LIGHTHOUSE
OUTDOOR LIGHTING AND AUDIO

SERVICEMINDER.IO TRAINING MODULE

Released 10/2021
Version 1.0

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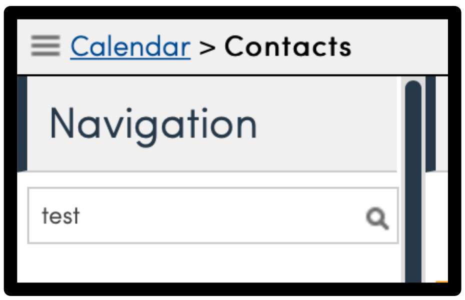
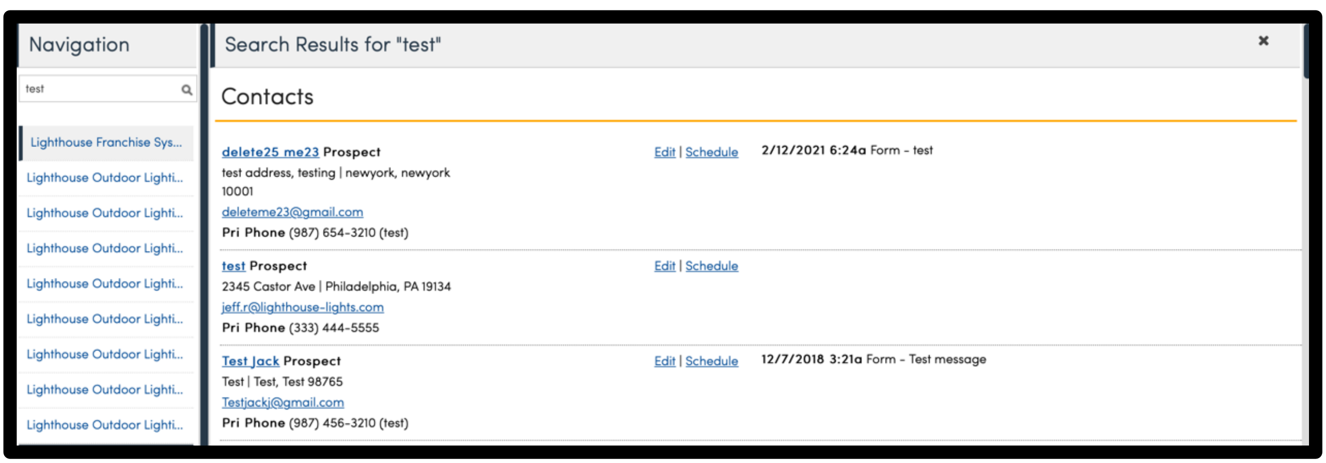
1. CONTACTS

The contacts module displays all your contacts in a grid and offers a wide variety of sorting and filtering capabilities.

A. Searching for Contacts

Using the navigation panel which is available on every screen, type in a portion or all, of the name (first, last or both) or street address to find a contact already in the system.





Note: Always conduct a search on anyone that calls in. If you suspect they are a new lead, it is still best to do a quick search to prevent duplicate records from being created.

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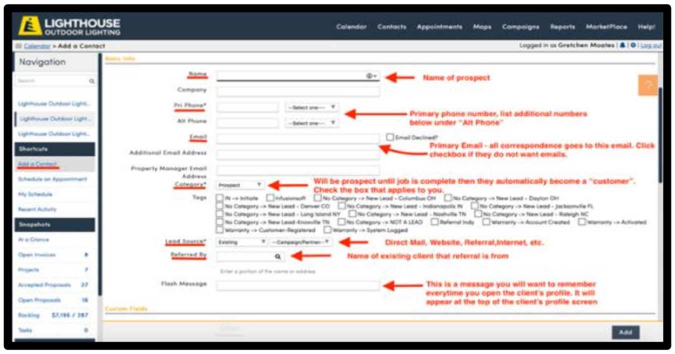
B. Add a New Contact

- Enter **name**, **phone number, email, and address**, which are all required.

- Choose the **lead source** – very important to capture for each new lead
  - If the lead source is a **referral** be sure to search for the referee, using search box



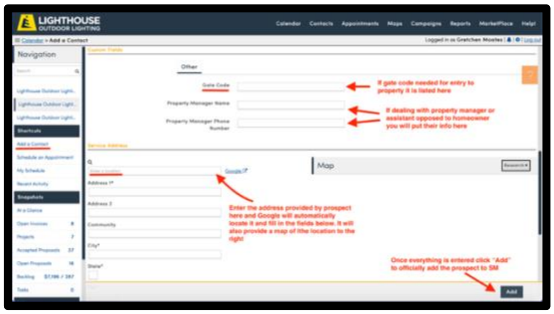
  - Enter **flash message** this is for any message that may need to be remembered about the client and will appear on the top of the contact's profile screen in an orange banner above their name. This is only visible internally.

  - Enter **client's address** in the first address line and Google Maps will fill in the address information and provide a map of the location to the right of the screen.

  - Enter client's **gate code** for entry, if applicable

  - If there is a **property manager** involved, there is a section for their contact information as well.

  - Click the **add** button in the bottom right corner of the screen, to save



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C. Merging Duplicate Contacts

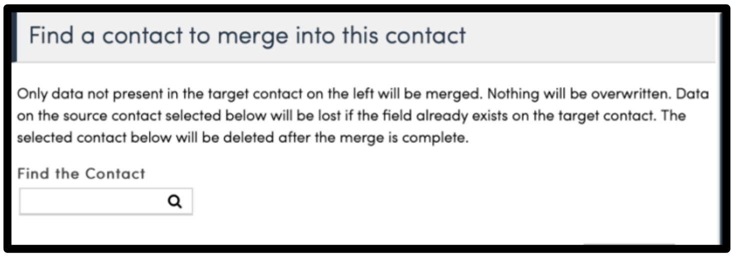
Contacts are merged when there are duplicate records. The two records will be combined with the main contact profile (most recent) will override the duplicate record.

- Open contact profile of the client to be merged. Be sure to choose the contact that has the most recent and accurate information as this is the contact information that will override the other file.

- Click the “Merge” option at the top of the contact profile page

- Enter the contact to be merged (overwritten) by entering a portion of the name in the “Find the Contact” box to the right of the contact profile page. This will pull up all contacts with the same name entered.

- Choose the contact to be merged and overwritten, from the list of contact results from the search.



- Click “Merge”

- This combines the two profiles and removes the duplicate profile.

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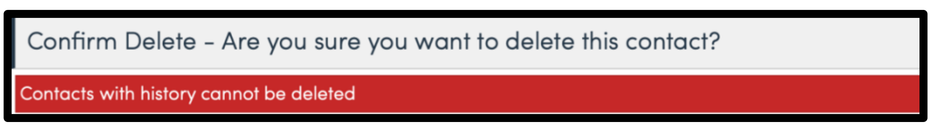
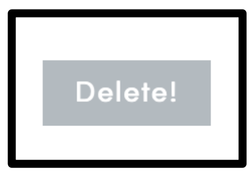
D. Deleting Contacts

Deleting a contact will remove the contact from the system all together. ServiceMinder will not allow deleting of contact profiles that have transactions attached to them. You can only delete contacts that do not have any activity. This feature is often used to remove prospects that come in electronically and are not legitimate leads.

- Open the contact profile that is to be deleted.
- Click on the “delete” tab at the top of the page.

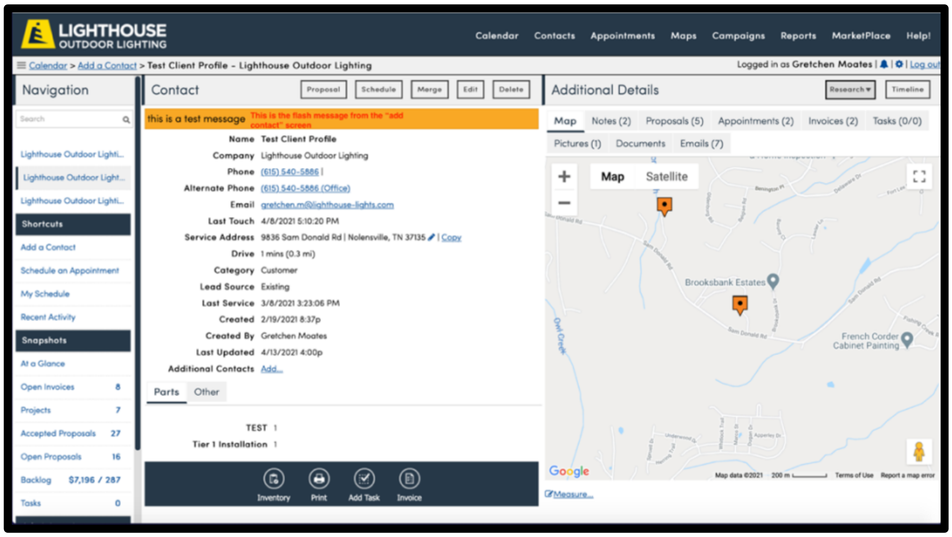
- ServiceMinder.io will ask for confirmation to delete the contact profile. However, if there IS history attached to this contact profile the system will provide an error message indicating that “contacts with history cannot be deleted”. At this point you cannot move forward and should back out of the screen using the browser’s back button. If there is NOT any history click the “Delete!” button. This will delete the contact from the system permanently.





E. UNDERSTANDING CONTACT PROFILE SCREEN

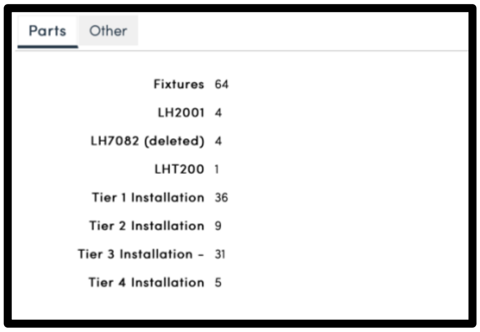
The contact profile screen provides all the information that is input about a client. This is where all a contact's history can be accessed.



