

The ServiceCEO Implementation Checklist

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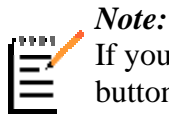
The Implementation Checklist is designed to help you setup ServiceCEO to work with you. It lists the lists and options that you need to configure, at a minimum, before starting to use ServiceCEO to run your business.

The Implementation Checklist is available in several places:

- Online as a PDF file. This is the clearest printable version.
- The ServiceCEO's Help System Table of Contents.
- The Implementation Checklist section below.
- The Implementation Training Series Video Library area of the Member Center.

Defining Company Information

The first step in configuring ServiceCEO is to define your company information.



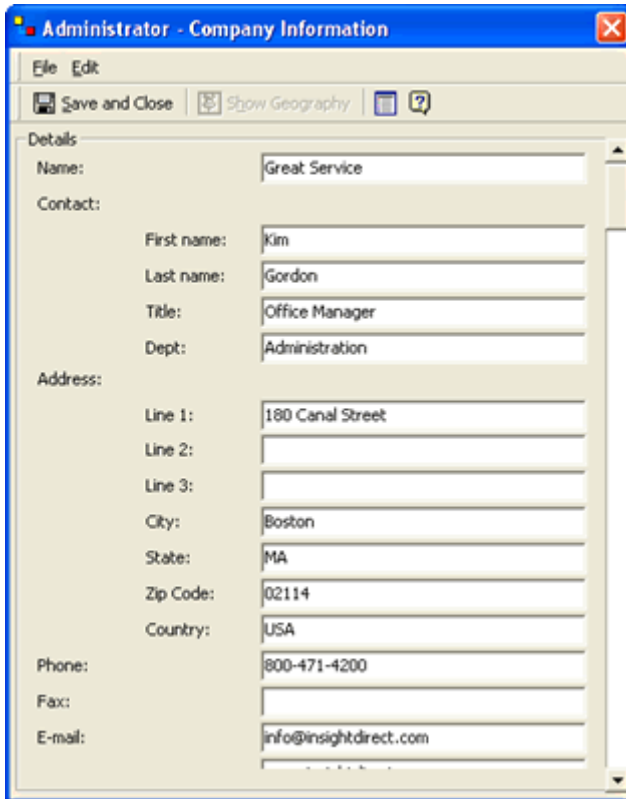
Note:

If you are running ServiceCEO Enterprise, the Company Information area and button will be called **Company Structure**. For more on ServiceCEO Enterprise, please read the ServiceCEO Enterprise Configuration Guide.

To define your company information:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Company Information** from the Categories bar. The Admin - Company Information dialog box appears.

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The screenshot shows a window titled "Administrator - Company Information" with a menu bar (File, Edit) and buttons for "Save and Close", "Show Geography", and a help icon. The form is organized into sections: "Details" (Name: Great Service), "Contact" (First name: Kim, Last name: Gordon, Title: Office Manager, Dept: Administration), and "Address" (Line 1: 180 Canal Street, City: Boston, State: MA, Zip Code: 02114, Country: USA). Other fields include Phone (800-471-4200), Fax, and E-mail (info@insightdirect.com).

3. Type the name of your company into the Name field. Note that your company name cannot contain more than 50 characters.
4. Type the name and information of the main company contact into the Contact section.
5. Type the address of your company's main location into the Address section.

Caution:



Your Activation code is linked to the company name and ZIP Code. If you edit the **Name** or **ZIP Code** fields, you will need to get a new Activation code. See the Activation Code section for details.

3. Type your main phone number into the Phone field.
4. Type your main fax number into the Fax field, if applicable.
5. Type your company's main e-mail address into the E-mail field. Note that if you do not define an e-mail address here, you will not be able to e-mail work orders to your employees. For details, see the E-mailing a Work Order to an Employee topic of the ServiceCEO Help System.
6. Type your company's website address into the Web site field.

7. Type the percentage of profits the company gets from its franchisees, if any, into the Royalty Rate 1 and 2 fields.
8. Type any information you would like into the five Custom Fields. Note that you cannot edit the names of these custom fields.
9. If you are using Inventory Tracking, select the Stock Location check box to make the company a stock location. See also the Defining Inventory Management Options topic.
10. Type any relevant notes into the Notes field.
11. You can insert your company logo into the Logo box. For more, see the Inserting a Logo topic.
12. You can integrate ServiceCEO with an accounting package by selecting the **Enabling Accounting Integration** check box. See the Integrating Accounting section for more information.
If you are not integrated with a third-party Accounting application, you can type the name of your main bank account into the Default Bank Account field.
13. If you are using Advanced Billing, click **Configure Billing Settings** to setup an advanced billing configuration for the entire company. See the Defining Billing Properties topic of the ServiceCEO Help System for more.
14. Click **Save and Close**.

Defining Tax Codes

ServiceCEO's multi-tiered tax rate functionality enables you to charge and track taxes on the services and products you provide. You can define up to three different tax types, with unlimited tax codes for each tax type.

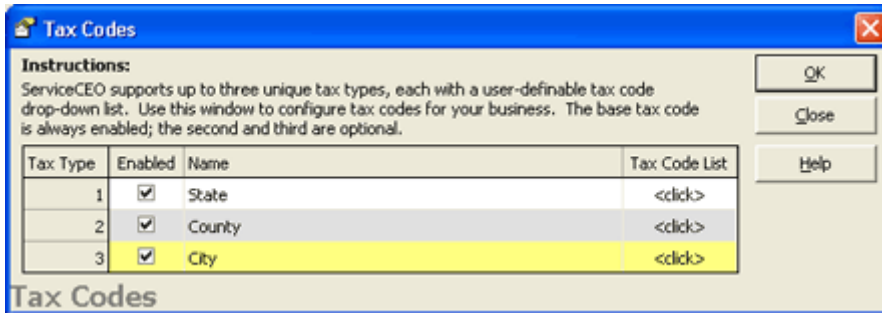
You do not need to enable all three tax types. For example, a company that only needs to charge a state tax (no city, county, or other extra taxes) would only need to enable a tax type named State.


Once a tax type is defined, you can create a list of different tax codes within that tax type. To continue our example, the company charging state taxes would define tax codes for each state within which the company conducts business.

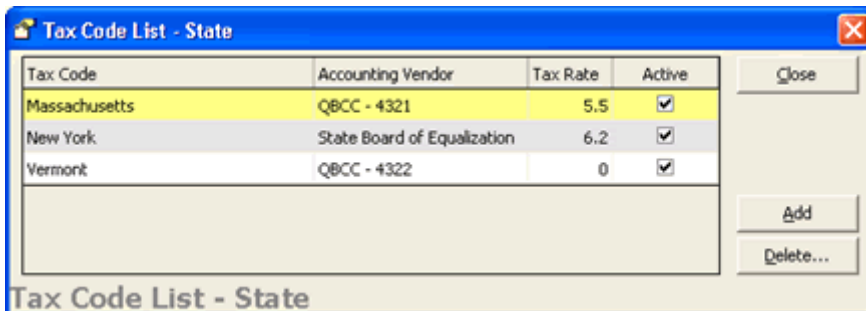
Adding Tax Codes

1. Select **Tools > Lists > Tax Codes**. The Tax Codes dialog box appears.

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2. The **Active** check box will be selected by default. Deselect it if you do not want this tax type to appear in drop-down lists in ServiceCEO.
3. Click the name field of the tax type you want to add.
4. Type the name of the tax into the **Name** field.
5. Click in the **Tax Code List** field.
6. Click . The Tax Code List dialog box appears. In this dialog box, you define the tax codes for the tax type. For example, if you do business in three states, you would create three tax codes - one for each state.

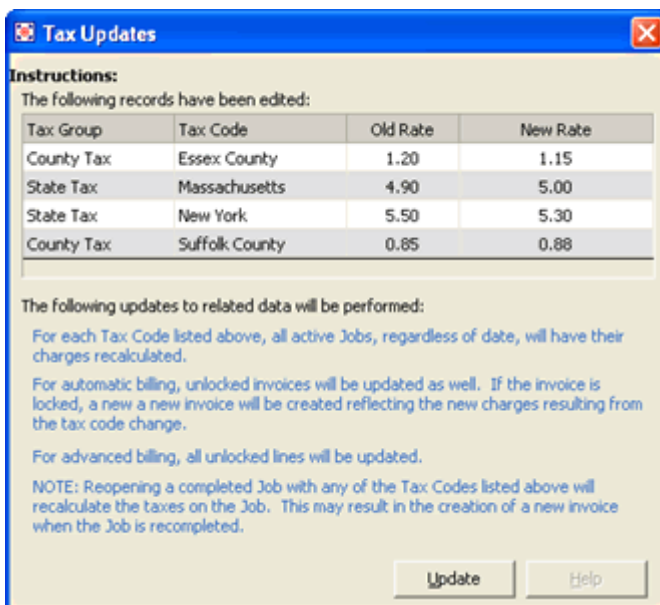


7. Click **Add**. A new row appears.
8. Type a name for the new tax code.
9. If you are using an accounting package, select the accounting vendor for this tax code from the **Accounting Vendor** drop-down list.
10. Type the tax rate into the **Tax Rate** field.
11. Deselect the **Active** check box if you do not want this tax code to appear on drop-down lists throughout ServiceCEO.
12. Repeat steps 7-11 to add more tax codes for the current tax type.
13. Click **Close**.
14. Repeat steps 2-13 to add additional tax types and codes.

15. Click **OK**.

Editing Tax Codes

1. Select **Tools > Lists > Tax Codes**. The Tax Codes dialog box appears.
2. Click in the **Tax Code List** field of the tax type that includes the tax code you want to edit.
3. Click . The Tax Code List dialog box appears.
4. Make any appropriate edits.
5. Click **OK**.
6. Repeat steps 2-5 to edit additional tax codes.
7. Click **OK**. The Tax Updates dialog box appears.



This dialog box displays all of the taxes you've changed. The tax changes will update all active jobs with unlocked invoices, as described in the dialog box.




Caution:

Taxes on miscellaneous charges, Credit Note Adjustments, and Service Contracts will not be automatically adjusted.

8. Click **Update**.

Deleting Tax Codes

You cannot delete tax codes that have been used in the past. Attempting to delete a tax code will mark it as Inactive, meaning that you will not be able to select this tax code in the future. Any existing customers that are currently using the existing tax code will continue to do so until the tax code is manually removed from the appropriate Customer Address.

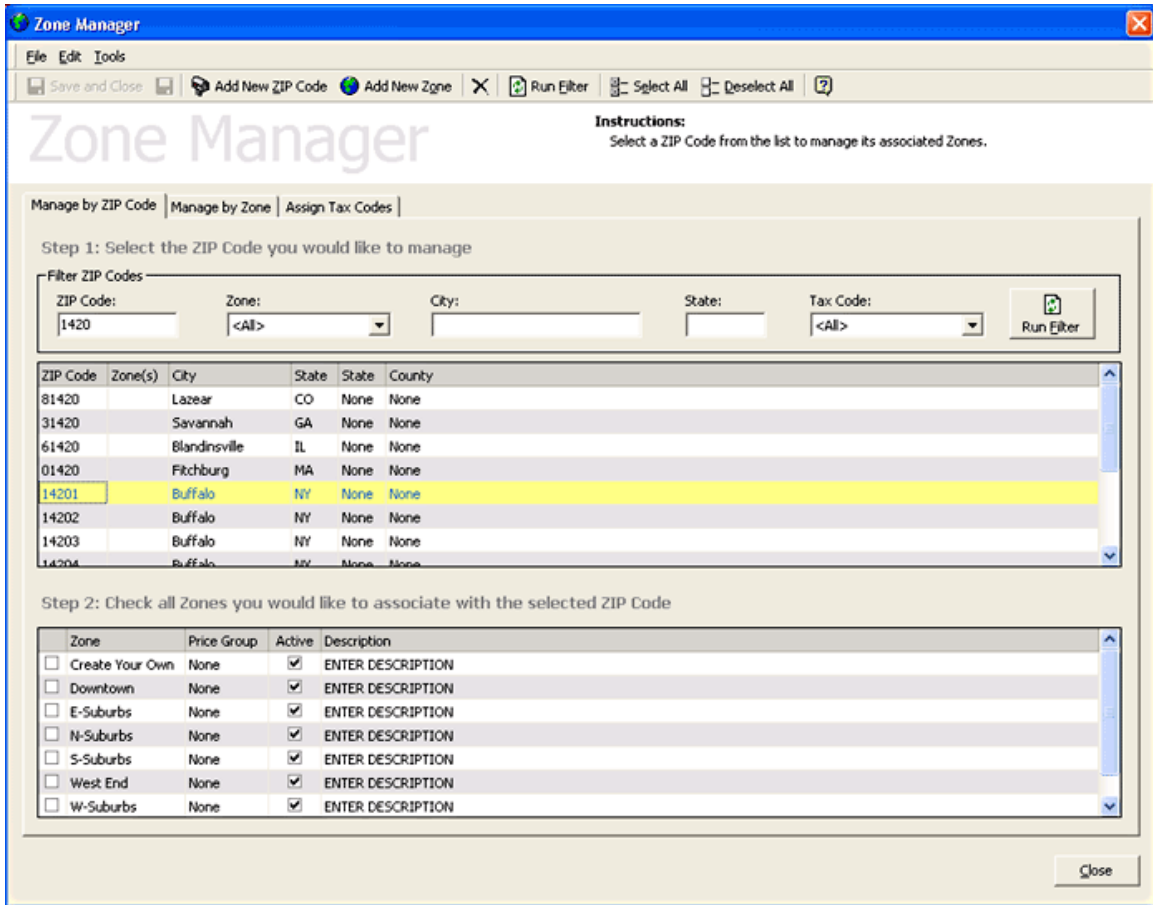
1. Select **Tools > Lists > Tax Codes**. The Tax Codes dialog box appears.
2. Click in the **Tax Code List** field of the tax type that includes the tax code you want to delete.
3. Click . The Tax Code List dialog box appears.
4. Select the name of the tax code you want to delete.
5. Click **Delete**. A confirmation dialog box appears.
6. Click **Yes**. The tax code is deleted.
7. Repeat steps 4-6 to delete additional tax codes.
8. Click **Close**.
9. Click **OK**.

The Zone Manager

A zone is a user-defined geographic territory. Zones enable you to break up your coverage area into manageable sub-sections so that you can associate teams and/or employees in a particular zone with customers located in the same zone, facilitating easy and efficient employee dispatching. You should assign your zones in such a way that a single team could handle multiple jobs within a zone without difficulty (due to reduced travel time).

Opening the Zone Manager

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager dialog box appears.

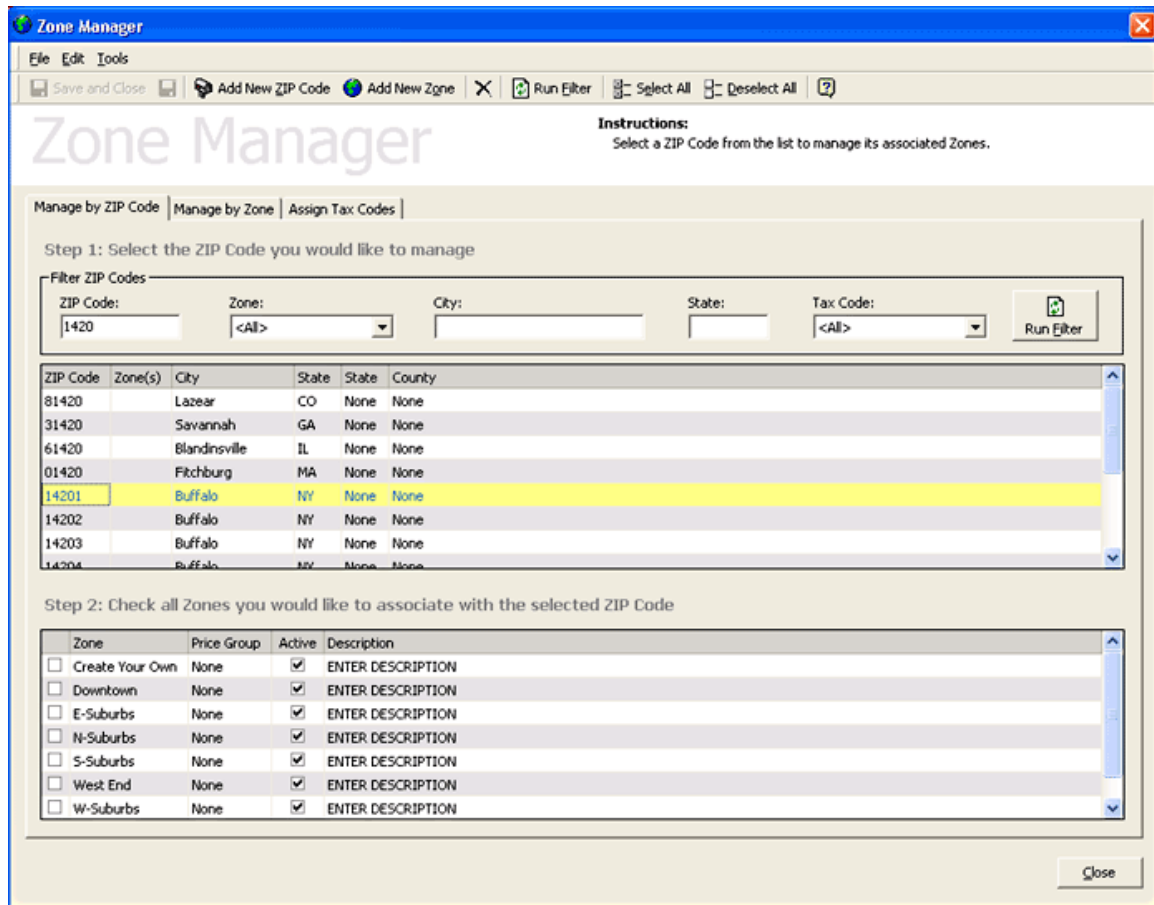


Manage by ZIP Code

The Manage by ZIP Code tab of the Zone Manager enables you to assign zones to particular ZIP Codes.

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Manage by ZIP Code tab of the Zone Manager appears.

