).



The note details dialog box allows you to view and/or change all and any of the note details.

Delete Note

To delete a note

- Select **Delete** from the dropdown list next to the date field on the Notes List screen.

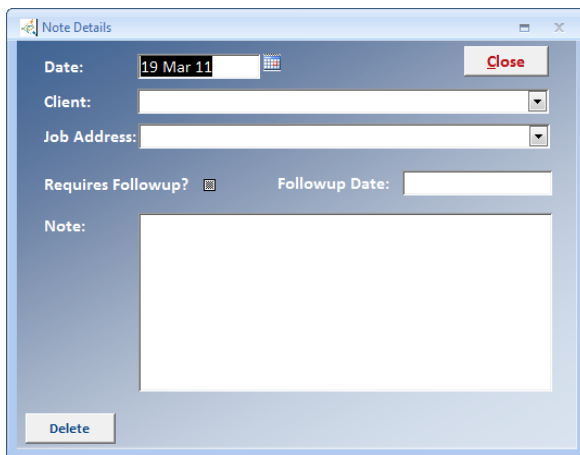
Print Notes List

To print a list of notes, click the **Print** button on the **Notes & Reminders** screen. Any filters that have been applied to the notes on the screen will also be applied to the printed list.

For a preview of this report and detailed instructions on how to print from the system, please refer to the Reports & Printing Manual.

Add New Note

To add a new note to the system, click the **New** button. A dialog box will open.

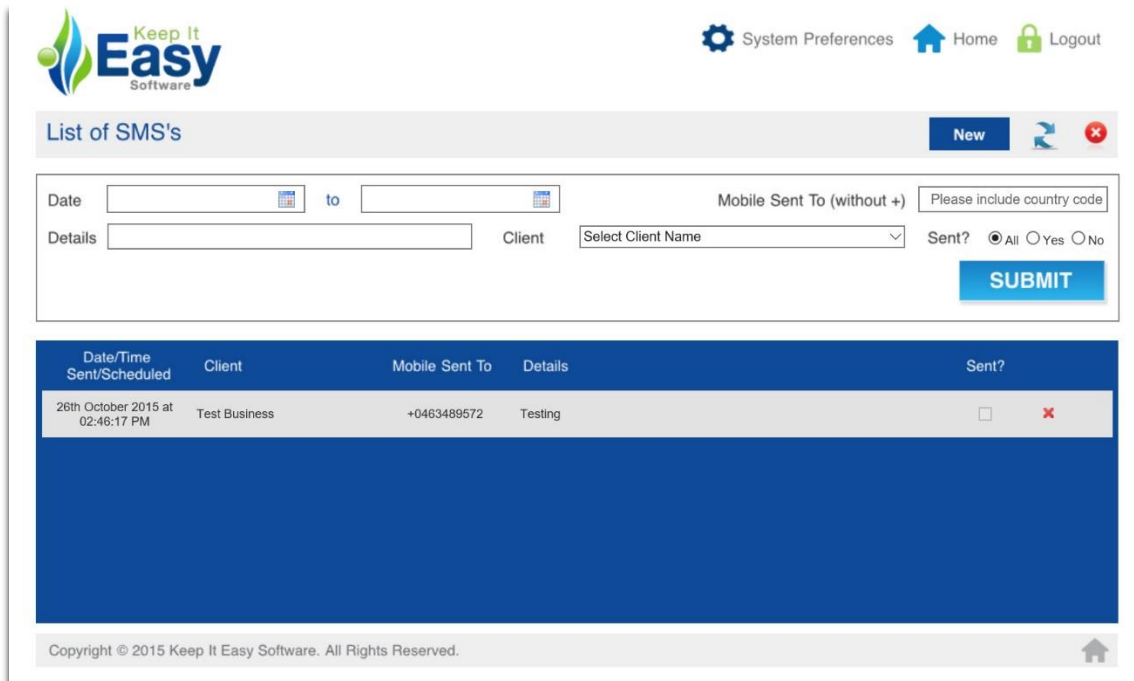
A screenshot of the "Note Details" dialog box. It has a title bar with a close button. The form contains: a "Date:" field with a calendar icon and a "Close" button; a "Client:" dropdown menu; a "Job Address:" dropdown menu; a "Requires Followup?" checkbox; a "Followup Date:" field; a large "Note:" text area; and a "Delete" button at the bottom left.

Enter all the details for the note, and click the **Close** button to close and save the note.

SMSs List

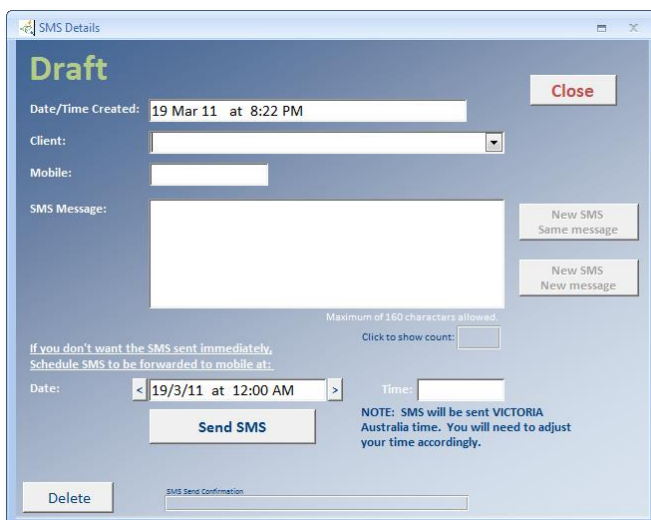
To access the SMSs List, click the **SMSs List** link on the Main Menu. This will open the **SMS List** screen.

To return to the **Main Menu**, select the **Home** icon.



New SMS

To create a new SMS, click the **New** button along the top of the screen. An empty dialog will open.

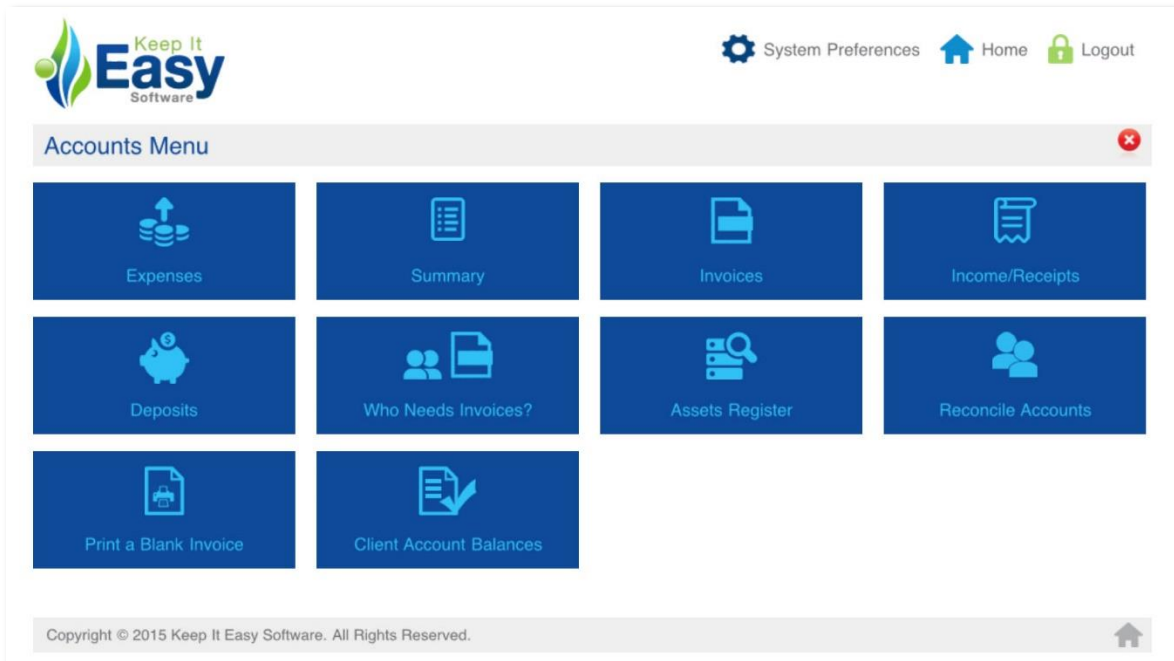


Fill out the details and select **Send**.

Accounts Menu

To open the **Accounts Menu** click the **Accounts** link on the Main Menu. The following screen will open.

To return to the **Main Menu**, select the **Home** icon.



