

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.



<u>Testjackj@gmail.com</u> Pri Phone (987) 456-3210 (test)

Lighthouse Outdoor Lighti..

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 **<u>name</u>**, **<u>phone number</u>**, **<u>email</u>**, **<u>and address</u>**, which are all required.
- Choose the lead source very important to capture for each new lead
 - If the lead source is a <u>referral</u> be sure to search for the referee, using search box



- Enter <u>flash message</u> 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 <u>client's address</u> 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 <u>property manager</u> involved, there is a section for their contact information as well.
- Click the <u>add</u> button in the bottom right corner of the screen, to save

| II Connite > Add is Contoo | 4 | | | Logged in as Gratchen Monites & @ |
|----------------------------|--------------------|--|-------------------------------|---------------------------------------|
| Navigation | Carrow Hatda | | | |
| | Offer | | | |
| Ughthman Dationer Light. | Gate | Carde | + If gate code property it is | needed for entry to |
| Lighthouse Conduct Light. | Property Menager 1 | 1979 - | - | |
| Lighthouse Duttion Light. | Property Manager 7 | hate | assistant | opposed to homeowner |
| Bhartouls | | njer | Aber with b | |
| Ake a Carriet | Denica Address | | | |
| Schedule as Appendicement | a | 1.100 | | (Annual) |
| Mybrieka | from a boother | Compt. (P | | |
| Report Autory | Address (* | | | |
| Enegation | 1 | | | |
| Al o Charlos | And and a | Enter the address provided by pr | ospec1 | |
| Open Houses | Casteriority | locate it and fill in the fields below | | |
| man P | | also provide a map of the locatio | in to the | |
| Accepted Proposite 37 | Eng* | | | |
| Oper Property 18 | their l | | Once ev | erything is entered click "Add" |
| | | | and office | |

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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

| Contact | Proposal | Schedule | Merge | Edit | Delete | |
|---------|----------|----------|-------|------|--------|---|
| | | | | | | _ |

- 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.

| Contact | Proposal | Schedule | Merge | Edit | Delete |
|---------|----------|----------|-------|------|--------|
| | | | | | |

 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.

| Confirm Delete - Are you sure you want to delete this contact? | |
|--|---------|
| Contacts with history cannot be deleted | Delete! |
| | |

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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.

| | JSE Calendar C | Contacts Appointments Maps Campaigns Reports MarketPlace Help! |
|--|---|---|
| ≡ <u>Calendar</u> > <u>Add a Contact</u> | > Test Client Profile - Lighthouse Outdoor Lighting | Logged in as Gretchen Moates 🌲 🕸 Log.ou |
| Navigation | Contact Proposal Schedule Marge Edit Delete | Additional Details |
| Search Q | this is a test message This is the flash message from the "add contact" screen | Map Notes (2) Proposals (5) Appointments (2) Invoices (2) Tasks (0/0) |
| Lighthouse Outdoor Lighti- | Name Test Client Profile | Pictures (1) Documents Emails (7) |
| Lighthouse Outdoor Light | Phone (615) 540-5866 (Office) Alternate Phone (615) 540-5866 (Office) | + Map Satellite |
| Lighthouse Outdoor Lighti | Email gretchen m@lighthouse_lights.com Last Touch 4/4/2021 5:10:20 PM | |
| Add a Contact | Service Address 9836 Sam Donald Rd Nolensville, TN 37135 ✔ <u>Coox</u> Drive 1 mins (0.3 mi) | |
| Schedule an Appointment | Category Customer Lead Source Existing | Brooksbank Estates Q gut M |
| Recent Activity | Last Service 3/8/20213:23:06 PM Created 2/19/20218:37p | |
| Snapshots | Created By Gratchen Moates Last Updated 4/13/2021 4:00p | Cabinet Painting Q |
| Open Invoices 8 | Additional Contacts Add | |
| Projects 7 | | |
| Accepted Proposals 27 | TEST 1 Tier 1 Installation 1 | |
| Open Proposals 16 Backlog \$7,196 / 287 | (i) (i) (ii) | Google Map data 60021 200 m Terms of Use Report a map error |
| Tasks O | Inventory Print Add Task Invoice | @Meggure |

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.

