Keep It Easy - Quick Start Guide

What is Keep It Easy Software?

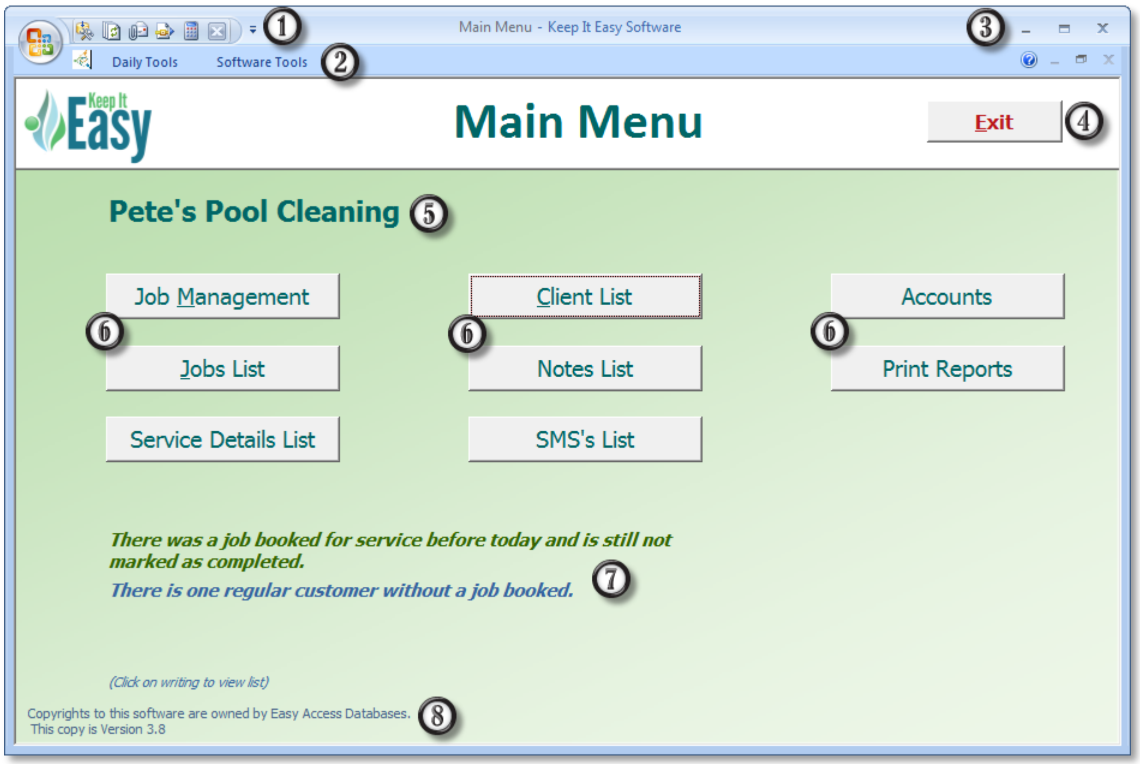
Keep It Easy is an MS Access Database you install on your Windows PC and use to administer your business—your clients and your jobs.

Installation

Before you get started, make sure the Keep It Easy Software is installed on your computer. There are two ways to install the Keep It Easy Software:

1. **Installation from a downloaded .exe file**
   If you have downloaded the Keep It Easy Software from our website, double click the .exe file you have downloaded. The rest of the installation is described below.
2. **Installation from a CD**
   If you have received the Keep It Easy Software on a CD, then place the CD in your computer's CD-ROM drive and wait for the Windows AutoPlay message to show. Select **Run Keep It Easy Software**.

Overview – Main Menu



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

1. Quick access buttons (compact & repair database, refresh all, e-mail, PDF or XPS, calculator, close print preview)
2. Ribbon (collapsed) to access Daily Tools & Software Tools
3. Minimize, maximize, close Keep It Easy software
4. Close Keep It Easy software
5. Your company's name as defined in the general settings
6. Buttons to access functionality of the system
7. System reminders
8. Copyright and version information

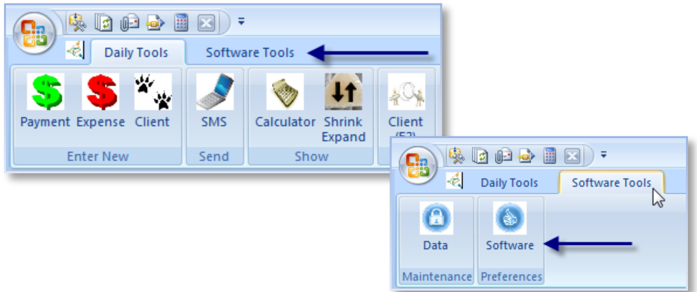
To be able to start using the software to manage your clients and jobs, you will first need to set up some general information about your company and your products and/or services.