Flash message will appear above the contact's name on this screen, if applicable. It is found above the client's name highlighted in orange, as shown below.

Parts

A consolidated list of all parts used for the client is provided in the contact profile. The system calculates a sum of every part and installation tier that has been used in an invoice. It also provides a list of all parts that are removed from an invoice.



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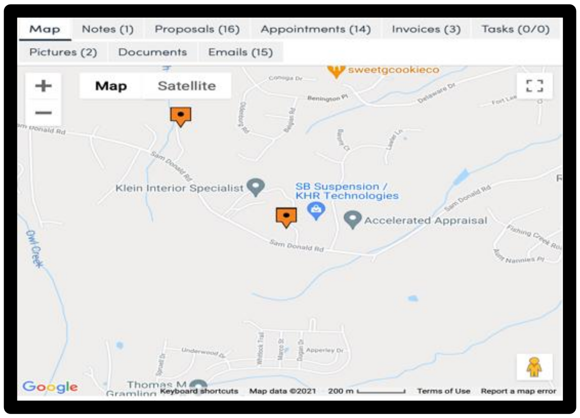
Map – shows the location of the property using Google Maps



Notes – internal notes can be entered from appointments, proposals, or directly in the notes section by clicking “add”. This is for internal use only and the client will not be able to see these notes.

Map | Notes (1) | Proposals (16) | Appointments (14) | Invoices (3)

Tasks (0/0) | Pictures (2) | Documents | Emails (15)

Page 1 of 1 (1 items) 1

Add...	Date	By	Privat	Title	Note
Edit | Delete	1/13/2021 11:46 AM	Gretchen Moates	Yes	Deleted invoice	Invoice 01637 was delet INVOICE TO SEE IF INVE THEN DELETED INVOICI

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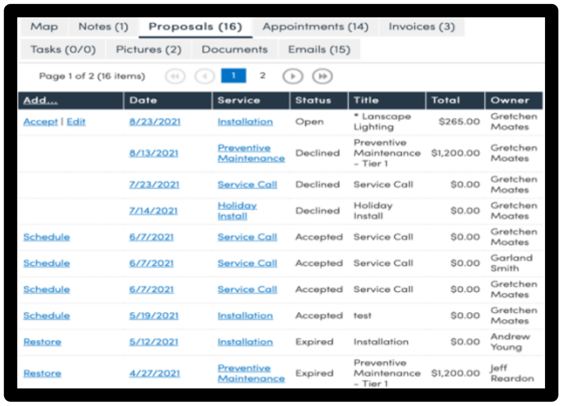
Proposals

- Any proposal (open, closed, accepted, or declined) are housed under this tab
- Sorted by creation date by default and each proposal can be accessed by clicking on the one needed
- Can view the status of each proposal as well as accept or decline the proposal on the client's behalf
- This is where you will go to edit an existing proposal as well by clicking edit next to the appropriate proposal

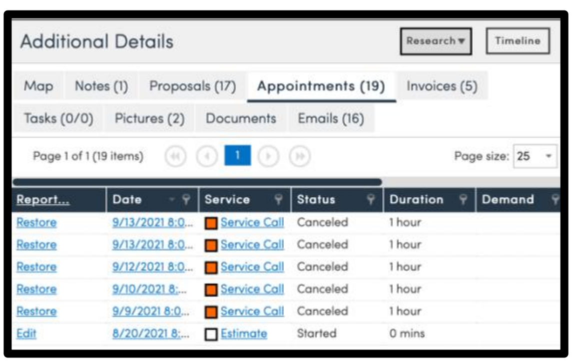


Add...	Date	Service	Status	Title	Total	Owner
Accept | Edit	8/23/2021	Installation	Open	* Lanscape Lighting	$265.00	Gretchen Moates
	8/13/2021	Preventive Maintenance	Declined	Preventive Maintenance - Tier 1	$1,200.00	Gretchen Moates
	7/23/2021	Service Call	Declined	Service Call	$0.00	Gretchen Moates
	7/14/2021	Holiday Install	Declined	Holiday Install	$0.00	Gretchen Moates
Schedule	6/7/2021	Service Call	Accepted	Service Call	$0.00	Gretchen Moates
Schedule	6/7/2021	Service Call	Accepted	Service Call	$0.00	Garland Smith
Schedule	6/7/2021	Service Call	Accepted	Service Call	$0.00	Gretchen Moates
Schedule	5/19/2021	Installation	Accepted	test	$0.00	Gretchen Moates
Restore	5/12/2021	Installation	Expired	Installation	$0.00	Andrew Young
Restore	4/27/2021	Preventive Maintenance	Expired	Preventive Maintenance - Tier 1	$1,200.00	Jeff Reardon

- Proposals can be created by clicking add (see section for creating proposals)

Appointments

- All appointments made are listed under this tab including open, completed, and cancelled appointments.
- Can be edited from this screen by clicking the "edit" option next to the appointment
- Appointments that have been cancelled can be restored. If it was previously cancelled the system will give the option to "restore". By clicking this option, you will be directed to the appointment screen for editing date, time, etc. Once saved the appointment will be restored and added to the calendar and the client will receive an email notification.



Report...	Date	Service	Status	Duration	Demand
Restore	9/13/2021 8:0...	Service Call	Canceled	1 hour	
Restore	9/13/2021 8:0...	Service Call	Canceled	1 hour	
Restore	9/12/2021 8:0...	Service Call	Canceled	1 hour	
Restore	9/10/2021 8:...	Service Call	Canceled	1 hour	
Restore	9/9/2021 8:0...	Service Call	Canceled	1 hour	
Edit	8/20/2021 8:...	Estimate	Started	0 mins	

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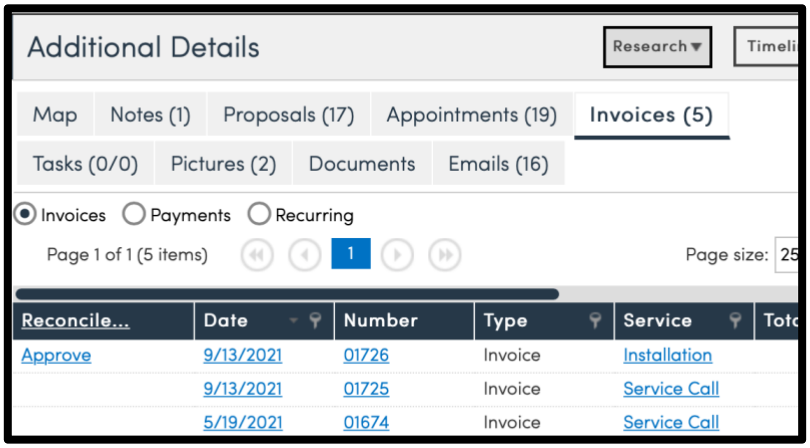
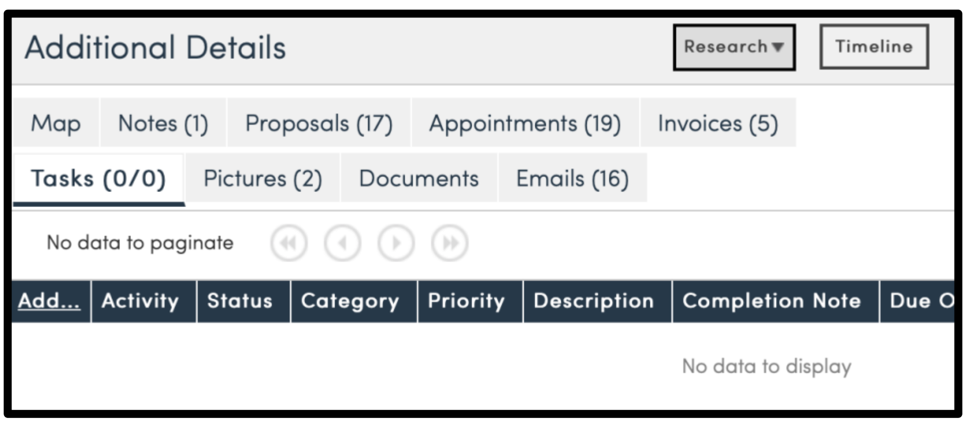
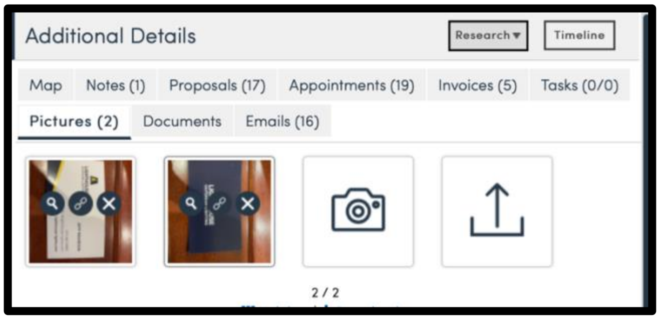
- Invoices
  - Invoices that have been created are listed, showing date, invoice number, invoice type, original invoice total and balance due.
  - You can open any invoice for editing or viewing from this point



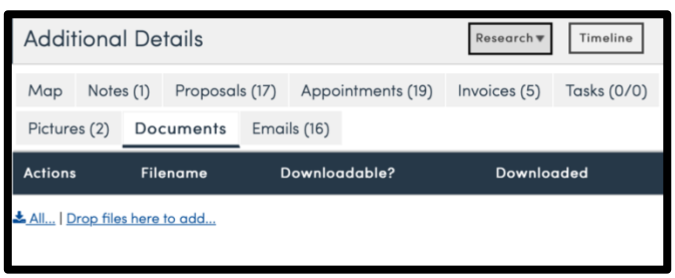
- Tasks
  - Lists any tasks that have been assigned to a service agent associated with a particular client.