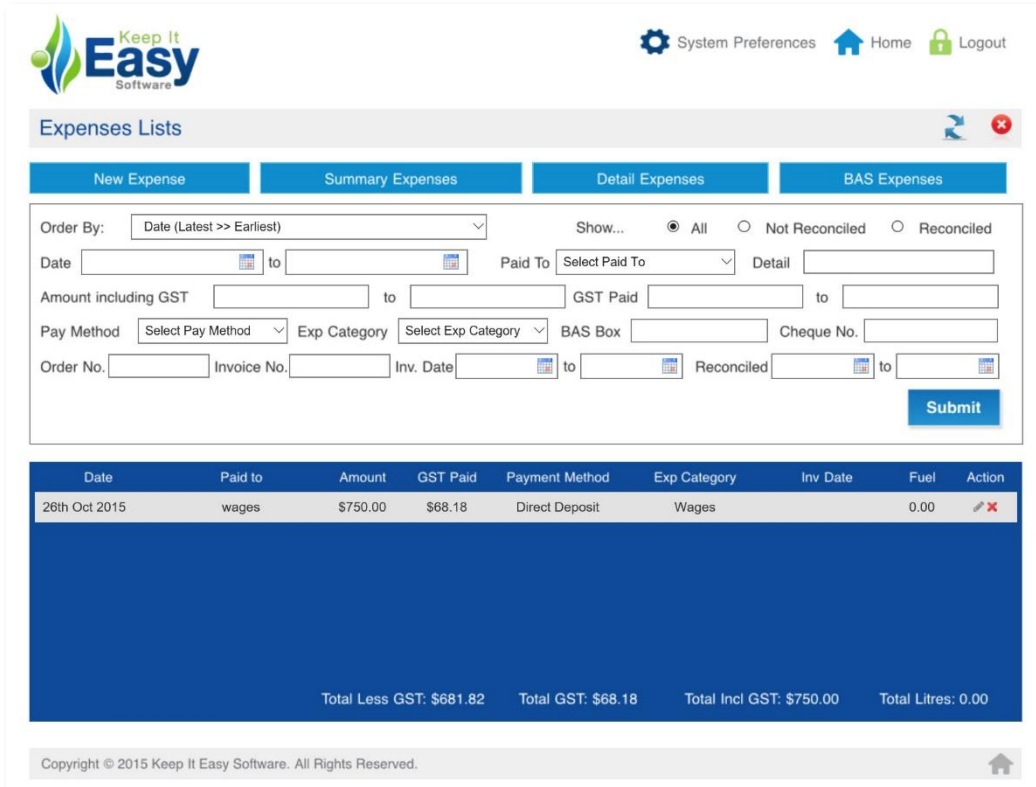
The Accounts Menu consists of a number of links that give you access to;

- Expenses
- Summary
- Invoices
- Income/Receipts
- Deposits
- Who Needs Invoices?
- Assets Register
- Reconcile Accounts
- Print a Blank Invoice
- Client Account Balances

Expenses


To access the **Expenses** screen, click the **List of Expenses** link on the Accounts Menu.

To return to the **Main Menu**, select the **Home** icon.



The screenshot shows the 'Expenses Lists' screen. At the top, there's a navigation bar with the 'Keep It Easy Software' logo, 'System Preferences', 'Home', and 'Logout' links. Below this is a sub-header 'Expenses Lists' with a refresh icon and a close icon. The main area has four tabs: 'New Expense', 'Summary Expenses', 'Detail Expenses', and 'BAS Expenses'. The 'New Expense' tab is active. It contains a form with various filter fields: 'Order By' (set to 'Date (Latest >> Earliest)'), 'Show...' (with radio buttons for 'All', 'Not Reconciled', and 'Reconciled'), 'Date' (with a date range selector), 'Paid To' (a dropdown), 'Detail' (a text field), 'Amount including GST' (with a range selector), 'GST Paid' (with a range selector), 'Pay Method' (a dropdown), 'Exp Category' (a dropdown), 'BAS Box' (a text field), 'Cheque No.' (a text field), 'Order No.' (a text field), 'Invoice No.' (a text field), 'Inv. Date' (with a date range selector), and 'Reconciled' (with a date range selector). A 'Submit' button is at the bottom right of the form. Below the form is a table with the following columns: Date, Paid to, Amount, GST Paid, Payment Method, Exp Category, Inv Date, Fuel, and Action. The table contains one row of data: 26th Oct 2015, wages, \$750.00, \$68.18, Direct Deposit, Wages, 0.00, and an action icon. At the bottom of the table, there are four summary fields: 'Total Less GST: \$681.82', 'Total GST: \$68.18', 'Total Incl GST: \$750.00', and 'Total Litres: 0.00'. The footer contains the copyright notice 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

General information about this screen

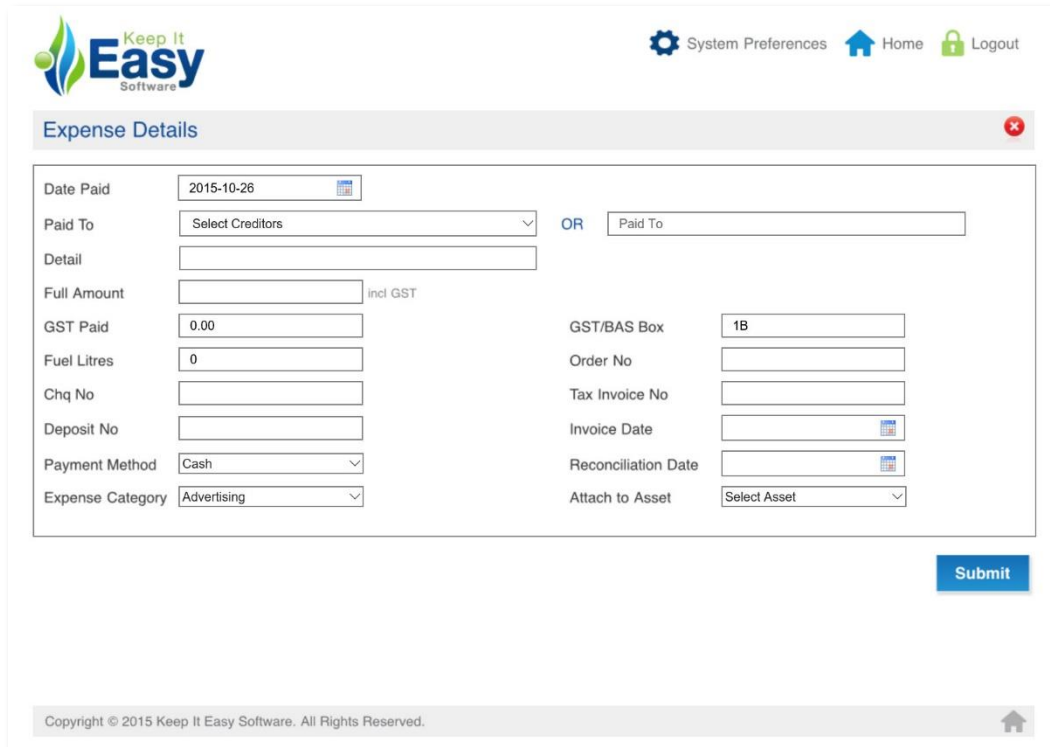
- You can limit the number of expenses displayed on this screen by using the filter fields.
- The list of expenses is ordered according to the selection in the **Order by** filter field.
- You can open an expense by selecting the  icon.
- Expenses totals are displayed at the bottom of the screen.

Edit / View Expense Details

Open an expense by selecting the  icon on the **Expenses List** screen.

New Expense

To enter a new expense, click the **New Expense** link along the top of the screen. The **Expense Details** screen opens.




The screenshot shows the 'Expense Details' form in the Keep It Easy Software interface. The form is titled 'Expense Details' with a close icon (X) in the top right corner. It contains various input fields for recording an expense:

- Date Paid:** 2015-10-26 (with a calendar icon)
- Paid To:** Select Creditors (dropdown menu) OR Paid To (text input)
- Detail:** (text input)
- Full Amount:** (text input) incl GST
- GST Paid:** 0.00 (text input)
- Fuel Litres:** 0 (text input)
- Chq No:** (text input)
- Deposit No:** (text input)
- Payment Method:** Cash (dropdown menu)
- Expense Category:** Advertising (dropdown menu)
- GST/BAS Box:** 1B (text input)
- Order No:** (text input)
- Tax Invoice No:** (text input)
- Invoice Date:** (text input) with a calendar icon
- Reconciliation Date:** (text input) with a calendar icon
- Attach to Asset:** Select Asset (dropdown menu)


A blue **Submit** button is located at the bottom right of the form. At the bottom of the page, there is a copyright notice: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

Enter all the information for the expense and click the **SUBMIT** icon along the bottom of the screen to save the expense.

To immediately enter another expense after submitting one, select the  icon to return to the **Expenses List** page.

Select the **New Expense** link along the top of the screen and this will bring up a new expense to be entered.

Delete Expense

To delete an expense, select the  icon next to the expense you wish to delete, confirm you wish to delete by selecting **Ok** when the pop up box appears, or select **Cancel** if you wish to return to the **Expenses List** screen.

Summary Expenses

For a summary of all expenses, click the **Summary Expenses** link along the top of the **Expenses List** screen. Note that if filters have been applied to the **Expenses List** screen, the same filters will also be applied to the printed list.

Detail Expenses

For a detailed overview of all expenses, click the **Detail Expenses** link along the top of the **Expenses List** screen. Note that if filters have been applied to the **Expenses List** screen, the same filters will also be applied to the printed list.