See the next page for a quick overview of how to set up this general information, or refer to the Keep It Easy User Manual for a detailed description of the system settings.

Tip: *If Keep It Easy displays a friendly reminder warning you that it has been a while since you last backed up your system—do yourself a big favor and take the hint. Remember: "A backup today is worth a 1,000 keystrokes tomorrow!"*

Set up General System Information

General Information used throughout the system is defined in a number of Setup Tables.



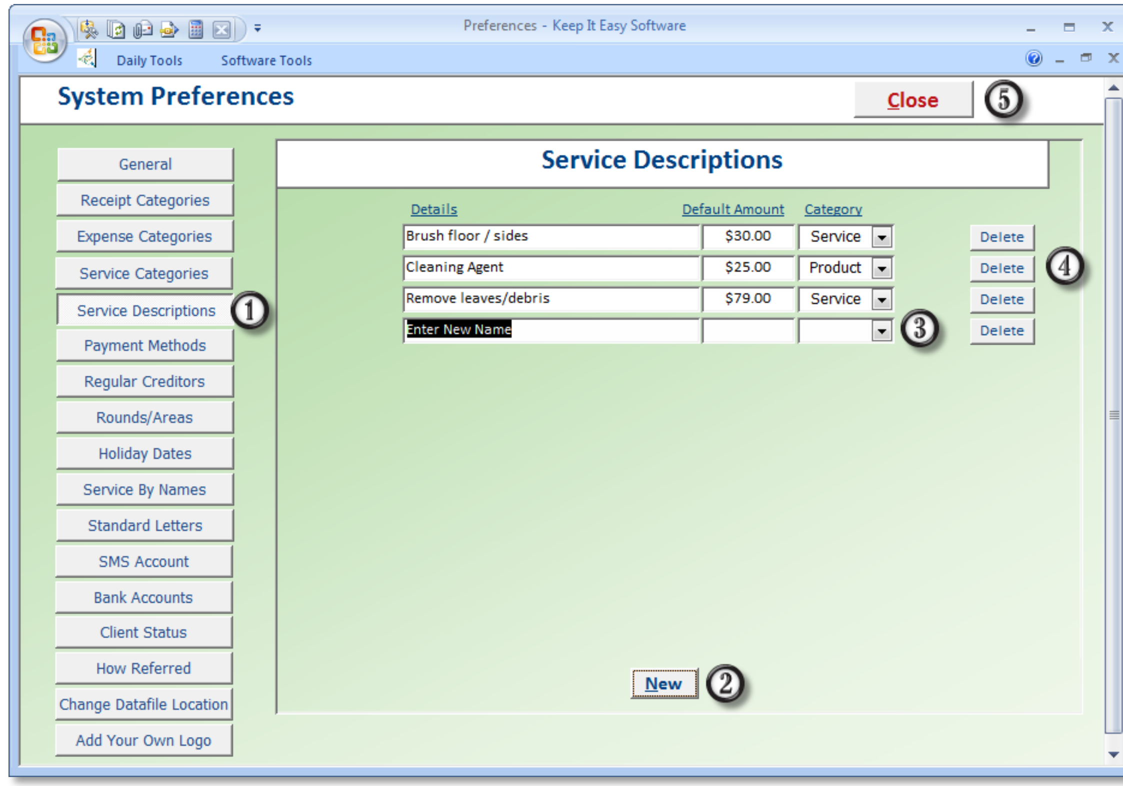
To access these tables, click **Software Tools > Software** to access the **System Preferences**, as shown above.

The **System Preferences** Screen will open with 17 buttons on the left for defining your general information

Eventually you will probably want to set up data for all these tables, but in order to quickly get started with the system you will need to **define at least the following**:

- **General** – your company name and address details, accepted payment methods, default invoice term, etc.
- **Receipt Categories** – receipt categories and BAS box.
- **Service Categories** – types of services you provide (e.g. service, product). Services entered here are referenced on the Service Descriptions screen.
- **Service Descriptions** – detailed descriptions of the services you deliver (e.g. dog wash, dog trim).
- **Service by Names** – names of the people providing the services.

TIP: *You can collapse and expand the "ribbon" of buttons by double clicking the corresponding tab. For example, double clicking the Software Tools tab will collapse (hide) the Data Maintenance and Software Preference buttons on that tab.*



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

1. On the left, click the button that corresponds to the data you want to set up
2. At the bottom of the screen, click **New**
3. In the new row that appears, enter your data. Select values from a dropdown box if and where necessary. If a dropdown box is empty, you will need to set up that table first. (e.g. first set up your service categories, then set up your service descriptions)
4. To delete any row of data, click the **Delete** button for that row
5. Click the **Close** button to exit the **System Preferences** screen. Your data will be saved automatically. Alternatively, click another button on the left to define other preferences.