| Contact | Proposal Schedule Merge Edit Delete | | | | | | | | |
|--|-------------------------------------|--|--|--|--|--|--|--|--|
| this is a test message This is the flash message from the "add contact" screen | | | | | | | | | |
| Name | Test Client Profile | | | | | | | | |
| Company | any Lighthouse Outdoor Lighting | | | | | | | | |
| Dhana | (616) 6 40 6000 | | | | | | | | |

<u>Parts</u>

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.

| Parts | Other | | |
|-------|------------|-------------|----|
| | | | |
| | | Fixtures | 64 |
| | | LH2001 | 4 |
| | LH7082 | (deleted) | 4 |
| | | LHT200 | 1 |
| | Tier 1 li | nstallation | 36 |
| | Tier 2 li | nstallation | 9 |
| | Tier 3 Ins | tallation - | 31 |
| | Tier 4 li | nstallation | 5 |
| | | | |

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Map – shows the location of the property using Google Maps



<u>Notes</u> – 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.

| Мар | Note | es (1) | Propos | sals (16) | Арр | ointment | ts (14) | Invoice | es (3) | | |
|---------------|---------------------------------|----------|-----------|-----------|------|----------|---------|---------|--------|-----------------|--|
| Tasks (| 0/0) | Pictur | res (2) | Docume | ents | Emails (| (15) | | | | |
| Page | Page 1 of 1 (1 items) (1) () | | | | | | | | | | |
| <u>Add</u> | Do | ıte | | Ву | | Private | Title | | Note | | |
| Edit | 1/1 | 2/2021 1 | 1.46 0.00 | Gretcher | n | Yes | Deleted | | | 01637 was delet | |
| <u>Delete</u> | 17.1 | 5720211 | 1.40 AM | Moates | | 103 | invoice | | THEN D | ELETED 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

| Map Notes (| 1) Proposal | s (16) App | ointments | (14) Invoice | es (3) | |
|-------------------|--------------|---------------------------|--------------|---------------------------------------|------------|--------------------|
| Tasks (0/0) | Pictures (2) | ocuments | Emails (15 |) | | |
| Page 1 of 2 (16 i | tems) 🔃 🤃 | 1 2 (| b (+) | | | |
| 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.

| Addit | ional D | etails | | | | Researc | h▼ | Timelin | 0 |
|---------|-----------------|------------|------------|------------|--------|----------|-----|------------|---|
| Мар | Notes (1) | Propos | (19) | Invoice | os (5) | 1 | | | |
| Tasks (| 0/0) Pic | tures (2) | Documents | Emails (16 | 5) | | | | |
| Page | 1 of 1 (19 iten | ns) 🛞 | 0 1 0 | ()) ()) | | | Pag | e size: 25 | ٠ |
| Report | <u>.</u> Da | te - 9 | Service | 9 Status | Ŷ | Duration | 9 | Demand | 9 |
| Restore | 9/1 | 3/2021 8:0 | Service Co | Canceled | | 1 hour | | | |
| Restore | 9/1 | 3/2021 8:0 | Service Co | Canceled | | 1 hour | | | |
| Restore | 9/1 | 2/2021 8:0 | Service Co | Canceled | | 1 hour | | | |
| Restore | 9/1 | 0/2021 8: | Service Co | Canceled | | 1 hour | | | |
| Restore | 9/9 | /2021 8:0 | Service Co | Canceled | | 1 hour | | | |
| Edit | 8/2 | 0/2021 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

| Addit | Additional Details | | | | | | | | | | 1 | Timeli |
|--|--|-------|---|----------------|-------------|----------|---------|---------|-------------|--------------|---|--------|
| Мар | Note | s (1) | (1) Proposals (17) Appointments (19) Invoices (| | | | | | | | | |
| Tasks (| Tasks (0/0) Pictures (2) Documents Emails (16) | | | | | | | | | | | |
| Invoices Payments Recurring Page 1 of 1 (5 items) (4) (4) (1) (5) (6) Page | | | | | | | | | ge siz | ze: 25 | | |
| <u>Reconci</u> | <u>le</u> | (| Date | - 9 | Num | nber | | Туре | Ŷ | Service | ٩ | Toto |
| Approve | | Ş | 9/13/202 | <u>!1</u> | <u>0172</u> | <u>6</u> | | Invoice | | Installation | | |
| | <u>9/13/2021</u> <u>0172</u> | | | | <u>5</u> | | Invoice | | Service Cal | <u> </u> | | |
| | | Ę | 5/19/202 | <u>21</u> | <u>0167</u> | <u>4</u> | | Invoice | | Service Cal | 1 | |

