



®

CloudActiv8 Support

Business Management Solution
Evaluation Quick Start Guide

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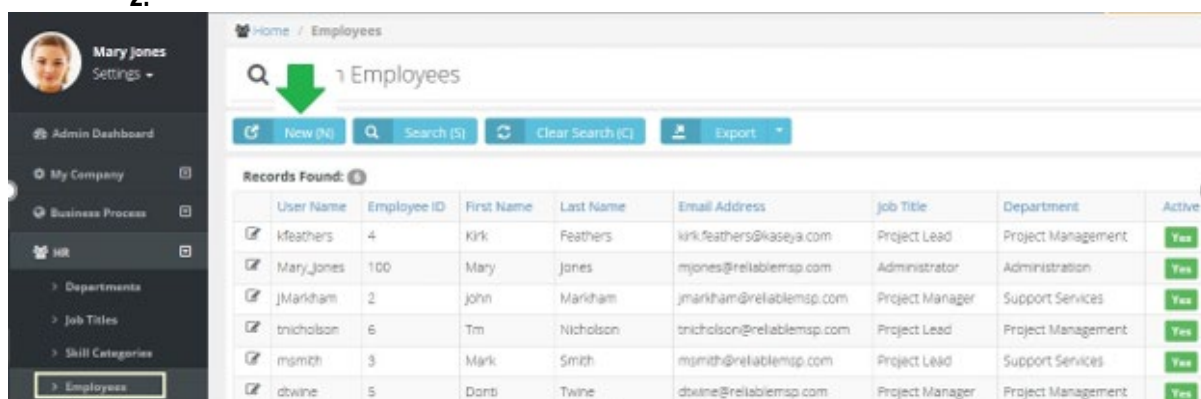
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Thank you for evaluating Support by CloudActiv8. As part of the trial process, we have included this Quick Start Guide – designed to help you navigate through the most common activities in the solution. Feel free to review and use these instructions to assist you in the trial of your Support Implementation.

Adding an Employee into HR folder

1. Go to **Admin Module ‘HR ‘Employees ‘New**
- 2.



3. Fill in, and select from drop-down menus, information in all required fields indicated by Q

Home / Employees / New Employee

Save (S) Save and Add New Cancel (C)

User Name:* JBlake First Name:* Joe Last Name:* Blake

Emp ID:* 7 Email Address:* jblake@reliablemsp.com Job Title:* Project Manager

Department:* Project Management Manager:* Mary Jones Employment Type:* Full Time

Employee Roles:* Project Manager Security Roles:* Project Manager Location:* New York Office

4. Click the **Save** button.
Support will automatically send an email with login credentials to the new user.

Adding Roles to an Employee Record

1. Go to **Admin** > **HR Folder** > **Employees** (Open an Employee Record)

Home / Employees / Edit Employee: Mary Jones

Save (S) Save and Add New Cancel (C) Delete (D) Refresh (R)

Personal Details Contact Info Wages Shifts Associated Clients Associated Queues **Employee Roles**

ROLE NAME	HAS ROLE	DEFAULT
Administration	<input type="checkbox"/>	<input type="radio"/>
Sr Level Technician	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Jr Level Technician	<input type="checkbox"/>	<input type="radio"/>
Database Administrator	<input checked="" type="checkbox"/>	<input type="radio"/>
Consultant	<input checked="" type="checkbox"/>	<input type="radio"/>
Project Manager	<input checked="" type="checkbox"/>	<input type="radio"/>
DBA	<input type="checkbox"/>	<input type="radio"/>

2. Add the Role(s) this employee has.
3. Set the Default Role. (*This role will appear when the employee enters time on Ticket or Task*)

Note: You can change role rate if you need to charge another client a different rate for Time and Material work. You create a NEW Time and Material Contract in the Finance Module. No need to create too many roles

Creating an Account in the CRM Module

In order to create contracts and open support tickets and manage projects for our customers you need to enter those customers into the CRM Module.

1. Go to **CRM** > **Accounts** Click on the **New** button.



Home / Accounts Management

Search: 1 Accounts

Buttons: New (N), Search (S), Clear Search (C), Export, Import (I)

Records Found: 10

Account Name	Account Type	Account Manager	Created By	Active
Berkshire Bank	Client	Mary Jones	Mary Jones	Yes
Hamilton County Court House	Client	Mary Jones	Mary Jones	Yes
Harris Law Firm	Client	Mary Jones	Mary Jones	Yes
Kaseya	Client	Global Admin	Global Admin	Yes

2. Fill in, and select from drop-down menus, information in all required fields indicated by Q

Home / Accounts Management / New Account

Buttons: Save (S), Save and Add New, Cancel (C), Delete (D), Refresh (R)

Account

Account Name: ABC Marketing Firm

Account Type: Client

Business Type: General

Website: www.abcmarketingfirm.com

Acquired Date: 10/1/2014

Credit Limit: \$0

Default Currency: US Dollar

Net Days: 0

Account Manager: Mary Jones

Description: The Tri-States premier marketing firm specializing in ...

3. Click the **Save** button.

Note: You can add the address information at any time, but for Quick Start purposes, you have enough information now to use this account in testing.

Adding a Contact in the CRM Module

Now that we created an Account, let's add a contact to this Client record. Why?