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

Booking a Job (and Adding a Client)

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

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

   On the popup that opens, click the **Add New Client to Database** button. This will open the **Client Details** screen.

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4. Fill out the basic contact details for this client, such as phone number and e-mail address.
5. Fill out the client's name, company name, and physical address.
6. Click the **Book Job** button. This will open the **Job Details** screen.

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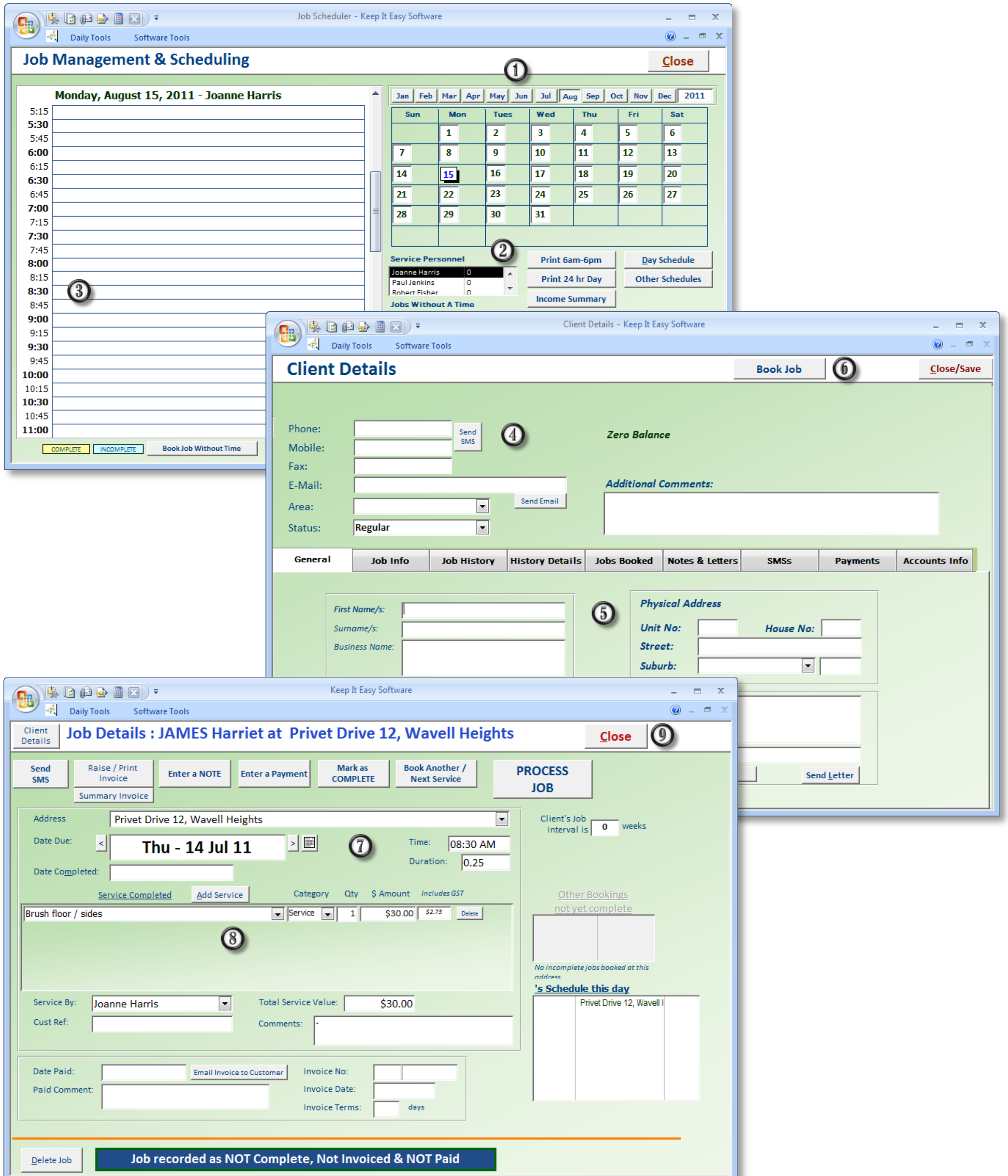
7. On the **Job Details** screen, verify the job address, due date, and time for the job. Make changes if required.
8. Select the service to be provided (or product to be delivered). To add another service or product, click the **Add Service** button. Continue until all services have been added.
9. Click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

8:15	
8:30	James Harriet : Privet Drive 12, Wavell Heights JN#9
8:45	



TIP: *To make changes to a job you have already booked, you can*

- *Go to the **Job Management & Scheduling** screen, select the job in the calendar and click the **Go to Job Details / Process Job** button.*

OR

- *Go to the **Client Details** screen, click the Jobs Booked tab and click the **Go to Job** button.*