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

| Addi | tional [| Details | Research ▼ | Time | line | | | | | | |
|------------|---|---------|-------------------|----------|--------------|--------------|--------|-------|--|--|--|
| Мар | Notes (| 1) Prop | oosals (17) | Appoin | itments (19) | Invoices (5) | | | | | |
| Tasks | (s (0/0) Pictures (2) Documents Emails (16) | | | | | | | | | | |
| No d | ata to pagii | nate 🤇 | | ()) | | | | | | | |
| <u>Add</u> | Activity | Status | Category | Priority | Descriptio | n Completion | n Note | Due O | | | |
| | | | | | | No data to d | isplay | | | | |

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- 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.

| Proposal Schedule View Print Edit | | | | | |
|-----------------------------------|----------|----------|------|-------|------|
| | Proposal | Schedule | View | Print | Edit |

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".

| Contact | Proposal Schedule Merge Edit Delete |
|-------------------------|-------------------------------------|
| This is a test message! | |
| Name | Test Client Profile |
| Company | LH Nashville |
| Phone | (615) 540-5886 (Office) |

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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.

| | | | Unfinished Tasks |
|----------------------------|---|--|------------------|
| | | | |
| Tasks | | Unfinished Finished Cotegories 🖄 Actions ¥ | |
| Page 1 of 1 (15 items) (() |) (ii) | | |
| Add Assigned To | P Activity P Status P Category Task Overdia Overdia Overdia Overdia | Priority P Description MAN TO SHOP COD MARRANCY DEDARD AND OF MAN TO SHOP COD MARRANCY DEDARD AND OF | |

 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.

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 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".

| Addit | Additional Details | | | | | | | |
|------------|-----------------------------|----------|------------|----------|---------------|---------------|--|--|
| Мар | Notes (| (1) Pro | posals (16 | Арро | intments (19) | Invoices (5) | | |
| Tasks | (0/0) | Pictures | (2) Do | cuments | Emails (16) | | | |
| No do | No data to paginate (🕢 🕟 🕪 | | | | | | | |
| <u>Add</u> | Activity | Status | Categor | y Priori | y Descriptio | on Completion | | |
| | | | | | | | | |

 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".

| Schedule an A | Appointment | | | | | | | |
|------------------------------|--|----------------------|---|---|-----------------------|------------------------|------------------|----------|
| Contact Customer Notes | Test Client Profile 9836 Sam Donald Rd Nolensville, T Pri (615) 540–5886 Alt (615) 540–5886 (Office) 2001L | U | pcoming Nearby Appoint 0 mins (0 ft) 1 Nashville fri. Apr 16, 2021 at 8:00a Design Services Gty 11 Dur 0 mins this is a test message | P Test Client Profile - Uphthouse Outdoor Uphtho 9836 Som Donald Rd I Notensville, TN 97136 974 (Sills) 5840-5886 (Office) | | | | |
| Option | | Item | Descriptio | ən | | Quantity | Rate | Amount |
| Select a t | emplate | Select a service V | | | | | | \$0.00 |
| ii 😵 -eption- | | -part- | Search | | | | | |
| | | | | | | Subtotal | | \$0.00 |
| | | | | | | Tax | | 50.00 |
| | | | | | | Total | | 50.00 |
| | | | | | | Duration | | |
| | | | | | | Demand | | |
| | | | | | | Demand | | |
| | | | | | | | | |
| | | | | | | | | |
| Recurrence Settings | | | | Name | Test Client Profile | | | |
| Date and Time Optic | ons | | | Company | Lighthouse Outdoor | Lighting | | |
| Scheduling Style | | | | Phone | (615) 540-5886 | | | |
| Normal Ad-hoo | Queued | | | Alternate Phone | (615) 540-5886 (Off | ice) une-lights con | | |
| Target Date | | In the second second | | Last Touch | 4/8/2021 5:10:20 PM | 1 | | |
| 4/16/2021 | | J First Available | | Service Address | 9836 Sam Donald R | d Nolensville, | TN 37135 / Cop | x |
| Target Timeframe | | | | Drive | | | | |
| | | | | Category | Customer | | | |
| | Enter on onlinnal time (e.n. 12n) | | | Lead Source | Existing | | | |
| Select a Service | enne en opronenning (engli sign) | | | Lifetime Value | \$5.00 | | | |
| Agent | | | | Customer Since | 3/8/2021 (Installatio | nì | | |
| | Select a Service Agent [™] | | | Last Service | 3/8/2021 3:23:06 PM | 4 | | |
| Additional Service Agents | | | | Next En Route | None | | | |
| Custom Fields | | | | Created | 2/19/2021 8:37p | | | |
| | | | | Created By | Gretchen Moates | | | |
| | Other | | | Last Updated | 4/13/2021 4:00p | | | |
| | | | | Additional Contacts | A00 | | | |
| | Property Manager Name | | | Parts Other | | | | |
| | | | | TE Tier 1 Installati | ST 1 on 1 | | | |
| | | | | Thu. Ann 15, 2021 at 8,000 | | Schedu | le & Send | 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