- n You open Tickets for contacts when they call looking for support
- n Contacts send emails to support@yourcompany.com
- n Email notifications are auto sent to contacts (example – close a ticket)
- n Quotes and Invoices are sent to Contacts

1. Goto **CRM** > **Accounts** Open the Account you just created (example here is ABC Marketing)

The screenshot shows the CRM interface. The top navigation bar includes Home, Service Desk, CRM, Finance, Projects, and Reports. The left sidebar shows the user profile 'Mary Jones' and navigation links for CRM Dashboard, Accounts, Contacts, Activities, and Opportunities. The main area shows a search bar and a table of accounts. A green arrow points to the 'ABC Marketing Firm' account.

Account Name	Account Type	Account Manager
ABC Marketing Firm	Client	Mary Jones
Berkshire Bank	Client	Mary Jones

2. Look at the lower section of **Account** and click **Account Contacts** and click on the **Add** button.

The screenshot shows the 'Account Contacts' section. The top navigation bar includes Locations, Account Contacts, Assigned Resources, Tax Settings, Opportunities, Activities, Linked Accounts, and Notes. The Account Contacts section has an 'Add' button with a green arrow pointing to it.

3. Fill in, and select from drop-down menus, information in all required fields indicated by Q

The screenshot shows the 'Company Contact' form. The form has two tabs: 'Account Contact' and 'Custom Fields'. The 'Account Contact' tab is active. Fields include First Name, Middle Name, Last Name, Location Name, Job Title, Phone, Email, Status, Point of Contact, Has Client Portal Access, and Receive Invoices. Required fields are marked with an asterisk and a red circle.

First Name: *	Middle Name:	Last Name: *
Sam		Parker

Location Name:	Job Title:
Main	CEO

Phone Type:	Phone: *	Status:
Personal Phone	555-555-5555	<input checked="" type="radio"/> Active <input type="radio"/> InActive

Email Type:	Email: *	Point of Contact:
Personal Email	sparker@abcmarket.com	<input type="radio"/> YES <input checked="" type="radio"/> NO

Has Client Portal Access:	Receive Invoices:
<input type="radio"/> YES <input checked="" type="radio"/> NO	<input type="radio"/> YES <input checked="" type="radio"/> NO

Save (S) Reset Password (R) Cancel (C)

4. Click the **Save** button.

Creating a New Ticket in the Service Desk Module

Tickets are used to capture a Customer issue and assign to the appropriate employee(s) to work and resolve that issue.

The Support solution allows you to create service tickets in a number of ways:

- Alerts from an RMM like CLOUDACTIV8 → create tickets
- Emails sent to Support@yourcompany.com → create tickets
- Client Portal Submissions → create tickets
- Clicking the NEW ticket if you take a support call

Let's create a Ticket based on taking a call from a customer

1. Go to Service Desk 'Tickets' 'New'

You can also click the Blue New Ticket button along the top

New Ticket

2. Fill in, and select from drop-down menus, information in all required fields indicated by Q

Ticket Details Custom Fields

Customer Info

Client:*

ABC Marketing Firm

Location:*

Main

Contact:

Sam Parker

Contact Phone:

413-654-0987

Contact Email:

sparkler@abcmarket.com

Source:*

Phone

Ticket Properties

Ticket Type:*

Incident

Issue Type:

Router

Sub-Issue Type:

Service Contract:

SLA:

Work Type:

Labor Hours

From Template:

Title:*

Sam Called in with problem with Router

Priority:*

Medium

Status:*

New

TTR:

None

Details:*

Sam called in today, cannot connect to office internet from meeting room and has a presentation tomorrow

Primary Assignee:*

Mary Jones

Open Date:*

3/11/2016 3:46 PM

Queue:*

Level One Support

Due Date:

3/13/2016 11:00 AM

Secondary Assignee(s):

Affected Hardware Asset:

Affected Software Asset:

Select or Drag and Drop File(s):

Select

3. Click the **Save** button.

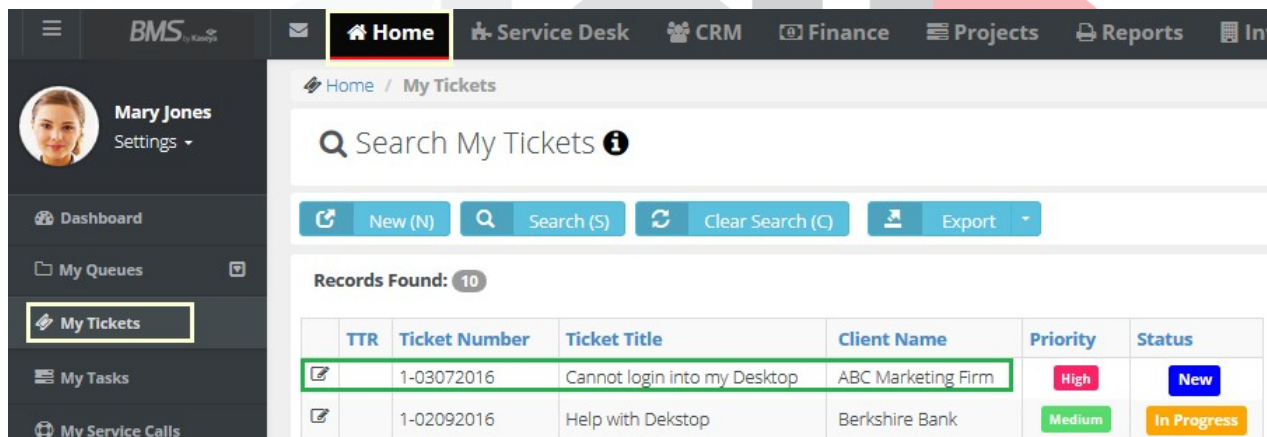
Accessing Tickets and Entering Time and Notes