- Pictures
  - All photos that have been attached to the client's profile can be found here. To open the photo just click on the "pictures" tab and choose the photo to be viewed.
  - Photos can also be added here by clicking the "upload" button
  - Only jpeg files can be saved

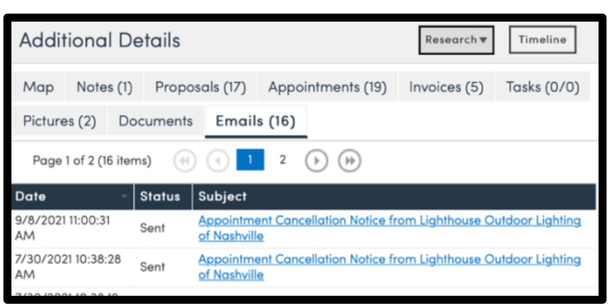


- Documents
  - Any important documentation that has been saved to the client's account can be found here
  - To upload a new document, drag and drop the file in pdf format into the box.
  - ServiceMinder.io only accepts pdf documents



- Emails

  This section lists all emails that ServiceMinder.io has sent the client. For example, any notifications sent regarding appointment reminders, proposal reminder, and invoice reminders. The date sent and the status of the email is provided in this view.



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2. SCHEDULING

A. Appointments

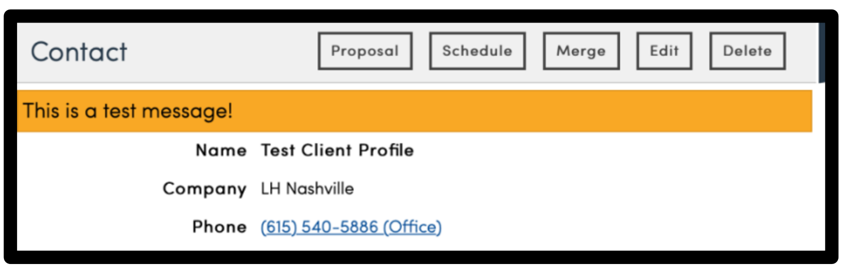
i. From Proposal

- Once it is time for installation scheduling, open the proposal and click “schedule”
- Scroll down and fill in the agent, date, and time
- Click “Schedule and Send” if you are ready to send that appointment confirmation email to the client
- If you aren’t ready to send to client yet but still want it on the calendar, click “schedule” and you can send to client later from the main contact page.

ii. From Contact Profile

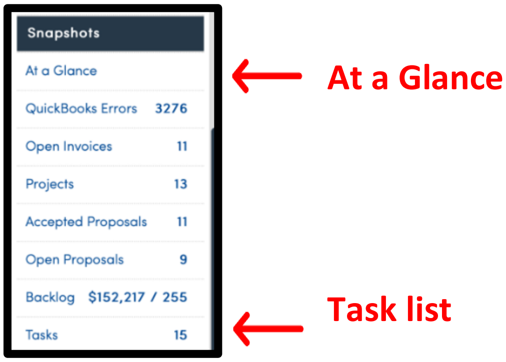
This is the most common way of scheduling appointments as it is done directly from the main contact profile screen. It is best to link all appointments associated with a proposal if possible.

- Open the contact profile and at the top of the page click “Schedule”.

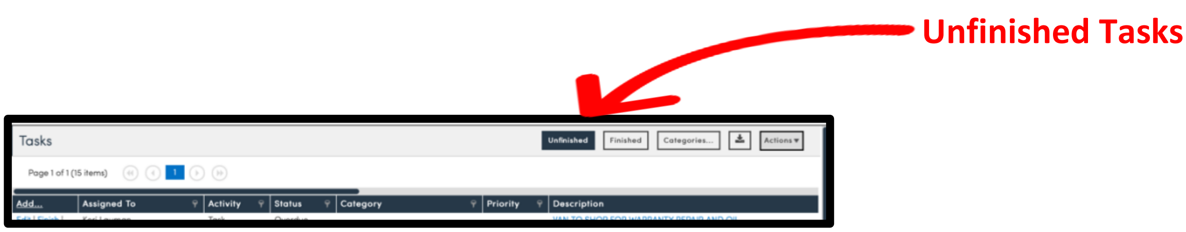


iii. From a Task

Users often prefer to schedule tasks for purposes of tracking client calls and scheduling appointments. This section will detail how to schedule an appointment from a task in an efficient manner.

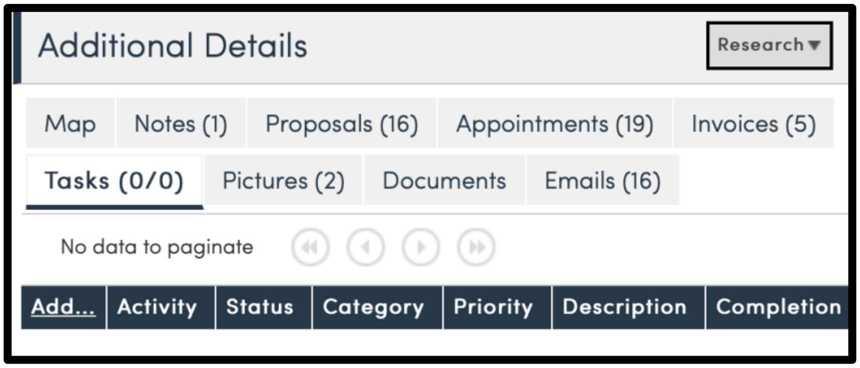


- Tasks that need to be completed can be found in the unfinished task list under the "tasks" section of ServiceMinder, unless it is a task assigned to you and it can be viewed in the "at a glance" section directly as well.



- Once you have opened the task section, using one of the two methods previously mentioned, select the task in question, by clicking on the description. At any time, you can choose to perform your task, as tasks are meant to be simple reminders. You are not restricted to performing your task in any specific timeframes.

- Once the task has been opened you can schedule an appointment as normal, but the quickest way is to click on the associated contact’s name. This will direct you to the contact profile page and from there you can schedule the appointment as explained in the section titled “From the Contact”.



- Once the appointment is scheduled, return to the contact's profile page, to complete the task. The task you wish to complete can be found under the “task” tab in the contact profile page. Find the task to be completed and click on it to open the task completion dialog. Enter any finishing comments necessary and click “submit” to complete the task.

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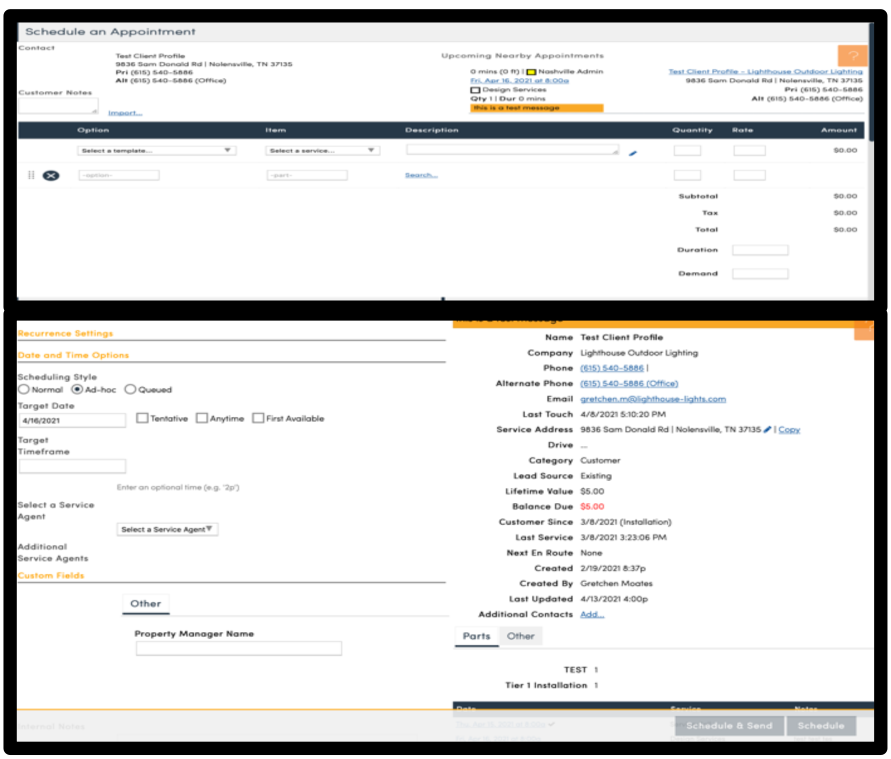
B. Scheduling the Appointment

The previously discussed methods of accessing the appointment screen will a all bring you to the same screen to schedule the appointment with the client.

- "Customer Notes" – enter anything that needs to be noted as it pertains to the appointment being scheduled. The client will be able to see this notes section information when they view the appointment notification via email.
- Choose Service being scheduled – price will default to zero as we generally don't know exactly how long an appointment will take therefore not able to present a cost associated with it.
- Choose date and time for the appointment and choose if it will be "tentative time", anytime if system is choosing dates
- Choose service agent (sales, service, etc.)
- Internal Notes – client will not see, for internal viewing only
- If ready to send to client, click "Schedule and Send", if not ready for client, click "Schedule".



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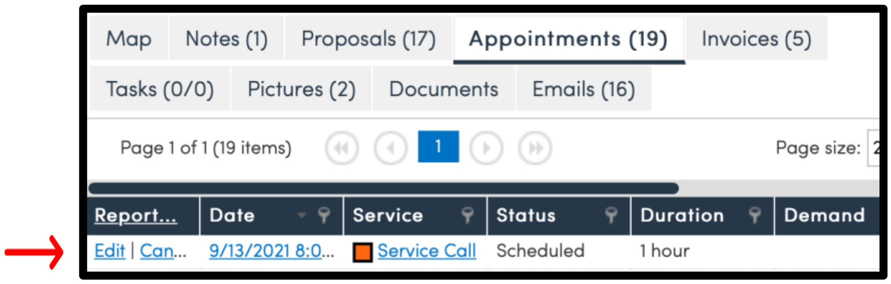
C. Rescheduling / Editing Appointments

- Open the contact profile page and find the appointment that needs to be edited.

- Click the “edit” option next to the appointment being edited. This will open the appointment screen for editing.



- Make necessary changes to date, time, notes, service agent, etc.

- Save the changes by clicking “save and send” if you want to send an updated appointment notification via email to the client or just click “save” if you just want to save the changes without sending any notifications. Changes will not be saved if you do not click one of the two.