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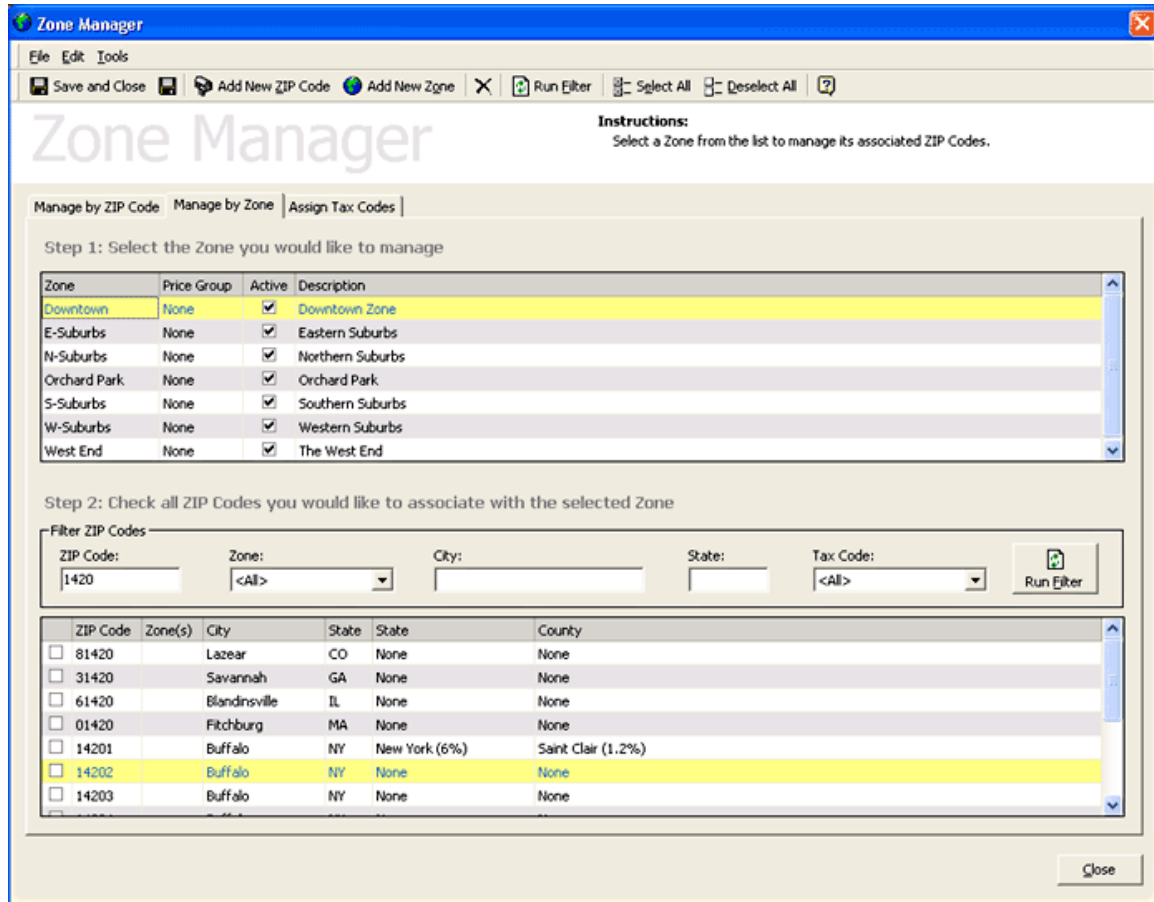


2. Filter the ZIP Code list to find the ZIP Code you want to associate with zones. For details, see the Zone Manager Filter section.
3. Select the ZIP Code that you want to associate with a zone(s).
4. Edit the ZIP Code as necessary. You can:
 - o **Define the City.** Add or edit the ZIP Code's city in the appropriate **City** field.
 - o **Define the State.** Add or edit the ZIP Code's two letter state code in the appropriate **State** field.
 - o **Define the Tax Rates.** Select a state tax rate from the appropriate **Rate** drop-down lists. The tax rates that appear are defined in the Tax Codes dialog box; see the Defining Tax Codes section for details.
5. Select the check box corresponding to the zone(s) you want to associate with the selected ZIP Codes.
6. Click **Save** or **Save and Close**. The Optional Updates dialog box appears. See the Optional Updates section.

Manage by Zone

The Manage by Zone tab of the Zone Manager enables you to assign ZIP Codes to particular zones.

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager appears.
2. Click the Manage by Zone tab.



3. Select the Zone you want to associate with ZIP Code from the Step 1 section.
4. If you'd like, edit the zones' values. You can:
 - **Define Zone Pricing.** Select a zone price for the zone from the Zone Pricing drop-down list. For more on Zone Pricing, see the Using Zone Pricing topic of the ServiceCEO Help System.
 - **Deactivate the Zone.** Deselect the **Active** check box if you do not want this zone to appear on the zone drop-down lists throughout ServiceCEO.

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Note:



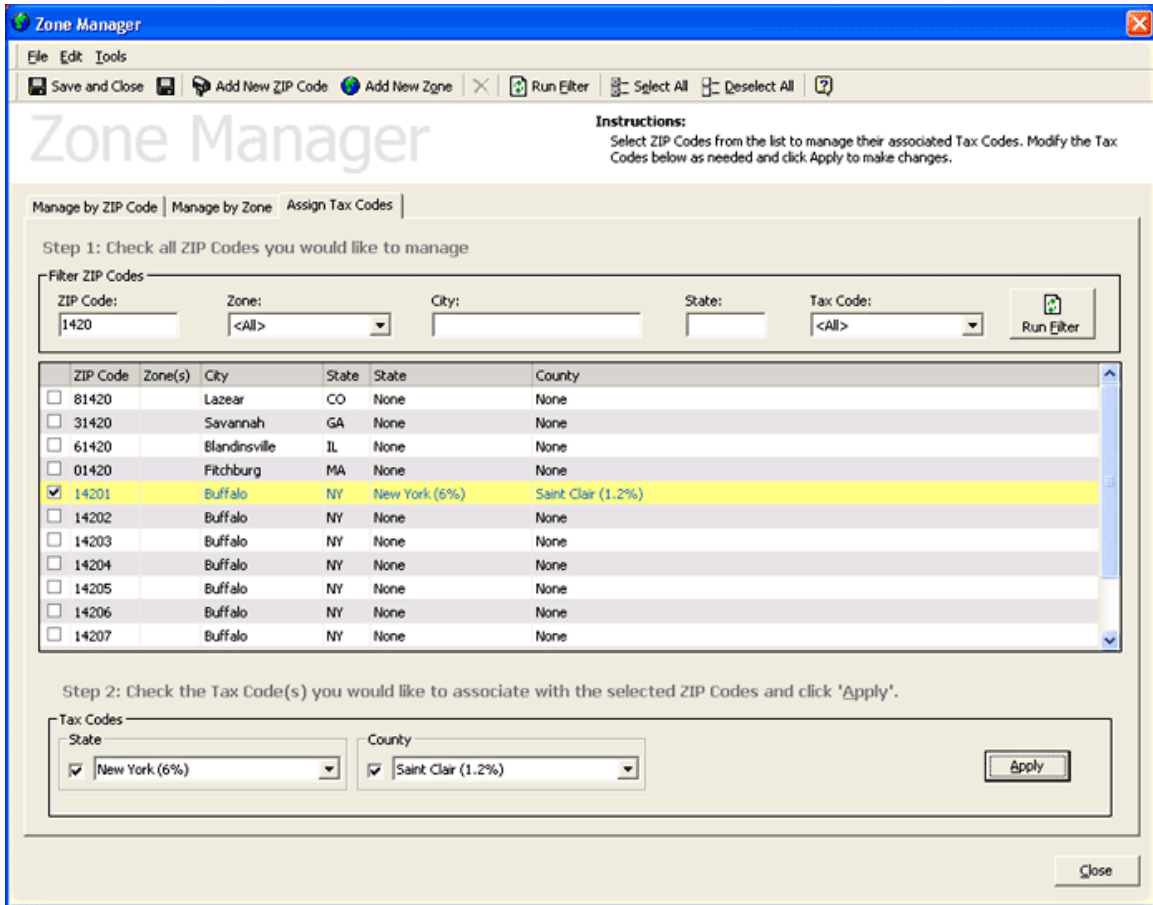
The **Active** check box for each zone is selected by default, meaning that it will appear on all customer and/or employee records. Deselecting the Active check box for existing list items will remove the list item for future records but keep it for those customer and/or employee records that are already using this item.

- **Describe the Zone.** Edit or define a zone's description by typing a short definition in the appropriate **Description** field.
5. Filter the ZIP Code list to find the ZIP Codes you want to associate with the selected Zone. For details, see the Zone Manager Filter section.
 6. Select the check box corresponding to the ZIP Code(s) that you want to associate with the selected zone.
 7. Edit the ZIP Code as necessary.
 8. Click **Save** or **Save and Close**. The Optional Updates dialog box appears. See the

Assign Tax Codes

The Assign Tax Codes tab of the Zone Manager enables you to assign tax codes to your zones.

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager appears.
2. Click the Assign Tax Codes tab.



3. Filter the ZIP Code list to find the ZIP Codes you want to associate with tax codes. For details, see the Zone Manager Filter section.
4. Select the check box(es) corresponding to the ZIP Code(s) for which you want to define tax codes.
5. Select the check box(es) corresponding to each tax type(s) that you want to apply to the selected ZIP Codes in the step two section.



Note:

The (up to three) tax types that appear correspond to the tax types you have defined and enabled. For details, see the Defining Tax Codes section.

6. Select the tax code(s) you want to assign to the ZIP Code(s) from the appropriate drop-down lists.
7. Click **Apply**. The tax codes selected in step 6 are applied to the selected ZIP Codes, and will appear in the appropriate Step 1 section.
8. Click **Save** or **Save and Close**. The Optional Updates dialog box appears. See the Optional Updates section, below.

The Zone Manager Filter

The Zone Manager filter appears on all three tabs of the Zone Manager.

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager appears.
2. Click the tab on which you want to define a filter.
3. Define the filter criteria. To do so, perform one or any combination of the following:
 - Type the ZIP Code you want to use in the ZIP Code field.
 - Select the Zone whose ZIP Codes you want to see from the Zone drop-down list.
 - Type the name of the city whose ZIP Codes you want to see in the City field.
 - Type the name of the state whose ZIP Codes you want to see in the State field.
 - Select the tax code whose associated ZIP Codes you want to see from the Tax Code drop-down list.
4. Click **Run Filter**. The list will be filtered by your criteria.



Note:

The Zone Manager filter is designed to work like the filter in other sections of ServiceCEO: If the Filter button contains a red circle, the filter is NOT active. If the Filter button contains a green circle with a check mark, the filter is active.

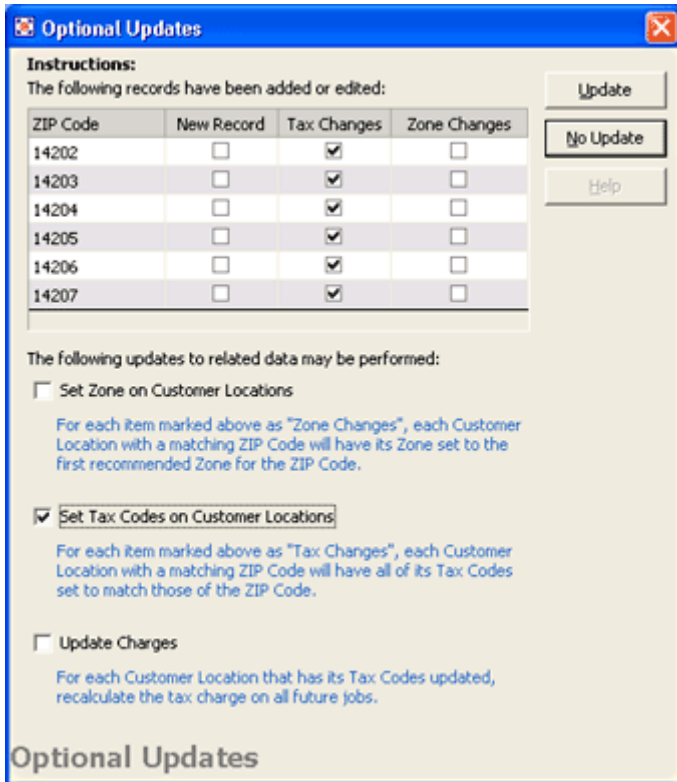


Tip:

If you want to clear all of the values in the filter fields, select **Edit > Clear Filters**. Note that this will clear the filter values for only the current tab - the filter values for the other tabs will still remain as they were.

Zone Manager Optional Updates

The Optional Updates dialog box enables you to propagate the changes you've made in the Zone Manager to existing customer records. It appears when you close the Zone Manager whenever you have made any additions or changes in the Zone Manager.



This dialog box details all of the changes you've made in the Zone Manager dialog box and enables you distribute these changes to existing records if you want. The changes you've made are displayed in the upper list box. You can control how these changes are made to existing records in the following ways:

- **Set Zone on Customer Locations.** Select this check box to change the zone for each customer location with the same zip code as those marked "Zone Changes".
- **Set Tax Codes on Customer Locations.** Select this check box to change the tax code for each customer location with the same zip code as those marked "Tax Changes".
- **Update Charges.** Select this check box to update the tax charges for all future jobs at customer locations with updated Tax Codes.

To update existing records, click **Update**. The changes are made to your database.

If you do not want to apply any Zone Manager changes to existing records, click **No Update**. No changes will be made to existing records; only records created from here on out will be affected by your edits.

Creating a Zone

You can create a new zone from the Zone Manager.

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager dialog box appears.

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2. Click **New Zone** or select **Edit > New Zone**. A new line appears in the zone list.
3. Type a name for the zone in the **Zone** field.

Tip:



It is usually a good idea to make your Zone name as short as possible. A shorter name will be able to be more easily deciphered if you use the Short Dispatch Job Line Format, which only displays the Zone's first five letters on the Dispatch Board. (See the Defining Dispatch Board Options topic of the ServiceCEO Help System for more.) For example, if one of your zones covers Northeast Houston, you could use the zone name "NEHou".

4. If necessary, select a zone price group for the zone from the **Zone Pricing** drop-down list. For more on Zone Pricing, see the Using Zone Pricing topic of the ServiceCEO Help System.
5. Deselect the **Active** check box if you do not want this zone to appear on the zone drop-down lists throughout ServiceCEO.

Note:



The **Active** check box for each zone is selected by default, meaning that it will appear on all customer and/or employee records. Deselecting the Active check box for existing list items will remove the list item for future records but keep it for those customer and/or employee records that are already using this item.

6. Edit or define a zone's description by typing a short definition in the appropriate **Description** field.
7. Click **Close**. The Optional Updates dialog box appears. See the Optional Updates section, above.

Editing Zones

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager dialog box appears.
2. Click the **Manage by Zone** tab.
3. Make any necessary edits to the zone you want to edit.

Note:




The **Active** check box for each zone is selected by default, meaning that it will appear on all customer and/or employee records. Deselecting the Active check box for existing list items will remove the list item for future records but keep it for those customer and/or employee records that are already using this item.

4. Click **Close**. The Optional Updates dialog box appears. See the Optional Updates section.

Deleting Zones

You cannot delete a Zone with active employees and/or jobs assigned to it. You can, however, make it inactive by clearing the Active check box for the appropriate zone.

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager dialog box appears.
2. Select the zone you want to delete.
3. Click  or select **Edit > Delete**. A Confirmation dialog box appears.
4. Click **Yes**. The zone is removed from the zone list.

Managing ZIP Codes

ServiceCEO can automatically fill in the City, State, Zone, and associated Tax Codes for every customer entered into ServiceCEO when you type the ZIP Code. To create this automation, you must define these items for every ZIP Code within your coverage area. ServiceCEO already contains a list of all of the ZIP Codes in the United States. All you need to do is map each ZIP Code to your tax codes and zones. For details about this automation, see the Defining a Customer Address topic of the ServiceCEO Help System.

Note:



Insight Direct does not have a license to distribute postal codes for other countries other than the United States. If you need different or additional ZIP/Postal Codes, you can either manually enter these codes or import ZIP Codes using the Data Import Wizard. From the Zone Manager, select **Tools > Import ZIP Codes**. The Data Import Wizard appears. For more information, read the Importing Data into ServiceCEO topic.

Adding ZIP Codes

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager dialog box appears.
2. Click **Add New ZIP Code** or select **Edit > New ZIP Code**. A new line will appear in the ZIP Code list.
3. Type the ZIP Code in the **ZIP Code** column.
4. Type the ZIP Code's city in the **City** column.
5. Type the ZIP Code's two letter state abbreviation in the **State** column.

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6. Select a state tax rate from the appropriate **Rate** drop-down lists.



Note:

The columns to the right of the **City** and **State** columns will vary depending on the defined tax types. See the Defining Tax Codes section for details.



Tip:

You can control the displayed ZIP Codes by using the filter. For details, see the Zone Manager Filter topic.


7. Click **OK**. The Optional Updates dialog box appears. For details, see the Zone Manager Optional Updates topic.
8. Click **OK**.

Editing ZIP Codes

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager dialog box appears.
2. Type the ZIP Code you want to edit into the **ZIP Code** field in the Filter ZIP Codes section.
3. Click **Run Filter**.
4. Click on the ZIP Code you want to edit. The row will highlight in yellow.
5. Edit the ZIP Code's values as needed.
6. Repeat steps 2-5 for additional ZIP codes.
7. Click **OK**. The Optional Updates dialog box appears. For details, see the Zone Manager Optional Updates topic.
8. Click **OK**.

Deleting ZIP Codes

1. Select **Tools > Lists > Zone Management** or press **CTRL+F6**. The Zone Manager dialog box appears.
2. Type the ZIP Code you want to delete into the **ZIP Code** field in the Filter ZIP Codes section.
3. Click **Run Filter**.
4. Select the ZIP Code you want to delete.

5. Click  or select **Edit > Delete**. A Confirmation dialog box appears.
6. Click **Yes**. The ZIP Code is removed from the list.
7. Repeat steps 2-6 to delete additional ZIP Codes.
8. Click **OK**. The Optional Updates dialog box appears. For details, see the Zone Manager Optional Updates topic.
9. Click **OK**.

Master Categories Overview

ServiceCEO groups together individual services and products in master categories. These master categories are useful for organizational and reporting purposes, and can be used to define employee skill sets.

After you define the master categories, you can assign every service or product in your database to a master category. You create a master category on any of the four tabs in the Service/Product Categories dialog box:

- **Services** - Categories defined here will only appear for services and on the Master Services List.
- **Products** - Categories defined here will only appear for Products and on the Master Products List.
- **Kits** - If using kits, categories defined here will only appear for kits and on the Kits List.
- **All** - Categories defined here will appear for all items (services, products and kits) as well as in all master lists.

Tip:



If you are using, or are going to use, ServiceCEO's Inventory Tracking module, we suggest you review the Product List Overview and relevant Inventory sections before creating your master categories. This will help you understand the direct relationship between Master Categories, Master Products, and the vendor catalog items.

Adding a New Master Category

1. Perform one of the following actions:
 - Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Click **Master Categories**. The Service/Product Categories dialog box appears.

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Service/Product Categories

Instructions:
Modify the list of Categories below. For information field definitions for using Categories with accounting integration, see TOOLS > OPTIONS > ACCOUNTING or press HELP.

Services | Products | Kits | All

Description	Active	Income Acct	Commission Account	Is a Skill?	Skill Req by All Emps?
Carpet Cleaning	<input checked="" type="checkbox"/>	<Click>	<Click>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Commercial and Janitorial	<input checked="" type="checkbox"/>	<Click>	<Click>	<input type="checkbox"/>	<input type="checkbox"/>
Installation Services	<input checked="" type="checkbox"/>	<Click>	<Click>	<input type="checkbox"/>	<input type="checkbox"/>
Maid Services	<input checked="" type="checkbox"/>	<Click>	<Click>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Services	<input checked="" type="checkbox"/>	<Click>	<Click>	<input type="checkbox"/>	<input type="checkbox"/>
Repair Services	<input checked="" type="checkbox"/>	<Click>	<Click>	<input type="checkbox"/>	<input type="checkbox"/>
Test Service Category	<input checked="" type="checkbox"/>	<Click>	<Click>	<input type="checkbox"/>	<input type="checkbox"/>
Window Cleaning	<input checked="" type="checkbox"/>	<Click>	<Click>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

OK
Cancel
Help
Add
Delete...

Service/Product Categories

3. Click the tab on which you want to add your master category.
4. Click **Add**. A new row will appear.
5. Type the name for the new category in the **Description** field.
6. The **Active** check box will be selected by default. Deselect it if you do not want this category to appear on the Products and Services page.
7. If you are integrated with an Accounting account, click the **Income Acct** field to link this category to an accounting account. The value you select here will set the Income account on the Accounting tab of the Product and Service Detail dialog box for all products under this category.
8. If you are integrated with an Accounting account, click the **Commission Account** field to link this category to an accounting account. The value you select here will set the Commission account on the Accounting tab of the Product and Service Detail dialog box for all products under this category.



