Keep It Easy Software – Cloud Quick Start Guide

What is Keep It Easy Software?

Keep It Easy is a cloud based scheduling software designed to make life easier for small business owners to keep their business running smoothly without more than one software.

How to install / start using the software?

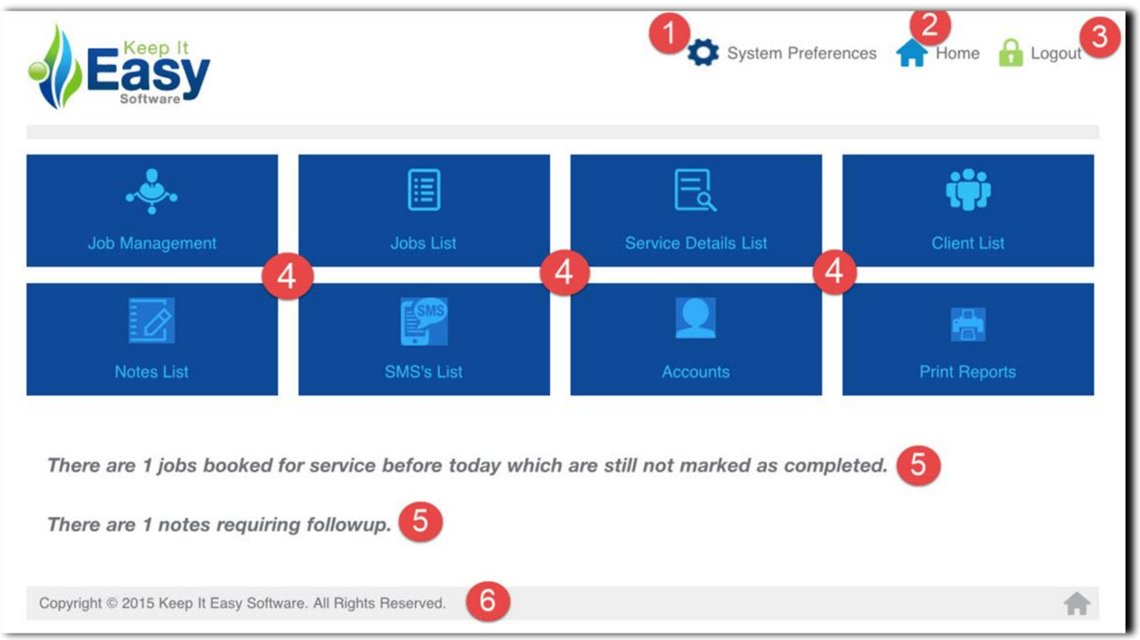
Keep It Easy Software on the cloud does not need to be installed on the device you are trying to use the program on.

It means you can use the software on as many devices as you like, at anytime, anywhere with internet access and no need for backups or worrying about your losing your clients information, just use your login as provided after the initial signing up.

To login to the website visit www.keepiteasy.com.au and click on the “Login” link at the top of the page, enter your username and password, login and enjoy the software!

TIP: Remember to always select the save icon to ensure the data you have entered is saved

Overview – Home Page



The numbers in the image on the left correspond to the following functions in the Keep It Easy Software

1. System Preferences
2. Home Page
3. Log Out
4. Buttons to access functionality of the system
5. System reminders
6. Copyright information

To be able to start using the software to manage your clients and jobs, you will first need to set up some general information about your company and your products and/or services.

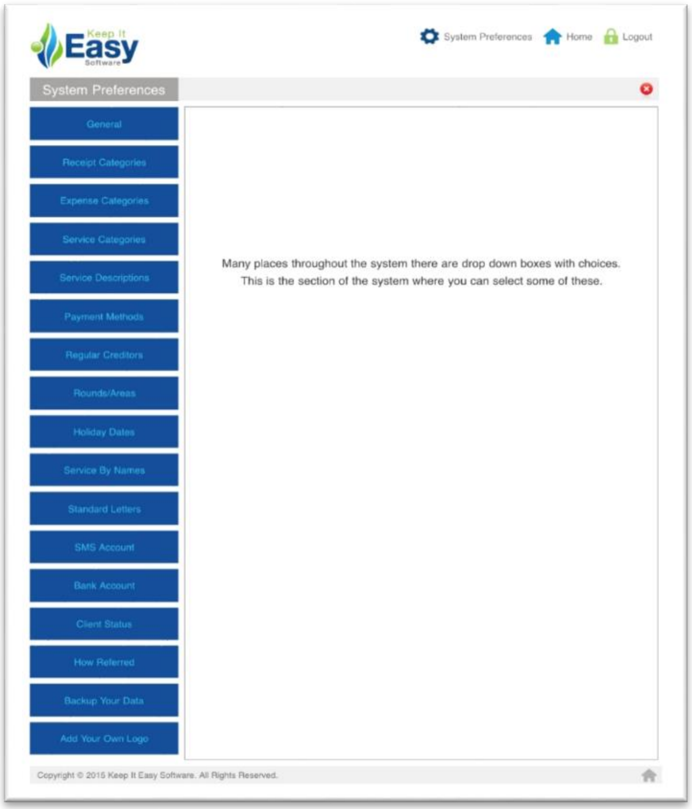
See the next page for an overview on how to set up the system preferences, or refer to the Keep It Easy User Manual for a detailed description.