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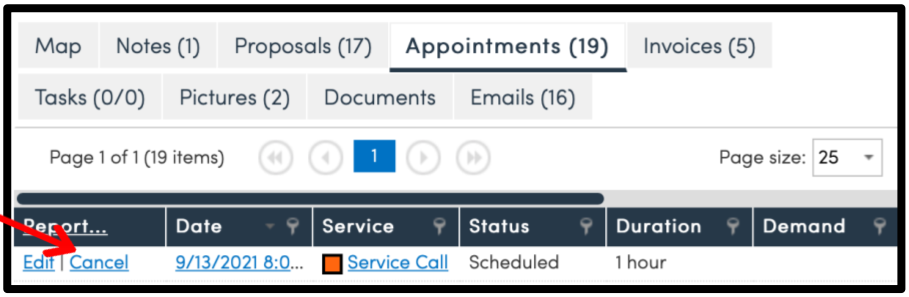
D. Canceling Appointments

- Open the contact profile and go into the appointments tab

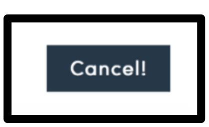
- Choose the appointment to be canceled and click the “cancel” option beside the appointment line



- Choose if you would like to send the client a cancellation notification by checking the box nex to “send cancellation notification?”. If this box is shaded the client will get notice of the cancellation. If it is not the appointment will cancel but the client will not receive notification.

- Give brief explanation of reason for cancelling (optional)

- Click the “cancel!” button at the bottom of the page to save the changes and cancel the appoitment.



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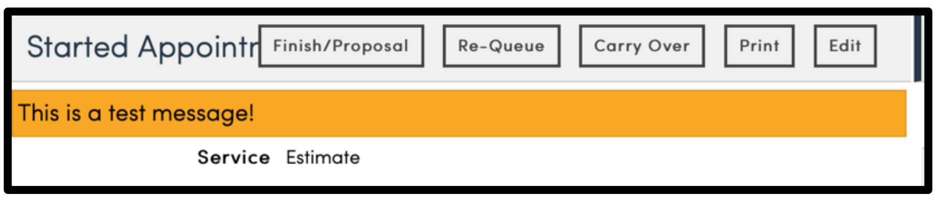
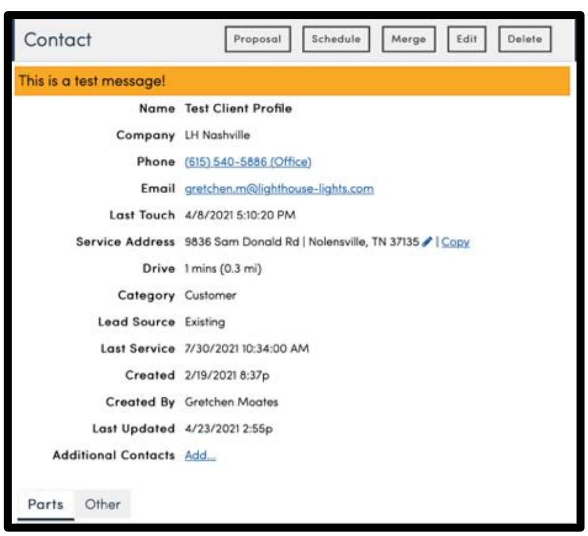
3.PROPOSAL

The description of services and products being offered for a prospect or customer. Each proposal contains a single service and the ability to add parts and add-ons. Once created, it can be printed, saved, and/or sent to the contact using the email address they have provided.

A. **From Estimate Appointment**

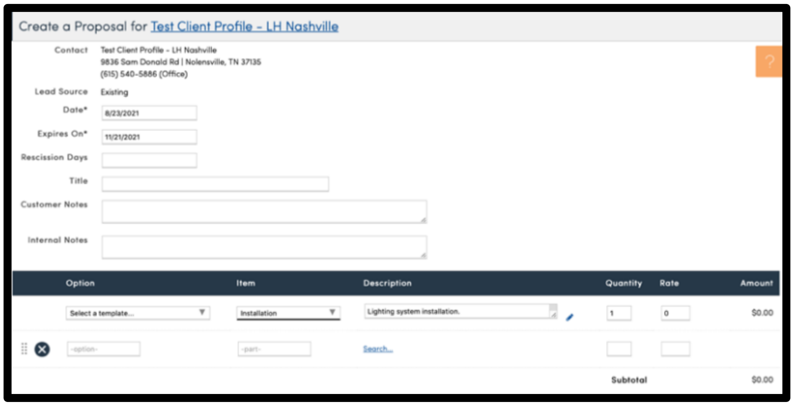
Common method used to automatically create a new proposal when finished with the sales (estimate) appointment. When the estimate appointment is completed, the system gives the option for you to create a new proposal by clicking the "finish/proposal" button. Once you have accessed the proposal screen from the appointment see the instructions on the following page in the "Creating Proposal" section.





B. From Contact Details page

Find the contact using the navigation tool then click on the “Proposal” button to create a new proposal for the chosen contact. Once you have accessed the proposal screen from the contact profile page see the instructions below in the “Creating Proposal” section.



C. Creating the Proposal

- Selecting a Service - the first thing to input for a proposal is the service that will be provided under “Title”. In most cases this would be an “installation”.

- Notes – there are two input options for notes at the top of the proposal creation page.

- Customer Notes – anything entered in this section will appear for the client to view online or printed. This section often includes a summary of the requested work to be done or any specific instructions for the service agent. The contact will be able to see these notes.

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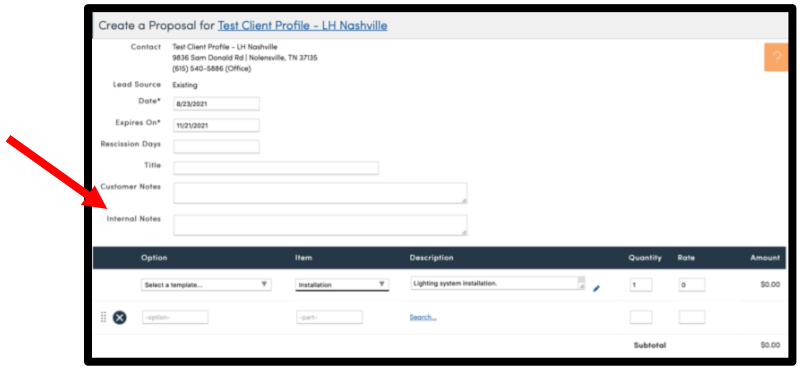
Internal Notes – this section of notes is only visible to internal staff with appropriate permissions, including the service agent. This is also a good place to provide notes for the service agent. The client cannot see anything under the internal notes section.



Options – offers the ability to group detail lines together to offer contact options they can select. Detail lines are grouped together if they have the same option name.

Detail Lines – once you have chosen a service, the first line will populate with the service and the service description. You can change the description of the service as needed for the proposal. The pricing can be set or changed at this point as well.

- Add detail lines – start typing in the “part” column. This is where you will enter you LH part number. As you start to enter the part number the system will show matching parts and allows you to select the one you want or can just type the entire part number.

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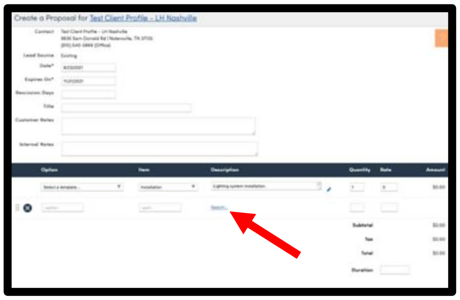
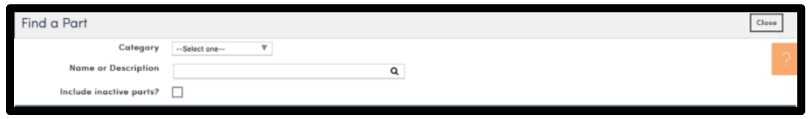
- If you do not know the part number you can click on the “search” button and find the part you are looking for, then click select.

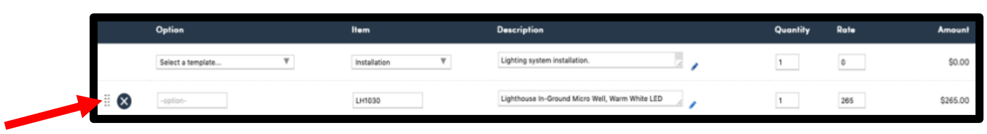




- Description and unit price can be edited for each line item.
- **<u>Internal notes</u>** - can be added to specific lines by clicking on the pencil link (highlighted below) next to the description box. A dialog box will appear and allow you to edit the description and/or the line’s internal notes. Be sure to check the box next to “internal” to ensure the notes are only visible to Lighthouse users and not the client.

  - Change quantity if more than one, as that will be the system default if not edited.
    - New lines are automatically added at the bottom of the proposal as you select parts on the existing lines.
    - To delete a detail line, just click the “X” on that line.

    - To change the order of the lines you can click and drag the line(s) where you would like it to be on the proposal. Only the first line for the Service is fixed and unable to move. All other detail lines can be moved around.



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Acceptance and Scheduling – the prospect can click "Accept" and apply an electronic signature to the proposal. If the proposal contains options, they can choose the options they prefer. Once the proposal is accepted, the user will receive an email notification so the client can be contacted for scheduling.

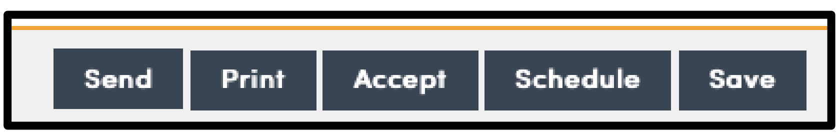
- Verbal acceptance – there is an accept option on the proposal details page. The user will be prompted for the name you are accepting on behalf of (client).
- Once accepted the work can be scheduled by clicking the "schedule" button (or link if using a grid)
- Schedule like any other appointment would be scheduled
- Enter date and time and choose scheduling options accordingly
- Save and send the appointment confirmation. Client will receive email confirming the appointment and the user will be copied on the email.