| Map Tasks (| Notes | s (1) | Propose | als (17) | Appo | ointment | s (19) |) Invoice | s (5) | | |
|---------------------------|------------------|-----------------------|-----------------|----------|---------------------|--------------------|--------|---------------------------|------------|--------|---|
| Page | items) | (2) | | | | 10) | | Page | e size: 25 | • | |
| <u>Perort</u> Edit Car | <u>.</u> ncel | Date <u>9/13/2</u> | - 9 2021 8:0 | Service | ې <u>ce Call</u> | Status Schedule | φ d | Duration 1 hour | 9 | Demand | ٩ |

 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)

| Reason | | |
|--------|---|--|
| | 4 | |

• 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.

| Started Ap | pointr Finish/Proposal Re-Queue Carry Over Print Edit |
|-------------------------|---|
| This is a test me | əssage! |
| | Service Estimate |
| | |
| Contact | Proposal Schedule Merge Edit Delete |
| This is a test message! | |
| Name | Test Client Profile |
| Company | LH Nashville |
| Phone | (615) 540-5886 (Office) |
| Email | gretchen.m@lighthouse-lights.com |
| Last Touch | 4/8/2021 5:10:20 PM |
| Service Address | 9836 Sam Donald Rd Nolensville, TN 37135 🖋 Copy |
| Drive | 1 mins (0.3 mi) |
| Category | Customer |
| Lead Source | Existing |
| Last Service | 7/30/2021 10:34:00 AM |
| Created | 2/19/2021 8:37p |
| Created By | Gretchen Moates |
| Last Updated | 4/23/2021 2:55p |
| Additional Contacts | Add |
| Parts Other | |

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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.

| Create a Proposal for <u>Test Client Profile – LH Nashville</u> | | | | | | | |
|---|--|----------------|-------------------------------|--|----------|------|--------|
| Contact | Test Client Profile - LH Nashville 9836 Sam Donald Rd Nolensville, 1 (615) 540-5886 (Office) | IN 37135 | | | | | ? |
| Lead Source | Existing | | | | | | |
| Date* | 8/23/2021 | | | | | | |
| Expires On* | 11/21/2021 | | | | | | |
| Rescission Days | | | | | | | |
| Title | | | | | | | |
| Customer Notes | | | | | | | |
| internal Notes | | | | | | | |
| Option | | Item | Description | | Quantity | Rate | Amount |
| Select | template T | Installation T | Lighting system installation. | | 1 | 0 | \$0.00 |
| -option | | -part- | Search | | | | |
| | | | | | Subtotal | | \$0.00 |

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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<u>Internal Notes</u> – 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.

| I 🛛 🖃 | tion- | | -part- | | Search | | | |
|------------------|---|------------------------|--------------|---|-------------------------------|----------|------|--------|
| Sel | ect a template | ٣ | Installation | ٣ | Lighting system installation. | 1 | 0 | \$0.00 |
| Ор | ion | | ltem | | Description | Quantity | Rate | Amount |
| Internal Note | | | | | | | | |
| Controlling Hole | | | | | | | | |
| Customer Note | | | | | | | | |
| Tu | | | | | | | | |
| Expires Or | 11/21/2021 | | | | | | | |
| Date | 8/23/2021 | | | | | | | |
| Lead Source | e Existing | | | | | | | |
| Conta | ct Test Client Profile – LH Nat 9836 Sam Donald Rd Noi (615) \$40-5886 (Office) | hville iensville, T | N 37135 | | | | | ? |
| create a r | | | | | | | | |

