

Keep It Easy Software – Quick Start Guide



1. SYSTEM PREFERENCES



This is a quick guide on the set up of Keep It Easy Software and also how to navigate and jump in and use the system right away


Note: If you wish to learn all the tips and tricks, you can follow step by step in the full user manual or book a training block where we can walk you through the set up and we can even set it up on your behalf if you wish.

- **Logging in:** Visit www.keepiteasy.com.au and select Login

Enter your login details and select submit, you will now be logged into the software and you will see the *Main Menu* screen.

We will now set up the system specific to your business in the **System Preferences** area

- You will now see 17 options on the left side of the screen
- To fill out these areas, click on the option and then fill in the details on the right side of the screen
- If a dropdown box is empty, you will need to set up that area first (ie; service categories and then service descriptions)
- To delete any row of data, select the  icon next to the row you wish to delete
- To edit any row of data, select the  icon next to the row you wish to edit
- To return to the *Main Menu*, select the Home option at the top of the screen

Note: Please ensure you **always** select the  icon every time you wish to change the page

2. ADD A CLIENT

Select the **Client List** from the Main Menu

From the top right select *New Client*, this will now open the *Client Details* page

Enter all of your client's details ensuring you enter as much detail as possible in the following options;

- General
- Job Info
- Accounts

Once all of this information has been filled in, select Save

You have now saved your client details!

3. BOOK A JOB

Select **Job Management** from the Main Menu

Select the date you wish to book the job for

Choose which *Service Personnel* you wish to book under and select a time you wish to book for

A pop up will open, select the drop down and the client, then click *Book Job*

This will now open the **Job Details** page

Verify the *Due Date* (this is the date you would like the job to be booked for) and time booked for

Now, you need to add a service by selecting **Add Service** and you can either select your *Service Description* from the drop down options (this is set up in System Preferences) and this will pre-fill the area for you or you can select **Manual**

This will allow you to manually type any text in the *Service Description*

Note: If you would like to enter multiple services, simply select **Add Service** and it will add another service

Select Save and you have now booked your job!

Client Details Job Details: LIGHTBRINGER Suzi at Main Street, Midland

Buttons: Send SMS, Raise / Print Invoice, Enter a NOTE, Enter a Payment, Mark as Complete, Book Another / Next Service, Process Job

Address: 5 Main Street, Midland

Due Date: Wed - 31 Aug 16

Date Completed:

Time: 07:45

Duration: 1.00

Client's Job Interval is 2 Weeks

Service Completed	Category	Qty	\$ Amount	Includes GST
Full clean up of front and back yard	Gardening	1	\$200	\$16.16

Other Bookings not yet complete

31st Aug 2016 \$200.00

Click on Job to go to the details.

Darcy's Schedule this day

07:15 AM
54 Lighthouse Way, Perth
\$60.00

07:45 AM
5 Main Street, Midland
\$200.00

09:15 AM

Service By: Darcy Total Service Value: \$200.00

Time Taken Minutes Cost \$

Cus Ref

Date Paid

Paid Comment

Comments

Invoice No. 1068

Invoice Date 2016-08-31

Invoice Terms 0 Days

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

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4. COMPLETE A JOB

On the **Job Management** page, select the date you wish to view, choose the job you would like to complete either on the calendar with a time chosen **OR** in the **Jobs without a time** box underneath *Service Personnel*

If the details in the job are correct and you do not need to view the details, scroll down and select **Mark Svc Done**

This has now marked the job as complete

If you need to view the details of the job, scroll down and select **Go to Job Details/Process Job**, this will show the job details where you can edit and change the details of the job.

Select **Process Job**, this will show a pop up box "Do you want to enter a payment for this job?" Select Yes or No, another pop up box will show "Do you want to book the next job?" (This is to rebook in advance) Select Yes or No

The job is now marked as complete

Service By: Darcy Total Service Value: \$60.00

Time Taken Minutes Co

Cus Ref

Date Paid

Paid Comment

Invoice Terms 7 Days

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

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5. DELETE A JOB

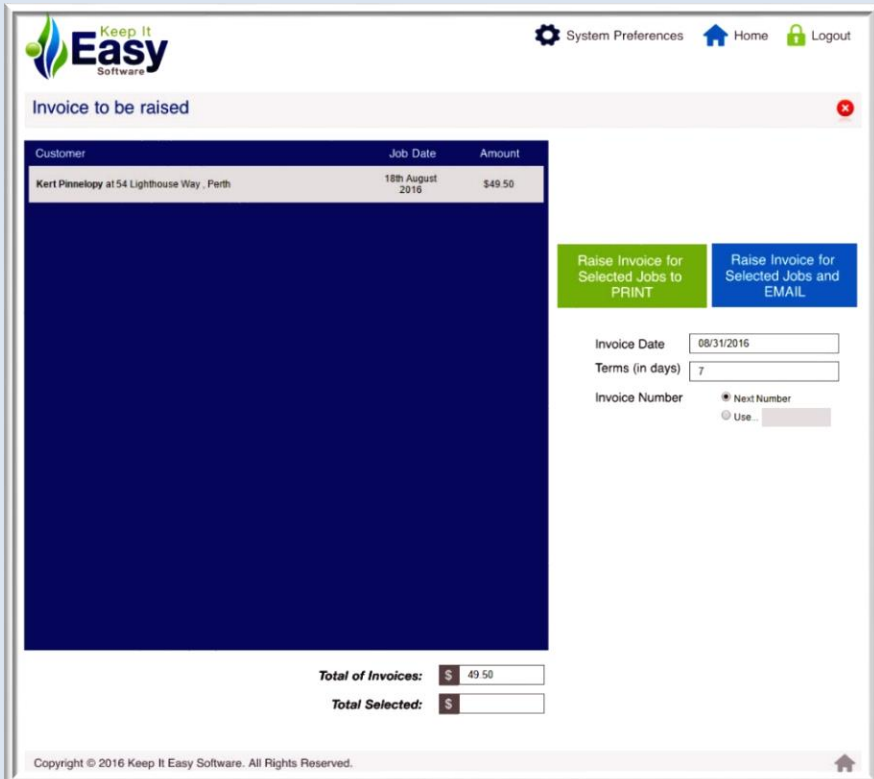
If for any reason you need to delete a job