Delivery methods

- Email – if the contact has an email address the send button is used to deliver the proposal via email. They will be able to click a link in the email to view the proposal

Save – the proposal can be saved and not sent by just clicking the "save" button instead of "send". This will allow the user to continue to work on the proposal or make any necessary changes before sending.

Printing- click the "print" button to print a hard copy of the proposal. If the client doesn't have an email you may want to use this option of mailing or hand delivering a proposal.



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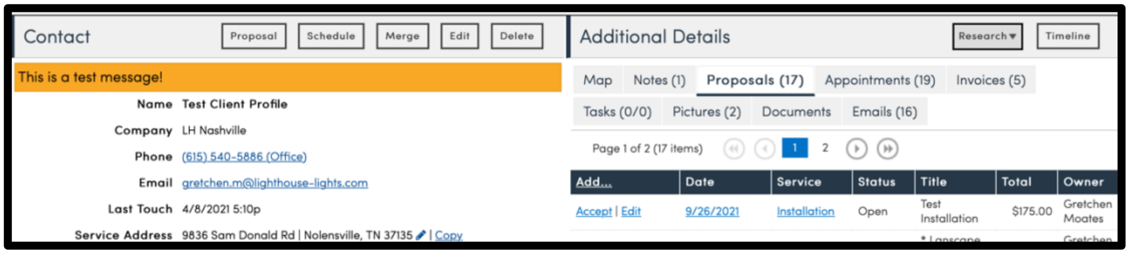
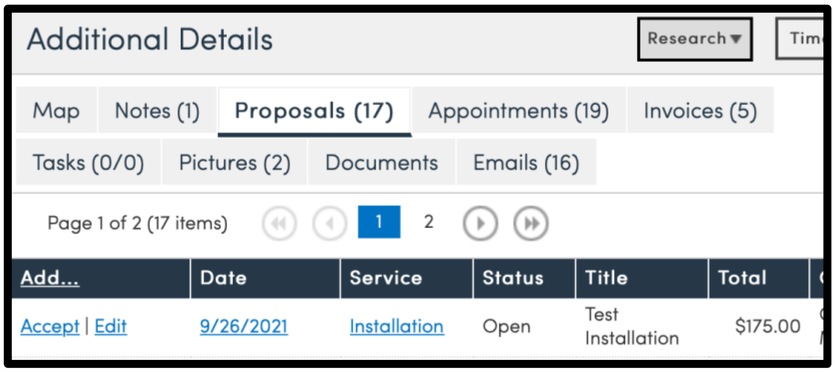
D. Editing a Proposal

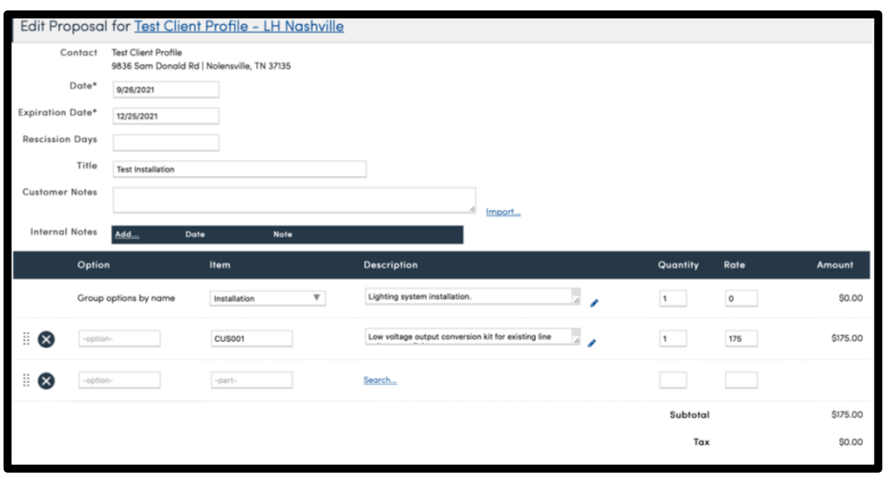
- Open the contact profile page and click on the “proposals” tab. This will provide a list of all proposals associated with the client.



- Click “edit” next to the proposal that is needing changes.



- Scroll down to the lines that need to be changed and make necessary changes. Please note that if a line item’s part number is changed the quantity will default back to 1 and the description and price will reflect what applies to the new part number being entered.



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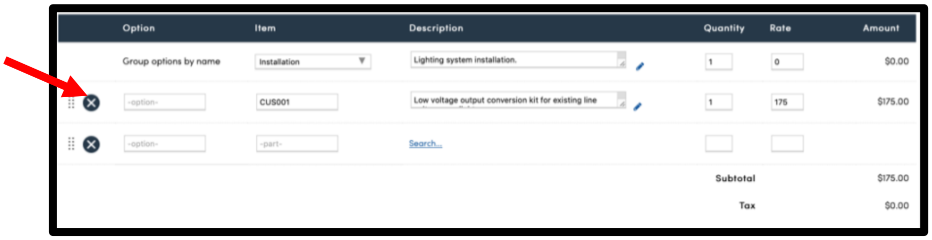
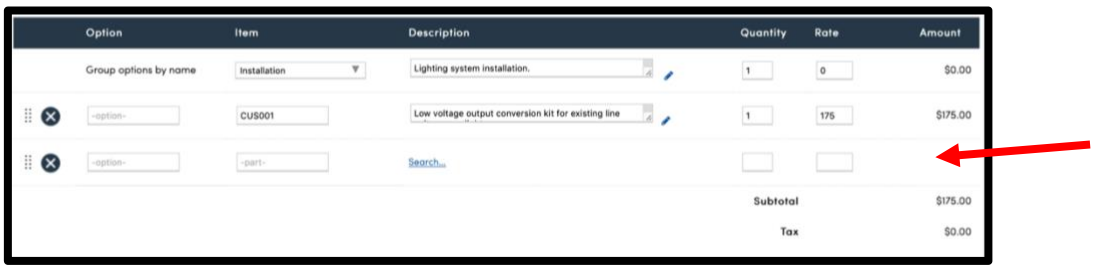
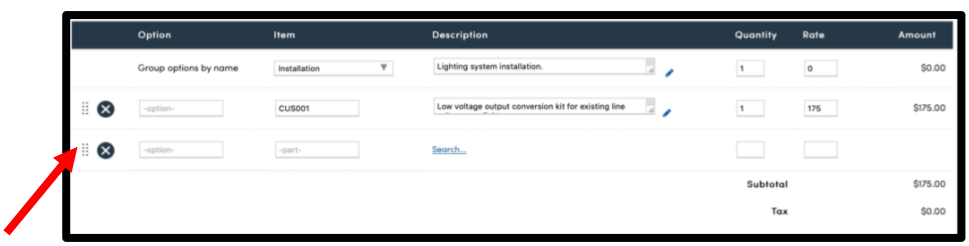
- Delete any unwanted lines by clicking the “X” to the far left of that line.



- To add items to an existing proposal, scroll to the bottom of the proposal page and start with the next blank line.



- The lines that are added can be dragged to a different location once the information is entered, by clicking the stacked dots to the left side of the line and drag to the preferred location within the proposal.



- The client can see all changes made to a proposal. The proposal cannot be edited once the client has accepted, without them being required to accept a new proposal reflecting the changes made.

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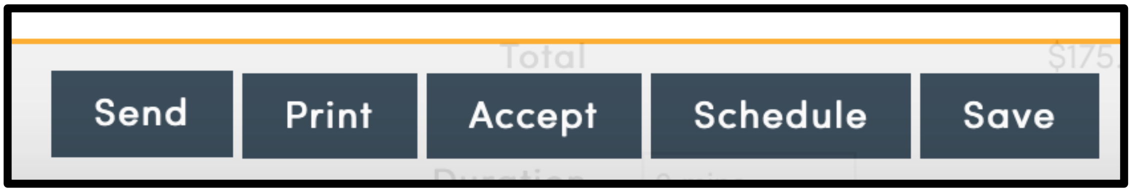
Once all necessary changes have been made scroll to the bottom of the screen and click accordingly

- Send – will save the proposal and send the updated version to the email on file for the client
- Print – will save the proposal and print the proposal
- Accept – only click this if accepting on the client's behalf but it will save and accept the proposal when clicked
- Schedule – will save the proposal and directs you to the appointment scheduling screen
- Save – clicking save will save the information and nothing more. The client will not receive notification of the changed proposal when this tab is chosen.



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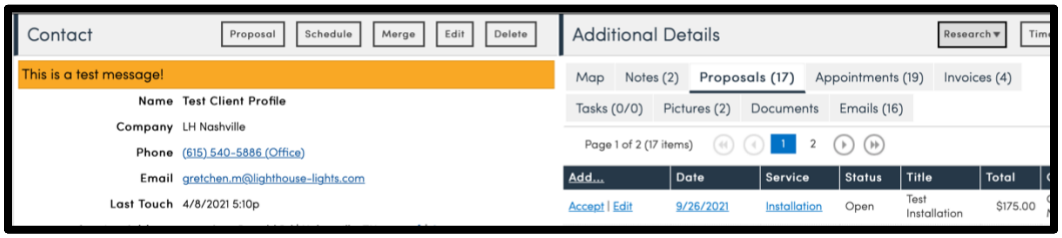
E. Accepting a Proposal

i. As a user of (on behalf of client – not recommended)

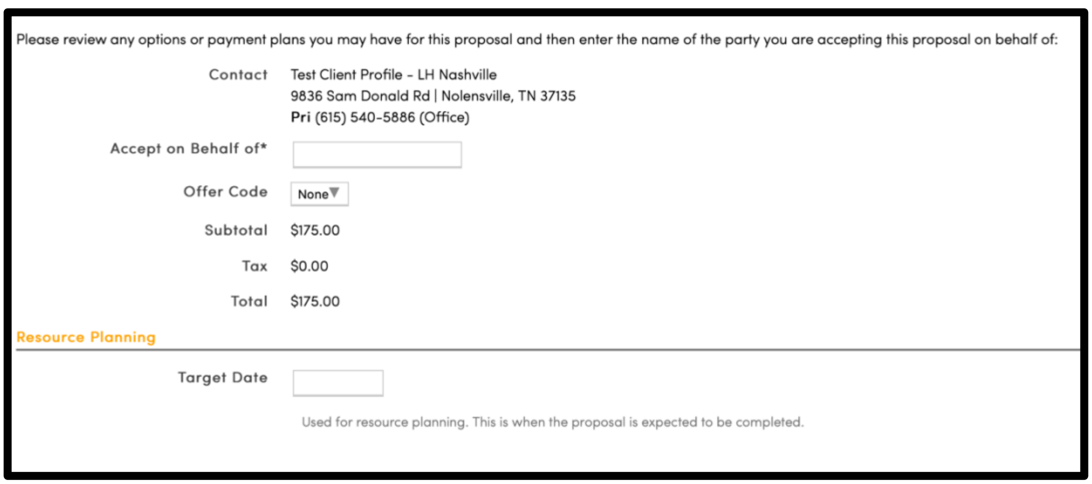
- Open contact profile and click on the “Proposals” tab. There is an option to “Accept” in the far-left column of the list of proposals. Click Accept.