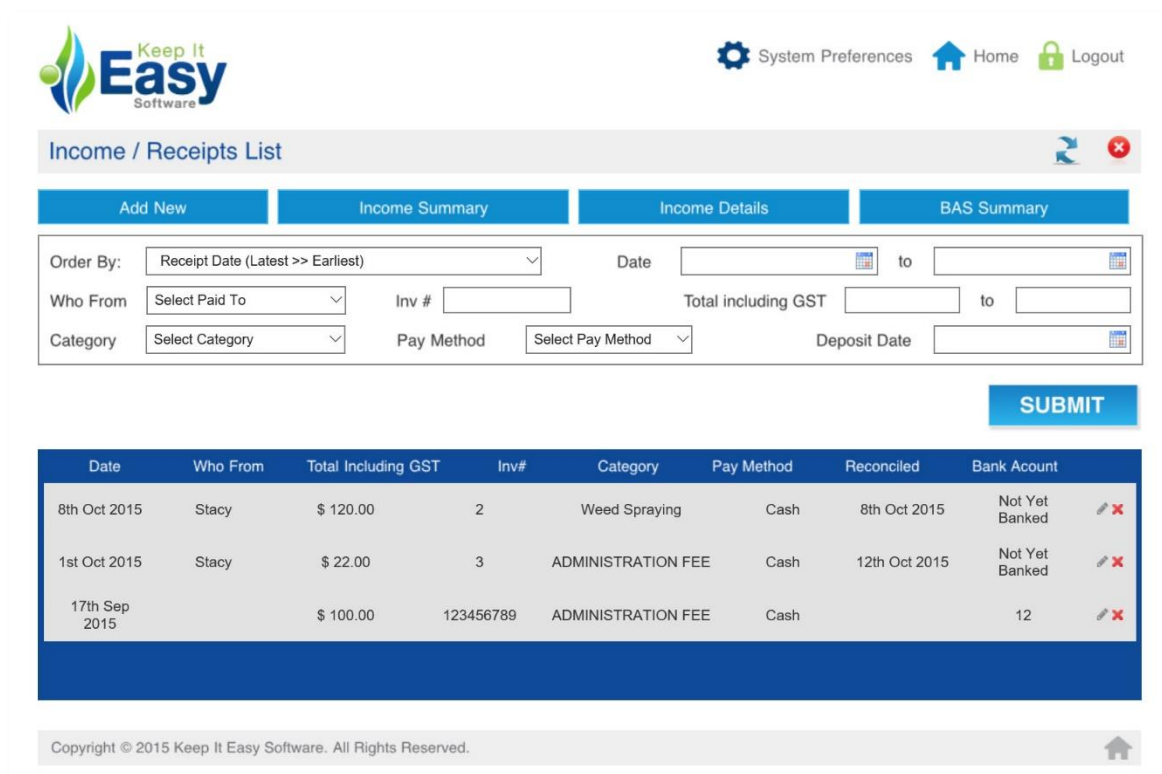
BAS Expenses







For a detailed overview of BAS expenses, click the **BAS Expenses** button along the top of the **Expenses List** screen. Note that if filters have been applied to the **Expenses List** screen, the same filters will also be applied to the printed list.

Income/Receipts

To access the **Receipts List** screen, click the **List of Receipts** link on the Accounts Menu. This is the only screen where you can make entries in a list, otherwise doing the reconciliations takes too long. You can edit the list directly from here without going in and out of the receipt details all the time.

To return to the **Main Menu**, select the **Home** icon.




Date	Who From	Total Including GST	Inv#	Category	Pay Method	Reconciled	Bank Account	
8th Oct 2015	Stacy	\$ 120.00	2	Weed Spraying	Cash	8th Oct 2015	Not Yet Banked	 
1st Oct 2015	Stacy	\$ 22.00	3	ADMINISTRATION FEE	Cash	12th Oct 2015	Not Yet Banked	 
17th Sep 2015		\$ 100.00	123456789	ADMINISTRATION FEE	Cash		12	 

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General information about this screen

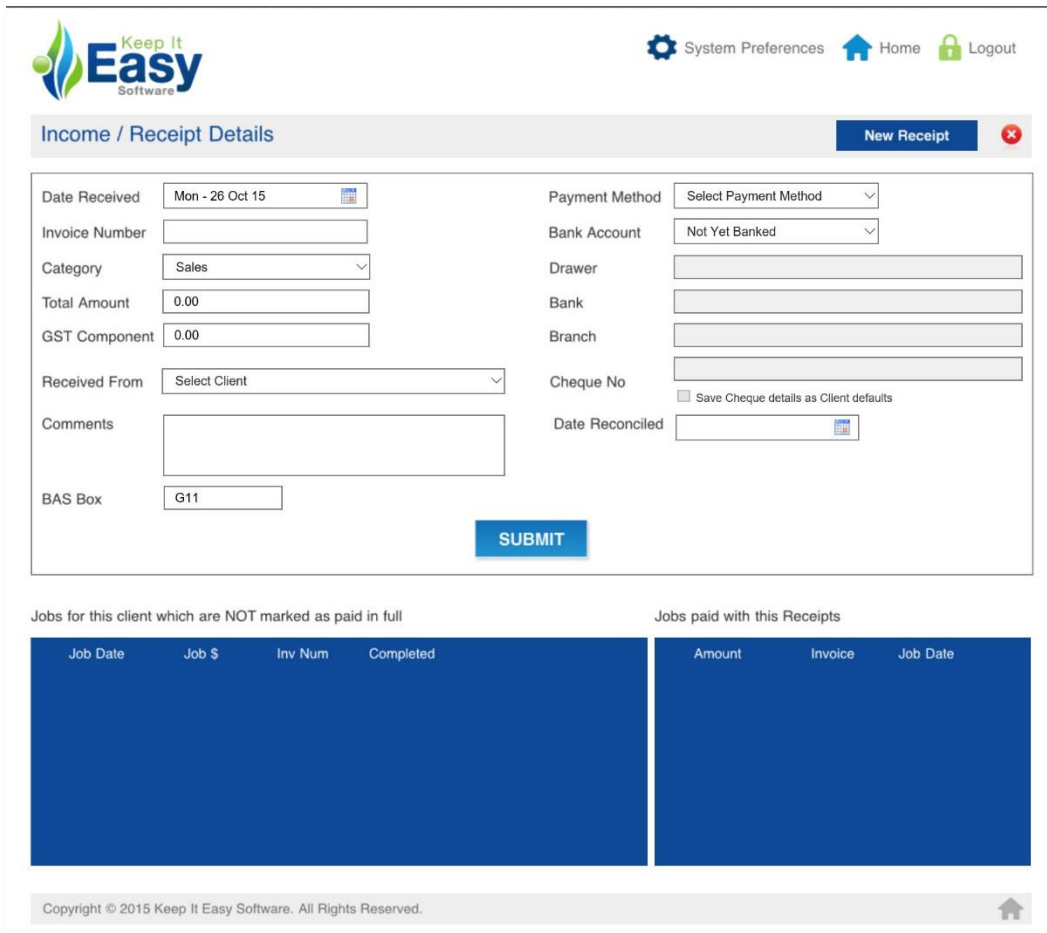
- You can limit the number of receipts displayed on this screen by using the filter fields
- The list of receipts is ordered according to the selection in the **Order by** filter fields.

Edit / View Receipt Details

Open a receipt by selecting the  icon next to receipt you wish to view or edit.

New Receipt

To enter a new receipt, click the **Add New** link along the top of the screen. The **Income/Receipt Details** screen opens.




The screenshot shows the 'Income / Receipt Details' form. At the top, there is a navigation bar with the 'Keep It Easy Software' logo, 'System Preferences', 'Home', and 'Logout' links. Below the navigation bar, the form title 'Income / Receipt Details' is displayed, followed by a 'New Receipt' button and a red 'X' icon. The form contains several input fields and sections:

- Date Received:** A date picker set to 'Mon - 26 Oct 15'.
- Invoice Number:** A text input field.
- Category:** A dropdown menu set to 'Sales'.
- Total Amount:** A text input field set to '0.00'.
- GST Component:** A text input field set to '0.00'.
- Received From:** A dropdown menu set to 'Select Client'.
- Comments:** A large text area.
- BAS Box:** A text input field set to 'G11'.
- Payment Method:** A dropdown menu set to 'Select Payment Method'.
- Bank Account:** A dropdown menu set to 'Not Yet Banked'.
- Drawer:** A text input field.
- Bank:** A text input field.
- Branch:** A text input field.
- Cheque No:** A text input field.
- Save Cheque details as Client defaults:** A checkbox.
- Date Reconciled:** A date picker.

At the bottom of the form is a blue 'SUBMIT' button. Below the form, there are two sections:


- Jobs for this client which are NOT marked as paid in full:** A table with columns 'Job Date', 'Job \$', 'Inv Num', and 'Completed'.
- Jobs paid with this Receipts:** A table with columns 'Amount', 'Invoice', and 'Job Date'.


At the very bottom, there is a copyright notice: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

Enter all the information for the receipt and click the **SUBMIT** icon along the bottom of the screen to save the expense. Select the  icon to return to the **Income/Receipts List** page.

To immediately enter another receipt, click the **Add New** button along the top of the screen.

Delete Receipt

To delete a receipt, select the  icon next to the receipt you wish to delete. Confirm you wish to delete when the pop up box appears by selecting **Ok**, or select **Cancel** to return.

View or edit a receipt by selecting the  icon, next to the receipt you would like to view or edit.

Income Summary

For a summary overview of all receipts, click the **Income Summary** button along the top of the Receipts List screen.

Income Details

For a detailed overview of all receipts, click the **Income Details** button along the top of the Expenses List screen.