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.

| \bigotimes | -option- | LH1030 | Lighthouse In-Ground Micro Well, Warm White LED | 1 |
|------------------|----------|--------|---|---|
| ⊗ | -option- | -part- | Search | |

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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.

| | | _ |
|-------------------------|---|---|
| Part/Add-on Line Detail | ls | |
| Description | Lighthouse in-Ground Micro Weil, Warm White LED | ? |
| Internal Notes | | |
| Unit Cost | 33.94 | |
| Unit Price | 265 | |
| Taxable? | | |
| Internal? | | |
| Exchange? | | |
| | Apply Concel | |

- 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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<u>Acceptance and Scheduling</u> – 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

<u>Save</u> – 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.

<u>**Printing-**</u> 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.

| Contact | Proposal Schedule Merge Edit Delete | Additional Details | | | | | Research v Timeline | | |
|-------------------------|--|--------------------|--------------|--------------|------------|-------------|----------------------------|----------|--|
| This is a test message! | | Map Notes (| 1) Proposal | s (17) App | ointments | (19) Invoic | es (5) | | |
| Name | Test Client Profile | Tasks (0/0) | Pictures (2) | ocuments | Emails (16 |) | | | |
| Company | LH Nashville | | | | | | | | |
| Phone | (615) 540-5886 (Office) | Page 1 of 2 (17 if | iems) |) 1 2 (| () | | | | |
| Email | gretchen.m@lighthouse-lights.com | <u>Add</u> | Date | Service | Status | Title | Total | Owner | |
| Last Touch | 4/8/2021 5:10p | Accept Edit | 9/26/2021 | Installation | Open | Test | \$175.00 | Gretchen | |
| Service Address | 9836 Sam Donald Rd Nolensville, TN 37135 🖋 <u>Copy</u> | | | | | * Lanscape | | Gretchen | |

• Click "edit" next to the proposal that is needing changes.

| Additional Details | | | | | | | | ch 🔻 | Tim |
|--|---|-----------|----------|-------|--------|---------------|--------|-------|------|
| Мар | Map Notes (1) Proposals (17) Appointments (19) | | | | | Invoice | es (5) | | |
| Tasks (0/0) Pictures (2) Documents Emails (16) | | | | | | | | | |
| Page | 1 of 2 (17 it | ems) 🕡 | 1 | 2 (| (| | | | |
| <u>Add</u> | | Date | Servic | e | Status | Title | | Total | |
| Accept [| Edit | 9/26/2021 | Installa | ition | Open | Test Insta | lation | \$175 | 5.00 |

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.

| Edit Proposa | for <u>Test Client</u> | <u> Profile - LH Nashville</u> | | | | |
|------------------|---|--------------------------------|---|----------|------|----------|
| Contact | Test Client Profile 9836 Sam Donald Rd | Nolensville, TN 37135 | | | | |
| Date* | 9/26/2021 | | | | | |
| Expiration Date* | 12/25/2021 | | | | | |
| Rescission Days | | | | | | |
| Title | Test Installation | | | | | |
| Customer Notes | | | | | | |
| Internal Notes | | | | | | |
| internal Notes | Add Date | Note | | | | |
| Option | n | ltem | Description | Quantity | Rate | Amount |
| Group | options by name | Installation V | Lighting system installation. | 1 | 0 | \$0.00 |
| ii 🚫 -optio |)÷ | CUS001 | Low voltage output conversion kit for existing line | 1 | 175 | \$175.00 |
| ii 🔕 -optio | 1 - | -part- | Search | | | |
| | | | | Subtotal | | \$175.00 |
| | | | | Tax | | \$0.00 |

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• Delete any unwanted lines by clicking the "X" to the far left of that line.