- Enter client’s name who gave permission for you to accept on their behalf in the “Accept on Behalf of” field.

- Offer code is used if discount or coupon codes are set up to be used.

- Target date is the date the job is expected to be completed. This is used for planning purposes and is not seen by the client.



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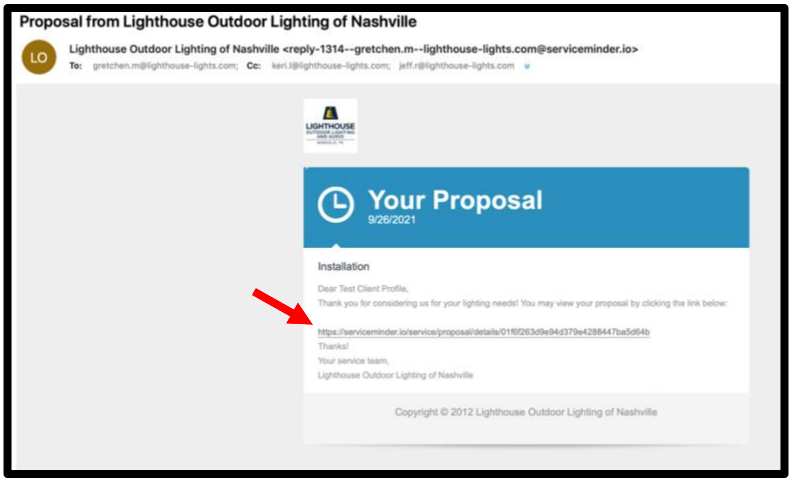
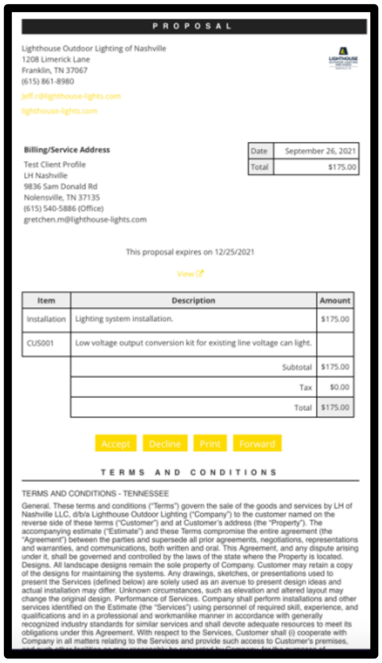
ii. As a client

- The client will receive an email notifying them the proposal is available for review. If they choose to accept the proposal they will click on the link in the email, which will direct them to the proposal.



- The proposal details and terms and conditions will open for the client to review. From this screen the client can accept, decline, print and forward the proposal by choosing one of the 4 options at the bottom of the proposal details page.



PROPOSAL

Lighthouse Outdoor Lighting of Nashville
1208 Limerick Lane
Franklin, TN 37067
(615) 861-8980
jeff.r@lighthouse-lights.com
lighthouse-lights.com

Billing/Service Address
Test Client Profile
LH Nashville
9836 Sam Donald Rd
Nolensville, TN 37135
(615) 540-5886 (Office)
gretchen.m@lighthouse-lights.com

Date	September 26, 2021
Total	$175.00

This proposal expires on 12/25/2021

View

Item	Description	Amount
Installation	Lighting system installation.	$175.00
CUS001	Low voltage output conversion kit for existing line voltage can light.	
	Subtotal	$175.00
	Tax	$0.00
	Total	$175.00

Accept Decline Print Forward

TERMS AND CONDITIONS

TERMS AND CONDITIONS - TENNESSEE

General. These terms and conditions ("Terms") govern the sale of the goods and services by LH of Nashville LLC, d/b/a Lighthouse Outdoor Lighting ("Company") to the customer named on the reverse side of these terms ("Customer") and at Customer's address (the "Property"). The accompanying estimate ("Estimate") and these Terms compromise the entire agreement (the "Agreement") between the parties and supersede all prior agreements, negotiations, representations and warranties, and communications, both written and oral. This Agreement, and any dispute arising under it, shall be governed and controlled by the laws of the state where the Property is located. Designs. All landscape designs remain the sole property of Company. Customer may retain a copy of the designs for maintaining the systems. Any drawings, sketches, or presentations used to present the Services (defined below) are solely used as an avenue to present design ideas and actual installation may differ. Unknown circumstances, such as elevation and altered layout may change the original design. Performance of Services. Company shall perform installations and other services identified on the Estimate (the "Services") using personnel of required skill, experience, and qualifications and in a professional and workmanlike manner in accordance with generally recognized industry standards for similar services and shall devote adequate resources to meet its obligations under this Agreement. With respect to the Services, Customer shall (i) cooperate with Company in all matters relating to the Services and provide such access to Customer's premises,

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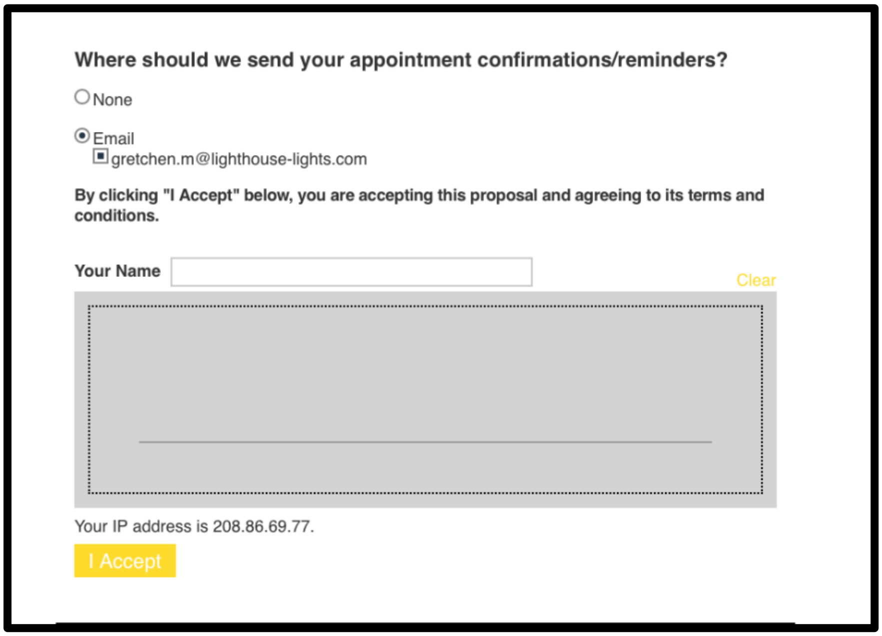
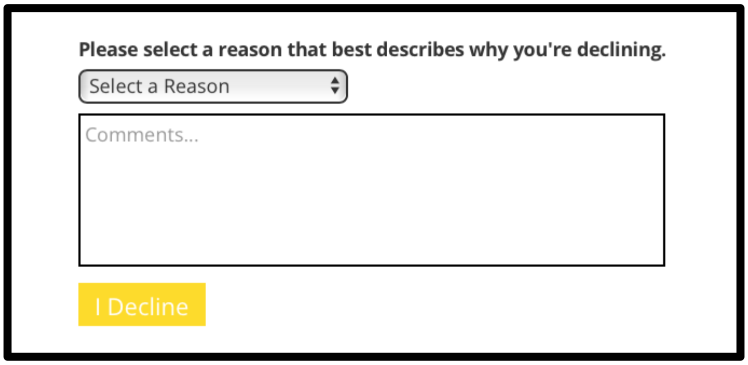
- Clicking Accept will open a window for the client to choose the email they prefer to receive updates throughout the process of the job and sign their name. They can also choose "none" if they opt out of receiving correspondence from Lighthouse.

- Once the client has typed and signed their name, they will click "I Accept" at the bottom of the window.



- If the client declines the proposal a window will appear asking them to select a reason and offers a space for comments they may have. They will then click "I decline" at the bottom of the window.



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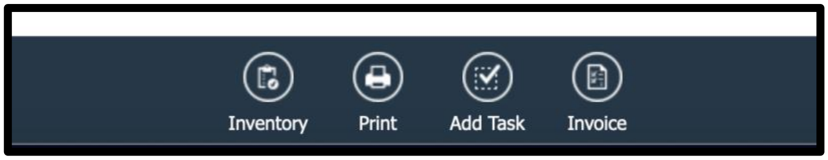
4. INVOICES

A. Creating an Invoice

i. From Contact Profile

- Open the contact profile and click on “invoice” at the bottom of the page below the contact information.