Select **Job Management** from the Main Menu page

Choose the date you wish to view your calendar for, select the job you wish to delete and select **Go to Job Details/Process Job**

This will now open the **Job Details** area, scroll to the bottom and select **Delete Job**

A pop up box will appear "Are you sure you want to delete this job?" Select Yes
Your job has now been deleted



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System Preferences Home Logout

Invoice to be raised

Customer	Job Date	Amount
Kert Pinnelopy at 54 Lighthouse Way , Perth	18th August 2016	\$49.50

Raise Invoice for Selected Jobs to PRINT

Raise Invoice for Selected Jobs and EMAIL

Invoice Date: 08/31/2016

Terms (in days): 7

Invoice Number: ☐ Next Number ☐ Use ..

Total of Invoices: \$ 49.50

Total Selected: \$

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6. SEND AN INVOICE

From the **Main Menu**, select **Accounts** and **Who Needs Invoices**

This is the area where all the invoices for jobs that have been completed go, ready for you to send the invoice to the client

Select the invoice you wish to send off and select either *“Raise Invoice for Selected Jobs to PRINT”* OR *“Raise Invoice for Selected Jobs to EMAIL”*

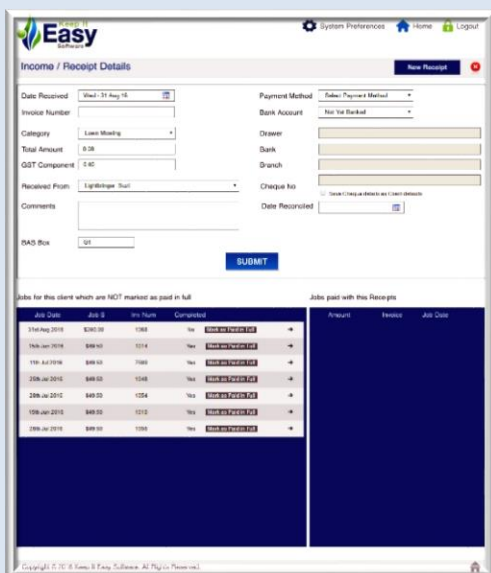
If you select to Print, this will open a new tab and show your invoice as a print a preview. From here you can print or download the invoice

If you select Email, an email box will appear. If you set up your *Text on Email accompanying invoices* from the System Preferences, the message will be prefilled and the email address (if entered in client details).

Enter the invoice number in the Subject Line and Select **Send**

A message will appear *“Your email has been successfully sent”*

Note: You can view all your sent emails in the **Client Details** under **Emails**



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System Preferences Home Logout

Income / Receipt Details

Date Received: 18th Aug 16

Invoice Number:

Category: Lawn Mowing

Total Amount: \$49.50

GST Component: \$4.45

Received From: Lighthouse Trail

Comments:

RAS Box:

Payment Method:

Bank Account:

Drawer:

Bank:

Branch:

Check to:

Date Reconciled:

SUBMIT

Job Date	Job \$	Job Name	Completed	
18th Aug 2016	\$49.50	Lighthouse Trail	Yes	View Receipt
18th Aug 2016	\$49.50	Lighthouse Trail	Yes	View Receipt
18th Aug 2016	\$49.50	Lighthouse Trail	Yes	View Receipt
18th Aug 2016	\$49.50	Lighthouse Trail	Yes	View Receipt
18th Aug 2016	\$49.50	Lighthouse Trail	Yes	View Receipt
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18th Aug 2016	\$49.50	Lighthouse Trail	Yes	View Receipt

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7. ADD A PAYMENT

Select **Accounts** and **Income/Receipts**

Click on **Add New**

Select the *Date Received* and choose the client the payment was received from in the *Received From* dropdown box

Enter the **Total Amount** received, category, invoice number, payment method, bank account (if applicable) and select the date reconciled

You now need to select the black arrow of the invoice you wish to pay with this receipt from the *Jobs for this client which are NOT paid in full* and it will transfer to the box *Jobs Paid with this Receipts*

Check all your information entered and select **Submit**

You have now entered a payment