| | Option | Item | Description | Quantity | Rate | Amount |
|------|-----------------------|----------------|---|----------|------|----------|
| | Group options by name | Installation T | Lighting system installation. | 1 | 0 | \$0.00 |
| II 😣 | -option- | CU\$001 | Low voltage output conversion kit for existing line | 1 | 175 | \$175.00 |
| II 😣 | -option- | -part- | Search | | | |
| | | | | Subtotal | | \$175.00 |
| | | | | Tax | | \$0.00 |

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

| | Option | Item | Description | Quantity | Rate | Amount |
|-----|-----------------------|----------------|---|----------|------|----------|
| | Group options by name | Installation T | Lighting system installation. | 1 | 0 | \$0.00 |
| ∥ ⊗ | -option- | CUS001 | Low voltage output conversion kit for existing line | 1 | 175 | \$175.00 |
| . 🛛 | +option- | -part- | Search | | | + |
| | | | | Subtotal | | \$175.00 |
| | | | | Tax | | \$0.00 |

• 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.

| | Option | ltem | Description | Quantity | Rate | Amount |
|------|-----------------------|----------------|---|----------|------|----------|
| | Group options by name | Installation T | Lighting system installation. | 1 | 0 | \$0.00 |
| . ⊗ | -option- | CU\$001 | Low voltage output conversion kit for existing line | 1 | 175 | \$175.00 |
| II 😣 | -option- | -part- | Search | | | |
| | | | | Subtotal | | \$175.00 |
| | | | | Ταχ | | \$0.00 |

• 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.

| Contact | Proposal Schedule Merge Edit Delete | Additional | Details | | | Resear | rch 🔻 🛛 Time |
|-------------------------|-------------------------------------|-------------------|--------------|--------------|-------------|----------------------|--------------|
| This is a test message! | | Map Notes (| (2) Proposa | ls (17) A | ppointments | (19) Invoid | es (4) |
| Name | Test Client Profile | Tasks (0/0) | Pictures (2) | Documents | Emails (16) | | |
| Company | LH Nashville | . , | | _ | 0.0 | | |
| Phone | (615) 540-5886 (Office) | Page 1 of 2 (17 i | tems) 🛞 🤄 | 1 2 | ())) | | |
| Email | gretchen.m@lighthouse-lights.com | <u>Add</u> | Date | Service | Status | Title | Total (|
| Last Touch | 4/8/2021 5:10p | Accept Edit | 9/26/2021 | Installation | Open | Test Installation | \$175.00 |

- 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.

| Please review any options or payment pl | ans you may have for this proposal and then enter the name of the party you are accepting this proposal on behalf of: |
|---|---|
| Contact | Test Client Profile – LH Nashville 9836 Sam Donald Rd Nolensville, TN 37135 Pri (615) 540-5886 (Office) |
| Accept on Behalf of* | |
| Offer Code | None▼ |
| Subtotal | \$175.00 |
| Ταχ | \$0.00 |
| Total | \$175.00 |
| Resource Planning | |
| Target Date | |
| | Used for resource planning. This is when the proposal is expected to be completed. |

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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.

| Lighthouse O 1208 Limerick Franklin, TN 3 (615) 861-898 | utdoor Lighting of Nashville Lane 0 | Lisemous |
|--|---|---|
| | | |
| | | |
| Billing/Servi | ce Address Date Septemb | er 26, 2021 |
| Test Client Pr LH Nashville 9836 Sam Do Nolensville, T (615) 540-588 gretchen.m@ | ofile Total Total Total (6006ce) Ighthouse-lights.com | \$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 | |
| General. Thes General. Thes Nastwille LLC reverse side or accompanying "Agreement") and warranties under it, shall Designs. All la of the designs present the Se actual installat change the or services ident qualifications an Company in a | Contrast-over - LTMPERENCE. The set approximate of the set of the pacebox and set of the set of | es by LH of on the termsentations spute arising located. tain a copy ed to eas and out may ns and other erience, and lly to meet its arate with premises, of |

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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.

| ⊃None | | |
|------------------------------|--|-------------------------------------|
| Email gretcher | n.m@lighthouse-lights.com | |
| By clicking " conditions. | Accept" below, you are accepting this prop | oosal and agreeing to its terms and |
| Your Name | | Clear |
| | | |
| | in 000 86 60 77 | |
| Your IP addre | SS IS 200.00.09.77. | |