When Tickets are created in the Support, a Service Desk Manager will see and have access to ALL tickets in the Service Desk Module via:



- n Service Desk Dashboard (Status / Priority / Assignee / Queue / Issue Type)
- n Tickets Folder
- n Recurring Master Tickets
- n Service Calls

Your employees will find tickets assigned to them in their Home Module.

1. Goto **Home** 'MyTickets' Click on Ticket Number or Pencil Icon 



Records Found: 10

TTR	Ticket Number	Ticket Title	Client Name	Priority	Status
	1-03072016	Cannot login into my Desktop	ABC Marketing Firm	High	New
	1-02092016	Help with Dekstop	Berkshire Bank	Medium	In Progress

2. When Ticket is open, look to bottom and click on the **Add Time** button
(Or Click on the Time Logs Tab and click Add Time)

(R)

Home / My Tickets / #1-03072016# - Cannot login into my Desktop

Edit (E) Cancel (C) Delete (D) Refresh (R) Assign Resolve Print Ticket

Ticket View **Time Logs** Expenses Custom Fields Attachments 0

Cannot login into my Desktop

Status: **New** Ticket Number: **1-03072016**

Priority: **High** Total Expenses: **\$0.00**

Total Time Spent: **0 hrs** Queue: Level One Support

Primary Assignee: Mary Jones Open Date: 3/3/2016 7:40:00 PM

Created By: Mary Jones Due Date: None

Work Type: None

Customer Info

ABC Marketing Firm
Main
413-555-5555
Contact Person:
Sam Parker
555-555-5555
@sparker@abcmarket.com
ABC Marketing Firm 124 Main Street,
North Adams, MA, UNITED STATES

Ticket Properties

Source: Email
Ticket Type: Incident
Issue Type: Desktop
Sub-Issue Type: None
Service Contract: None
SLA: None

Ticket Description

Sam called because he could not login into Desktop

Assets **Secondary Assignee(s)**

None None

Activities Expenses & Charges Service Calls & To-Dos

Add Note **Add Time**

3. After you click on the **Add Time** button the following screen will appear.

Fill in, and select from drop-down menus, information in all required fields indicated by Q

Note: General Notes are public facing. **Internal Notes** are seen by employees and not clients.

Add/Edit

Add / Edit Ticket Time Log

Time Details Notifications

Date Started:* 3/13/2016 Start Time:* 03:55 PM End Time:* 04:55 PM Time Spent (hrs):* 1.00

Role:* Sr. Technician Work Types:* Labor Hours

Status: Completed

General Notes:

This is what I did to help Sam log back into his desktop
These notes will show on Invoices and Reports

Internal Notes will only show for internal Employees
Client will NOT see these notes

Save (S) Cancel (C)

4. Click the **Save** button.

This Time entry has updated many forms including:

- n Time will now be captured on the Ticket
- n The employee's Time sheet will be updated.
- n You can review the Labor Entry in the Finance Module to create an Invoice.

Creating a Project in the Projects Module

Projects in the Support can be created in a number of ways:

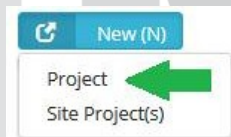
- n Create the Project from scratch – adding Tasks and Employees
- n Copy an existing Project
- n Cloning a Project from the Template Project folder

1. Go to **Project** **All Projects** **New**

	Project Number	Project Name	Client	Contract	Manager
<input checked="" type="checkbox"/>	Prj_97	Service Item	Ballston Spa National	Service Item - Service	Mary

2. Click on the **New** button and select Project

You will get the following screen...



3. Fill in, and select from drop-down menus, information in all required fields as well as any applicable fields

Project Name* Name of the project.

Client* Client you are performing work for (Client form CRM).

Project Type* Used to track projects – Types can be configured.

Status You should leave it as an OPEN status if this project is active and you want employees to enter time/expenses against it.

Project Manager* Who is managing this project within your organization? Required

Department* Track which Department is leading the project. Can report on Projects by Department. R

Contract You can select a contract that will manage how time entered is billed for this project. (Example - Fixed PriceContract)

Start Date* The first day work on this project will begin. All tasks must have a start date equal or greater than the start date of the project. You can adjust this if needed.

Planned End Date* The Day you are targeting to end this project.

Actual End Date The day you actually complete the project and set to Closed

Timesheet Approval Route Select which approval route flow you want submitted Timesheets to follow for this specific project. If NONE is selected, then you are telling the system to Auto-Approve all submitted Timesheets for this project only.

Expense Approval Route Select which approval route flow you want submitted Expense Sheets to follow for this specific project. If NONE is selected, then you are telling the system to Auto-Approve all submitted expenses for this project only.

Project Description A description of this project – who, what, where, when and why?