Tip:

For more details, see the Associating Master Categories with Accounting section.

9. Select the **Is a Skill?** check box to make this master category a skill. For more on skills, see the Defining Skills section.
10. Select the **Skill Req by All Emps?** check box to require that, if a job requires this skill, all employees assigned to the job must have this skill.
11. Repeat steps 3-10 to add more master categories.
12. Click **OK**.

Editing a Master Category

1. Perform one of the following actions:
 - Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Click **Master Categories**. The Service/Product Categories dialog box appears.
3. Click the tab on which the master category you want to edit is located.
4. Edit the necessary fields.
5. Click **OK**.

Deleting a Master Category

If services and/or products are referencing a master category, you cannot delete the master category. In these instances, you should deselect the **Active** check box to make the master category inactive.

When you deactivate a master category, it will automatically deactivate all products and services within that category, so it is a good idea to move all of the products and services to new categories before deactivating the current category.

To deactivate a master category:

1. Perform one of the following actions:
 - Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Click **Master Categories**. The Service/Product Categories dialog box appears.
3. Click the tab on which the master category you want to deactivate is located.
4. Clear the **Active** check box for the master category you want to deactivate.
5. Click **OK**.

To delete a master category that has never had any information contained within it, repeat the steps above but click Delete rather than the Active check box in step 4.

Defining Service Units

A Service Unit is a method of breaking down or measuring a service for payment purposes. For example, if you wanted to measure a lawn cutting service by acres cut, you could create an “acre” service unit and define how much the customer would be charged per acre in the Product Detail or Service Detail dialog box. The Service Units list allows you to build the specific unit types that you want for those items that you charge services/labor on a per unit basis.

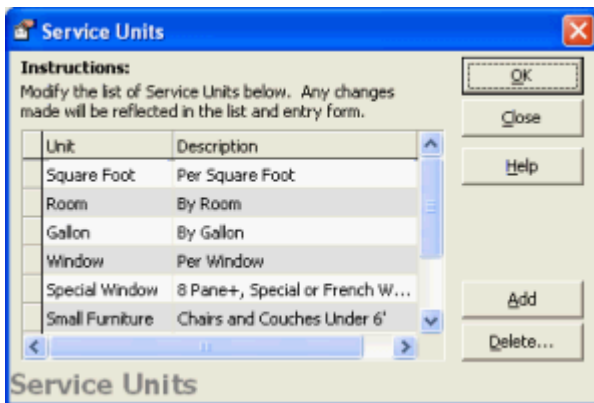


Tip:

Companies that charge for labor/services on a flat fee or hourly rate do not need to create service units.

Adding Service Units

1. Perform one of the following actions:
 - Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Click **Unit List**. The Service Units dialog box appears.



3. Click **Add**. A new row appears.
4. Type a name for the service unit in the **Unit** field.
5. Type a description of the service unit in the **Description** field.
6. Repeat steps 3-5 to add additional service units.
7. Click **OK**.

Editing Service Units

1. Perform one of the following actions:
 - Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Click **Unit List**. The Service Units dialog box appears.
3. Select the service unit you want to edit.
4. Edit the Unit and Description fields as necessary.
5. Click **OK**.

Deleting Service Units

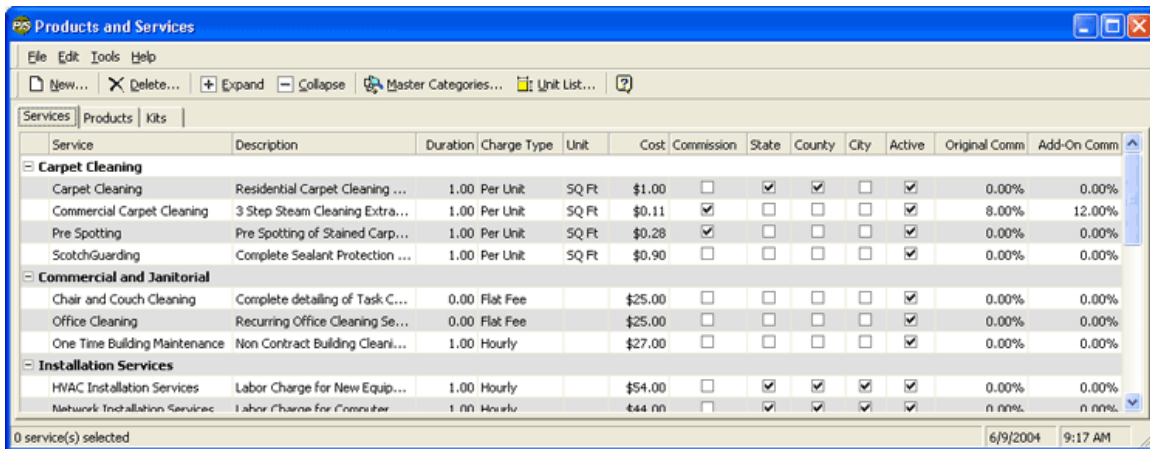
Deleting service units that are in use on jobs will remove the service units from those jobs. The amount of the service will remain the same, but the unit will no longer have a name.

1. Perform one of the following actions:
 - Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Click **Unit List**. The Service Units dialog box appears.
3. Click the gray button to the left of the service unit you want to delete in order to select the entire row.
4. Click **Delete**. A confirmation dialog box appears.
5. Click **OK**.
6. Click **OK**.

Services List Overview

All of the ServiceCEO's services are located on the Services tab of the Products and Services dialog box. Note that any existing Master Categories (as defined on the Services or All tab of the master Categories dialog box) are displayed in bold black lettering.

Implementation Checklist




The screenshot shows a software window titled "Products and Services" with a menu bar (File, Edit, Tools, Help) and a toolbar (New, Delete, Expand, Collapse, Master Categories, Unit List). The main area is a table with columns: Service, Description, Duration, Charge Type, Unit, Cost, Commission, State, County, City, Active, Original Comm, and Add-On Comm. The table is organized into three main categories: Carpet Cleaning, Commercial and Janitorial, and Installation Services. Each category is expanded to show its sub-items.

Service	Description	Duration	Charge Type	Unit	Cost	Commission	State	County	City	Active	Original Comm	Add-On Comm
Carpet Cleaning												
Carpet Cleaning	Residential Carpet Cleaning ...	1.00	Per Unit	SQ Ft	\$1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%
Commercial Carpet Cleaning	3 Step Steam Cleaning Extra...	1.00	Per Unit	SQ Ft	\$0.11	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8.00%	12.00%
Pre Spotting	Pre Spotting of Stained Carp...	1.00	Per Unit	SQ Ft	\$0.28	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%
ScotchGuarding	Complete Sealant Protection ...	1.00	Per Unit	SQ Ft	\$0.90	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%
Commercial and Janitorial												
Chair and Couch Cleaning	Complete detailing of Task C...	0.00	Flat Fee		\$25.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%
Office Cleaning	Recurring Office Cleaning Se...	0.00	Flat Fee		\$25.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%
One Time Building Maintenance	Non Contract Building Cleani...	1.00	Hourly		\$27.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%
Installation Services												
HVAC Installation Services	Labor Charge for New Equip...	1.00	Hourly		\$54.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%
Network Installation Services	Labor Charge for Computer	1.00	Hourly		\$44.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00%	0.00%


Each line item is a service that is available when creating jobs and schedules (on the Services and Products tab). These services will also appear on the work order and invoice(s) that will be created. As you are creating your service list, keep in mind that the more detailed the Services list, the more detailed your reports will be. In addition, a detailed list will also increase the power of the Sort and Filter grouping capabilities for both the revenue tracking and marketing modules.

For details on creating individual services, see the Defining Service Items section.

To expand the master categories:

- Click the plus sign to the left of the master category to expand the single category.
- Click  **Expand** to expand all master categories.

To collapse the master categories:

- Click the minus sign to the left of the master category to collapse the single category.
- Click  **Collapse** to collapse all master categories.

Defining Service Items

Before you can assign services to a job, you first have to define the services in the application. Note that the information you record here is only for default purposes. You will have the ability to edit this information on the job or recurring schedule to which you apply the service.

Adding a New Service

1. Select **Tools > Lists > Master Service List** or press **CTRL+F4**. The Products and Services page appears.
2. Click **New**. The Product and Service Detail dialog box appears.

The screenshot shows a software window titled "Product and Service Detail" with three tabs: "Properties", "Accounting", and "Tasks". The "Properties" tab is active. It is divided into two main sections: "Service Description" and "Price".

Service Description:

- Category: Carpet Cleaning (dropdown)
- Service: ScotchGuarding (text field)
- Description: Complete Sealant Protection of Carpeted Services (text field)
- Active:

Price:

- Charge Type: Per Unit (dropdown), SQ Ft (dropdown), Print as Flat Fee
- Est. Duration: 1 (spin box) minutes per SQ Ft
- Charge: \$0.90 (spin box) per SQ Ft
- Price Groups: Edit... (button)
- Tax: State, County
- Commissions:
 - Pay Commission:
 - Pay same commission rate.
 - Pay different commission rates.
 - Original Sale Rate (%): 5.00 (spin box)
 - Add-On Sale Rate (%): 7.00 (spin box)

Buttons at the bottom: OK, Close, Help.

3. Select a category from the **Category** drop-down list.
4. Type a name for the service in the **Service** field.
5. Type a description of the service into the **Description** field.
6. The **Active** check box will be selected by default. Deselect it if you do not want this category to appear on the Products and Services page.
7. Select the type of charge you want to apply to this service from the **Charge Type** drop-down list. Depending on what you select, additional fields will appear:

If you select Per Unit, a drop-down list and the **Est. Duration** field appear. Select the type of unit from the first drop-down list. Enter the minimum amount of units for this service in the Est. Duration field.

Note:



The Est. Duration field enables you to add services to a per-unit job without specifically setting job duration. For example, if you create a new job and add a service (with an Est. Duration value of 15 minutes) to it with and a Quantity of two, the duration of the service will be 30 minutes or .5 man-hours.

8. Click the **Print as Flat Fee** check box to display all charges as one charge on the work order. This check box will not appear if you selected Flat Fee from the Charge Type drop-down list.
9. Type the default charge into the **Charge** field.
10. Click **Edit...** to define and edit price groups for the service. For more, see the Using Price Groups topic of the ServiceCEO Help System.

Implementation Checklist

11. Select the appropriate **Tax** check boxes to apply taxes to the service.



Note:

The name of the tax check boxes will vary depending on your defined tax types. In the screenshot above, we've defined two tax types as State and County. See the Defining Tax Codes section for details.

12. Select the **Pay Commission** check box to pay commissions on this service. The commission fields will activate.
 - To apply the same commission rate to all commissioned employees, select the **Pay same commission rate** option button and edit the rates in the **Original Sale Rate (%)** and **Add-On Sale Rate (%)** fields as needed.
 - To apply different commission rates to different employees, select **Pay different commission rates** and click **View Individual Rates**. The Per-Employee Commissions dialog box will appear. Edit these fields as necessary. Click **Save**. The Per-Employee Commissions dialog box will close. The new commission rates are now in effect.
13. If you're integrated with an Accounting package, click the **Accounting** tab. See the Associating Products-Services with Accounting section for details.
14. You can automatically create a task when this service is sold. See Automatically Creating Tasks with Products and Services for details.
15. Click **OK**. When you add this service to a job, this task will automatically appear on the Tasks tab, linked to the service and job.
16. Click **OK**.

Editing Service Details

1. Select **Tools > Lists > Master List** or press **CTRL+F4**. The Products and Services page appears.
2. Double-click the product or service you want to edit. The Product and Service Detail dialog box appears.
3. Edit the values as necessary.
4. Click **OK**.

Deactivating Services

Services that are associated with a job at any point - be it a job in the past, present, or future - cannot be deleted. You can, however, mark the service as **Inactive**, meaning that you will no longer be able to assign the service to jobs moving forward.

1. Select **Tools > Lists > Master Service List** or press **CTRL+F4**. The Products and Services page appears.
2. Double-click the service you want to deactivate. The Service Detail dialog box appears.
3. Clear the **Active** check box. A confirmation dialog box appears.
4. Click **OK**.

Products List Overview

The Master Products list functions much like the Master Services list – it lists each product your business offers for sale as part of a job, project or invoice. If you do not want to track purchases or inventory amounts, you'll configure the Master Products list in the exact same manner as the Master Services List, meaning that the Master Products list will serve as a Master List of all of the products you sell. You will also be able to attach these products to jobs and schedules. To use the Master Products List in this manner, enter your products in the same manner as you did the Master Services List. See the Service List Overview section for details.

Tip:



Items are listed exactly as they will appear on work orders and invoices, so names and descriptions should be customer friendly. The part numbers entered here should be the ones you use internally for referencing a part, regardless of which vendor or supplier from which it came.

If you are, or plan on ever, tracking inventory in ServiceCEO, the Master Products List can also act as an internal parts control system. See the Inventory topic of the ServiceCEO Help Systems for details.

Defining Master Product Items

Before you can assign products to jobs, you first have to define the products in ServiceCEO. The information you record here is only for default purposes. You will have the ability to edit this information on the job or recurring schedule to which you apply the service.

Adding a New Product

1. Select **Tools > Lists > Master Product List** or press **CTRL+F5**. The Products and Services Detail page appears.
2. Click **New**. The Product and Service Detail dialog box appears.

Implementation Checklist

Product and Service Detail

Properties | Inventory | Vendors | Stock Levels | Accounting | Tasks

Product Description:

Category: Telephone Parts & Equipment

Product No.: 3052-00

Product Name: 3052-00

Description: XTS Station User Guides 6 Packs

Active:

Custom Fields:

Pest: None

Method of Appl.: None

Spec. Location: None

Concen.: 3.00 %

Price & Cost:

Units: Packs (optional)

Our Cost: \$29.80 /unit

Selling Price: \$87.00 /unit

Price Groups: Edit... (optional)

Sales Tax: State
 County

Commissions:

Pay Commission:

Pay same commission rate.
 Pay different commission rates.

Original Sale Rate (%): 5.00

Add-On Sale Rate (%): 7.00

OK Close Help

3. Select the product's category from the **Category** drop-down list.
4. Type a number for the product in the **Product No.** field.
5. Type a name for the product in the **Product** field.
6. Type a description of the product into the **Description** field.
7. The **Active** check box will be selected by default. Deselect it if you do not want this category to appear on a job's Services/Products tab.
8. If necessary, select the product's units from the **Units** drop-down list.
9. Type the amount it cost you to buy this product in the **Our Cost** field..
10. Type the amount you are selling this product for in the **Selling Price** field.
11. Click **Edit...** to define and edit price groups for the product. For more, see the Using Price Groups section.
12. Select the appropriate **Tax** check boxes to apply taxes to the product.



Note:

The name of the tax check boxes will vary depending on your defined tax types. In the screenshot above, we've defined two tax types as State and County. See the Defining Tax Codes section for details.

13. Select the **Pay Commission** check box to pay commissions on this product. The commission fields will activate.
 - To apply the same commission rate to all commissioned employees, select the **Pay same commission rate** option button and edit the rates in the **Original Sale Rate (%)** and **Add-On Sale Rate (%)** fields as needed.
 - To apply different commission rates to different employees, select **Pay different commission rates** and click **View Individual Rates**. The Per-Employee Commissions dialog box will appear. Edit these fields as necessary. Click **Save**. The Per-Employee Commissions dialog box will close. The new commission rates are now in effect.
14. If the product's custom fields are active, you can define values for them now. These fields are activated in the Products/Services Options dialog box.
15. If you want to add this product to Inventory Tracking, click the **Inventory**, **Vendors** and **Stock Levels** tabs. For more, see the Adding Master Products to Inventory topic of the ServiceCEO Help System.
16. If you're integrated with an Accounting package, click the **Accounting** tab. See the Associating Products-Services with Accounting section for details.
17. You can automatically create a task when this product is sold. See the Automatically Creating Tasks with Products and Services topic of the ServiceCEO Help System for details.
18. Click **OK**. When you add this product to a job, this task will automatically appear on the Tasks tab, linked to the product and job.
19. Click **OK**.

Editing Product Details

1. Select **Tools > Lists > Master Product List** or press **CTRL+F5**. The Products and Services page appears.
2. Double-click the product you want to edit. The Product and Service Detail dialog box appears.
3. Edit the values as necessary.
4. Click **OK**.

Implementation Checklist

Deactivating Products

Products that are associated with a job at any point - be it a job in the past, present, or future - cannot be deleted. You can, however, mark the product as **Inactive**, meaning that you will no longer be able to assign the product to jobs moving forward.

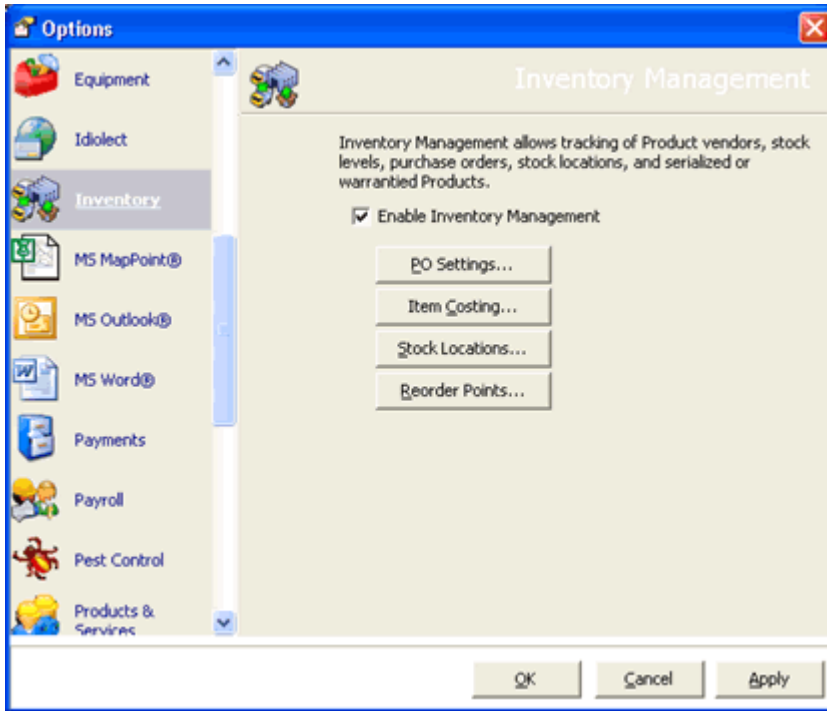
1. Select **Tools > Lists > Master Product List** or press **CTRL+F5**. The Products and Services page appears.
2. Double-click the product you want to deactivate. The Product Detail dialog box appears.
3. Clear the **Active** check box. A confirmation dialog box appears.
4. Click **OK**.

Defining Inventory Management Options

You can use ServiceCEO to track your inventory data. Enabling inventory management lets you track product vendors, purchase orders, and the stock levels at your stock locations. For more on tracking Inventory, please read the Inventory topic of the ServiceCEO Help Systems.

Enabling Inventory Management

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Inventory** from the Categories bar. The Inventory Management Options dialog box appears.



3. Click the **Enable Inventory Management** check box to start managing your inventory.

To further control how you track inventory, you can define settings in four different areas:

- **Purchase Order Settings** - Defines the appearance of your Purchase Orders (POs).
- **Item Costing** - Defines the rules that set the cost of non-serialized items, and controls which items will be used to fill purchase orders.
- **Stock Locations** - Enables inventory stocking at the various levels of your organization.
- **Reorder Points** - Excludes inventory that is already assigned to jobs from the figures that determine reorder and maximum control point warnings.