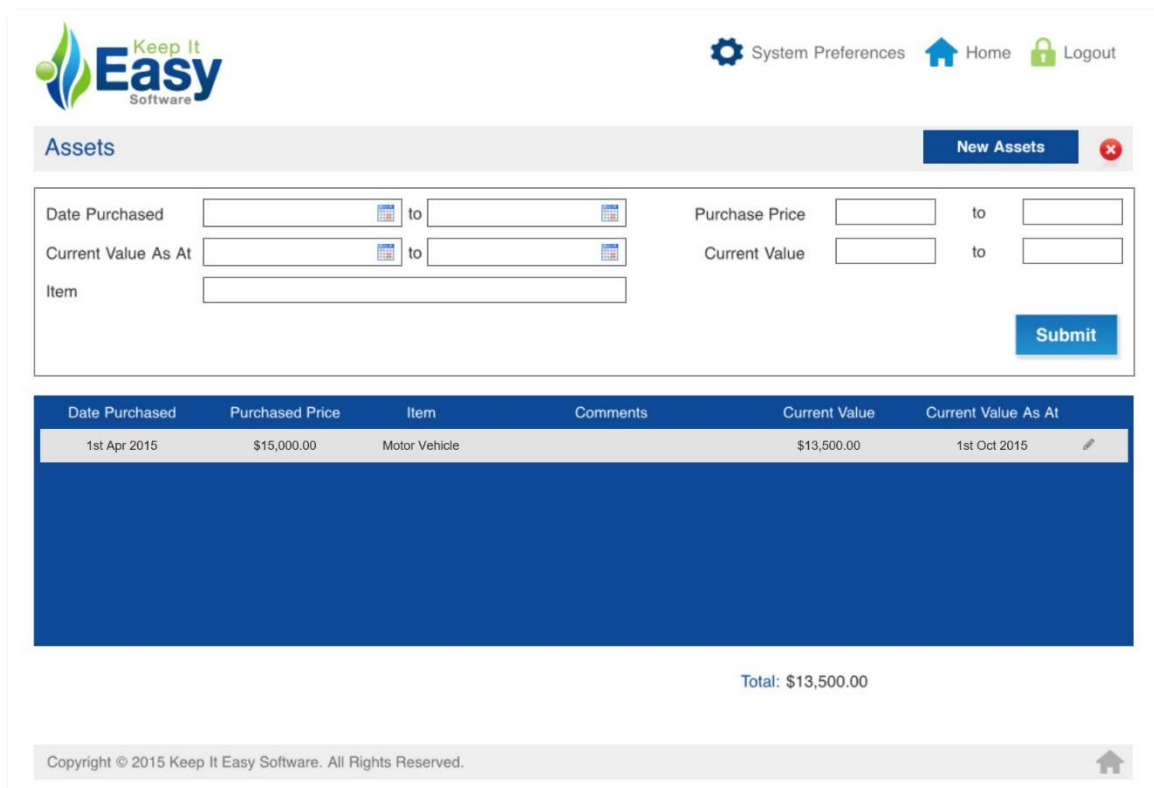
BAS Summary

For an overview of receipts by BAS reference, click the **BAS Summary** button along the top of the **Receipts List** screen.

Assets Register

To access the **Assets Register**, select the **Assets Register** link on the Accounts Menu.

To return to the **Main Menu**, select the **Home** icon.




The screenshot displays the 'Assets' section of the software interface. At the top, there is a navigation bar with the 'Keep It Easy Software' logo, 'System Preferences', 'Home', and 'Logout' links. Below this, the 'Assets' tab is active, and a 'New Assets' button is visible. The main area contains a form for adding new assets with fields for 'Date Purchased', 'Purchase Price', 'Current Value As At', and 'Item'. A 'Submit' button is located at the bottom right of the form. Below the form is a table listing existing assets. The table has columns for 'Date Purchased', 'Purchased Price', 'Item', 'Comments', 'Current Value', and 'Current Value As At'. One asset is listed: 'Motor Vehicle' purchased on '1st Apr 2015' for '\$15,000.00', with a 'Current Value' of '\$13,500.00' as of '1st Oct 2015'. A 'Total: \$13,500.00' is shown at the bottom right of the table. The footer contains the copyright notice 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

Date Purchased	Purchased Price	Item	Comments	Current Value	Current Value As At
1st Apr 2015	\$15,000.00	Motor Vehicle		\$13,500.00	1st Oct 2015

Total: \$13,500.00

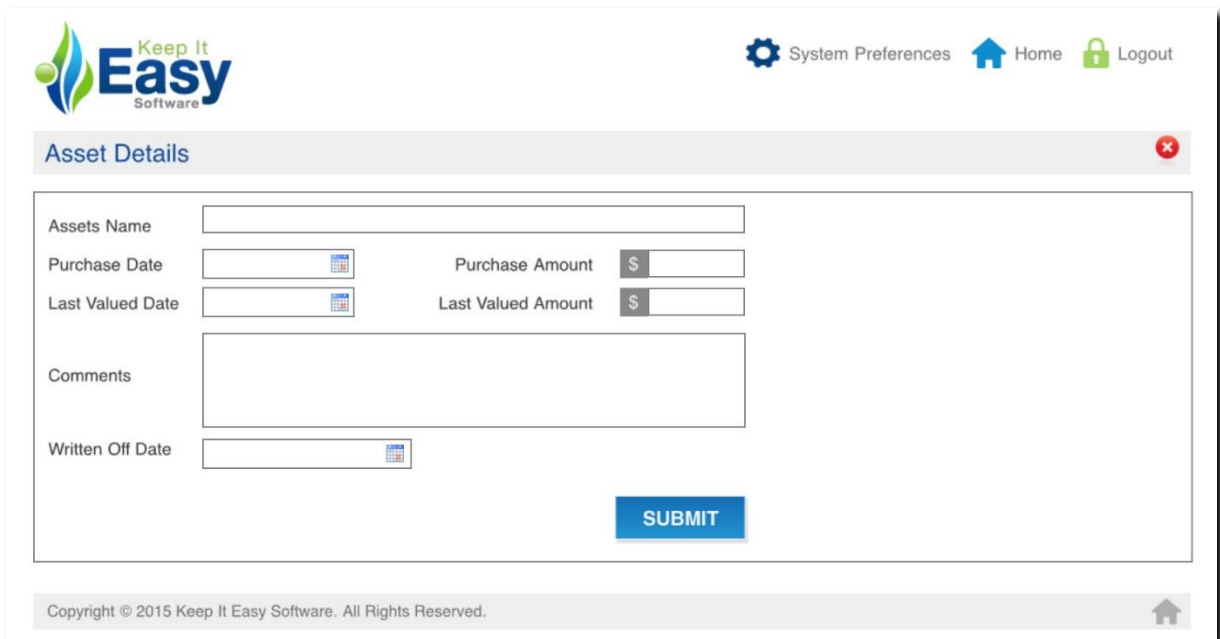
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Edit / View Assets Details

To edit or view an asset, select the  icon next to the asset you wish to view or edit.

New Asset

To enter a new asset, click the **New Assets** link along the top of the screen. The **Asset Details** screen opens.



The **Asset Details** screen displays the following fields:

- Assets Name
- Purchase Date
- Last Valued Date
- Purchase Amount
- Last Valued Amount
- Comments
- Written Off Date

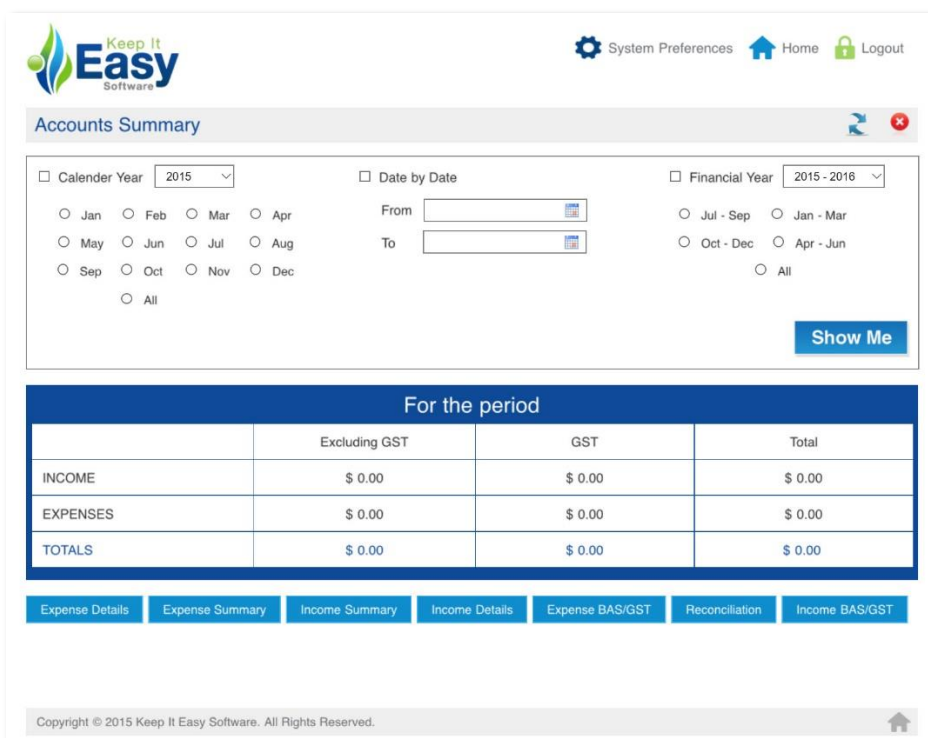
A **SUBMIT** button is located at the bottom right of the form.

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Fill out all the details for the asset and click **SUBMIT** to save the asset.

Summary

The **Account Summary** screen gives quick access to a number of reports, summaries, and overviews.



The **Accounts Summary** screen displays the following options:

- ☐ Calendar Year: 2015
 - ☐ Jan ☐ Feb ☐ Mar ☐ Apr
 - ☐ May ☐ Jun ☐ Jul ☐ Aug
 - ☐ Sep ☐ Oct ☐ Nov ☐ Dec
 - ☐ All
- ☐ Date by Date
 - From: [Date Picker]
 - To: [Date Picker]
- ☐ Financial Year: 2015 - 2016
 - ☐ Jul - Sep ☐ Jan - Mar
 - ☐ Oct - Dec ☐ Apr - Jun
 - ☐ All

A **Show Me** button is located at the bottom right of the selection area.

For the period

	Excluding GST	GST	Total
INCOME	\$ 0.00	\$ 0.00	\$ 0.00
EXPENSES	\$ 0.00	\$ 0.00	\$ 0.00
TOTALS	\$ 0.00	\$ 0.00	\$ 0.00

Navigation links: Expense Details, Expense Summary, Income Summary, Income Details, Expense BAS/GST, Reconciliation, Income BAS/GST

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Select a calendar year or financial year, and select a month, quarter, or date range. Then click the **Show Me** link to instantly generate an overview of all income and expenses.