4. Set the Planned Budget and Planned Hours

Financials	Related Opportunities	Expenses	Charges	Receipts 1	Custom Fields	Attachments 1
Planned Budget:* <input type="text" value="\$5,000.00"/> Used Budget Labor: <input type="text" value="\$435.36"/> Used Budget Expense: <input type="text" value="\$200.00"/> Used Budget Materials: <input type="text" value="\$0.00"/> Remaining Budget: <input type="text" value="\$4,364.64"/> Percentage Used: <input type="text" value="12.71 %"/>	Planned Hours:* <input type="text" value="80.00"/> Used Hours: <input type="text" value="20.00"/> Remaining Hours: <input type="text" value="60.00"/> Percentage Used: <input type="text" value="25.00 %"/>	PO Amount: <input type="text" value="\$0.00"/> Total Billing: <input type="text" value="\$2,420.00"/> Actual Billing: <input type="text" value="\$0.00"/> Remaining Unbilled: <input type="text" value="\$2,420.00"/>	Cost Type: <input type="text" value="Client Billable"/> Cost Center: <input type="text"/>			

Creating Project Tasks and Assigning to Employees

A Project without a Task(s) is only a static holder of project related information (Name, budget, manager, costs, etc.)

Tasks are what make a project interactive, dynamic, and make it possible to track its progress

Tasks are what employees enter time against and it updates their timesheets automatically – eliminating the need for double and triple entry

1. Go to **Tasks Tab** on our NewProject

The screenshot shows the BMS software interface. The top navigation bar includes Home, Service Desk, CRM, Finance, **Projects**, Reports, and Inventory. The left sidebar shows the user profile for Mary Jones and a Projects Dashboard with links to All Projects and All Tasks. The main content area is titled 'Home / All Projects / Edit Project: Implementation Project Prj_1000'. Below the title bar are buttons for Save (S), Cancel (C), Delete (D), Refresh (R), and Actions. The 'Tasks' tab is highlighted with a green box and a green arrow. Below the tab, the 'Project Nu' field contains 'Prj_1000' and the 'Project Name: *' field contains 'Implementation Project'.

2. Click the **Add Task** button and then select the **Task**tab

Home / All Projects / Edit Project: Implementation Project Prj.1000

Save (S) Cancel (C) Delete (D) Refresh (R) Actions

Project **Tasks**

Add Task (A) Gantt Chart Batch Actions

Task
Summary Task
Clock Task
Milestone

You have not created any tasks for this project.
Please Click the "Add Task" button above to create your first task.

Reminder: You **must** define and staff at least one task in order to log time against this project.
(You can always come back and perform this step at a later time)

3. Fill in, and select from drop-down menus, information as indicated on the following page.

Add/Edit

Add/Edit Tasks

Basics Members Notes Custom Fields Attachments 0

Task Name: **Task** *

First Task of Implementation Project for ABC

Status: Open

Used Hours: 0.00 Percent Used: 0.00 %

Cost Type: Client Billable

Planned Hours: **4.00** *

Percent Done: 0.00 %

Work Type: Labor Hours

Duration (Days): 3.00

Start Date: **3/11/2016** *

End Date: **3/15/2016** *

Task Description:

Save (S) Save and Add New Cancel (C)

Task Name* Name of the task.

Status* Set to Open.

Cost Type* Set to Client Billable

Planned Hours How long should it take to complete? - Can be "0" hours

Work Type Set to Labor Hours

Start Date* and End Date*

4. Click the **Save** button.

Adding Employee(s) to the Task

1. Go to the **Members** tab on the Task and Tasks Tab on our New Project

Add/Edit

Add/Edit Tasks

Basics **Members** Notes Custom Fields Attachments 0

Add

EMPLOYEE

No records to display.

Search and Select

Search Users

OK (O) Cancel (A) Search (S) Clear Search (C)

Records Found:1

EmployeeId	UserName	FirstName	LastName	EmailAddress
10	mary.jones	Mary	Jones	mary.jones@reliablemsp.com

The Project Manager will see Task on Project Schedule

Home / All Projects / Edit Project: Implementation Project Prj.1000

Save (S) Cancel (C) Delete (D) Refresh (R) Actions

Project Tasks

Add Task (A) Gantt Chart Batch Actions

Task Name	Duration	Start Date	End Date	Planned Hrs	Status	Member(s)	Used Hrs	% Used	% Done
1 First Task of Implementation Project for ABC	3 d	03/11/2016	03/15/2016	4.00	Open	Mary Jones	0.00	0.00%	0.00%

Your employees will find tasks assigned to them in their Home Module

Entering Time and Notes on ProjectTasks

In the Support, your employees can track time worked on any Project Task they are assigned to. Time entries here, just like tickets, can be used to generate line items on an invoice.

1. Goto **Home** **MyTasks** and click on Task Name or Pencil Icon

Home / My Tasks

Search My Tasks ⓘ

Search (S) Clear Search (C) Export

Records Found: 2

Task	Client Name	Start Date	End Date	Est. Hrs	Used Hrs.	Status
Implementation Project First Task of Implementation Project for ABC	ABC Marketing Firm	3/11/2016	3/15/2016	0.00	0.00	Open
Implementation Project Assessment Session	Berkshire Bank	1/1/2016	1/8/2016	0.00	2.00	Open

2. Select the **Time Logs** tab and then click the **Add** button

Home / My Tasks / Edit My Tasks: Implementation Project / First Task of Implementation Project for ABC

Save (S) Cancel (C) Refresh (R)

Basics **Time Logs** Notes Custom Fields Attachments 0

Add

ACTIONS WORK TYPE EMPLOYEE

No records to display.