Purchase Order Settings

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Inventory** from the Categories bar. The Inventory Management Options dialog box appears.
3. Click **PO Settings**. The Purchase Order Print Options dialog box appears.

Implementation Checklist

Purchase Order Print Options

Audit Trail

Require notes after each phase of Purchase Order - Approval, Receipt, etc.

Print Settings

Print Bill-To Information in Header Phone Fax Web Email

When ordering for a Region, bill the: Region

When ordering for a Branch, bill the:

When ordering for a Team, bill the: Company (default)

Use the following text to describe the notification message printed on Purchase Orders that use a notification date. Use %DATE% to insert the notification date.

Please notify by %DATE% if this order can not be shipped and received by its DATE DUE.

OK Cancel Help

4. Select the **Require notes after each phase of Purchase order** check box to capture an audit trail for each purchase order.
5. Select the **Print Bill-To Information in Header** check box to include billing information in the header of a printed purchase order.
6. If you selected the **Print Bill-To Information in Header** check box, next select the check boxes corresponding to the information you want to include in the header. These options include:
 - Phone
 - Fax
 - Web
 - E-mail
7. From the first drop-down list, select the company segment to which you want to bill orders for a Region.
8. From the second drop-down list, select the company segment to which you want to bill orders for a Branch.



Tip:

Steps 7 and 8 are only valid if you are using ServiceCEO Enterprise to manage multiple company locations.

9. From the third drop-down list, select the company segment to which you want to bill orders for a Team.
10. In the text box, edit the text. This text appears on Purchase Orders as a notification message with notification dates.

**Tip:**

To automatically insert the purchase order's notification date, type "%DATE%" in the text field.

11. Click **OK**.

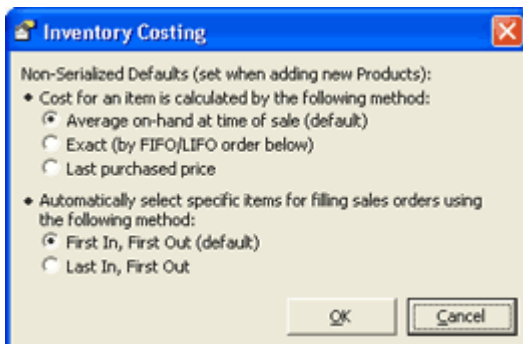
Item Costing

Since non-serialized inventory items are indistinguishable from each other, but each item may cost differently depending on the Vendor from which they are purchased, you need to define a cost estimate and inventory selection method. The Inventory Costing dialog box enables you to define a default method of estimating the inventory cost and which item will be used when the master product is sold - see the Non-Serialized Inventory topic of the ServiceCEO Help System for more.

**Tip:**

You will always be able to change these defaults when defining a new master product.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Inventory** from the Categories bar. The Inventory Management Options dialog box appears.
3. Click **Item Costing**. The Inventory Costing dialog box appears.



4. In the first section, click the appropriate option button to set the default method of calculating an item's cost.
5. In the second section, click the appropriate option button to set the method of selecting which items will fill new sales orders. Your options are:
 - o **First In, First Out.** Older inventory will ship before newer stock.
 - o **Last In, First Out.** Newer inventory will ship before older stock.

Implementation Checklist



Note:

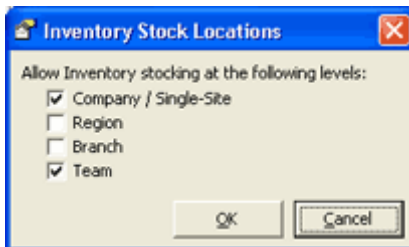
For more details on these options, please read the Non-Serialized Inventory topic in the ServiceCEO help system.

6. Click **OK**.

Inventory Stock Locations

By selecting the check boxes in the Inventory Stock Locations dialog box, you make that level a Stock Location. In other words, if you select the **Team** check box in step four, every team in ServiceCEO will be become a functioning stock location.

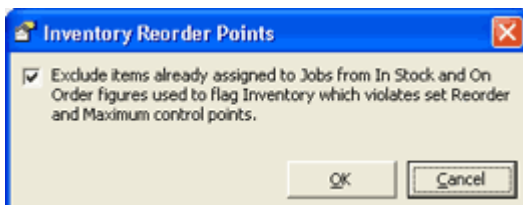
1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Inventory** from the Categories bar. The Inventory Management Options dialog box appears.
3. Click **Stock Locations**. The Stock Locations dialog box appears.



4. Select the check boxes that correspond to every location where you want to enable inventory stocking. The Region and Branch check boxes will only appear if you are running ServiceCEO Enterprise.
5. Click **OK**.

Inventory Reorder Points

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Inventory** from the Categories bar. The Inventory Management Options dialog box appears.
3. Click **Reorder Points**. The Inventory Reorder Points dialog box appears.



4. Select the check box to exclude inventory that is already assigned to jobs from the figures that determine your reorder and maximum control point warnings.

Price Levels Overview



Caution:

Price levels are different from Zone Pricing. Zone Pricing used to be called "Price Groups" in versions of ServiceCEO before 6.1. For more on Zone Pricing, please see the Using Zone Pricing topic of the ServiceCEO Help System.

Price Levels enable you to tailor charges for particular customer locations or jobs by raising or lowering product and service prices by a percentage that you define. For example, if you could provide a preferred customer a 5% markdown on all of their products and services.

In addition, you can mark up or mark down products based on the cost or price. In other words, you can use price levels to generate the product's sell price based on two things:

1. **Standard Price.** Price-based price levels generate a new sell price by adjusting the product's standard price as defined in the Product Detail dialog box.
2. **Cost Based.** The sell price will be derived by taking the product's cost (as defined in the Product Detail dialog box) and multiplying it by the price level.

Note:



Depending on how the inventory product is being costed (i.e., Serialized, LIFO, FIFO, Average On Hand, Last Purchase Price, etc.), the original cost of items may vary; for details on how inventory items are costed, see the How is the Cost Calculated for Inventory Items? topic of the ServiceCEO Help System.

Managing Price Levels

You can define percentage by which the price level will increase or decrease cost or sell prices in the Price Levels dialog box.

Creating Price Levels

Before you can use Price Levels, you first need to create them. To do so:

1. Select **Tools > Lists > Price Levels**. The Price Levels dialog box appears.

Implementation Checklist

Active	Name	Services	Products	Products
<input checked="" type="checkbox"/>	10% markup (cost)	+10%	+10%	Cost
<input checked="" type="checkbox"/>	10% markup (sell price)	+0%	+10%	Sell Price
<input checked="" type="checkbox"/>	13% above cost	+13%	+13%	Cost
<input checked="" type="checkbox"/>	Discounted Products	+0%	-7.5%	Sell Price

2. Click **Add** to add a new price level to the list.
3. The Active check box is selected by default. Deselect it if you do not want this price level to appear when assigning products and services to jobs.

Tip:



Once a price level has been created, it cannot be deleted. If you are no longer using a price group, simply deselect the Active check box and the price group will no longer be able to be selected from a drop-down list in ServiceCEO. See the Discontinuing Price Levels section for details.

4. Type a name for the price level in the Name field.
5. In the Services field, type the percentage amount by which you want to change the sell price of services using this price group. This value can be positive or negative.
6. Type the percentage amount by which you want to change products using this price group in the first Products field. This value can be positive or negative.
7. If you typed a value in the Products field, select what about the product you want to change from the Products drop-down list. Your options are:
 - o **Cost.** The product's cost will be adjusted by the amount in the first Products field. If you are using the Inventory Tracking module, the method of cost calculation may vary, depending on what costing type you are using (i.e., serialized, LIFO, FIFO, Average On Hand, Last Purchase Price, etc.)
 - o **Sell Price.** The product's sell price will be adjusted by the amount in the first Products field.
8. Repeat steps 2-7 to create additional price levels.
9. Click **OK** to save your changes and close the Customer Price Levels dialog box.

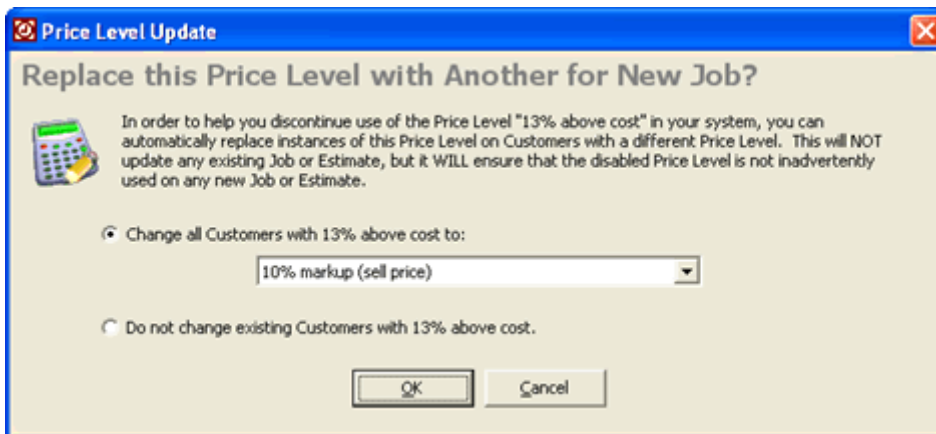
Editing Price Levels

1. Select **Tools > Lists > Price Levels**. The Price Levels dialog box appears.
2. Select the price level you want to add.
3. Edit any of the values as necessary.
4. Repeat steps 2-3 to edit additional price levels.
5. Click **OK**. Your changes are saved.

Deactivating Price Levels

Once created, you cannot delete a price level. However, you can make it inactive so that the price level no longer appears in drop-down lists throughout ServiceCEO. To do so:

1. Select **Tools > Lists > Price Levels**. The Price Levels dialog box appears.
2. Clear the **Active** check box for the price level you want to deactivate. If the price level is assigned to any customers, customer locations, or jobs, then the Price Level Update dialog box appears:



Implementation Checklist

This dialog box lets you control how the inactive price level is replaced, if at all, on your customers and/or jobs. Your choices are:

- **Change all Customers with [deactivated price level] to.** This option will replace the deactivated price level with the price level you select from the drop-down list. The replacement will occur in all customer records and addresses where the deactivated price level appears. In other words, if a customer is using the price level you are deactivating, that price level will be replaced by the one you select now. The implications of this replacement are:
 - All new jobs will use the price level you define here.
 - All old jobs will continue to use the old price level.
- **Do not change existing Customers with [deactivated price level].** All jobs for the customer will continue to use the deactivate price level.

Caution:



If you keep the deactivate price level, it will continue to be used for those customers that have it selected in their Address Information dialog box. However, you will not be able to select it from any of the price level drop-down lists in ServiceCEO.

3. Select the appropriate value from the drop-down list.
4. Click **OK**. The Price Level is not active.
5. Repeat steps 2-4 to deactivate other price levels.
6. Click **OK**. Your changes are saved.

Campaigns

Campaigns Overview

A campaign is a specific marketing activity, such as such as yellow page ads, store fronts, billboard ads, mass emails, holiday cards, direct mail, and telemarketing campaigns. You can manage your campaign efforts from a centralized location in ServiceCEO by utilizing your existing customer base and demographics. Campaigns are comprised of several interconnected features:

- Configuring and maintaining campaigns.
- Assigning tasks to users and/or groups that need to be completed as part of a campaign
- Tracking metrics about the cost and revenue generated by specific campaigns

**Note:**

In versions of ServiceCEO before version 6.0, "campaigns" were known as "marketing".

Campaigns are organized into several main areas:

- Defining Campaign Categories
- Defining Campaigns
- Campaign Tasks
- Defining Demographics

Campaign Metric Tracking

You can track the performance of your campaigns using two reports:

- **Revenue report.** Select Marketing from the **Select the order / groups in which the items will appear** drop-down list.
- **Job Costing report.** Select the **Campaign - Summary** or **Campaign - Details** print style.

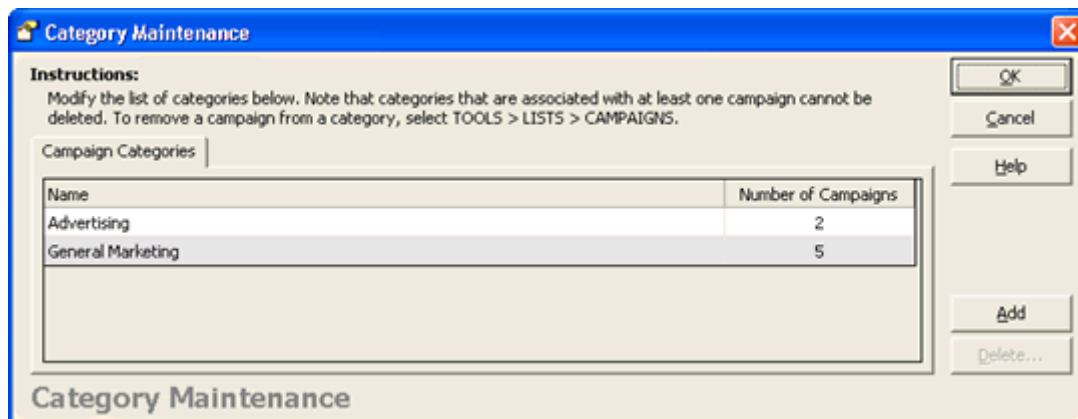
Campaign Categories

Before you create a campaign, you can create different categories in which to save your campaigns. You can do this in the Category Maintenance dialog box.

The value displayed in the Number of Campaigns column indicates how many campaigns are located in this category in the Campaign Setup & Maintenance dialog box. This value is read-only.

Creating a Campaign Category

1. Select **Tools > Lists > Campaign Categories**. The Category Maintenance dialog box appears:



Implementation Checklist

2. Click **Add** to add a new category.
3. Type the category's name in the Name field.
4. Repeat steps 2-3 to add more categories.
5. To delete a category, highlight the category and click **Delete**. Note that you will only be able to delete categories without any campaigns attached to it.

Editing a Campaign Category

1. Select **Tools > Lists > Campaign Categories**. The Category Maintenance dialog box appears.
2. Make any necessary edits to the appropriate campaign categories.
3. Click **OK**.

Deleting a Campaign Category

Note that you can only delete categories without any campaigns attached to it. If at least one campaign belongs to a category, the Delete button will not be active. You will need to remove all campaigns from the category before you can delete it.

1. Select **Tools > Lists > Campaign Categories**. The Category Maintenance dialog box appears.
2. Highlight the campaign category you want to delete.
3. Click **Delete**.
4. Click **OK**.

Defining Campaigns

A campaign enables you to track what marketing efforts are being conducted and how effective they are in generating revenue for your company.

Creating Campaigns

To create a campaign:

1. Select **Tools > Lists > Campaigns** or press **CTRL + F7**. The Campaign Setup & Maintenance dialog box appears.

2. Highlight the category in which you want your new campaign to appear and click **New Campaign**. The Campaign Details section will appear with no data.
3. Type a name for the campaign in the **Name** field.
4. Select the campaign's category from the **Category** drop-down list. See the Defining Campaign Categories section for details.
5. Select the date the campaign will start from the **Start Date** calendar box. The default value is today's date.
6. Select the date the campaign will end from the **End Date** calendar box. The default value is today's date.
7. Enter the amount budgeted for the campaign in the **Budget Amount** field. The default value is \$0.00.
8. Enter the actual amount spent during the campaign in the **Actual Amount** field. The default value is \$0.00.
9. If necessary, enter any notes into the **Notes** field.

Implementation Checklist


10. The **Keep Available in Drop-Downs** section controls when the campaign will be present in the Campaign fields elsewhere in ServiceCEO. To define these values:
 1. Select the **From** option button corresponding to the date at which you want the campaign to start being displayed in the drop-down lists:
 - **Campaign Start Date.** The campaign will start being displayed on the date entered in the Start Date field.
 - **Specific Date.** Select the date you want the campaign to start appearing from the calendar box.
 2. Select the **Until** option button corresponding to the date at which you want the campaign to start being displayed in the drop-down lists:
 - **Campaign Start Date.** The campaign will start being displayed on the date entered in the Start Date field.
 - **Specific Date.** Select the date you want the campaign to start appearing from the calendar box.
 - **Always.** The campaign will always appear in the drop-down lists.
11. Add tasks to the campaign. See the Campaign Tasks section for details.
12. Click **Save and Close**.

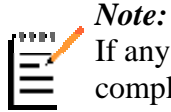
Editing Campaigns

1. Select **Tools > Lists > Campaigns** or press **CTRL + F7**. The Campaign Setup & Maintenance dialog box appears.
2. Expand the category tree and select the campaign you want to edit.
3. Make any necessary edits in the Campaign Details and/or Tasks sections.
4. Click **Save and Close**.

Deleting Campaigns

You cannot delete a campaign if it is selected in the Campaign drop-down list in at least one customer or job record. While you cannot make the campaign inactive either, you can adjust the campaign's **Keep Available in Drop-Downs** fields so that the campaign cannot be selected in the future.

1. Select **Tools > Lists > Campaigns** or press **CTRL + F7**. The Campaign Setup & Maintenance dialog box appears.
2. Expand the category tree and select the campaign you want to delete.
3. Click .

**Note:**

If any tasks are associated with the campaign, the tasks which are already complete will NOT be deleted and will instead be detached from the Campaign. Tasks that are not started will be deleted.

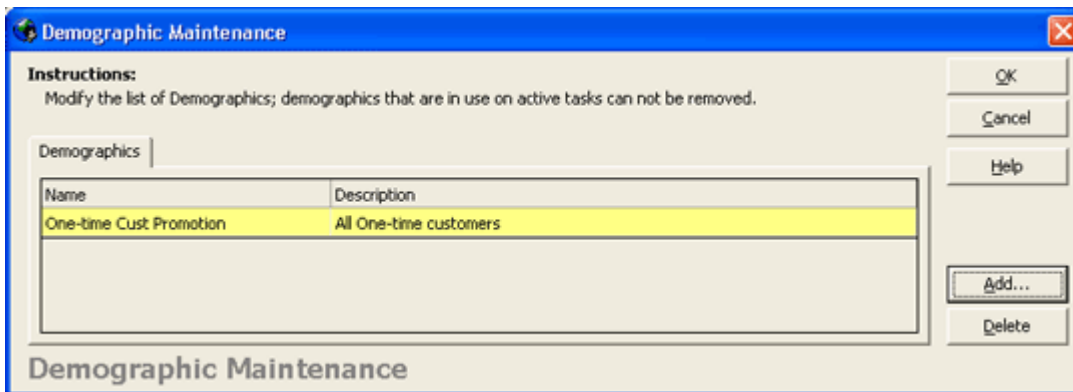
Demographics

In ServiceCEO, a demographic is a selected group of customers based on characteristics and/or filters you define. You can create a demographic and then reuse it in multiple campaigns without redefining your filter criteria. Demographics are typically used to define the audience for Campaign Tasks.

Creating Demographics

To create a demographic:

1. Select **Tools > Lists > Demographics**. The Demographic Maintenance dialog box appears.



2. Click **Add**. The Demographic Builder dialog box appears.

Implementation Checklist

Demographic Builder

Demographic

Instructions:
Select from the options below to define a demographic - click OK when done.

Zone | Date of Service | Date Entered/Contacted
Campaign | Custom Fields | Profiles | Contact Interval
Status | Product/Service

Only include Customers with the following status settings:

- Active-One time
- Active-Recurring
- Archived
- Inactive
- Prospective

Enter a name and description

Name: One-time Cust Promotion

Description: All One-time customers

Select which Customer locations to target

- Target the locations specified by the filter tabs (default).
- Target the PRIMARY locations of the specified Customers.
- Target the BILL TO locations of the specified Customers.