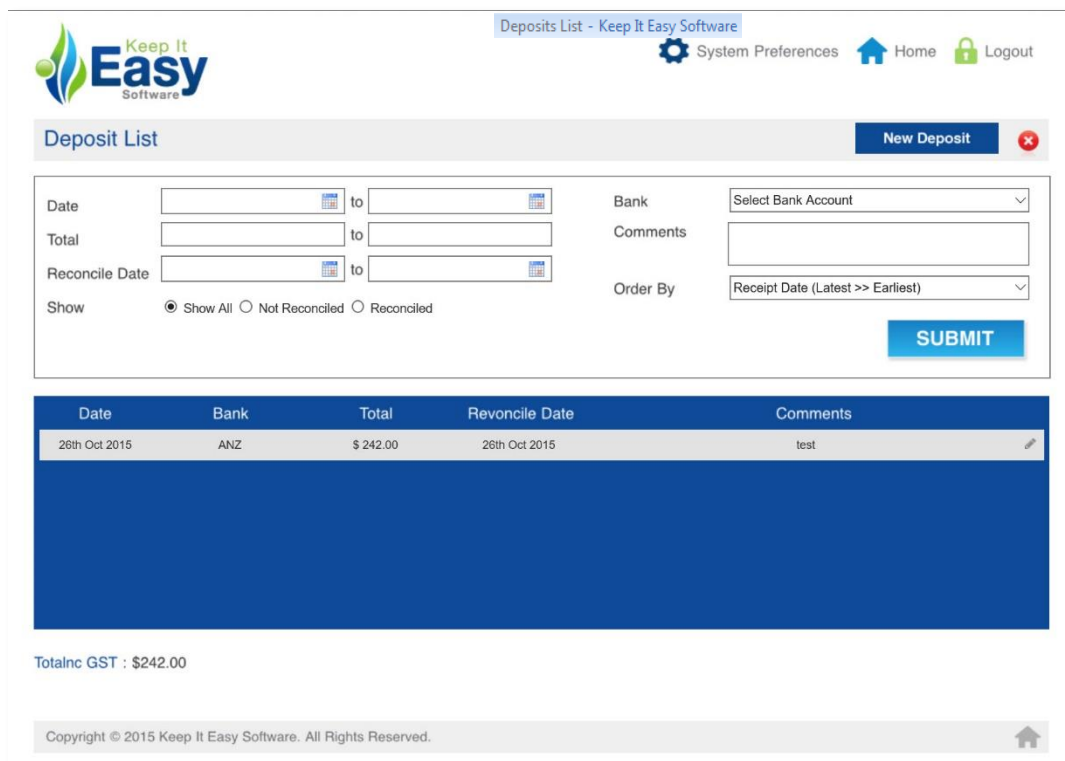
Select the options below to show different summaries and reports

- Expense Details
- Expense Summary
- Receipts Summary
- Receipts Details
- Expenses BAS/GST
- Reconciliation
- Receipts BAS/GST

Deposits List

To keep track of your deposits and print a deposit slip, click the **Deposits** link on the **Accounts List** screen.

To return to the **Main Menu**, select the **Home** icon.



Deposits List - Keep It Easy Software

System Preferences Home Logout

Deposit List New Deposit

Date [] to [] Bank Select Bank Account

Total [] to [] Comments []

Reconcile Date [] to [] Order By Receipt Date (Latest >> Earliest)

Show ☒ Show All ☐ Not Reconciled ☐ Reconciled

SUBMIT

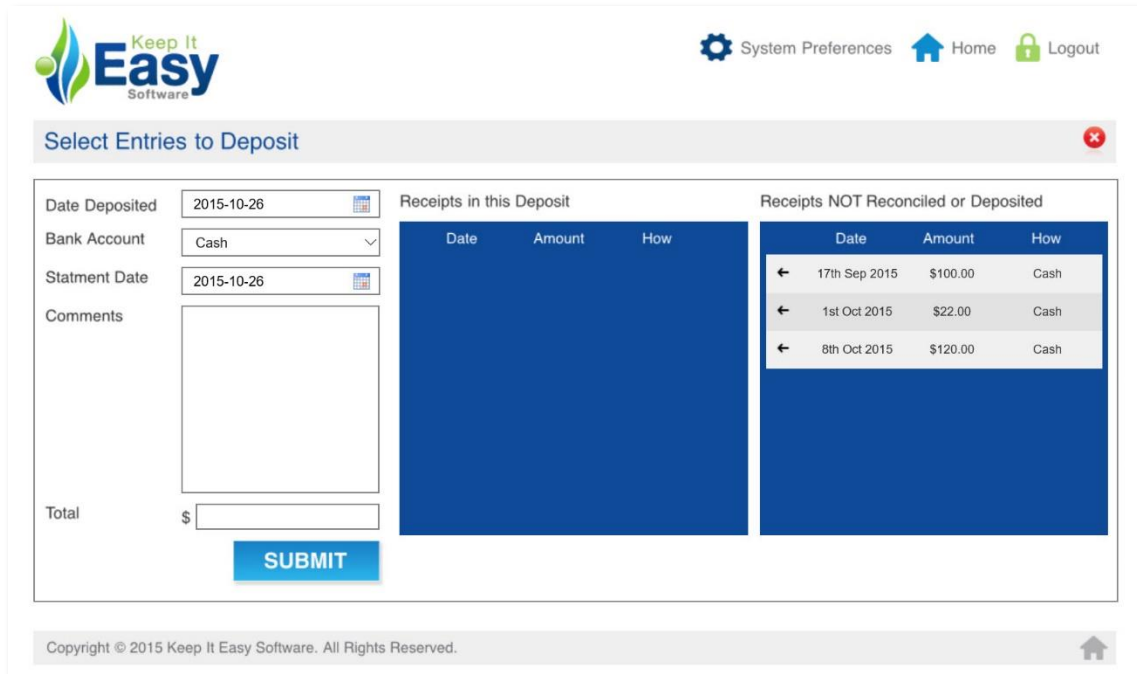
Date	Bank	Total	Reconcile Date	Comments
26th Oct 2015	ANZ	\$ 242.00	26th Oct 2015	test

Totalinc GST : \$242.00

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Add New Deposit

To enter a new deposit, click the **New Deposit** option along the top of the screen. A screen will open where you can select entries to deposit.



Select Entries to Deposit

Date Deposited: 2015-10-26
 Bank Account: Cash
 Statement Date: 2015-10-26
 Comments:
 Total: \$
 SUBMIT

Receipts in this Deposit

Date	Amount	How
------	--------	-----

Receipts NOT Reconciled or Deposited

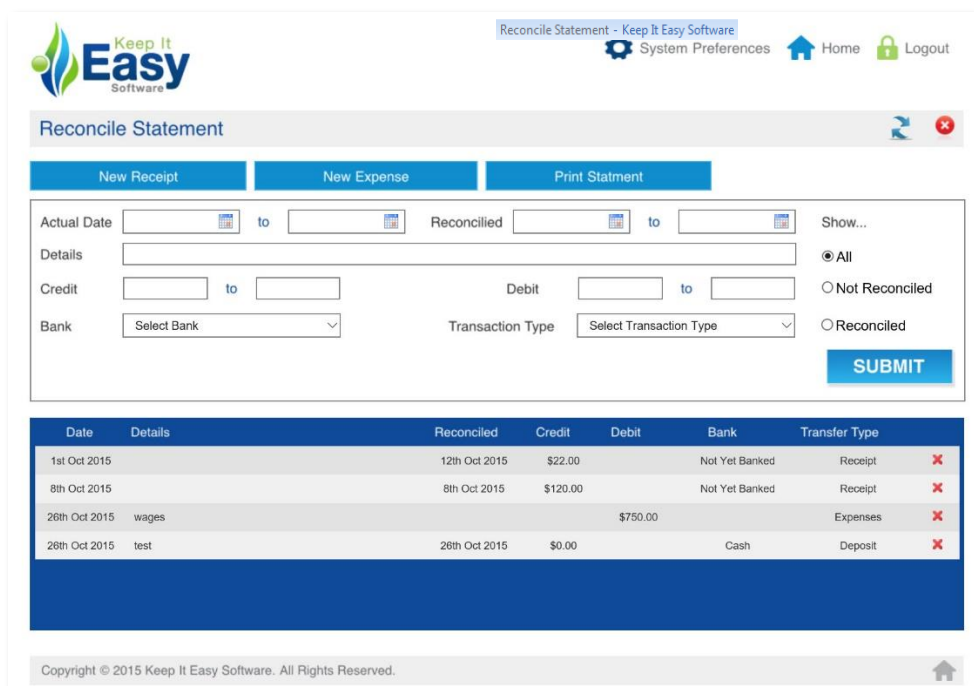
Date	Amount	How
← 17th Sep 2015	\$100.00	Cash
← 1st Oct 2015	\$22.00	Cash
← 8th Oct 2015	\$120.00	Cash

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First, select a date deposited with the calendar icon, select a bank account from the dropdown list on the left. Then, add receipts to the deposit by clicking receipts on the right. The receipt will be moved to the left window, select a statement date and after you have added all receipts to the deposit, close the window by clicking **SUBMIT**

Reconcile Accounts

The Reconcile Statement screen allows you to compare your Keep It Easy records to your bank account statements to make sure they are in agreement with income and expenses.