Set up System Preferences

To set up your software, click **System Preferences**.

The **System Preferences** Screen will open with 17 buttons on the left for different areas.

To ensure your software is working correctly you will want to set up all of the options.

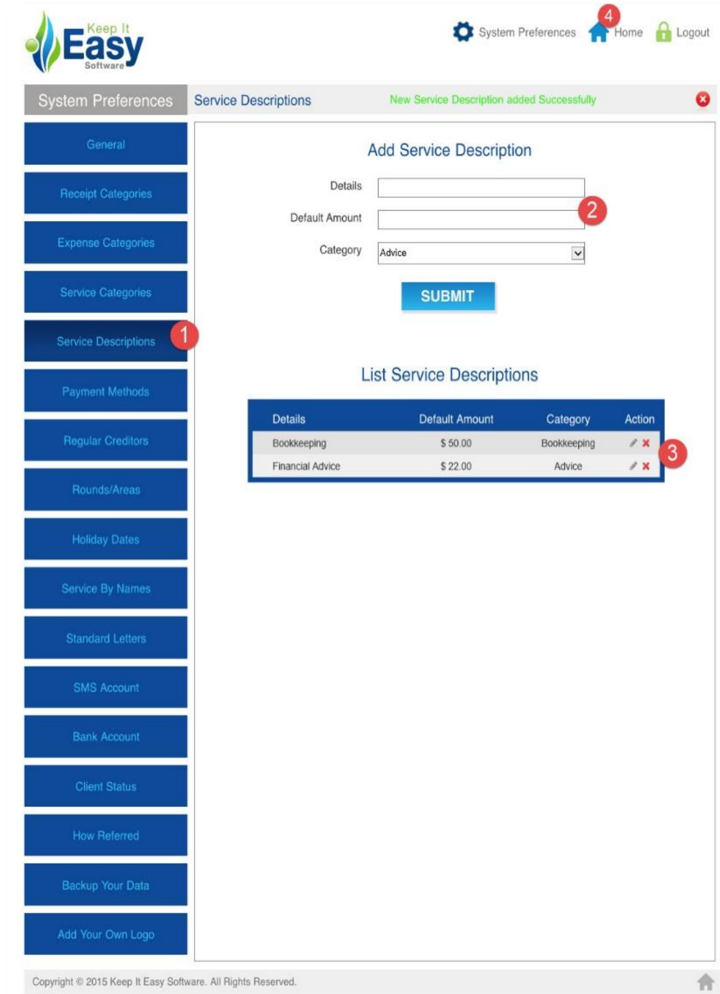


TIP: For a detailed description of all system preferences, and how to add information to or delete information from these screens, please refer to the Keep It Easy User Manual.

Adding your company's preferences to the Keep It Easy software works the same for almost all setup options, except for the **General** tab, which only requires you to fill out a number of standard fields. For the other tables, follow these steps:

1. On the left, click the button that corresponds to the data you want to set up.
2. Enter your data into the **Details** area, Enter the amount you would like the service to be defaulted to in the **Default Amount** area and select the **Category** from the drop down options and press **Submit.**

   If a dropdown box is empty, you will need to set up that area. (e.g. first set up your service categories, then set up your service descriptions)
3. To delete any row of data, click the large red X button and to edit the row of data, click the pencil icon.
4. Click the **Home** button to exit the **System Preferences** screen and return to the **Main Menu**.



Booking a Job and Adding a Client

Click **Job Management** on the Main Menu. The **Job Management & Scheduling** screen will open.

1. Select the date for the job from the calendar.
2. Select the person that will provide the service.
3. Click the space next to the time you want to book the job.

   On the popup that opens, click **Add new client to database**. This will open the **Client Details** screen.

4. Fill out the contact details of the client in all tabs.
5. Click the **Book Job** button. This will open the **Job Details** screen.

6. On the **Job Details** screen, verify the job address, due date, and time for the job. Make changes if required.
7. Select the service to be provided (or product to be delivered).
8. To add another service or product, click the **Add Service** button. Continue until all services have been added.
9. Click the Save icon to save the job. You will be returned to the **Job Management & Scheduling** screen where you will see the job has been booked into the calendar for that day.