• 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.

| Select a Reason | \$ |
|-----------------|----|
| Comments | |
| | |
| | |
| | |
| L Decline | |

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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.

| Create | Create Invoice for Test Client Profile - LH Nashville | | | | | | | | | |
|-----------|---|---|-------------------------------|---|-------------------|----------|------|----------|--|--|
| | Contact | Test Client Profile - LH Nas 9836 Sam Donald Rd No | shville lensville, TN 3713 | 5 | | | | | | |
| | Date* | 9/13/2021 | | | | | | | | |
| | Туре | Invoice T | | | | | | | | |
| | Customer Notes | | | A. | Import | | | | | |
| c | Option | Item | | Description | | Quantity | Rate | Amoun | | |
| G | Group options by name | Installation | V | Lighting system installation. | <i>a</i> 1 | 1 | 0 | \$0.00 | | |
| \otimes | -option- | LH1030 | | Lighthouse In-Ground Micro Well, Warm White LED |) // / | 1 | 265 | \$265.00 | | |
| \otimes | -option- | -part- | | Search | | | | | | |
| | | | | | | Subtotal | | \$265.00 | | |
| | | | | | | Tax | | \$0.00 | | |
| | | | | | | Total | | \$265.00 | | |
| | Duration | | | | | | | | | |
| lelivery | | The email or phone number | r selected here wi | I also be the default | | Send | Save | Cancel | | |

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ii. From Appointment

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

| Contact | Proposal Schedule Merge Edit Delete | Additional Details Research * Timeline |
|-------------------------|---|---|
| This is a test message! | | Map Notes (1) Proposals (16) Appointments (19) Invoices (3) |
| Name | Test Client Profile | Tasks (0/0) Pictures (2) Documents Emails (16) |
| Company | LH Nashville | |
| Phone | (615) 540-5886 (Office) | Page 1 of 1 (19 items) ((() 1 () (() () (() () () (() () () (() (|
| Emai | gretchen.m@lighthouse-lights.com | Report Date ?? Service ? Status ? Duration ? Demand ? i |
| Last Touch | 4/8/2021 5:10p | Restore 9/13/2021 8:0 Service Call Canceled 1 hour |
| Service Address | 9836 Sam Donald Rd Nolensville, TN 37135 🖋 Copy | Restore 9/13/2021 8:0 Service Call Canceled 1 hour |
| Drive | 1 mins (0.2 mi) | Restore 9/12/2021 8:0 Service Call Canceled 1 hour |

- 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.

| Generate an Invoice | | |
|---------------------|-----------------------------|----|
| Invoice Type | Full | |
| | O Percentage % | |
| | Progress between 1 and 100 | |
| | O Amount | |
| | Amount between 1 and 265.00 | |
| Invoice Date | | |
| | Create Invoice! | Ca |

• 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

| Contact | Proposal Schedule Merge Edit Delete | Additional Details | Timeline |
|-------------------------|-------------------------------------|--|----------------|
| This is a test message! | | Map Notes (1) Proposals (17) Appointments (19) Invoices (5 |) |
| Name | Test Client Profile | Tasks (0/0) Pictures (2) Documents Emails (16) | _ |
| Company | LH Nashville | | |
| Phone | (615) 540-5886 (Office) | C invoices Payments O Recurring | 1 |
| Email | gretchen.m@lighthouse-lights.com | | ige size: 25 * |
| Last Touch | 4/8/2021 5:10p | Reconcile Date - ? Number Type ? Service | 9 Total |

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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

| Unapproved Invoice 01725 | View Print Ap | prove Edit | Merge | Delete Timeline |
|--------------------------------------|---------------|------------|-------|----------------------------|
| This is a test message! | | | | |
| Test Client Profile – LH Nashville 🖋 | | | | Status Unapproved |
| 9836 Sam Donald Rd | | - | | Owner None d |
| Nolensville, TN 37135 | | | | Invoice Number 0172 |
| (615) 540-5886 (Office) | | | | Invoice Date 9/13/202 |
| aretchen.m@lighthouse-lights.com | | | | Created At 9/13/2021 9:290 |
| Bill To | | | | Service Service Ca |
| 9836 Sam Donald Rd | | | | |
| Nolensville, TN 37135 | | | | |