Select contacts to target

- Primary Contact (default)
- All Contacts (multiple records per location)

Select the order that you would like the output to be sorted

- Alphabetically by Name (default)
- ZIP Code

Cancel OK



Tip:

The filters in the Demographic Builder are identical to the filters in the Marketing Module report.

3. Type a name for the demographic in the **Name** field.
4. Type a description of the demographic in the **Description** field.
5. Select the check boxes corresponding to the customer locations you want to include in the demographic:
 - **Target the locations specified by the filter tabs.** All locations that match the criteria you define in the filter tabs will be included. This check box is selected by default.
 - **Target the PRIMARY locations of the specified Customers.** Will include only the primary locations for customers matching your criteria (as defined in the demographic filters).
 - **Target the BILL TO locations of the specified Customers.** Will include only the bill to address for customers matching your criteria (as defined in the demographic filters).

**Tip:**

You can select multiple customer location check boxes to further refine your location criteria. For example, if you select the first two check boxes, the demographic will include only the primary location for every customer returned by your filter criteria.

**Note:**

The Primary and Bill To addresses are defined in the customer's Address Information dialog box. See the Defining a Customer Address topic of the ServiceCEO Help System for more details.

6. Select the option button corresponding to the contacts that you want to include in the demographic:
 - **Primary contact.** Will only include each customer's primary contact. This option button is selected by default. (The primary contact is the first contact listed in the customer's Contact Name drop-down list.)
 - **All contacts.** Will include all customer contacts.
7. Select the option button corresponding to the order in which the output will be sorted:
 - **Alphabetically by Name.** This option button is selected by default.
 - **ZIP Code.**
8. Select your filter criteria from the left side of the dialog box. For details, see the Demographic Filters section.
9. Click **OK**. The demographic is saved.

Caution:

You cannot edit a demographic once it has been created, so be sure that the demographic contains the correct filters before you save it. If you want to preview a filter setup to review the results, preview the mailing labels output using the Marketing Module report. This report uses the same filters as the Demographic Builder.

Deleting Demographics

You cannot delete a demographic that are used for any active or completed campaign tasks. If the demographic is not in use, follow these steps:

1. Select **Tools > Lists > Demographics**. The Demographic Maintenance dialog box appears.
2. Select the demographic you want to delete.

Implementation Checklist

3. Click **Delete**. A confirmation dialog box appears.
4. Click **Yes**. The demographic is deleted.
5. Repeat steps 2-4 to delete additional demographics.
6. Click **OK**.

Demographic Filters

The demographic filter consists of nine tabs. Click the tab to define a filter on that tab. You can define filter settings on as many or as few tabs as necessary. The tabs are all described in detail below.



Tip:

These filters also appear on the Marketing Module report.

Status

To filter the demographic by status:

1. Select the **Only include Customers with the following status settings:** check box.
2. Select the check box corresponding to the customer statuses you want to include in the demographic.

Product/Service

To filter the demographic by product/service:

1. Select the **Only include Customers scheduled for the following Products/Services:** check box. Past jobs are included unless you also define a date filter.
2. By default, the master product and service categories appear in a tree format. To expand the list, click the appropriate plus box.
3. Select the check box corresponding to the product/services you want to include in the demographic filter. All customers scheduled for service that includes the selected product/service will be included in the filter.



Tip:

If you select the check box corresponding to a master category, all products/services under the category will be selected.

For more details, read the Master Service-Product Categories Overview section.

Campaign

To filter the demographic by campaign:

1. Select the **Only include Customers with the following Campaigns:** check box.
2. Select the campaign for which you want to filter the demographic. Only customers who are part of the selected campaign(s) will be included in the current campaign.

Custom Fields

To filter the demographic by custom field:

1. Select the check box corresponding to the custom field you want to filter.
2. Type or select the value for which you want to filter the custom field.
3. Repeat steps 1-2 to filter by additional custom fields.

For more on custom fields, please read the Defining Custom Fields topic of the ServiceCEO Help System.

Profiles

To filter the demographic by company profile:



Tip:

The Profile tab will only appear if the use of company profiles has been enabled in ServiceCEO. For more on profiles, read the Creating Multiple Company Profiles topic of the ServiceCEO Help System.

1. Select the **Only account for Customers with the following Profile association:** check box.
2. Select the check box(es) associated with the profile(s) for which you want to filter the demographic.

Contact Interval

To filter the demographics' customers by their contact interval settings:

1. Select the check box corresponding to the contact interval that you want to honor. If needed, you can select multiple contact settings.

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Zone

To filter the demographic by zone:

1. Select the **Only include Customers with a location in one of the following Zones:** check box.
2. Select the check box(es) associated with the zone(s) for which you want to filter the demographic.

For more details, read the Zone Manager section.

Date of Service

To filter the demographic by the job's date of service:

1. Select the **Filter by a Date Range** check box.
2. Select the option button corresponding to the type of date range you want to use:
 - **Only include Customers with service in the following date range.** This option will include customers who have at least one active job, schedule, or project scheduled during the date range defined below.
 - **Only include Customers whose last completed service occurred in the following date range.** This option will include customers whose most recently completed job, schedule, or project falls within the date range defined below.
3. Select the start date from the Start calendar box.
4. Select the end date from the End calendar box.
5. Select the type of records for which you want to filter from the Account for drop-down list. Your choices are:
 - **All Records.** Includes Jobs, Schedules, and Estimates.
 - **All Estimates.** Only includes estimates.
 - **All Jobs.** Includes Jobs, Schedules, and Projects.
 - **Recurring Jobs.** Only includes schedules (jobs with a defined frequency).
 - **One-Time Jobs.** Only includes jobs being performed once.
 - **Reservice Jobs.** Only includes reserviced jobs. For more on the reserviced jobs fields, please read the Reservicing Jobs topic of the ServiceCEO Help System.



Tip:

In the Date of Service tab of the Demographic Builder, projects will be returned if you select All Jobs or Recurring Jobs from the Account for drop-down list.

Date Entered/Contacted

To filter the demographic by customers' entered or contacted dates:

1. To filter by entered date, select the **Filter by date Customer was entered** check box. Only customers that were created during the date range will be included in the demographic.



Note:

The Date Entered field is located on the customer's General tab.

2. To filter by the customers last contacted date (as defined in the Customers Detail Tab), select the **Filter by date Customer was last contacted** check box and the contact type by which you want to filter from the drop-down list. Your choices are Mail, Voice, and E-mail.
3. Select the filtering option button you want to use:
 - **Between specific dates.** Select a date range from the two drop-down lists. Only customers that were created or contacted during the date range will be included in the demographic.
 - **Between relative dates.** These dates will be relative to the date on which the demographic is run.
 - Type the amount of days you want the date range to include in the number field.
 - Select the relative amount from the drop-down list.

For example, if you wanted to create a demographic that included everyone that had been contacted by e-mail in the last 60 days, you would select the second **filter** option button, select **E-mail** from the drop-down list, select the second **between** option button, and setup **60 Days Before** and **0 Days After**.

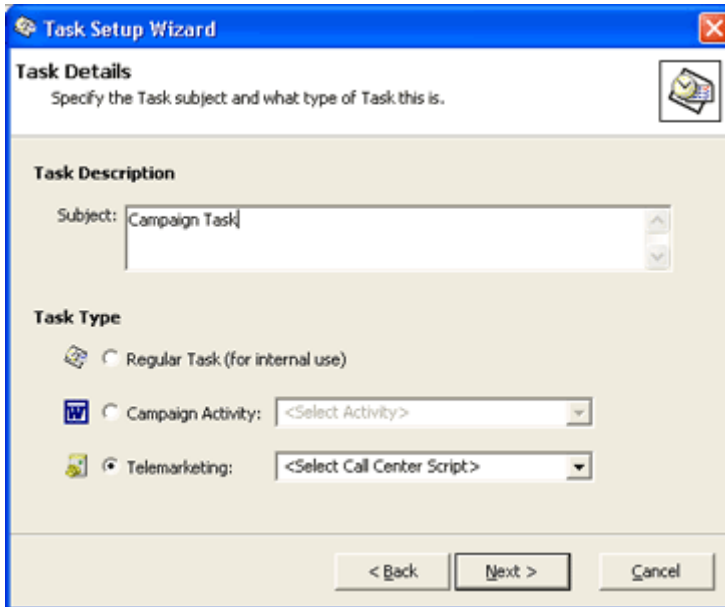
Campaign Tasks

Creating Campaign Tasks

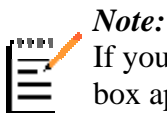
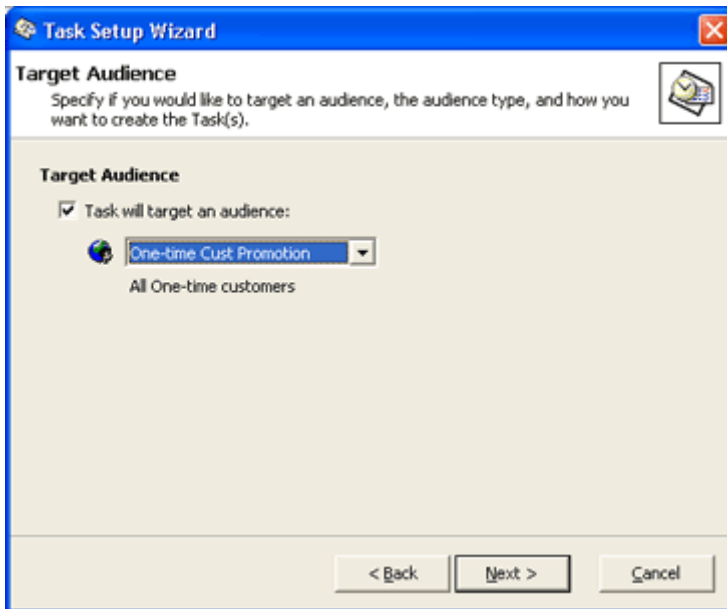
To create a campaign task:

1. Open the campaign to which you want to add a task.
2. Click **Add**. The Task Setup Wizard appears.

Implementation Checklist



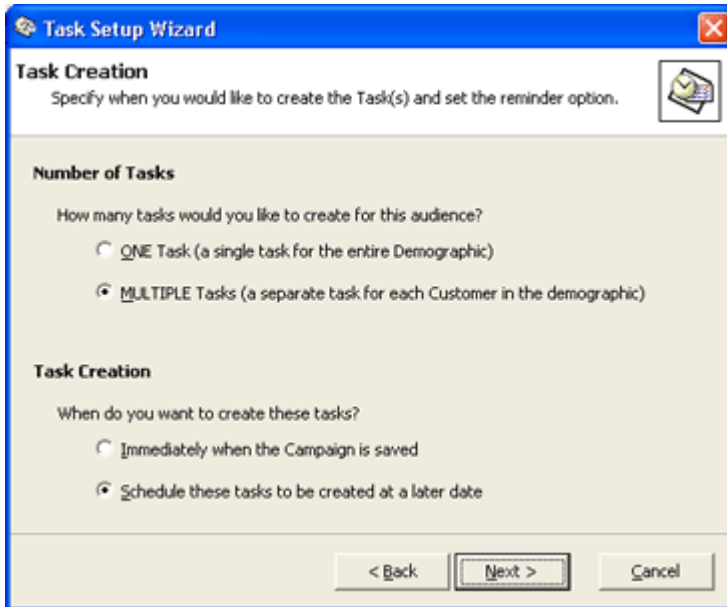
3. Type a title for the task in the Subject field.
4. Select the option button corresponding to the type of task you wish to create. Your options are:
 1. **Regular Task.** A normal task.
 2. **Campaign Activity.** Includes:
 - **Microsoft® Word® Mail Merge.** Create a mail merge document for this campaign. For more on mail merges, see the Running a Mail Merge topic of the ServiceCEO Help System.
 - **Mailing Labels.** Creates a Microsoft Word document containing mailing labels for the task's audience.
 - **Copy E-mails.** Copies the e-mail addresses for the task's audience to your clipboard so that you can paste them into an e-mail application.
 - **Microsoft Excel® Expert.** Exports the customers to Microsoft Excel.
 3. **Telemarketing.** Used to link a task to a call center record. The values that appear on this list correspond to the call types you've created. (See the Defining Call Types topic of the ServiceCEO Help System for details.) Selecting a call type will automatically run the call type when the task is begun.
5. Click **Next**. The next page of the Task Setup Wizard appears.

**Note:**

If you are creating a Microsoft Word Mail Merge, the Select Template dialog box appears. See the Defining Mail Merge Templates topic of the ServiceCEO Help System for details.

6. In many instances, the **Task will target an audience** check box will be selected by default, meaning that the task's audience will be controlled by a demographic. If it is not selected and you do not want to use an audience/demographic, go to step 8.
7. If the Task will target an audience check box is selected, select a value from the drop-down list. Your options are:
 - **Edit List.** Select if you want to define a new demographic. The Demographic Maintenance dialog box will appear. See the Demographic Setup section for details.
 - All existing demographics will appear in the drop-down list. Select one to use it for the current task.
8. Click **Next**. The Task dialog box appears.
9. Define the task details in the usual manner. See the Creating a Task topic of the ServiceCEO Help System for details.
10. Click **OK**. If you are creating a regular task or a Telemarketing task (based on your selection from the first page of the Task Setup Wizard) and you selected an audience, the third page of the Task Setup Wizard appears. If you selected Campaign Activity, the task will be saved and appears on the Campaign page.

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11. Select the option button corresponding to how many tasks you want to create for the audience:
 - Select **ONE Task** to create one task that covers the entire demographic audience.
 - Select **MULTIPLE Tasks** to create one task for each customer in the task's demographic. The Task Creation section will become active.



Caution:

Depending on your demographic, selecting multiple tasks could create a large number of tasks.

12. Select the option button corresponding to when you want to create the multiple tasks. For more, see the Executing Campaign Tasks section.
 - **Immediately when the Campaign is saved.** The task will be created when you click **Next**.
 - **Schedule these tasks to be created at a later date.** A reminder task will appear when you click **Next**.
13. Click **Next**. If you selected the Schedule these tasks to be created at a later date option button, a reminder task appears.
14. Change the date of the reminder task to the date to which you want to be reminded to create the tasks.
15. Assign the task if necessary.
16. Click **OK**. The task appears on the campaign dialog box as well as the Tasks section of Office Duties.

Deleting Campaign Tasks

Note:



Deleting a parent task (a task that created one task for each customer in its demographic) will delete all associated child tasks that have not yet been completed. However, any child tasks that have already been completed will not be deleted.

To delete a campaign task:

1. Open the campaign from which you want to delete a task.
2. Select the task you want to delete.
3. Click **Delete**. A warning dialog box appears.
4. Click **Yes**. The task is deleted from the campaign.

Executing Campaign Tasks

Creating a multiple task (a task where you selected **Multiple Tasks** from the final page of the Task Setup Wizard) will create one task for each member of the task's demographic. You can create these in two ways:

- **Immediately after saving the campaign.** The series of tasks will automatically be created and will appear on the Tasks tab of the Office Duties area.
- **At a later date.** The series of tasks will be created at a later date. You will be prompted to create a "reminder" task. Once created, the reminder task will appear identical to a normal task except for the Begin Task button. Click **Begin Task** to run the task. The multiple tasks are created and will appear on the Tasks tab of the Office Duties area.

Caution:



If you use the **At a later date** option, the customers in your demographic may be different then if you created the tasks immediately. For example, if you defined a demographic to include all customers with a job scheduled 30 days before and 30 days after the run date, the demographics' customers will vary depending on the date on which you begin the task.

Starting a Task

If the task requires an action (like opening a Call Center script or creating mailing labels), you must begin the task to start this action. To begin the task, perform one of the following actions:

- Open the task record and click **Begin Task**.
- Right-click the task and select **Begin Task** from the pop-up menu.



Tip:

Tasks that require starting will be distinguished by a green arrow on their icon:



Once begun, the task will have a substatus of “In Progress” so that other users will not attempt to begin working on the same task, or at least be warned that it has been opened by another user.

At the conclusion of the action, the task record appears with a default status of **Completed Task** and substatus of **Completed as Requested**. You can keep these values or, if the task is not yet completed, edit them before saving.

Defining Substatuses

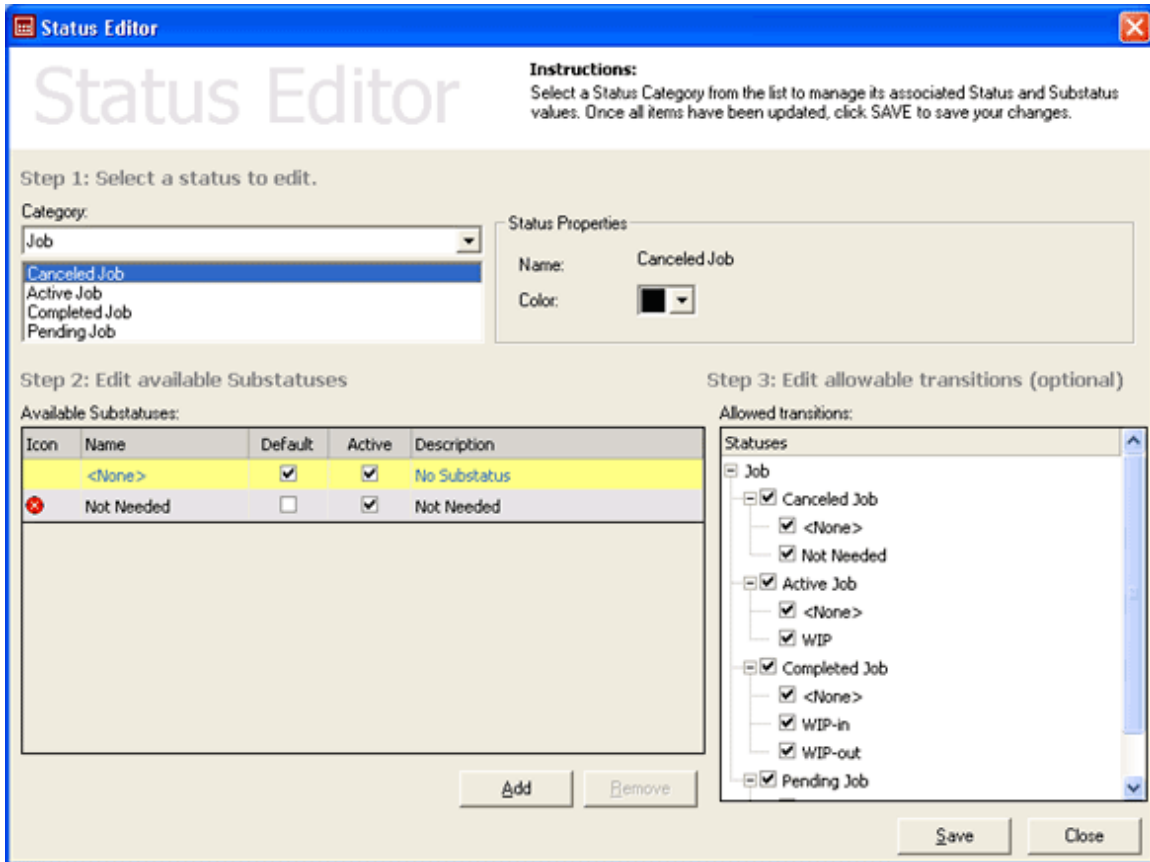
Substatuses enable you to define the state of your jobs, estimates, and tasks with a greater degree of accuracy. For example, you may want to distinguish between different types of Active Jobs. To do this, you could create substatuses for the Active Job status. Once defined, you would then select the appropriate substatus from each Job's **Substatus** field.