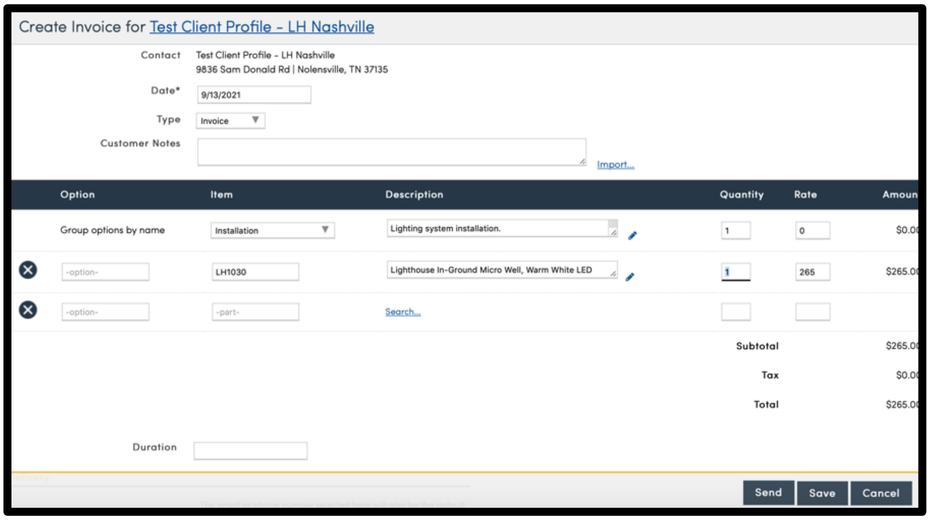
- For the first line select a service such as “installation” or “service call” from the dropdown box depending on the service that was completed.

- Add part numbers for any parts that were used for the job.

- Enter quantity

- Verify pricing is correct and move to the next line item.

- Once everything is as you wish it to be, click “send” or “save” at the bottom of the page. Send will allow the invoice to be sent to the client but if just saved it will not send without re-opening the invoice and sending.



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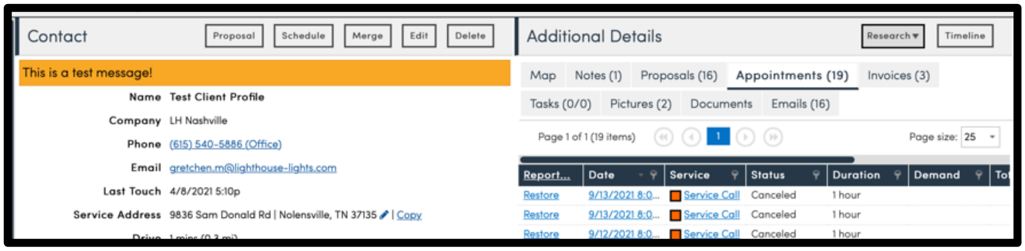
ii. From Appointment

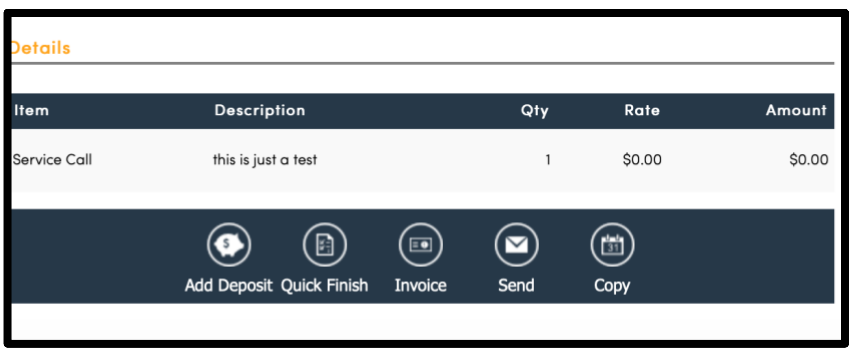
- Open contact profile and locate and open the appointment to be invoiced.



- Click “invoice” at the bottom of the page below the appointment detail.

- Review the invoice and click save or edit as necessary.

- You will then need to open the invoice and click “send” to make sure the invoice is sent to the client.



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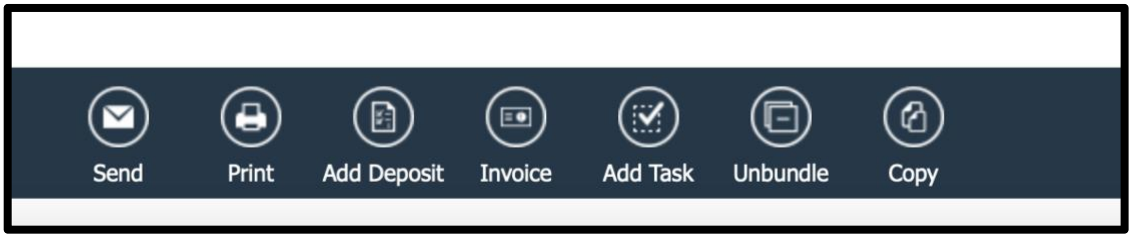
iii. From Completed Proposal

- Open the client profile and locate the proposal being invoiced.

- Click the "invoice" option at the bottom of the proposal page.

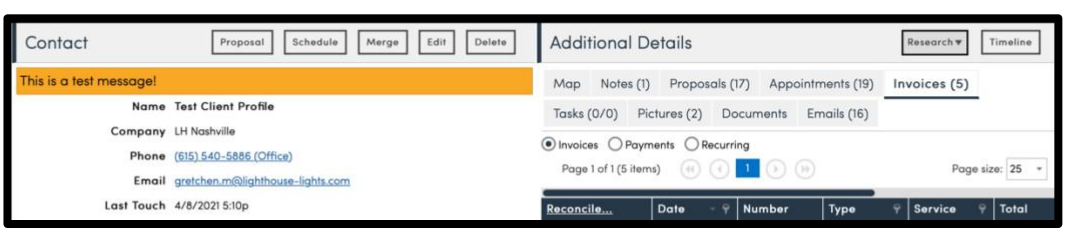


- Click "create" invoice leaving the "full" option checked unless there is a specific amount different than the proposal to be billed.

- From this page you will verify everything is accurate and click "save & send" or "save". Of course, "save and send" will send the invoice to the client, whereas "save" will only save to the system and not send.

B. Editing Invoices

- Open the contact profile
- Click on the "invoices" tab to the right of the contact information page



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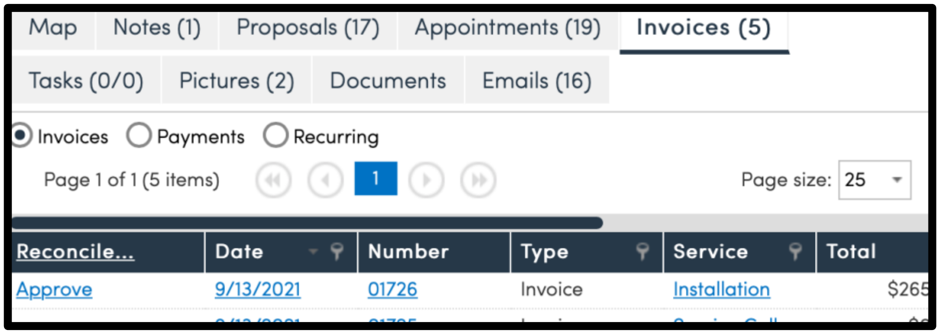
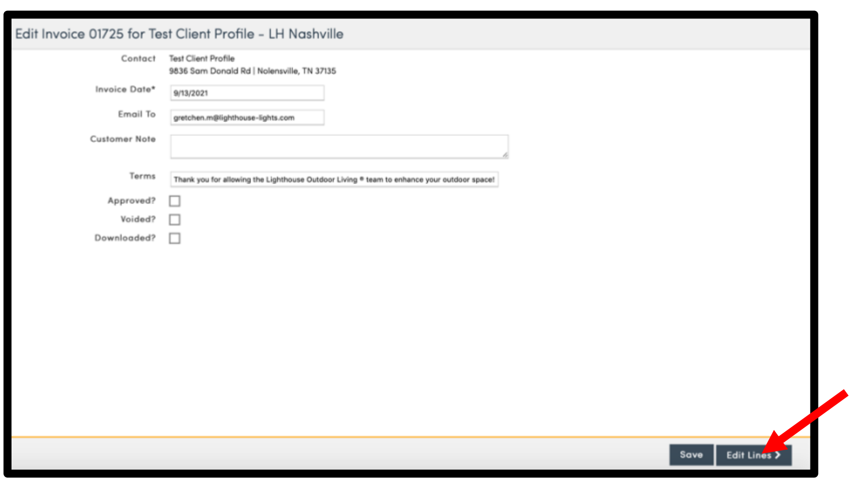
- Click on the invoice to be edited. This will take you to the invoice screen



- Click "edit" to make necessary changes

- Click "Edit Lines" at the bottom of the page. This will take you to the portion of the invoice page that includes all the line items.



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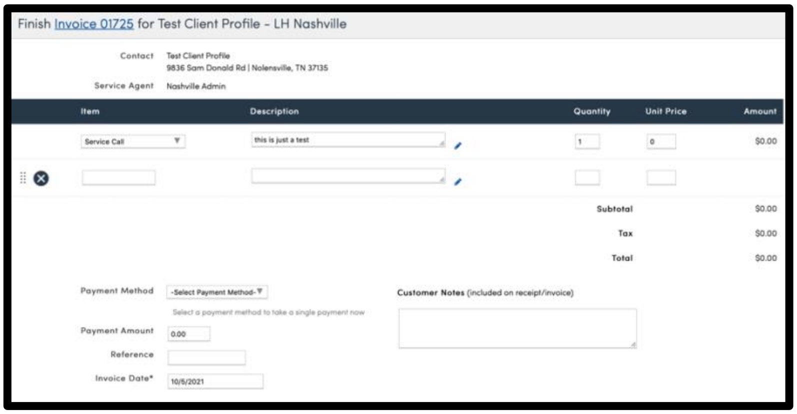
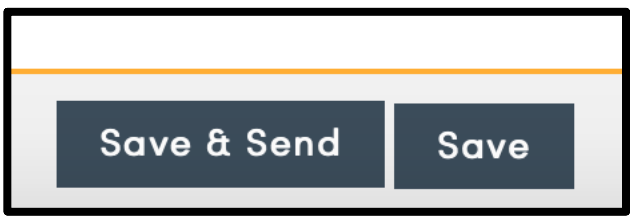
- Make any necessary changes and as indicated when changing a proposal when a line item is changed on the invoice the quantity will default to 1 and the description and price will change to reflect the newly chosen part number.