• 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.

| Edit Invoice 01725 for Te | st Client Profile – LH Nashville |
|---------------------------|--|
| Contact | Test Client Profile 9836 Sam Donald Rd Nolensville, TN 37135 |
| Invoice Date* | 9/13/2021 |
| Email To | gretchen.m@lighthouse-lights.com |
| Customer Note | |
| Terms | Thank you for allowing the Lighthouse Outdoor Living * team to enhance your outdoor space! |
| Approved? | |
| Voided? | |
| Downloaded? | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | Save Edit Lines > |

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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.

| Finish In | voice 01725 for | Test Client Prof | ile - LH Nashville | | | | |
|-----------|--------------------------|--|---|---------------------------------------|----------|------------|--------|
| | Contact Service Agent | Test Client Profile 9836 Sam Donald Rd Nashville Admin | Nolensville, TN 37135 | | | | |
| | Item | 1 | Description | | Quantity | Unit Price | Amount |
| | Service Call | ¥ | this is just a test | | 1 | 0 | \$0.00 |
| . 🛛 | | | | | | | |
| | | | | | Subtoto | d | \$0.00 |
| | | | | | Ta | x | \$0.00 |
| | | | | | Toto | đ | \$0.00 |
| | Payment Method | -Select Payment Metho Select & poyment mat | d-T had to take a single payment now | Customer Notes (included on receipt/i | nvoice) | | |
| | Payment Amount | 0.00 | | | | | |
| | Reference | | | | | | |
| | Invoice Date* | 10/5/2021 | | | | | |

• 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.

| Save & Send | Save |
|-------------|------|

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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.

| | | × |
|--------------------------|--------------------------------------|----------|
| Unapproved Invoice 01725 | View Print Approve Edit Merge Delete | Timeline |
| | | |

• 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.

| ñ., | (615) 540-5886 (O gretchen.m@light Bill To | ffice) house-lights.com | | Invoice Created At Serv | 9/13/2021 9/13/2021 9:29a rice Service Call | No data | a to pag |
|-----|--|--|--|-------------------------------|---|---------|----------|
| | | Delete Invoice | | | | | |
| | | Are you sure you want to delete invoice 0172 | 5? This will revert any associated app | ointment to an unfinished s | tate. | | |
| | | | | Yes | No | | |
| ti | Service Call | this is just a test | 1 | 0.00 | \$0.00 | When | Ac |

• 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"

| | | | | | | | Т | otal |
|----------|------|-------------|-------------|----------|----------|------|---|------|
| | Send | () Print | Add Deposit | (Invoice | Add Task | Сору | | |
| achments | | | | | | | | |

- 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.

| Accept Deposit | |
|-----------------|------------------------|
| Payment Method* | Select Payment MethodY |
| Amount* | 0 |
| Date* | 9/26/2021 |
| Reference | |
| Receipt? | Send email receipt? |
| | Save Cancel |



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

| Name | MacGregor "Mac" Poll |
|---------------------|--|
| Service Address | 400 Wire Grass Ln Franklin, TN 37064 |
| Total Paid | \$0.00 of \$150.00 (0.00 %) |
| Total Balance Due | \$150.00 |
| Payment Method | -Select Payment Method-▼ |
| Amount | 150.00 |
| Payment Date | 9/28/2021 |
| Reference | |
| Message to Customer | |
| | |

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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MarketPlace

Campaigns

Reports

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

Calendar

Contacts Appointments

- 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
 - o 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.

| Report Month End | 静 日 日 K < Page 1 * of 1 > N 日 日 PDF * Submit for September Settings |
|--|---|
| Month End Report | Lighthouse Outdoor Lighting of Nashville |
| September 2021 (4 invoices) Accrual | |

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"

| Integrations | | | | | | |
|--------------|-----------|-----------|-------|------------|--|--|
| Payments Ac | ccounting | Marketing | Other | Publishing | | |

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

| Connect to QuickBooks |
|---|
| QuickBooks Online Connect to QuickBooks Online to sync customers, invoices, payments and more |
| QuickBooks Payments Connect to QuickBooks Payments for optional credit card processing. If you do not use QuickBooks to process your credit card transactions, do not select this option. |

Finally, click the green box labeled "Connect to QuickBooks"



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