1. Select **Tools > Lists > Job Status** or press **CTRL+F10**. The Configure Statuses dialog box appears.



Tip:

The **Status Name** and **Description** fields of the default system statuses cannot be edited or deleted.



This dialog box enables you to define and control substatuses for all of the system's Job, Estimate, and Task statuses. If you like, you can also control which substatuses can be assigned from other substatuses.



Note:

ServiceCEO's statuses are standard and cannot be edited.

Adding/Editing Substatuses

To add or edit substatuses:

1. Select the category of status to which you want to add or edit a substatus by selecting Job, Estimate or Task from the Category drop-down list.
2. If necessary, select a color from the Color drop-down list. The color you select will be displayed for all jobs, tasks and/or estimates with that status on the ServiceCEO calendar.
3. Select the status for which you want to add or edit a substatus from the list box. All of the statuses' substatuses will appear in the Step 2 list box.

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Note:

All statuses automatically have a default status of <None>.

4. If adding a new substatus, click **Add**. A new substatus appears in the Step 2 list box.
5. Define or edit the substatures' values as necessary:
 - **Icon.** Select the icon you want to display on the Dispatch Board from the drop-down list. All jobs, estimates, or tasks with this substatus will display the icon you select here.
 - **Name.** The title of the substatus.
 - **Default.** Select this check box to make the current substatus the default value of its status. Note that only one substatus can be the default of a status.
 - **Active.** Activated by default, this check box makes the substatus visible in ServiceCEO.
 - **Description.** A brief explanation of the substatus.



Note:

In previous versions of ServiceCEO, only Active Jobs could have icons. However, with 6.0, 130 new icons are available to help you distinguish between your Jobs, Tasks, Estimates and Roles.

6. In the allowed transactions dialog box, select the check box corresponding to all status or substatures to which you want to allow the user to change. In other words, if the check box is selected, then users will be able to change the current substatus to the selected status or substatus in the system.



Note:

If you select or deselect a status check box, you will be prompted to permit or restrict access all substatures under this status. Clicking Yes will select or deselect all of the substatures under the status.

7. Repeat steps 1-5 to add or edit more substatures.
8. When complete, click **Save** to save your changes.
9. Click **Close**.

Once configured, ServiceCEO will verify that substatus changes are allowed before saving a substatus edit. The following areas of ServiceCEO are affected:

- New Job
- Existing Job
- Customer Jobs tab
- New Tasks
- Tasks tab of the Office Duties area
- Completion tab of the Office Duties area
- Canceling jobs via the Calendar



Caution:

Only one substatus can be marked as the default value of the primary status.

Deleting Substatuses

Substatuses that are in use for an active or completed record cannot be deleted. For substatuses that can't be deleted, we recommend that you deactivate the substatus by clearing the Active check box for the substatus. This means that existing records will continue to use this substatus, but it will not be able to be assigned to any new records moving forward.

To delete a substatus:

1. Select **Tools > Lists > Job Status** or press **CTRL+F10**. The Status Editor dialog box appears.
2. Select the status category in which the substatus you want to delete is located.
3. Click in the **Substatus** field for the status you want to delete.
4. Click **Remove**. A Confirmation dialog box appears.
5. Click **OK**. The substatus is deleted.
6. Repeat steps 2-5 to delete additional substatuses.
7. Click **OK**. The Status Editor dialog box closes.

To deactivate a substatus:

1. Select **Tools > Lists > Job Status** or press **CTRL+F10**. The Status Editor dialog box appears.
2. Select the status category in which the substatus you want to delete is located.

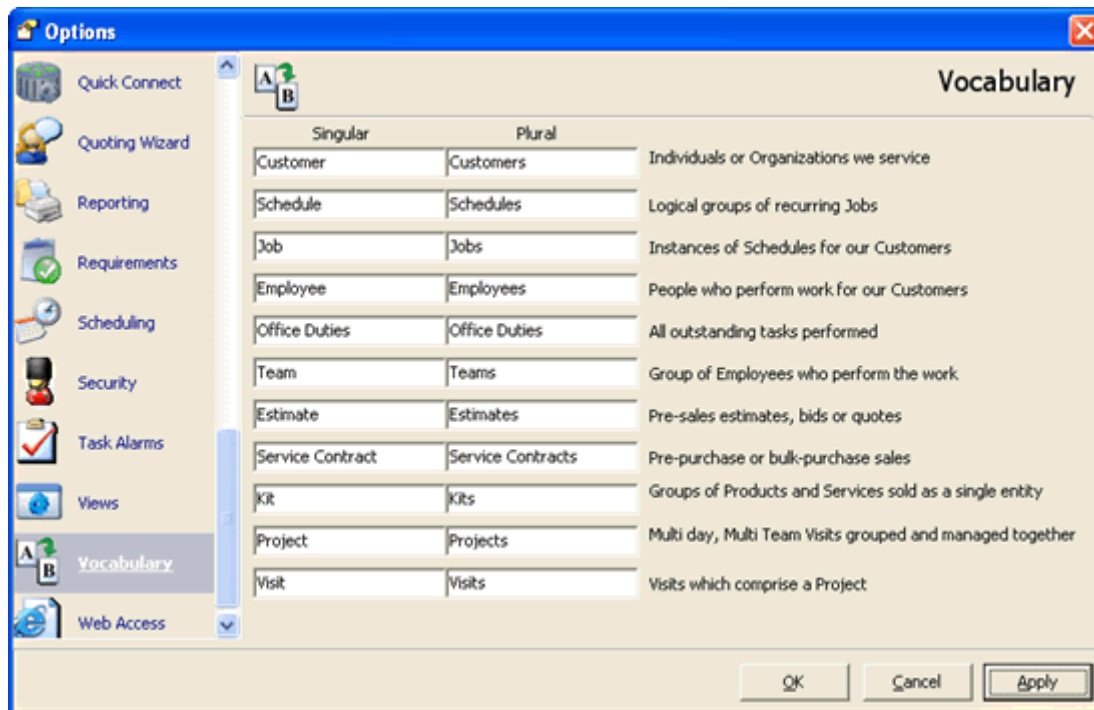
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3. Click in the **Substatus** field for the status you want to deactivate.
4. Clear the Active check box.
5. Repeat steps 3-4 to deactivate additional substatuses.
6. Click **OK**. The Status Editor dialog box closes.

Defining Vocabulary

The Vocabulary option lets you customize common ServiceCEO terms.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Vocabulary** from the Categories bar. The Vocabulary Options dialog box appears.



3. Type a new name for any field that you would like to customize. The fields on this page are described below in the order in which they appear:
 - **First field.** The name for the individuals/organizations to which you provide services and or products. This setting defaults to "Customer".
 - **Second field.** The name for a job with a frequency, or service plan. Defaults to "Schedule".
 - **Third field.** The name for the work scheduled to be performed for your customers. This defaults to "Jobs".

- **Fourth field.** The name for the people who perform tasks for your customers. This field defaults to "Employees". Customized Examples: Technicians, subcontractors, cleaners, service providers.
 - **Fifth field.** The name for the area of the application in which you will perform various financial and inventory tasks. This field defaults to "Office Duties". Customized examples: Financials, Completions, To Dos, Pending Posting.
 - **Sixth field.** The name for a group of employees who perform tasks. This field defaults to "Teams". Customized Examples: Crews, Routes, Technician, Trucks, etc.
 - **Seventh field.** The name for a pre-service plan for your customers. This field defaults to "Estimates".
 - **Eighth field.** The name for a contract for service between you and your customers. Defaults to "Service Contracts".
 - **Ninth field.** The name for a grouping of products and services. Defaults to "Kits".
 - **Tenth field.** The name for a set of services, products, kits, and/or tasks that are scheduled under multiple visits but all appear on one invoice. Defaults to "Projects".
 - **Eleventh field.** The name for the individual jobs that make up a project. Defaults to "Visits".
4. Click **OK**.



Tip:

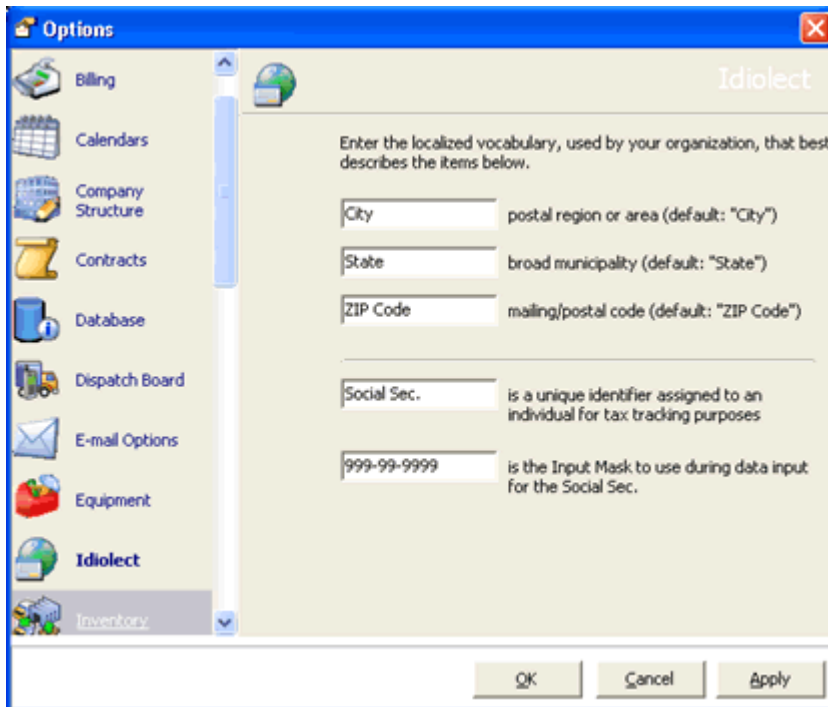
The name of the third icon on the Navigator bar is controlled by the plural value of the second, or "schedules", field.

Defining Idiolect

Idiolect is a linguistic pattern unique to speakers of a language or dialect. In terms of ServiceCEO, idiolect enables you to customize the terms used in ServiceCEO to match those of the country or region in which you are operating. You can customize five different fields. These fields, which default to the U.S. standards, are described in more detail below.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Idiolect** from the Categories bar. The Idiolect Options dialog box appears.

Implementation Checklist



3. Type a new value into any field whose value you want to customize. These fields are described in order below:
 - **First custom field.** The name for your the postal region or local area. This field defaults to "City".
 - **Second custom field.** The name for your broad municipality. This field defaults to "State".
 - **Third custom field.** The name for your mailing or postal code. This field defaults to "ZIP Code".
 - **Fourth custom field.** The name for the unique identifier assigned to an individual for tax tracking purposes. This field defaults to "Social Security No".
 - **Fifth custom field.** The format of the unique identifier (the fourth custom field). This field defaults to the U.S. Social Security Number format: "999-99-9999". To change this value, use "A" (uppercase, not lowercase) for alphanumeric characters and "9" for numbers.
4. Click **OK**.

Defining Note Types

Many areas of ServiceCEO let you create notes for customers, employees, jobs, and estimates. These notes can be used to track performance, capture comments, or save any other necessary information. For reporting purposes, ServiceCEO has a master list of note types that allows you to manage, group and report on the notes that users create. You can add to, edit, or delete these note types as you see fit.

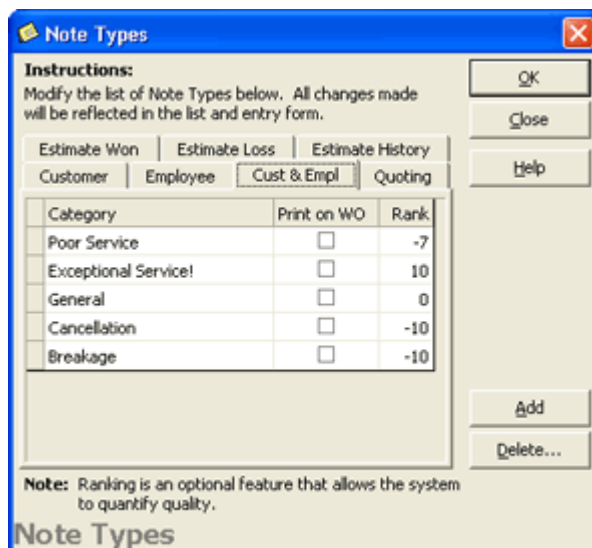
Note Type Tabs

There are seven different categories of note types:

- **Customer** - Customer note types are available on a customer's Notes tab. An example of a Customer note type is "Client Call Details."
- **Employee** - Employee note types are available on an employee's Personnel File tab. An example of an Employee note type is "Training Update."
- **Cust & Empl** - Cust & Empl note types are available when recording customer feedback through the feedback wizard. These items also appear with the standard Customer and Employee notes in their usual locations. An example of a Cust & Empl note type is "Poor Service."
- **Quoting** - Quoting note types are available when a user cancels or ends a call center quote during the quoting wizard process. These note types help you track why quotes are abandoned. An example of a Quoting note type is "Did Not Want To Give Name."
- **Estimate Won** - Estimate note types help the company track why a customer chose your bid over others. An example of an Estimate Won note type is "Best Price."
- **Estimate Loss** - Estimate Loss note types help the company track why a customer chose a competitor's bid over your company's estimate. An example of an Estimate Loss note type is "Staying with current provider."
- **Estimate History** - Estimate History note types are available when adding a note to an estimate. An example of an Estimate History note type is "Progress Update."

Adding New Note Types

1. Select **Tools > Lists > Note Types** or press **CTRL+F2**. The Note Types dialog box appears.



Implementation Checklist

2. Select the appropriate tab for the note type you would like to add.
3. Click **Add**. A blank row will appear.
4. Double-click the blank cell in the **Category** column.
5. Type a descriptive name for the new note type.
6. Some tabs have extra check boxes, including:
 - o **Customer** and **Cust & Empl** tabs. Select the **Print on WO** check box if you would like the note type printed on work orders.
 - o **Estimate History**. Select the **Print by Def.** check box to print these notes on reports.
7. If desired, type a numeric rank for the new note type in the **Rank** field. Adding a rank will enable ServiceCEO to numerically quantify the notes. Type a positive value for good note types; type a negative value for negative note types.

Note:



The **Rank** field enables you to assign a value to a note. You can use these values to track employee performance or customer satisfaction. Note types that you wish to not be used in these calculations should have a zero rank, as zero rank items are not included in any ranking calculations.

8. Click **OK**.

Editing Note Types

1. Select **Tools > Lists > Note Types** or press **CTRL+F2**. The Note Types dialog box appears.
2. Select the tab that contains the note type you want to edit.
3. Select the note type you want to edit.
4. Make any necessary changes to the note type. You can change the note's name, rank, or choose to include or remove the note from printed reports.
5. Click **OK**.

Deleting Note Types

Please be aware that any note type that has already been used cannot be deleted.

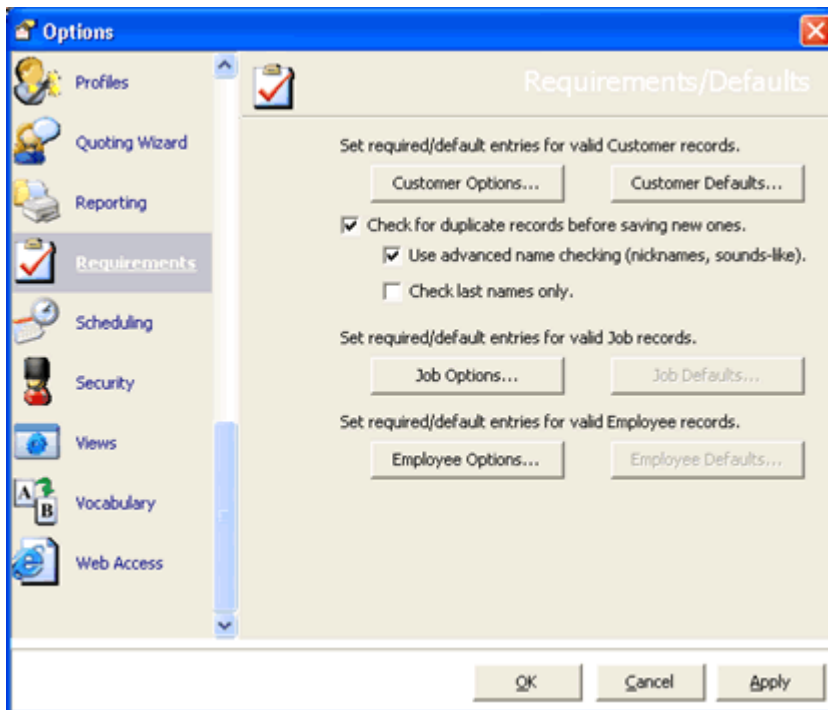
1. Select **Tools > Lists > Note Types** or press **CTRL+F2**. The Note Types dialog box appears.
2. Select the tab that contains the note type you want to delete.

3. Select the note type you want to delete.
4. Click **Delete**.
5. Click **OK**.

Defining Requirements

You can control which fields must be entered before a record is created in ServiceCEO. These required fields are defined in the Requirements Options dialog box. To open this dialog box:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Requirements** from the Categories bar. The Requirements/Defaults Options dialog box appears.



You can control the requirements for three types of records:

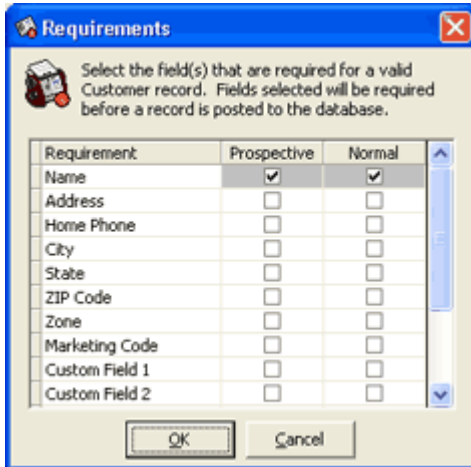
- Customers
- Jobs
- Employees

Customer Options

Customer Requirements

You can define what fields must be entered before a customer record can be saved. To do so:

1. From the Requirements/Defaults Options dialog box, click **Customer Options**. The Requirements dialog box appears.



2. Select the appropriate **Prospective** check box for each field you want to make required when creating a prospective customer. Prospective customers are customers without any jobs.
3. Select the appropriate **Normal** check box for each field you want to make required when creating an active customer. An active customer is a customer with at least one job.
4. Click **OK**.
5. Select the **Check for duplicate records before saving new ones** check box to enable ServiceCEO to search all existing customer records before saving a new record. The other two check boxes will become active.

Note:



If this check box is selected, ServiceCEO will, when a user attempts to save a new customer record, check the database for potential duplicate records. If any potential duplicates are found, the Duplicate Warning dialog box appears displaying the customer record(s) that could be considered a duplicate of the new one. You will have the opportunity to either continue creating the new record or switch to the existing record.

6. Select the **Use advanced name checking (nicknames, sounds-like)** check box to have the system search for similar names when checking for duplicate records.
7. Select the **Check last names only** check box to have the system check only last names when searching for similar names.

Note:



Due to the complexity of many names, we can't guarantee that the advanced name checking or check last name functionality will find all of the names one may think are sufficiently similar to the new name. While this functionality will find most of the similar names, for those users uncomfortable with this uncertainty, we recommend that you use the basic duplicate checking feature.

Customer Defaults

You can define the default values for all new customer records. To do so:

1. From the Requirements/Defaults Options dialog box, click **Customer Defaults**. A blank customer record will appear.
2. Enter the values you would want to appear by default for a new customer into the General tab and the Detail tab. You can always edit these values when you are actually creating a new customer.