Add/Edit

Time Log

Time Details Notifications

Date Started: 3/13/2016 Start Time: 03:00 PM End Time: 05:00 PM Time Spent (hrs): 2.00

Role: Sr. Technician Work Types: Labor Hours

General Notes:

This is the work I did for 2 hours on task

Save (S) Cancel (C)

3. Fill in, and select from drop-down menus, information in all required fields.

Remember that General Notes are public facing.

4. Click the **Save** button.

- n This Time entry will now be captured on the Projects Info tab (total hours)
- n The employee's Time sheet will be updated.
- n You can review the Labor Entry in the Finance tab to create an Invoice

Approve and Post Process

The Time entered on our Ticket and Task is now sitting in the Finance Folder ready to go through the Approve and Post Process

1. Go to Finance ‘Billing Review ‘Labor Hours

Home / Labor Hours

Search Time Entries

Client: Start Date: 3/11/2016 End Date: 3/14/2016

Time Sheet Status: Tickets/Projects: Department:

Work Type: Role:

Search (S)

You can use the Search Grid to filter the data.

2. Click on the **Search** button and you will see the results below.

Home / Labor Hours

Search Time Entries

Results

Post (P)

	DATE	CLIENT NAME	TICKET/PROJECT	WORK TYPE	EMPLOYEE	NOTES	OVERTIME HOURS TO BILL	OVERTIME BILLING RATE	HOURS TO BILL	BILLING RATE	TOTAL PRICE
<input checked="" type="checkbox"/>	03/13/2016	ABC Marketing Firm	1-03072016 Cannot login into my Desktop	Labor Hours	Mary Jones	This is what I did to help Sam log ...	0.00	\$150.00	1.00	\$150.00	\$150.00
<input checked="" type="checkbox"/>	03/13/2016	ABC Marketing Firm	Prj_1000 First Task of Implementation Project for ABC	Labor Hours	Mary Jones	This is the work I did for 2 hours ...	0.00	\$150.00	2.00	\$150.00	\$300.00

In this example, we see two time entries made by employees:

The first line record is time posted against a Ticket (1 hour @ \$150)

The second line record is time we posted against a Task (2 hours @ \$150) You can adjust the Hours to Bill and Billing Rate if needed.

3. To approve and post, check the boxes next to the entry and click on the **Post** button



Billing Process

After reviewing Labor Hours and approving the time entries, these items have moved into the Billing Folder

Here you can combine these Labor Hours with other items you may wish to invoice:

- Expenses added to a ticket or project
- Recurring Service Contracts
- Fixed Price Contract Milestones (ex – Deposit or Final Project Payment)
- Retainer Hour Contracts (some call them Block Hours)

1. Go to Finance ‘Billing Review’ ‘Billing

The screenshot shows the BMS Finance dashboard. The sidebar on the left has a user profile for Mary Jones and a menu with options: Finance Dashboard, Contracts, Billing Review, and Billing (highlighted). The main content area is titled 'Generate Invoices' and includes a search bar with filters for Client, From Date (3/11/2016), and To Date (3/14/2016). A green arrow points to the 'Search (S)' button.

You can use the Search Grid up top to filter the data.

2. Click on the **Search** button and you will see the results below.

The screenshot shows the BMS Finance dashboard with search results. The 'Generate Invoice (G)' button is highlighted. The table shows two labor hours for 'ABC MARKETING FIRM'.

	SOURCE	ITEM NAME	ITEM DESCRIPTION	QTY	PRICE	TOTAL PRICE	VALUE DATE
CLIENT: ABC MARKETING FIRM							
NO CATEGORY							
	<input checked="" type="checkbox"/>	Labor Hours	Labor Hours	1.00	\$150.00	\$150.00	3/13/2016
	<input checked="" type="checkbox"/>	Labor Hours	First Task of Implementation Project for ABC - This is the work I did for 2 hours on task ...	2.00	\$150.00	\$300.00	3/13/2016

The Client is listed in the gray bar = ABC Marketing Firm

The first line record is Labor Hours posted against a Ticket (1 hour @ \$150) The second line record is Labor Hours posted against a Task (2 hours @ \$150)

3. Check the boxes next to the entry to be billed and click on the **Generate Invoice** button



Note: You can UNPOST these records if you see an error. It will place them back in the Billing Review folder where you can make adjustments and walk through process again.