Reconcile Statement

New Receipt New Expense Print Statement

Actual Date: to Reconciled: to Show...
 Details:
 Credit: to Debit: to
 Bank: Select Bank Transaction Type: Select Transaction Type
 SUBMIT

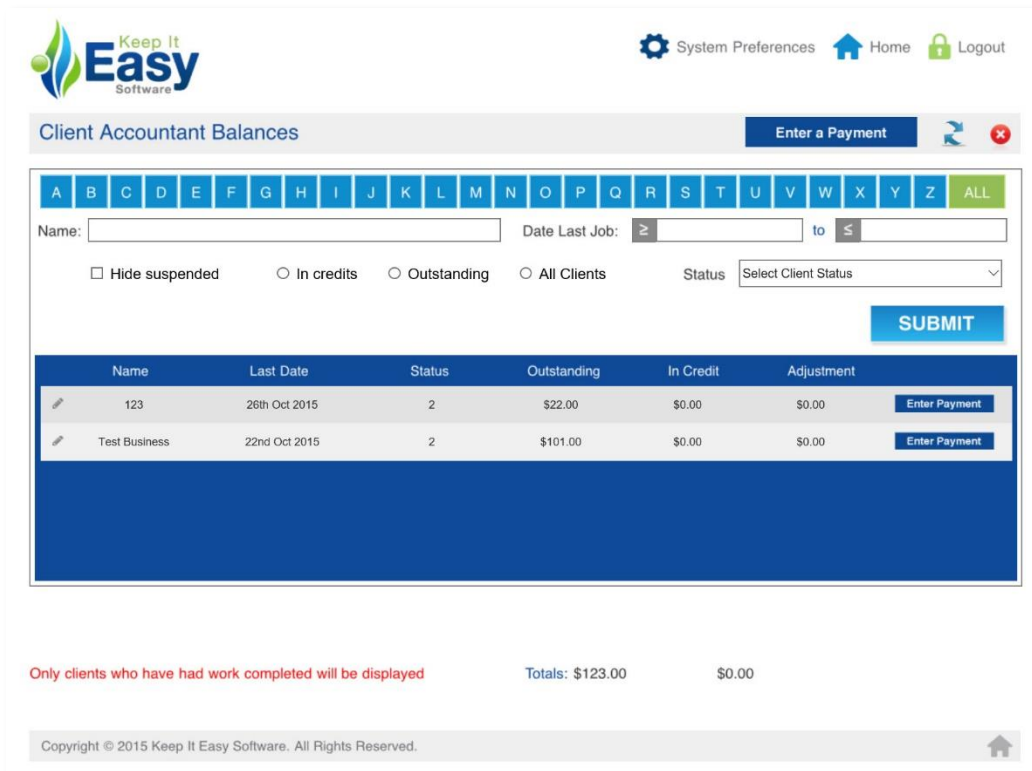
Date	Details	Reconciled	Credit	Debit	Bank	Transfer Type	
1st Oct 2015		12th Oct 2015	\$22.00		Not Yet Banked	Receipt	✗
8th Oct 2015		8th Oct 2015	\$120.00		Not Yet Banked	Receipt	✗
26th Oct 2015	wages			\$750.00		Expenses	✗
28th Oct 2015	test	28th Oct 2015	\$0.00		Cash	Deposit	✗

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Print Statement

To print a Reconcile Bank Statement, click the **Print Statement** link along the top of the screen. A report will open.

Client Account Balances



Client Accountant Balances

Enter a Payment

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Name: Date Last Job: ≥ to ≤

☐ Hide suspended ☐ In credits ☐ Outstanding ☐ All Clients Status:

SUBMIT

Name	Last Date	Status	Outstanding	In Credit	Adjustment
123	26th Oct 2015	2	\$22.00	\$0.00	\$0.00
Test Business	22nd Oct 2015	2	\$101.00	\$0.00	\$0.00

Only clients who have had work completed will be displayed

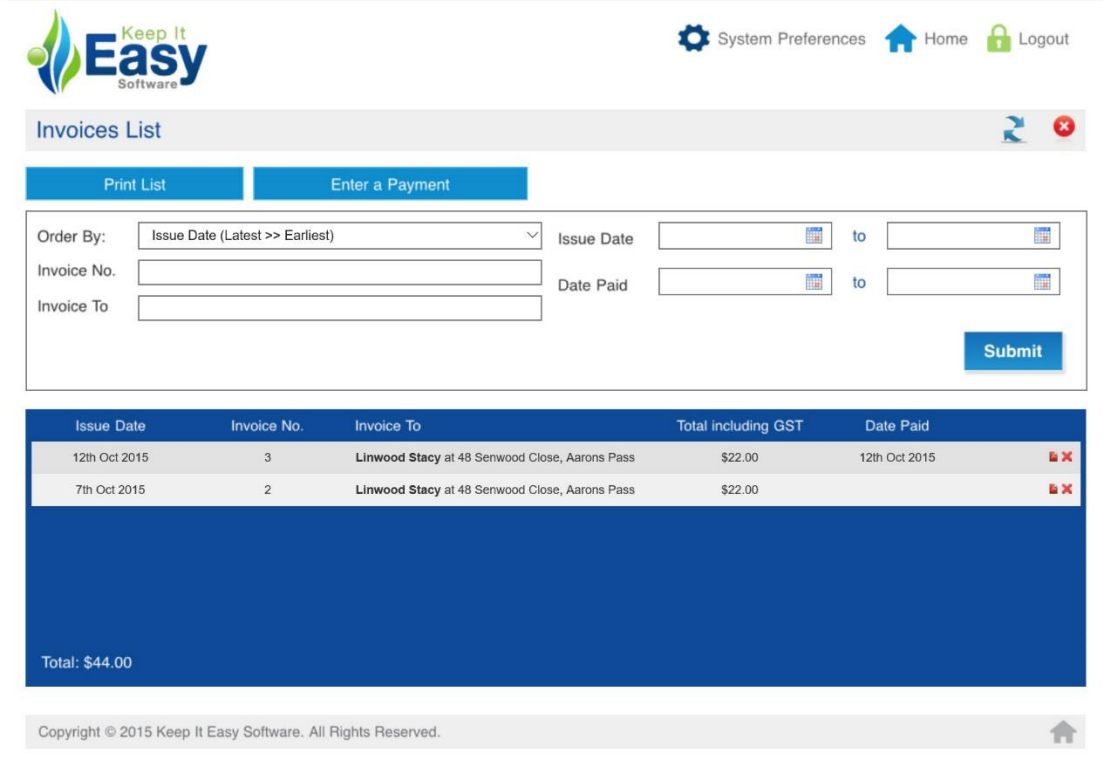
Totals: \$123.00 \$0.00

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Add New Deposit

To enter a new deposit, click the **New Deposit** button along the top of the screen. A screen will open where you can select entries to deposit.

Invoices



The screenshot shows the 'Invoices List' screen. At the top, there is a navigation bar with the 'Keep It Easy Software' logo, a 'System Preferences' link with a gear icon, a 'Home' link with a house icon, and a 'Logout' link with a lock icon. Below the navigation bar, the 'Invoices List' title is displayed. There are two buttons: 'Print List' and 'Enter a Payment'. Below these buttons is a search and filter section with the following fields:

- Order By:** A dropdown menu currently set to 'Issue Date (Latest >> Earliest)'.
- Issue Date:** A date picker field.
- to:** A date picker field.
- Invoice No.:** A text input field.
- Date Paid:** A date picker field.
- to:** A date picker field.
- Invoice To:** A text input field.
- Submit:** A blue button to execute the search.

Below the search section is a table with the following columns: Issue Date, Invoice No., Invoice To, Total including GST, and Date Paid. The table contains two rows of data:

Issue Date	Invoice No.	Invoice To	Total including GST	Date Paid
12th Oct 2015	3	Linwood Stacy at 48 Serwood Close, Aarons Pass	\$22.00	12th Oct 2015
7th Oct 2015	2	Linwood Stacy at 48 Serwood Close, Aarons Pass	\$22.00	

Below the table, a blue box displays the total: **Total: \$44.00**. At the bottom of the screen, there is a footer with the text: 'Copyright © 2015 Keep It Easy Software. All Rights Reserved.' and a home icon.

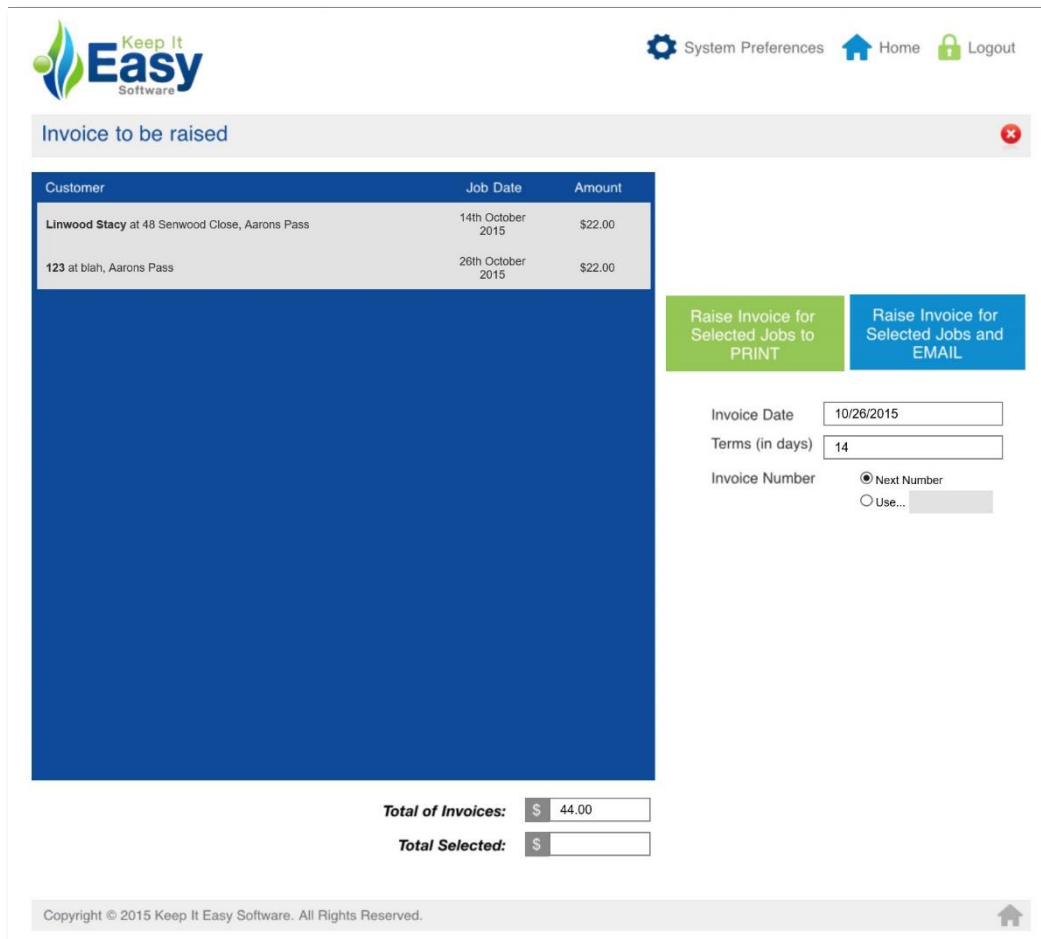
Enter a Payment

To enter a new payment, click the **Enter a Payment** link along the top of the screen. The Receipt Details screen will open where you can enter the payment.