Caution:

You will not be able to define a default value for all customer fields. For example, you cannot define any location fields as a customer default.

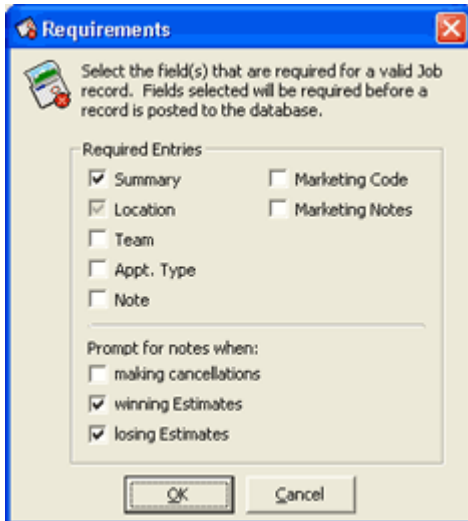
3. Click **Save and Close**. The default values are saved.

Job Options

To define the required fields for a job record:

1. From the Requirements/Defaults Options dialog box, click **Job Options**. The Requirements dialog box appears.

Implementation Checklist



2. Select the appropriate check box in the **Required Entries** section for each field you want to make required when creating a new job.
3. Select the appropriate check box in the **Prompt for notes when:** section for each job action you want to prompt the user to enter a note. Your options are:
 - **Making Cancellations.** You will be prompted to enter a note when cancelling a job.
 - **Winning Estimates.** You will be prompted to enter a note (with the Estimate Won note type) when marking an estimate as won.
 - **Losing Estimates.** You will be prompted to enter a note (with the Estimate Lost note type) when marking an estimate as lost.
4. Click **OK**.

Employee Options

To define the required fields for an employee record:

1. From the Requirements/Defaults Options dialog box, click **Employee Options**. The Requirements dialog box appears.



2. Select the appropriate check box for each field you want to make required when creating a new employee.
3. Click **OK**.

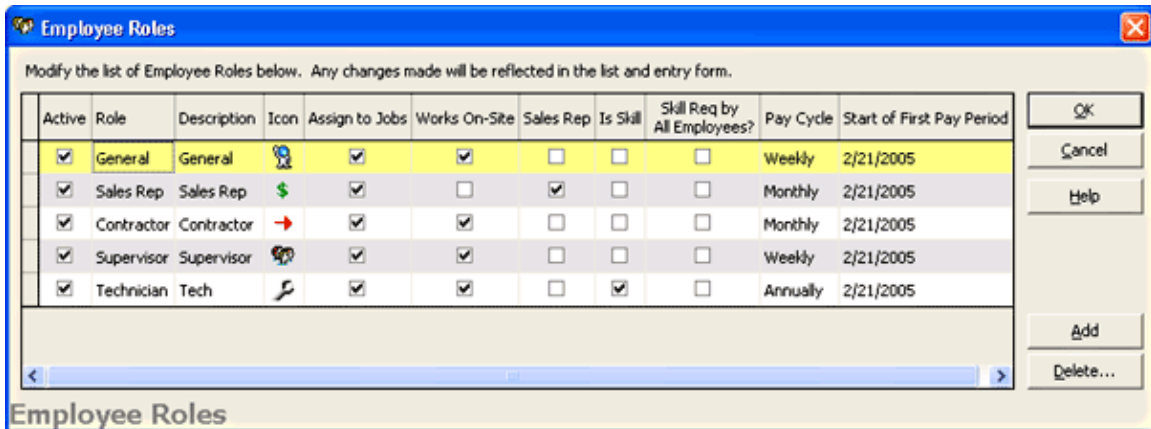
Defining Employee Roles

You can define employee roles to control employee payroll based upon the work they perform on any given job. You can also use roles to organize your employees based upon the duties they perform.

Once defined, you can determine an employee's roles on the employee's Payroll Setup tab.

Adding Employee Roles

1. Select **Tools > Lists > Employee Roles**. The Employee Roles dialog box appears.



Note:

There are two default roles: General and Sales Rep.

Implementation Checklist

2. Click **Add**. A blank row will appear.
3. The **Active** check box is selected by default. Deselect it if you do not want the role to be visible when creating/editing employees.
4. Type a descriptive name for the new employee Role in the Role field.
5. Type a description for the new employee role in the Description field.
6. Select the icon you would like to represent this role from the Role drop-down list. The icon that you select here will be displayed on the Dispatch Board.
7. Select the **Assign to Jobs** check box if you want to be able to assign this role to jobs via the Dispatch Board and job record. Note that if you deselect this check box, employees with this role will not appear on the Dispatch Board or in the job record.
8. Select the **Works On Site** check box to indicate if employees assigned to this role work at your customer's site(s). Because only employees that work on site will be included in payroll calculations (as opposed to employee who work off site, like Sales Representatives), this designation affects payroll calculations for man-hour scheduling. For details on man-hour scheduling, see the Defining Scheduling Options section.
9. Select the **Sales Rep.** check box to indicate if the role is for a Sales Representative. Assigning an employee to a Sales Representative role affects payroll calculations.
10. Select the **Is A Skill** check box to add the job to the Skills list. See the Defining Skills section for more.
11. Select the **Skill Req by All Employees?** check box to require that any job needing this skill will then need ALL employees assigned to the job to have the requisite skill. If this check box is not selected, only one employee will need the skill.

Note:



If you have run the Payroll Setup Wizard, the Pay Cycle and Start of First Pay Period fields will already be populated. In this case, you should not select new values here unless you want to override the common values set in the Payroll Setup Wizard or you are creating a new role. For more, see the Using the Payroll Setup Wizard section.

12. Select the frequency by which you want to run payroll for all employees working under this role from the appropriate Pay Cycle drop-down list. Note that you can select a different pay cycle for each role.

13. If necessary, type the date at which you want the first pay period for this role to start.
14. Repeat steps 2-13 to add additional roles.
15. Click **OK**.

Editing Employee Roles

1. Select **Tools > Lists > Employee Roles**. The Employee Roles dialog box appears.
2. Edit any of the role fields as necessary.
3. Click **OK**.

Deactivating Employee Roles

You cannot delete employee roles that are in use or have been used in the past.

You can deactivate a role as long as it is not currently an employee's default role (on their Payroll Setup tab). Deactivating a role will remove the role from all current configurations and you will not be able to use it moving forward. Keep in mind that if an employee is eligible for a role and the role is deactivated, the employee will no longer be eligible for that role.

1. Select **Tools > Lists > Employee Roles**. The Employee Roles dialog box appears.
2. Clear the Active check box for the role you want to deactivate.
3. Click **OK**. The role is deactivated!

Configure Payroll

Payroll Overview

Follow these steps to configure payroll in ServiceCEO:

1. Run the Payroll Setup Wizard.
2. Define Payroll Options. See the Defining Payroll Options section for details.
3. Define Payroll Security Options. See the Establishing Security Rights section for details.
4. Define XML export options. For information on exporting your Payroll information to a General Ledger application, see the Integrating Accounting section.

Implementation Checklist

5. Define Pay Cycles. Defined during the Payroll Setup Wizard, you can override these settings in the Employee Roles dialog box. See the Defining Employee Roles section for details.
6. Define Time Code defaults. See the Defining Time Codes section for details.
7. (Optional) If needed, define your holidays. See the Defining Holidays topic of the ServiceCEO Help System for details.
8. Configure specific employee records
 - Payroll Setup. See the Employee Payroll Setup Tab topic of the ServiceCEO Help System for details.
 - Work hours. See the Employee Work Hours topic of the ServiceCEO Help System for details.
9. Enter time cards. See the Time Cards Overview topic of the ServiceCEO Help System for more on Time Cards.
10. Calculate paychecks.
11. Review employee payroll history. See the Employee Payroll History Tab topic of the ServiceCEO Help System for details.

Caution:



Depending on your company's business processes, steps 2-9 are optional. Please review the specific sections below to determine if you want to configure this section of ServiceCEO's payroll functionality or not. There are no adverse effects of not using a particular portion of payroll.



Tip:

For more information on payroll, and solutions to common payroll issues, please also read the Frequently Asked Questions about Payroll topic of the ServiceCEO Help System.

The Payroll Setup Wizard

The Payroll Setup Wizard provides you with a quick, easy method of configuring employee payroll in ServiceCEO. It will automatically configure the payroll settings for all of your employees. However, note that after you run the wizard, you can always configure the settings for individual employees in the appropriate employee record.

You can access the Payroll Setup Wizard from several places:

- Click **Payroll Setup Wizard** from the Payroll Options dialog box.
- If you haven't already run the Payroll Setup Wizard, it will appear when:
- You select the **Use Time Cards** or **Pay by Work Hours** check boxes on the Payroll Setup tab of an employee record.
- You access the Payroll or Time Cards tabs of the Office Duties area.

Caution:



You can run the Payroll Setup Wizard at any time. However, running the Wizard again after the first time will override any previous settings you may have made for individual employees.

If you have run the wizard, a reminder will appear, informing you of this fact.

Once you access the Payroll Setup Wizard, an introductory page appears. Click **Next** to open the next page of the Payroll Setup Wizard. The settings on this page will overwrite the **Pay Cycle** and **Start of First Pay Period** fields in the Employee Roles dialog box.

1. Select the date on which you want to start using ServiceCEO for your payroll from the first drop-down list.



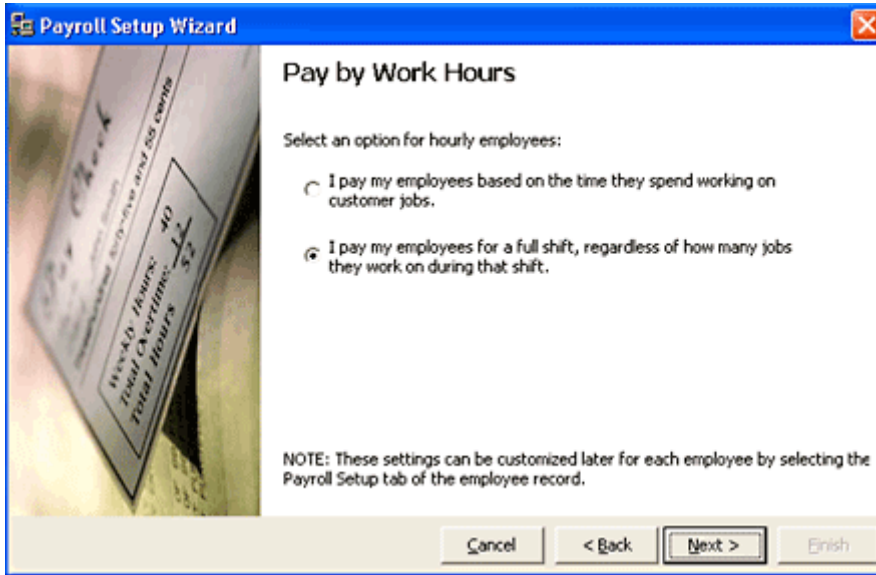
Tip:

Since all payment frequencies operate on a weekly basis, we recommend defining your payroll start date on a Sunday or Monday so that your pay periods conform to a typical week.

2. Select the frequency on which you pay your employees from the second drop-down list.

Implementation Checklist

3. Click **Next**. The third page of the Payroll Setup Wizard appears.



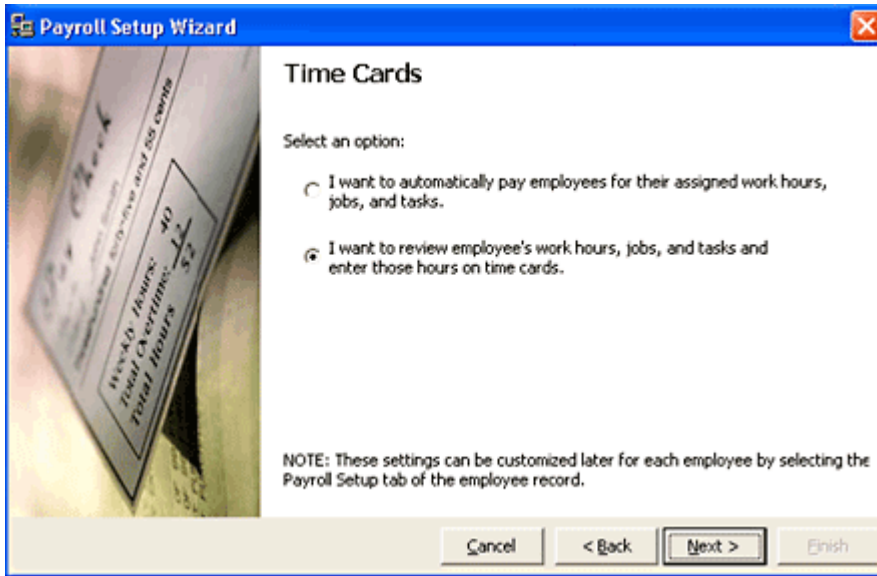
4. Select the option that corresponds to how you pay your hourly (non-salaried) employees:
 - **I pay my employees based on the time they spend working on customer jobs.** This will automatically deselect the **Pay by Work Hours** check box on the Payroll Setup tab for all employees. This option means that employees will only be paid for the jobs and tasks that they work on, just like previous versions of ServiceCEO.
 - **I pay my employees for a full shift, regardless of how many jobs they work on during that shift.** This will automatically select the **Pay by Work Hours** check box on the Payroll Setup tab for all employees. The Pay by Work Hours check box will consider both the employee's paid work hours and the time spent on work assignments (jobs, tasks, etc.) in calculating the employee's pay. Work hours are used to calculate a base pay for the employee, which can be overridden at the job or task level.

Tip:



If using Pay by Work Hours, keep in mind an employee can only be paid for one assignment at one time. This means that you will need to make sure that start and end times of jobs and tasks are properly recorded. If multiple assignments accidentally overlap, ServiceCEO will choose one assignment to determine pay for the overlapping period.

5. Click **Next**. The Fourth page of the Payroll Setup Wizard appears.



6. Select the first option button to pay employees based on their work hours without using Time Cards (i.e., the **Use Time Cards** check box will not be selected on all employees' Payroll Setup tab).

Select the second option button to pay employees based on Time Cards (i.e., the **Use Time Cards** check box will be selected on the Payroll Setup tab of all employee records).

7. Click **Next**. The fifth page of the Payroll Setup Wizard appears.



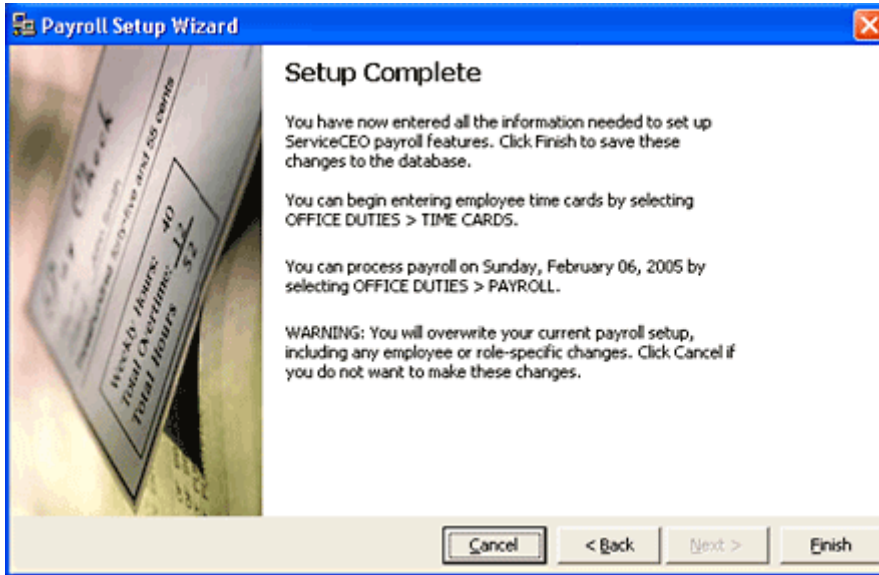
Caution:

The second Time Cards page will only appear if you select the second option button on the first Time Cards page.



Implementation Checklist

8. Select the check box corresponding to the frequency by which you want to enter time cards. You can also define this setting in the Payroll Options dialog box. The frequency you select here will automatically populate the **Enter Time Cards every X days** field in the Payroll Options dialog box.
9. Click **Next**. The Final page of the Payroll Setup Wizard appears.



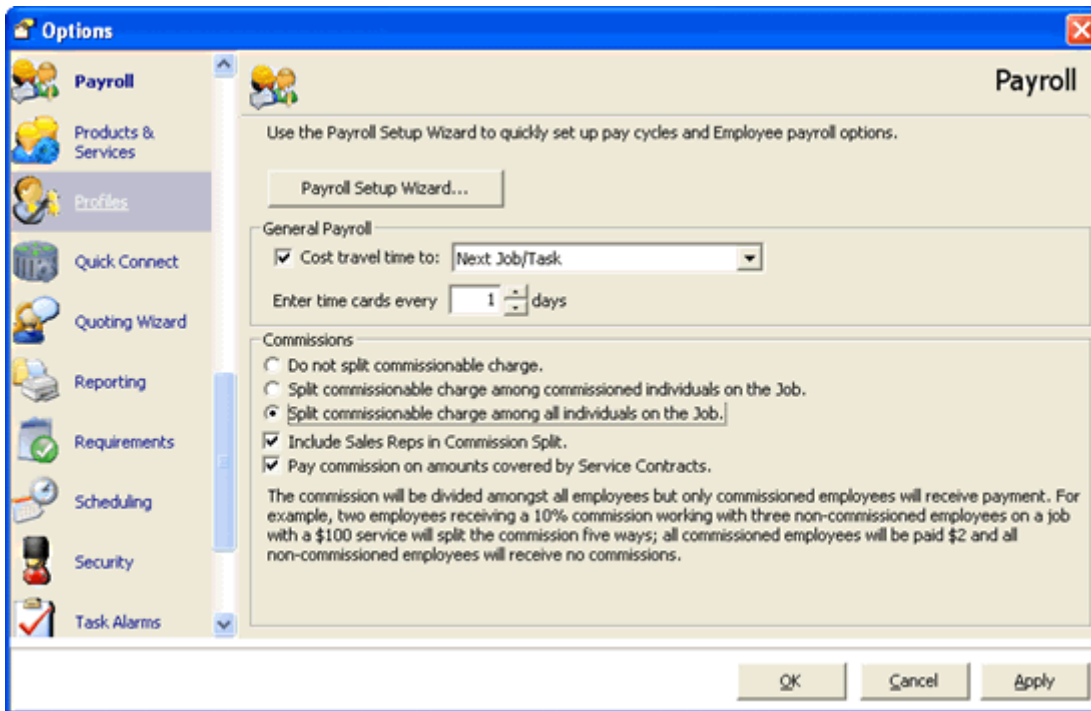
10. Click **Finish**. All of your hourly employees are now configured for payroll.

Defining Payroll Options

You can control your payroll options in the Payroll Options dialog box. Configurable options include the Payroll Setup Wizard, travel time costing, and employee commission splitting.

To define payroll options:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Select **Payroll** from the Categories bar. The Payroll Options dialog box appears.



3. Click **Payroll Setup Wizard** to run the Payroll Setup Wizard. See the Using the Payroll Setup Wizard section for details.
4. To include travel time in your job costing calculations, select the **Cost travel time to:** check box and select a value from the drop-down list:
 - **Previous Job/Task.** Travel time is included in the cost of the job/task immediately preceding the travel.
 - **Next Job/Task.** Travel time is included in the cost of the job/task occurring immediately after the travel.
 - **Both (split).** The cost of the travel time is split between the two jobs/tasks occurring before and after the travel.
5. Select frequency by which you want to enter time cards in the **Enter Time Cards every X days** field. You can also define this setting in the Payroll Setup Wizard.