- Once all necessary changes have been made click “save” to only save the invoice. Click “save & send” to save and send the updated invoice to the client.



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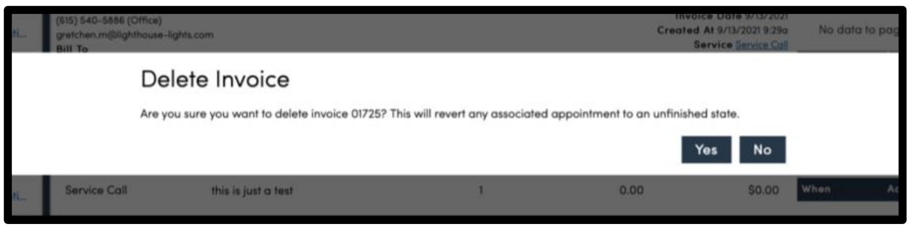
C. Deleting an Invoice

- Open the invoice to be deleted as explained above

- Click the "delete" tab at the top of the page.

- A warning message will pop up to confirm you want to delete the invoice, as once it is deleted it is no longer retrievable. Click "yes" to continue to delete the invoice.



- The invoice is deleted, and the system will return to the contact profile page or the appointment the invoice was created from, if applicable.

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5. PAYMENTS

Payments are received for deposits prior to installation services and for invoices of completed installations and services.

A. Receiving Deposits

- Open the contact profile for the client making the deposit.

- Click on the “Profile” tab to the right of the contact profile page and choose the proposal to which the deposit should be applied.

- At the bottom of the proposal there will be an option to “Add Deposit”

- Fill the requested information in as follows:
  - Payment Method (check, cash, credit card, existing deposit)
  - Amount of deposit
  - Date (should automatically populate current date)
  - Reference – this is for entering check number or credit card transaction authorization number
  - Receipt – choose whether you want the client to receive a receipt via email for the deposit being applied to their proposal

- Save the information. If you do not click “save” the information entered will be lost.

- Clicking “Cancel” will return to the previous screen without saving any of the information that has been entered for the deposit, therefore, not applying the deposit to the client’s account.

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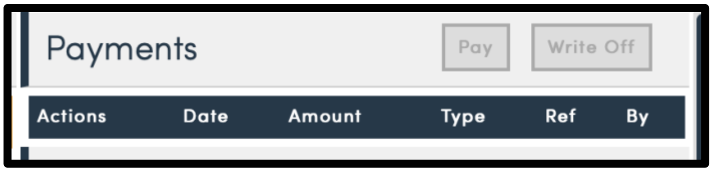
B. Applying Invoice Payments

- Open the invoice to be paid

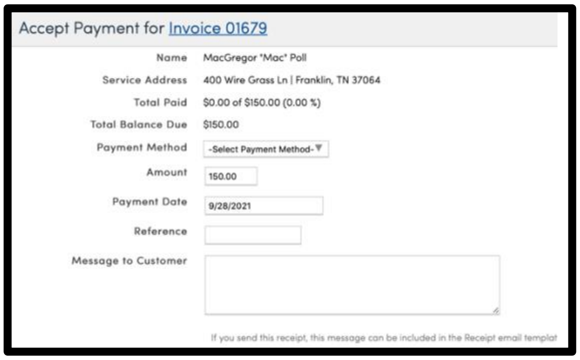
- Click the “Pay” tab in the upper right corner of the invoice page



- Enter the payment method, amount paid, and payment date.

- Reference – used to enter check number or credit card authorization number

- Message to Customer – any message that you would like the customer to see on the payment receipt should be entered in this section



- Click “Send” to save and send the payment receipt to the client. If you do not wish to send a receipt, click “Save” and it will only save the information in the system and will not send the client a receipt via email.

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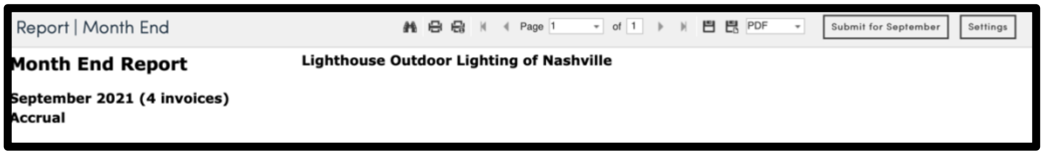
6. REPORTING

A. Viewing/Running Reports

- From the main screen of ServiceMinder there is a "Reports" option. Click on this to get a list of reports available.

- Reports:
  - **Backlog -** view backlog sorted by week or day
  - **Commissions -** view subtotals of all appointments with the assigned user
  - **Completed Appointments** - subtotals of all completed appointments within a date range
  - **Contacts -** includes all contacts in your organization
  - **Donation of Parts** - view invoices where donation parts were used
  - **Email Performance -**view performance of your Ad Hoc email messages
  - **End of Month - all invoice or payment activities for the selected month. We use this report for our monthly sales report / Royalties**
    - Click on the "Settings" tab to choose the month
    - Once the preferred month is chosen, click "Apply"
    - Click the printer icon to print the report
    - Click the disk icon to save to computer
    - To close the month out click. "Submit for (month)"
      - Once a report is submitted it cannot be changed.



  - **Installment Payments -**upcoming installment payments, summarized by month.

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- **Invoice Reconciliation -** view invoices in specific date range, and the payment details
- **Invoice Summary -** view invoices with service and part category counts
- **Mileage** - view how many miles your agents have driven
- **Offer Codes -** view offer code usage for proposals and invoices
- **Open Invoices -** shows all currently open invoices
- **Open Proposals / Options -** open proposals and proposals with unselected options
- **Payment Reconciliation -** view all invoices with payments inside of a specific date range
- **Pipeline -** shows revenue pipeline for contacts, proposals, and backlog data
- **Proposal Pivot Grid -** interactive pivot grid of proposal data
- **Referrals -** shows all contacts that have been referred by other contacts
- **Referrals by Invoice -** shows referrals related to each invoice by month
- **Resource Planning -** view necessary part resources for your backlog
- **Revenue At a Glance-**revenue by service for backlog and invoices
- **Revenue by Lead Source -** shows sales earned by each lead source and campaign
- **Revenue by Service Agent -** shows revenue by day for each active service agent
- **Revenue Pivot Grid -** interactive pivot grid of invoice data
- **Reworks -** track appointment reworks
- **Service Agent Hours -**show hours worked for each service agent
- **Service Agent Inventory -**show part inventory based on service agent quantities
- **Services Summary -**services summary report with counts, average scheduled and average actual durations

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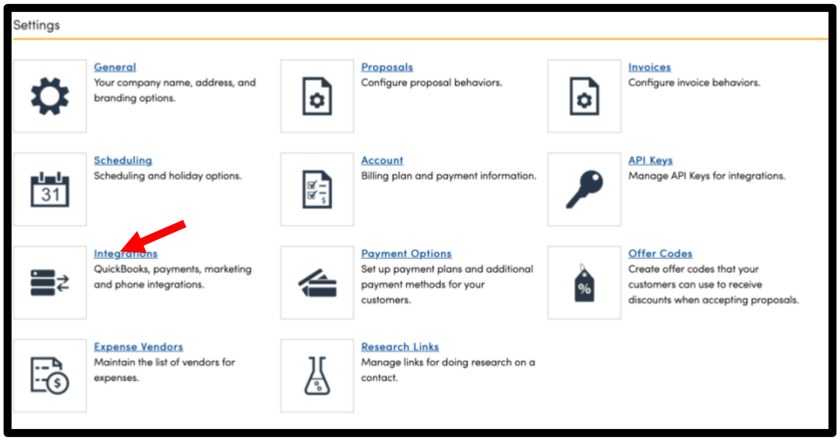
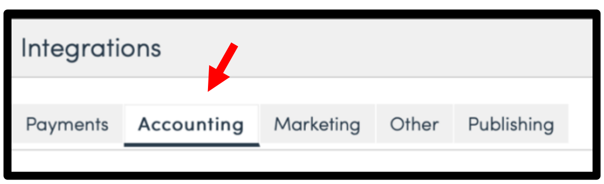
7. QUICKBOOKS

A. LINKING SERVICEMINDER TO QUICKBOOKS

- Open the control panel from the main screen.
- Under the settings section click on "Integrations"

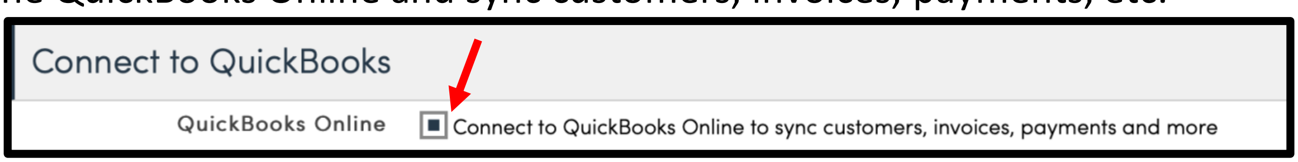


- Click on the "Accounting" tab and scroll down to the section titled "Connect to QuickBooks Online"



- Click on the "connect" link next to "Status"

- Make sure the checkbox for "QuickBooks Online" is shaded, to connect to the QuickBooks Online and sync customers, invoices, payments, etc.



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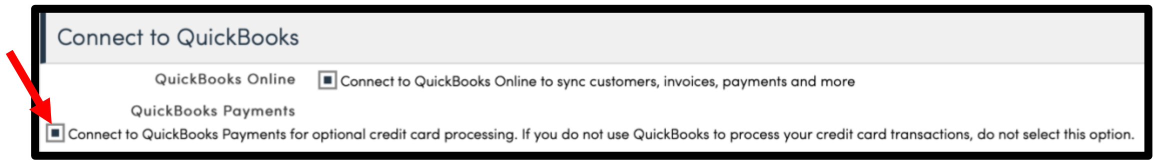
- If using QuickBooks to process credit card transactions make sure the second checkbox shaded. This will connect ServiceMinder.io to QuickBooks Payments. If you are not using QuickBooks Payments, be sure to uncheck this box



- Finally, click the green box labeled “Connect to QuickBooks”

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