Billing Process

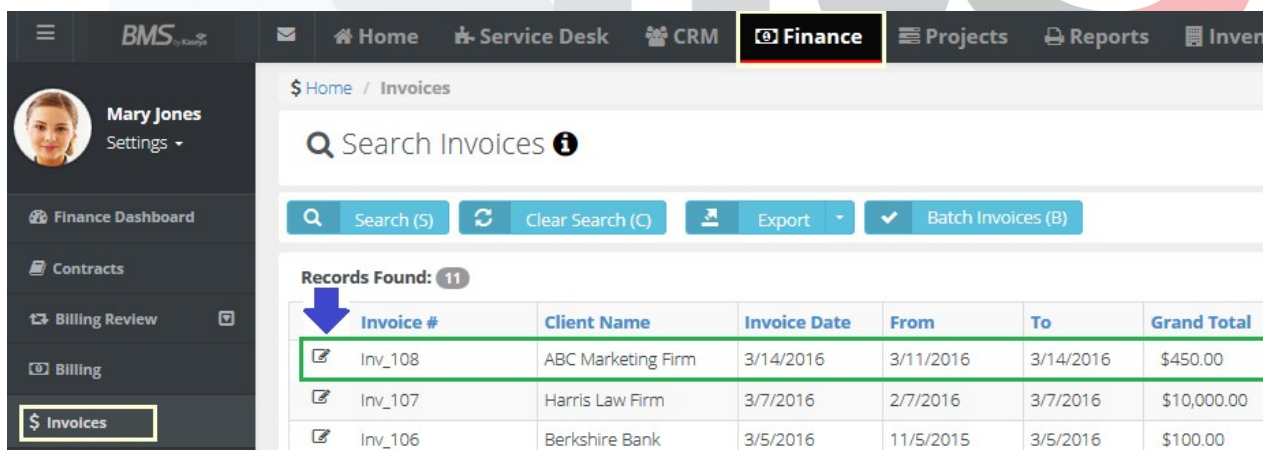
All the items that have been Reviewed and Approved and Generated are now sitting in the Invoice Folder with the Status of NEW

When we moved the items from Billing to the Invoice folder it assigned the next Invoice number in line (example Inv_108)

You can now make adjustments before creating the final Invoice and sending to your client or transferring to QuickBooks:

- n Add additional information to Line items or a Note on Invoice
- n Adjust Quantity or Unit Price
- n Apply a Discount – a dollar or percentage amount
- n Attach Receipts (that flowed through system to final invoice)
- n Add any additional attachments

4. Goto **Finance** 'Invoices' Click on Invoice Number or 



The screenshot shows the BMS Finance Invoices page. The left sidebar contains a user profile for Mary Jones and a navigation menu with options: Finance Dashboard, Contracts, Billing Review, Billing, and Invoices (highlighted). The main content area has a search bar, filters for Search (5), Clear Search (0), Export, and Batch Invoices (B). Below this, a table titled "Records Found: 11" displays a list of invoices. A blue arrow points to the first row of the table.

Invoice #	Client Name	Invoice Date	From	To	Grand Total
Inv_108	ABC Marketing Firm	3/14/2016	3/11/2016	3/14/2016	\$450.00
Inv_107	Harris Law Firm	3/7/2016	2/7/2016	3/7/2016	\$10,000.00
Inv_106	Berkshire Bank	3/5/2016	11/5/2015	3/5/2016	\$100.00

5. After you open Invoice click on the green **Generate** button along the top.

\$ Home / Invoices / Edit Invoice: Inv_108

Save (S) Cancel (C) Refresh (R) **Generate** Void Invoice

Invoice Information Billing Address

Client: ABC Marketing Firm P.O. Number: From: 3/11/2016 To: 3/14/2016 Invoice Date: 3/14/2016 Due Date: 3/14/2016 Sales Representative: Project: Notes:

Inv_108 New Tax Item: Total Tax: \$0.00 Total Price: \$450.00 Grand Total: \$450.00 Balance Due: \$450.00

6. After clicking on the green **Generate** button, you can select an invoice template. Select the template and click the **Generate** button

Add/Edit

Invoice Template

Select Invoice Template:*

Detailed Invoice

☐ Print Cover Letter

☐ Print Receipts(Only Images)

Generate (S) Cancel (C)

Your Invoice buttons along the top will now include more options.

\$ Home / Invoices / Edit Invoice:

☐ Save (S)

Invoice Information Billing Address

Client: ABC Marketing Firm
 From: 3/11/2016
 Invoice Date: 3/14/2016
 Sales Representative:
 P.O.Number:
 To: 3/14/2016
 Due Date: 3/14/2016
 Project:
 Inv_108 ReadyToSend
 Tax Item:
 Total Tax: \$0.00
 Total Price: \$450.00
 Grand Total:

The Status of your Invoice is now READY TO SEND

- n You can Preview your Invoice
- n You can Regenerate
- n You can send to your customer
- n You can Void the Invoice if necessary which places items back into Approve and Post.

Note: All invoices with READY TO SEND or SENT statuses are now sitting in the QuickBooks folder in the Finance Module ready to sync with QuickBooks (if configured).