Print List

To print an overview of the invoices listed on this screen, click the **Print List** button.

Who Needs Invoices?



Customer	Job Date	Amount
Linwood Stacy at 48 Senwood Close, Aarons Pass	14th October 2015	\$22.00
123 at blah, Aarons Pass	26th October 2015	\$22.00

Total of Invoices: \$ 44.00

Total Selected: \$

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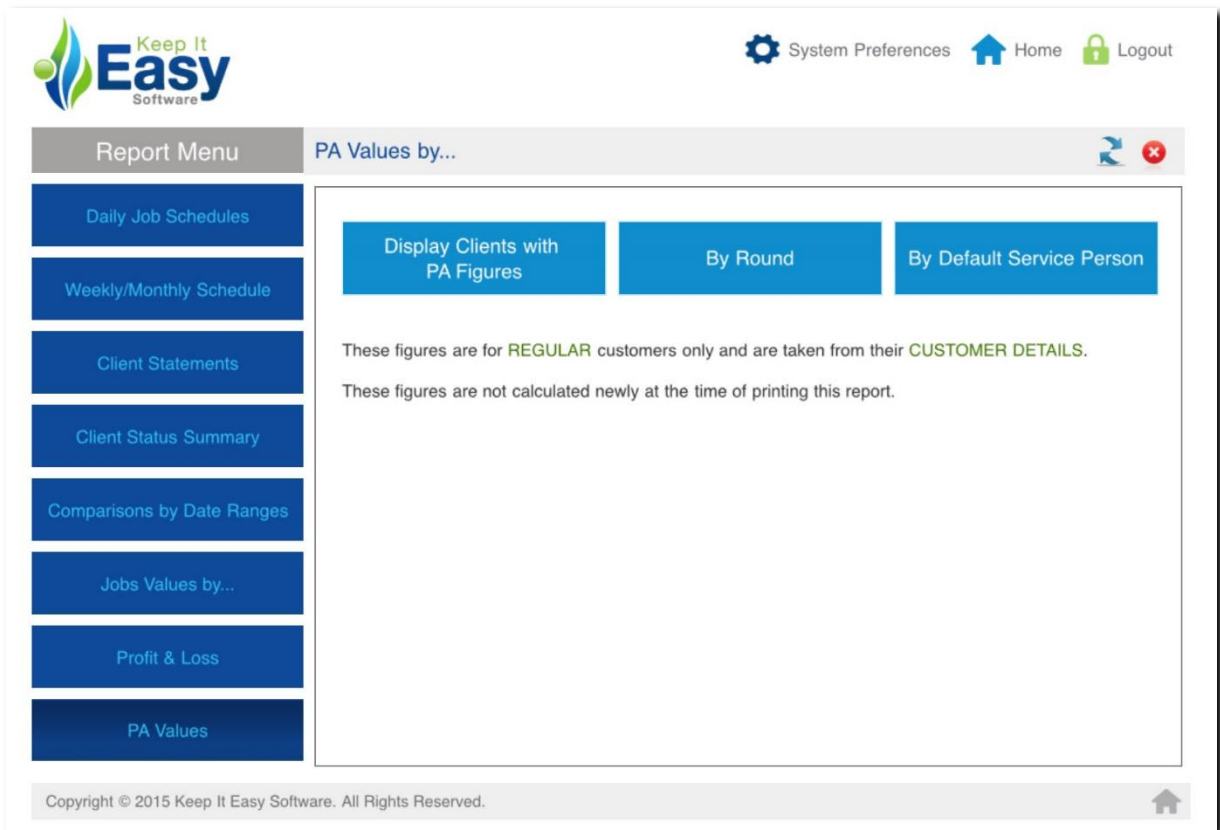
To raise invoice for a client on this list, select them on the left and choose to print or to email the invoice. In order to be able to send an invoice by email, the client's email address has to be stored in the client details.

Print a Blank Invoice

To print a blank invoice, click the **Print a Blank Invoice** link on the **Accounts Menu**.

Print Reports

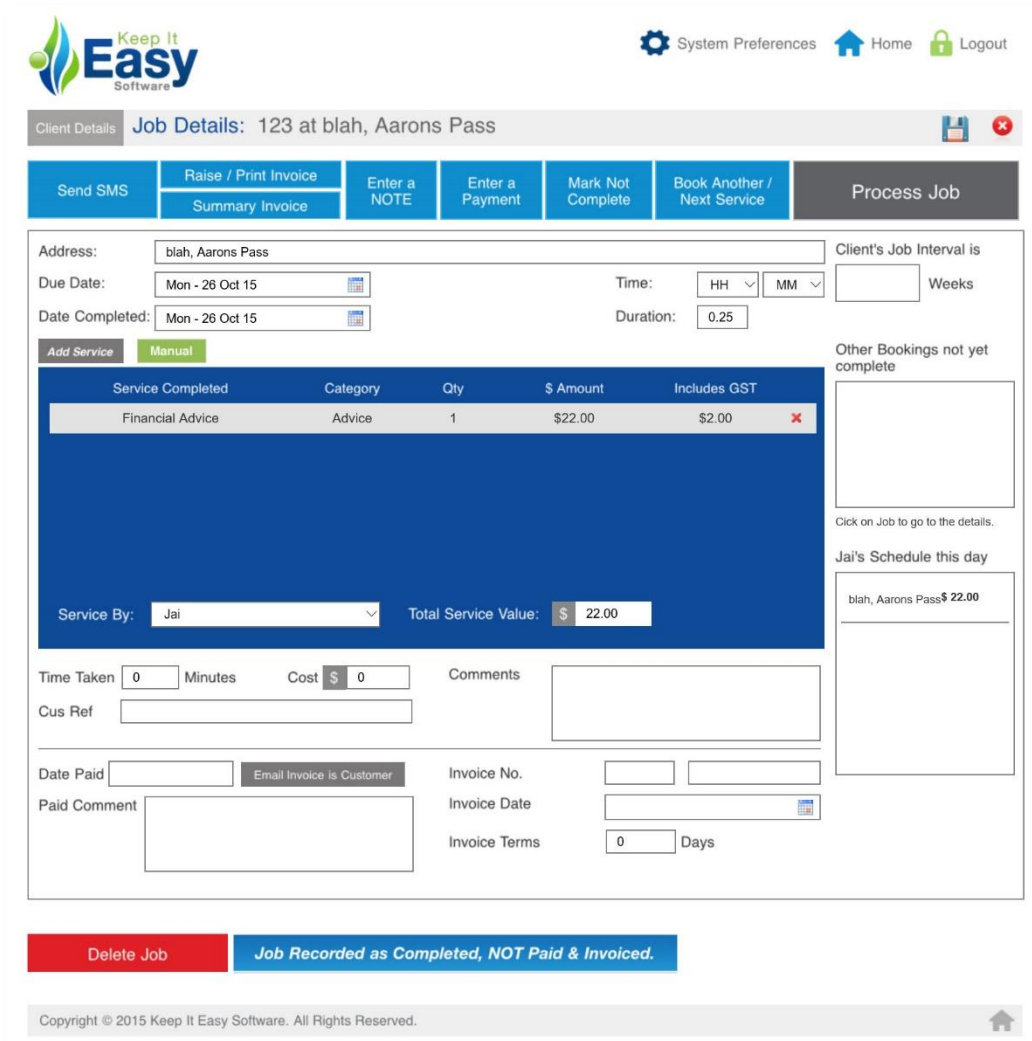
The **Print Reports** button on the Main Menu gives access to the Reports Menu shown below.



Examples of all these reports can be found in the Reports & Printing Manual.

Job Details

The Job Details screen not only provides information about booked jobs, but also gives quick access to a lot of other functionality in the system, viewing client details, sending an sms, entering a note, etc.



The screenshot shows the 'Job Details' screen for a client named '123 at blah, Aarons Pass'. The interface includes a top navigation bar with 'System Preferences', 'Home', and 'Logout' links. Below the navigation bar, there are buttons for 'Send SMS', 'Raise / Print Invoice', 'Enter a NOTE', 'Enter a Payment', 'Mark Not Complete', 'Book Another / Next Service', and 'Process Job'. The main form area contains fields for 'Address', 'Due Date', 'Date Completed', 'Time', 'Duration', and 'Client's Job Interval'. A table lists the services completed, with one entry for 'Financial Advice' at \$22.00. The 'Service By' field is set to 'Jai', and the 'Total Service Value' is \$22.00. There are also fields for 'Time Taken', 'Cost', 'Comments', 'Cus Ref', 'Date Paid', 'Paid Comment', 'Invoice No.', 'Invoice Date', and 'Invoice Terms'. A sidebar on the right shows 'Other Bookings not yet complete' and 'Jai's Schedule this day'. At the bottom, there is a red 'Delete Job' button and a blue button that says 'Job Recorded as Completed, NOT Paid & Invoiced.'.