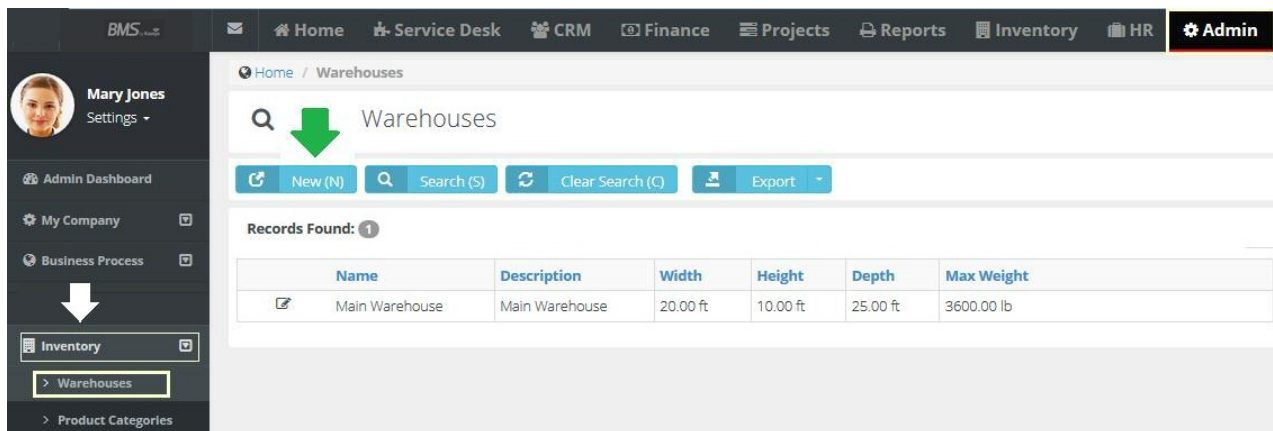
Inventory, Warehouse Locations and Product Categories

Support comes with an Inventory Module that helps you:

- n Store Inventory in Multiple locations
- n Maintain Products Lists so you can:
 - n Manage the Inventory Process (maintain levels of Inventory, Generate Purchase Orders and Replenish Stock)
 - n Use as Products Catalog so you can create Quotes in the CRM

Create Warehouse Locations

1. Go to Admin 'Inventory' 'Warehouse



2. Fill in, and select from drop-down menus, information in all required fields and make sure to include the address of the warehouse.

The screenshot shows the 'New Warehouse' form. It includes fields for Warehouse Name, Description, Width, Height, Depth, Max Weight, and Warehouse Prefix. The form is titled 'New Warehouse' and has buttons for Save, Save and Add New, Cancel, Delete, and Refresh. A green arrow points to the 'Save' button.

Warehouse Name: * New York Office
Description: Inventory Room in the NY Office
Width: * 20.00 ft
Height: * 10.00 ft
Depth: * 20.00 ft
Max Weight: * 2000.00 lb
Warehouse Prefix: NY_Inv_

3. Click the **Save** button.

Create Product Categories

1. Go to Admin 'Inventory' 'Product Categories
2. Click the **New** button.

Home / Product Categories

Search: h Products Categories

Buttons: New (N), Search (S), Clear Search (C), Export

Records Found: 13

	Name	Description	Active
	Wireless Router		<input checked="" type="checkbox"/> Yes
	Smartphone		<input checked="" type="checkbox"/> Yes
	Monitor		<input checked="" type="checkbox"/> Yes
	Phones		<input checked="" type="checkbox"/> Yes

3. Fill in information in all required fields.

Home / Product Categories / New Product Category

Buttons: Save (S), Save and Add New, Cancel (C), Delete (D), Refresh (R)

Category Info

Category Name*: Power Supply

Description:

Status: ☒ Active ☐ InActive

Sub Categories

Buttons: Add, Delete

NAME*	DESCRIPTION	IS ACTIVE
CORSAIR RM750i	ATX12V / EPS12V 80 PLUS Gold certified Digital monitoring capability Full Modular 105°C	<input checked="" type="checkbox"/>

4. Click the **Save** button.

Managing Inventory

In the Inventory Module, you will manage your Products by warehouse location

1. Go to **Inventory** 'Products' 'Product Availability'

Here you will enter product information and location.

Inventory

Home / Product Availability

Search Available Products

Search (S) Clear Search (C) Export

Records Found: 8

Product #	Product Name	UPC	Warehouse	In Stock	Committed	QTY Available
03172016	Power Supply	11111118281	New York Office	0.00	0.00	0.00
03172016	Power Supply	11111118281	Main Warehouse	0.00	0.00	0.00
Labor	Lanbor Hours	11111161260	New York Office	0.00	0.00	0.00

Creating Sales Quotes

In the CRM Module, you will use the Products created in the Inventory to generate Sales Quotes

1. Go to **CRM** 'Quotations' 'Product Quotations

CRM

Home / Product Quotations

Search Product Quotation

New (N) Search (S) Clear Search (C) Export

Inventory Items Items Charge

Add

ITEM ITEM DESCRIPTION

No records to display.

Records Found: 2

Product #	Product Name	UPC	Warehouse	In Stock	Committed
03172016	Power Supply	11111118281	New York Office	0.00	0.00
03172016	Power Supply	11111118281	Main Warehouse	0.00	0.00

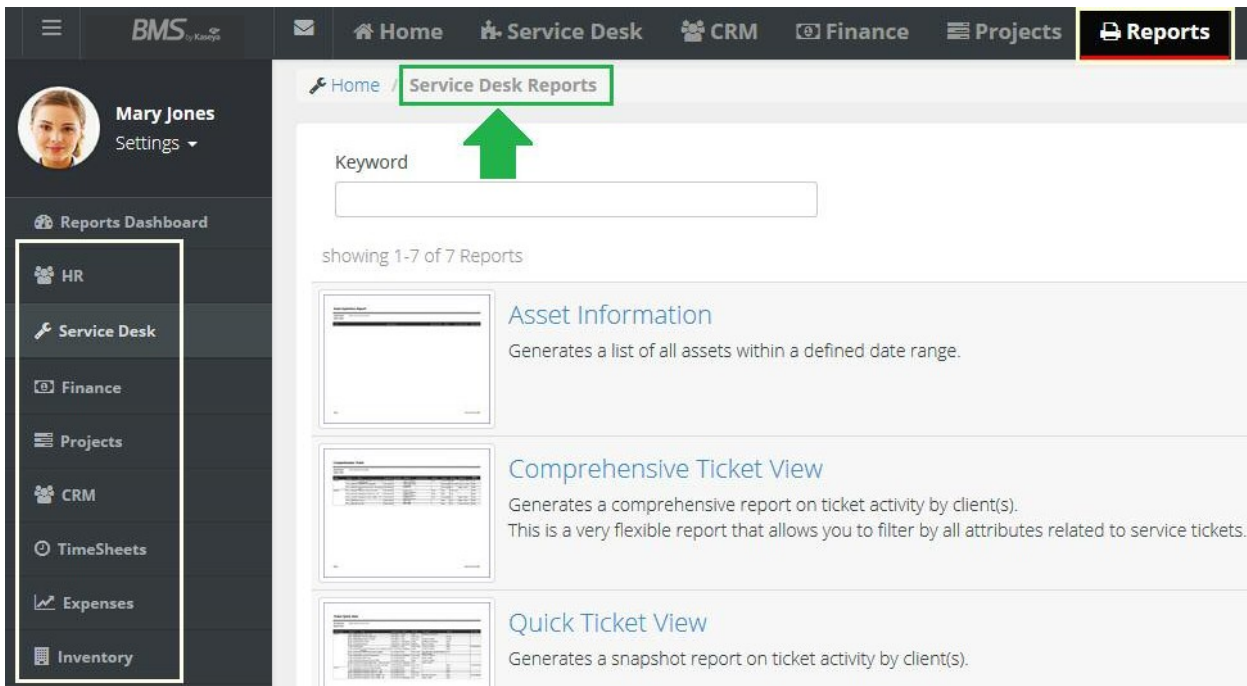
2. Click the **New** button.
3. Fill in information in all required fields.
4. Click the **Add** button under Inventory Items and select the Product you wish to quote.
5. Click the **Save** button and send quote to prospect.

Creating Reports

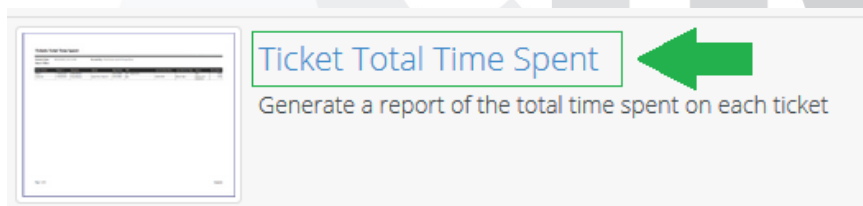
Support comes with Reports for each Module

1. Go to **Reports** 'Reports Dashboard'

Click on the Module you want to create a report for. (Service Desk is selected in this example)



2. Click on the Name of the Report you want to generate.



3. Then use the Search Grid to produce desired output and Click on **Search**


Home / Service Desk / **Ticket Total Time Spent**

Search

Client: Ticket #: Assignee:

Queue: Title: Created Date: From: 2/9/2016 To: 3/10/2016

Status:





Result



You will see your Report under the Results banner.

4. Choose to print or export the report in a variety of formats

Result

Export to the selected format Export  

Export to the selected format
 Acrobat (PDF) file
 CSV (comma delimited)
 Excel 97-2003
 Rich Text Format
 TIFF file
 Web Archive
 XPS Document

Tickets Total Time Spent

Printed Date: 3/10/2016 2:29:43 AM Printed By: Mary Jones
 Report Filter: Created Date: From: 2/9/2016 To: 3/10/2016

Client Name	Ticket #	Assignee	Queue	Open Date	Title	Status	Time Spent
ABC Marketing Firm	1-03072016	Mary Jones	Level One Support	3/3/2016	Cannot log into my Desktop	In Progress	0.00
Berkshire Bank	1-02092016	Mary Jones		2/9/2016	Help with Desktop	In Progress	3.00
Berkshire Bank	1-02252016		Client Portal Created Tickets	2/25/2016	I need Help with my Laptop	New	0.00

ABOUT CLOUDACTIV8

CloudActiv8® is the leading provider of complete IT management solutions for Managed Service Providers and small to midsize businesses. CloudActiv8 allows organizations to efficiently manage and secure IT in order to drive IT service and business success. Offered as both an industry-leading cloud solution and on-premise software, CloudActiv8 solutions empower businesses to command all of IT centrally, manage remote and distributed environments with ease, and automate across IT management functions. CloudActiv8 solutions currently manage over 10 million endpoints worldwide and are in use by customers in a wide variety of industries, including retail, manufacturing, healthcare, education, government, media, technology, finance, and more. CloudActiv8, headquartered in Dublin, Ireland is privately held with a presence in over 20 countries. To learn more, please visit www.CloudActiv8.com

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