Client Details: Job Details: 123 at blah, Aarons Pass

Buttons: Send SMS, Raise / Print Invoice, Enter a NOTE, Enter a Payment, Mark Not Complete, Book Another / Next Service, Process Job

Form Fields:

- Address: blah, Aarons Pass
- Due Date: Mon - 26 Oct 15
- Date Completed: Mon - 26 Oct 15
- Time: HH MM
- Duration: 0.25
- Client's Job Interval is Weeks

Service Completed	Category	Qty	\$ Amount	Includes GST
Financial Advice	Advice	1	\$22.00	\$2.00

Service By: Jai Total Service Value: \$ 22.00

Time Taken: 0 Minutes Cost: \$ 0

Cus Ref:

Date Paid: Email Invoice is Customer Invoice No. Invoice Date Invoice Terms: 0 Days

Paid Comment:

Other Bookings not yet complete

Jai's Schedule this day

blah, Aarons Pass \$ 22.00

Buttons: Delete Job, Job Recorded as Completed, NOT Paid & Invoiced.

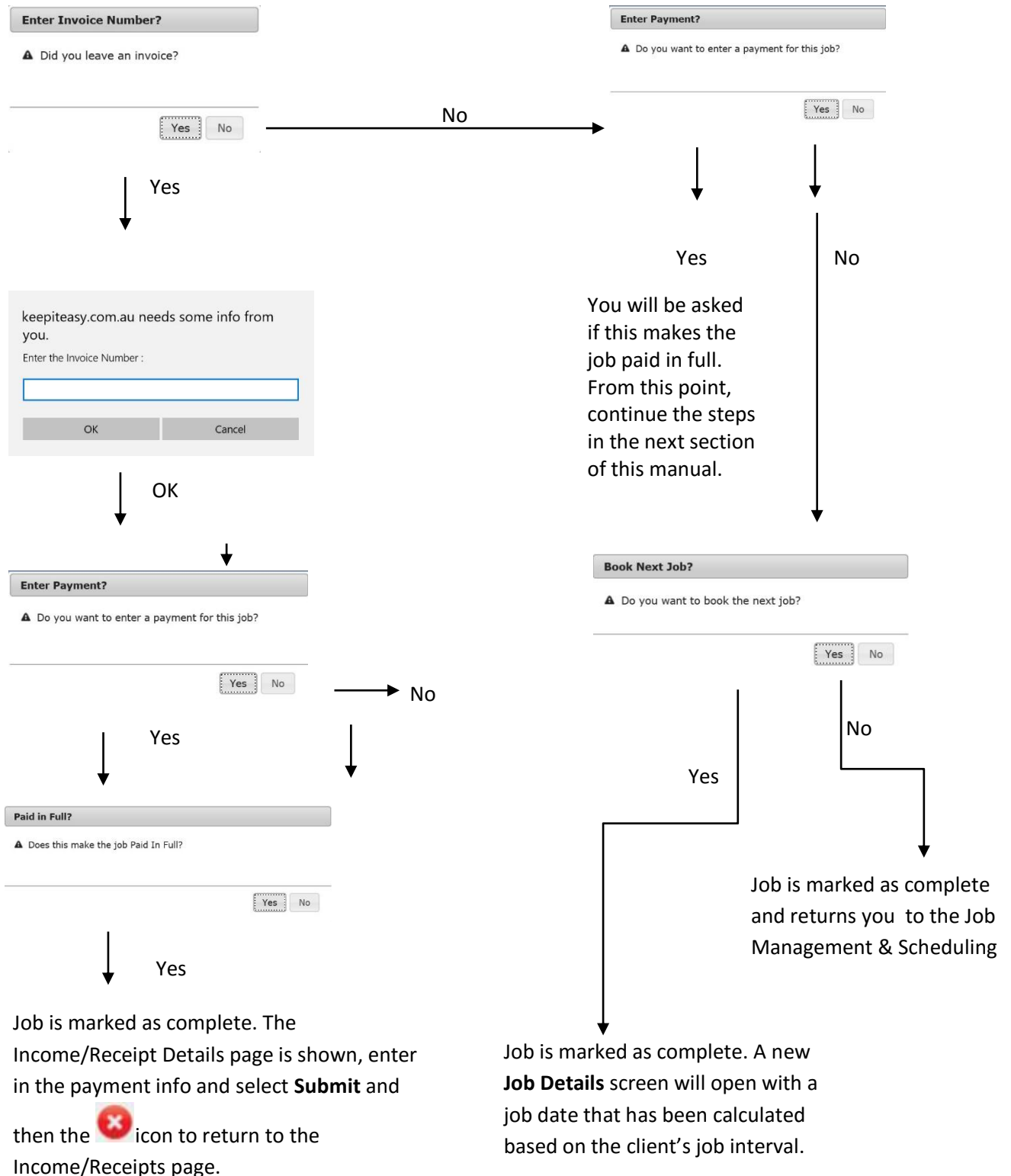
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Different sections of this manual have covered the actions that can be performed on this screen.

Process Job

The Process Job button allows you to quickly handle all the administration for a job that has been completed. This process will take you through a number of steps from entering the payment to booking the next job for the client.

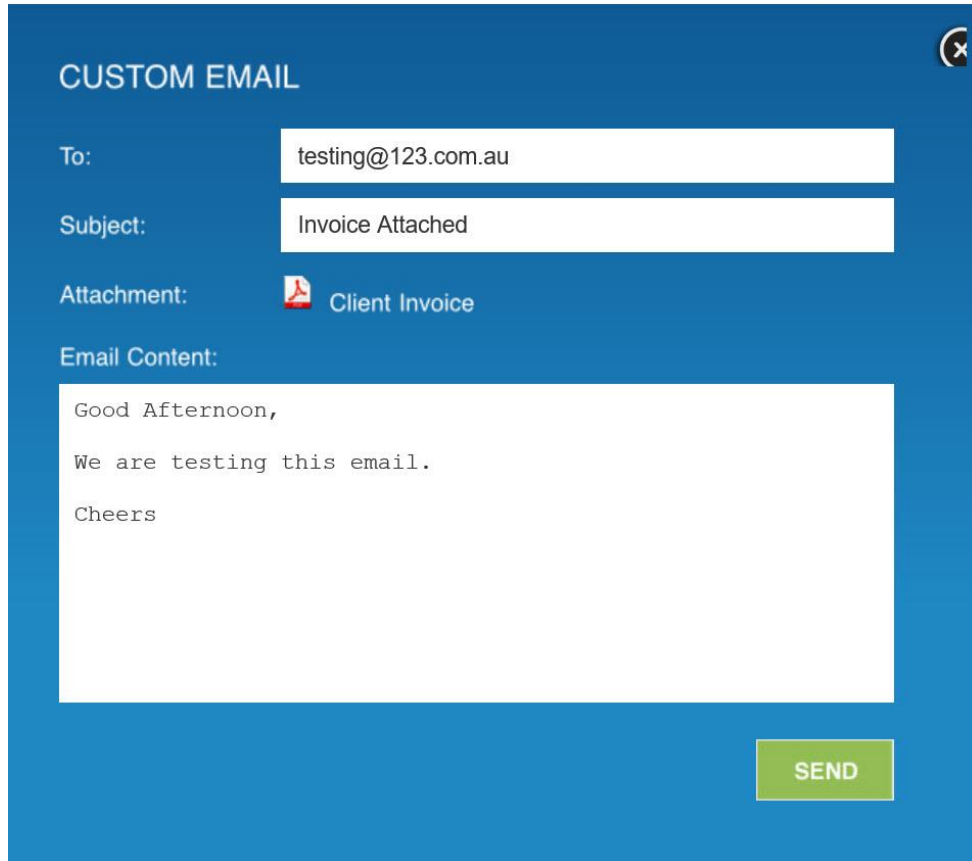
When you click the **Process Job** button, you will be taken through several steps. The options are shown below.



Email Invoice to Customer

Go to **Who Needs Invoices** and click the invoice you wish to email, then select the **Raise Invoice for Selected Jobs and EMAIL** option to have the Keep It Easy software automatically generate an email to the client.


A dialog box will pop up with the invoice attached. Double click the invoice to view prior to sending and add anything extra to the email if necessary. Click **Send**.

A screenshot of a "CUSTOM EMAIL" dialog box. The dialog has a blue header with the title "CUSTOM EMAIL" and a close button (X) in the top right corner. Below the header, there are three input fields: "To:" with the value "testing@123.com.au", "Subject:" with the value "Invoice Attached", and "Attachment:" with a red PDF icon and the text "Client Invoice". Below these fields is a text area labeled "Email Content:" containing the text "Good Afternoon,", "We are testing this email.", and "Cheers". At the bottom right of the dialog is a green button labeled "SEND".

CUSTOM EMAIL

To: testing@123.com.au

Subject: Invoice Attached

Attachment:  Client Invoice

Email Content:

Good Afternoon,
We are testing this email.
Cheers

SEND

Deleting Information from your database

You should always be very careful when deleting information from your database. Once it's gone, it's gone forever.

Be especially careful when deleting setup values (e.g. service descriptions, client status, etc.). Setup values are referenced on other screens and a weird situation is created when a value is referenced (in history records for a client) that no longer exists. If you are ever in doubt whether or not it is smart or safe to delete data from your database, please do not hesitate to contact us. We'll be happy to help.