Implementation Checklist

6. Select the option button corresponding to how you want to pay out commissions to commissionable employees. The three options are:
- **Do not split commissionable charge.** The commission will not be split, meaning that all commissioned employees will be paid their full commission. For example, two employees receiving a 10% commission on a \$100 service would both be paid \$10.
 - **Split commissionable charge among only commissioned individuals on the job.** The commission for the job is split among all commissioned employees. For example, two employees receiving a 10% commission on a \$100 service would be paid \$5 a piece (10% of \$50). Non-commissioned employees do not factor into this calculation.
 - **Split commissionable charge among all individuals on the job.** The commission will be divided amongst all employees but only commissioned employees will receive payment. For example, two employees receiving a 10% commission working with three non-commissioned employees on a job with a \$100 service will split the commission five ways; all commissioned employees will be paid \$2 and all non-commissioned employees will receive no commissions.

To demonstrate, for a commissionable charge of \$100.00 on a job with three employees assigned to it:

	Pay Commissions? (defined via Employee Role or a Service/Product Item)	Tools > Options > Payroll Options setting		
		Do not split commissionable charge	Split commissionable charge among only commissioned employees on the job	Split commissionable charge among all employees on the job
Empl. 1	Yes (10%)	\$10.00	\$5.00	\$3.33
Empl. 2	Yes (20%)	\$20.00	\$10.00	\$6.66
Empl. 3	No	N/A	N/A	N/A

Tip:



Another way of looking at commissionable charge splitting is that ServiceCEO will apply the employee's commission percentage to the total sale of the service, then divide it by the number of employees on the job. In other words:
 $(\text{Sale} * \text{Commission rate}) / \# \text{ of Employees.}$

7. If one of the last two option buttons in the Commission section are selected, the **Include Sales Reps in Commission Split** check box will be selected by default, meaning that your sales representatives will be included in any payroll commission splitting.
To remove sales reps from this commission split, deselect the check box.
8. Select the **Pay commission on amounts covered by Service Contracts** check box to pay a commission on all moneys mentioned in a service contract. For more on service contracts, see the Enabling Service Contracts topic.
9. Click **OK**.

Defining Time Codes

ServiceCEO is shipped with a set of time codes designed to meet the needs of most businesses. Time codes provide three settings to the time blocks to which they are assigned:

- **Availability.** Determines if the employee is available or unavailable for work.
- **Hourly Employee Setup.** Determines if the time block is eligible for payroll or not.
- **General Ledger Account.** If integrated with an Accounting Account, determines the account to which pay associated with this time code will be exported.

Time code setup is hierarchical. This means that values not explicitly defined are inherited from a higher level in your company hierarchy. Thus, if you define time codes for your entire company, these values will propagate down to all of the companies' employees. Accordingly, if you then edit an employee's time codes, the new values will override the company level time code for that employee.

Tip:



When you save an employee-level override of a company-level time code, the edited time code row will appear in bold. Afterwards, if you change the employee-level time code's values to match the company, the override will be deleted when the record is saved.

You can access the Time Code Setup dialog box from two places:

- For the entire company, select **Tools > Lists > Time Codes**.
- For an individual employee, click **Time Codes** from the employee record.

Implementation Checklist

Time Codes

Instructions:

1. Use Time Codes to set properties of time blocks on Employees' Work Hours and Time Cards.
2. Settings for a specific Employee can be set while editing that Employee's information.

Setup for: Entire Company

Color	Active	Name	Available for Work	Hourly Employee Setup	General Ledger Account
	<input checked="" type="checkbox"/>	Available	Available	Exclude	
	<input checked="" type="checkbox"/>	On Clock	Available	Include	
	<input checked="" type="checkbox"/>	Job	Busy	Include	
	<input checked="" type="checkbox"/>	Task	Busy	Include	
	<input checked="" type="checkbox"/>	Travel	Busy	Include	
	<input checked="" type="checkbox"/>	Break	Unavailable	Exclude	
	<input checked="" type="checkbox"/>	Lunch	Unavailable	Exclude	
	<input checked="" type="checkbox"/>	Time Off	Unavailable	Exclude	
	<input checked="" type="checkbox"/>	Sick	Unavailable	Exclude	
	<input checked="" type="checkbox"/>	Vacation	Unavailable	Exclude	

Buttons: Add, Delete..., OK, Cancel



Tip:

The values for Color, Active, Name, and Available for Work can be updated for the entire organization. However, they cannot be updated for individual employees or, if you are running ServiceCEO Enterprise, specific branches.

Adding Time Codes

If you'd like, you can add new time codes to ServiceCEO.

1. Open the Time Codes dialog box.
2. If necessary, select the level for which you want to define time codes from the Setup for drop-down list.
3. Click **Add** to add a new time code.
4. Type the name of the time code into the Code field.
5. By default, all time codes are active. Deselect the **Active** check box if you don't want it to appear in the list when you select a Time Code elsewhere in ServiceCEO.



Note:

Time codes which are in use in the database cannot be deleted. However, they can be deactivated, which will make them unavailable for selection on new records.

6. Select the appropriate value from the Available for Work drop-down list. Your options are:
 - **Available.** Indicates employees with this time code are available for work.
 - **Unavailable.** Indicates employees with this time code are not available for work.
 - **Busy.** Busy is generally used to mark time spent on a job. It indicates that an employee is not available to be scheduled for work because they are busy working (as opposed to explicitly unavailable time like a vacation). Note that you cannot schedule an employee to be Busy (i.e., you cannot assign an employee a time code with a Busy value on the Work Hours or Work Hours Override screen).
7. Select the appropriate value from the Hourly Employee Setup drop-down list. Your options are:
 - **Include.** This time code will be used to calculate payroll for hourly employees.
 - **Exclude.** This time code will NOT be used to calculate payroll for hourly employees.
 - **Include/No Overtime.** This time roll will be used to calculate normal payroll for hourly employees, but will not be used towards calculation of overtime.



Caution:

The Hourly Employee Setup selection only controls hourly payroll. It will not affect employees being paid commissions, a flat fee, or a salary.

8. To link a time code with a particular accounting account, click the "three dots" button in the General Ledger Account column and select the appropriate account from the subsequent dialog box.



Tip:

The General Ledger Account column appears only if Accounting Integration is enabled.

9. To add additional time codes, repeat steps 3-8.
10. When complete, click **OK**.

Editing Time Codes

1. Open the Time Code Setup dialog box.
2. If necessary, select the level for which you want to define time codes from the Setup for drop-down list.
3. Edit the time code values as necessary.



Note:

Note that you cannot deactivate time codes that are in use. In addition, the Job, Task, and Travel are built-in time codes which cannot be renamed or have their Available for Work status changed.

4. Click **OK**.

Deactivating Time Codes

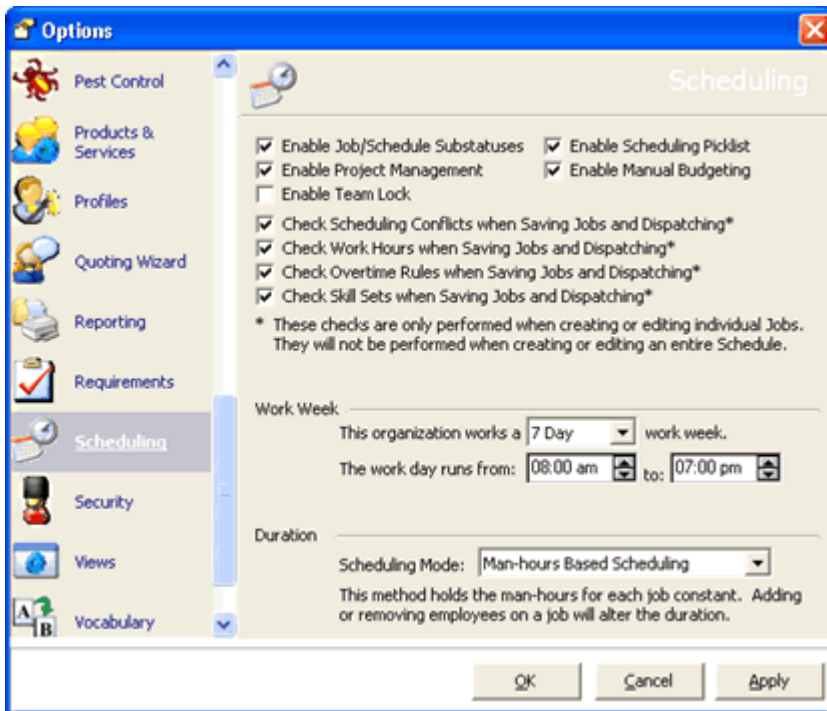
You cannot delete time codes that are in use, or have been used in the past. You can, however, deactivate time codes, meaning that the time code will not be removed from current configurations, but you will not be able to select the deactivated time code from any Time Code drop-down list moving forward.

1. Open the Time Code Setup dialog box.
2. If necessary, select the level for which you want to deactivate a time code from the **Setup for** drop-down list.
3. Clear the **Active** check box for time code you want to deactivate.
4. Repeat steps 3-4 to deactivate additional time codes.
5. Click **OK**.

Defining Scheduling Options

The Scheduling option enables you to customize the application's scheduling possibilities. Here, you can define the company's work week, job duration measurement, and many other options.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Scheduling** from the Categories bar. The Scheduling Options dialog box appears.



3. Select the appropriate check boxes to enable its functionality. The available check boxes are:
 - **Enable Job/Schedule substatuses.** Select this check box to enable the substatus field in jobs. This allows a more detailed status for jobs, beyond the default statuses (**Canceled**, **Active**, **Completed** and **Pending**). See the Defining Substatuses section for details.
 - **Enable Project Management.** Select this check box to enable the creation of projects. A project is a job that is performed over several days or visits and is combined into one invoice. If this check box is not selected, the project button will not appear in the job record or in the various right-click menus. For more on projects, please read the Project Overview topic of the ServiceCEO Help System.
 - **Enabling Scheduling Picklist.** Select this check box to enable scheduling picklists. The Picklist is a list of all active jobs that do not have specific engagement times. The picklist is used to accommodate customers with tight schedules who may not know when they can be serviced until the day their job is scheduled to be performed.
 - **Enable Manual Budgeting.** Select this check box to enable manual budgeting. Manual budgeting lets you define estimates for job costs (services, materials, labor, etc.) that, after the job is completed, can be compared to the actual job using the Job Costing report. The manual budgeting fields are the **Charge**, **Labor**, and **Materials** fields located on the right side of the Job record page.

Implementation Checklist

- **Enable Team Lock.** Select this check box to enable users to lock any team for a day, meaning that no changes can be made to the team (add/remove members, assign/move jobs to or from the team) for that day. See the Locking a Team from the Dispatch Board topic of the ServiceCEO Help System.
- **Check Scheduling Conflicts when Saving Jobs and Dispatching.** Select this check box to warn you if an employee is already committed to another job or task when saving a job or making a change on the Dispatch Board. This will ensure that your employees are not scheduled for multiple jobs at the same time.
- **Check Work Hours when Saving Jobs and Dispatching.** Select this check box to enable automatic review of available employee hours when you save a job or make changes on the Dispatch Board. This will help ensure that there are no time conflicts. See the Employee Work Hours topic of the ServiceCEO Help System for more.
- **Check Overtime Rules when Saving Jobs and Dispatching.** Select this check box to warn you if a job's settings will create overtime pay for the employees assigned to the job. The warning will appear if overtime rules are called when saving a new or edited job, or when any changes are made to the job via the Dispatch Board. For more on overtime, see the Defining Overtime Rules topic of the ServiceCEO Help System.
- **Check Skill Sets when Saving Jobs and Dispatching.** Select this check box to compare the required skills for a job with the skill sets of the employees assigned to it. If they do not match, then a warning dialog box will appear when a new job is saved, or the job is reassigned via the calendar or the Dispatch Board. See the Employee Skills Tab topic of the ServiceCEO Help System.

Tip:



Note that the four check boxes that begin with **Check...** will cause warning dialog boxes to appear whenever a conflict is generated. For example, if the **Check Scheduling Conflicts when saving jobs and dispatching** check box is selected, and you create a new job for employee X at the same time that employee X is scheduled to work on another job, a warning dialog box will appear informing you of the conflict.

4. Select the number of days in a week your company is open from the **works a X work week** drop-down list.
5. Select the time at which your company is open for business from the first spin control box.
6. Select the time at which your company is closed from the second spin control box.

Note:

Steps 4-6 control your company's default work hours. The values you enter here will be displayed in white on the Daily and Weekly Views of the Calendar (as opposed to gray) and in light yellow in an employee's Work Hours dialog box (as opposed to dark yellow).

7. Select the option button corresponding to how you want to calculate the duration of a job. Your options are:
 - **Man-hour based Scheduling.** Calculated by dividing the total hours for the job by the number of workers assigned to that team. For example, if you have a 4 hour job and there are 2 individuals (that work on site) on the assigned team, the Duration will be displayed as 2 hours. If there were only one individual on the assigned team, the Duration would be displayed as 4 hours.
 - **Duration-based Scheduling.** Calculated by using the total hours of the job, regardless of amount of employees assigned to the job. For example, a 4 hour job will take up 4 hours of time, regardless of whether there are 1, 2, 3, or more employee(s) assigned to it.
8. Click **OK**.

Entering Employees

To add a new employee in ServiceCEO:

1. Click **Employee** from the Navigator bar. The Employee List appears.
2. Click **New** or select **File > New Employee**. The General tab of a new employee record appears.
3. Enter the employee's data on the relevant tabs. See the appropriate topics of the ServiceCEO Help System for details:
 - Employee General Tab
 - Employee Detail Tab
 - Employee Signouts Tab
 - Employee Personnel File Tab
 - Employee Links Tab
 - Employee Payroll Setup Tab
 - Employee Skills Tab
 - Employee Payroll History Tab
4. When done, click **Save and Close**. The Employee List appears, displaying the new employee.

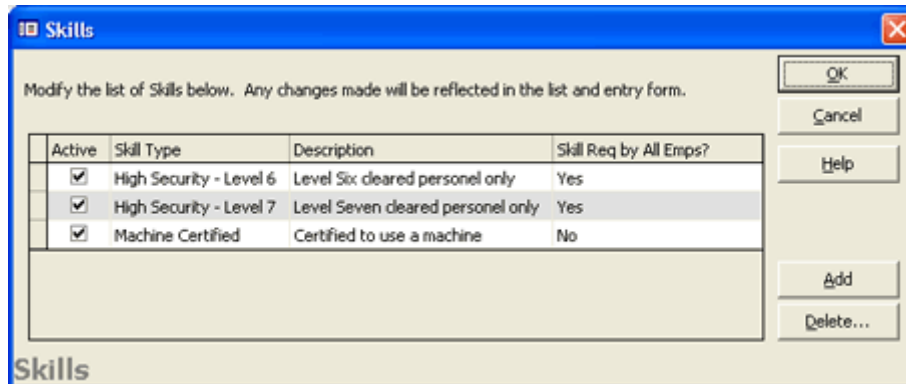
Defining Employee Skills

Skills are the abilities a particular employee possesses. For more, see the Employee Skills Tab topic of the ServiceCEO Help System.

Creating Skills

To manually define skills:

1. Select **Tools > Lists > Skills**. The Skills dialog box appears.



2. Click **Add** to add a new row.
3. The **Active** check box is selected by default. Deselect this check box if you do not want anyone to use this skill.
4. Type a name for the skill in the **Skill Type** field.
5. Type a brief description of the skill in the **Description** field.
6. Select **Yes** from the **Skill Req by All Emps?** drop-down list. If selected, any job requiring this skill will then need ALL employees assigned to the job to have the requisite skill. If not selected, only one employee will need the skill.
7. Repeat steps 2-6 to add additional skills.
8. Click **OK**.

Editing Skills

1. Select **Tools > Lists > Skills**. The Skills dialog box appears.
2. Edit any of the skills fields as necessary.
3. Click **OK**.

Deleting Skills

If a skill is in use, meaning that it is assigned to at least one employee, the skill cannot be deleted. In these instances, we recommend you deactivate the skill by clearing its Active check box. Doing so means that the skill will continue to be assigned to those employees and jobs who had it before, but the skill will not be able to be assigned in the future.

1. Select **Tools > Lists > Skills**. The Skills dialog box appears.
2. Select the skill you want to delete.
3. Click **Delete**. A confirmation dialog box appears.
4. Click **Yes**. The Skill is deleted.
5. Repeat steps 2-4 to delete additional skills.
6. Click **OK**.

Creating Teams

A team is a group of employees that work together. When a team is assigned to a job, all of the team's employees will work on the job. Teams are created and populated in the Team dialog box - you can create a team, add employees to it, and default values for the team.

Note:



The team's default employees are in the Team dialog box; however, you will always be able to customize a team's employees for an individual job. This customization can be defined through the job record, the dispatch board, and the completion wizard.

A Team's default values enable you to control which teams can be assigned to which jobs. First, you define default values for your teams as described below. Once these values are defined, selecting the **SmartList** check box on the General tab of a job record will limit the teams displayed in the Team drop-down list to those teams whose default values match the job's values. For more, see the Jobs General tab topic of the ServiceCEO Help System.

Tip:



If you no default values to a team, then, for SmartList purposes, the team will appear for all of those values. For example, if you do not select any zones in the Team dialog box, the team will appear for all zones when the SmartList check box is selected.

Creating Teams

1. Select **Tools > Lists > Teams List** or press **CTRL+F1**. The Team dialog box appears.

2. Select **File > New** or click **New**. A new row appears.
3. Type a name for the new team in the Name field.
4. The **Active** check box is selected by default. Deselect it if you do not want the team to be visible when assigning jobs.
5. Click the appropriate check box for every employee you want to assign to this team in the Employee Name section.
6. Click the appropriate check box for every zone you want to assign to this team in the Zone section.
7. Click the appropriate check box for every customer type you want to assign to this team in the Customer Type section.

8. Click the appropriate check box for every Master Service/Product Category you want to assign to this team in the Categories section. For details on Master Product/Categories, read the Master Service-Product Categories Overview section.
9. Click the appropriate check box for every appointment type you want to assign to this team in the Appointment Type section. For details, read the Defining Appointment Types topic of the ServiceCEO Help System.
10. Click the appropriate check box for every substatus you want to assign to this team in the Substatus section. For details, read the Defining Substatuses section.
11. Repeat steps 3-10 for each additional team.
12. Click **Save and Close**. The Team dialog box closes.

Editing Teams

1. Select **Tools > Lists > Teams List** or press **CTRL+F1**. The Team dialog box appears.
2. Select the team you want to edit.
3. Make any necessary changes to the team **Name** or **Active** fields.
4. Add or remove employees and default values by selecting or deselecting the appropriate check boxes.
5. Click **OK**.
6. Click **Save and Close**.

Deactivating Teams

You cannot delete teams that are either currently assigned to a job or have worked on a job in the past. You can, however, deactivate a team, meaning that the team will not be able to be assigned to any work moving forward.




Tip:

Teams that are assigned to active or pending jobs cannot be deactivated. If you want to deactivate the team, you will need to either assign those jobs to another team, or wait until the scheduled jobs are completed or canceled.

1. Select **Tools > Lists > Teams List** or press **CTRL+F1**. The Team dialog box appears.
2. Select the name of the team you want to deactivate.
3. Clear the **Active** check box. The team is deactivated.

Implementation Checklist

4. Click **Save and Close**.

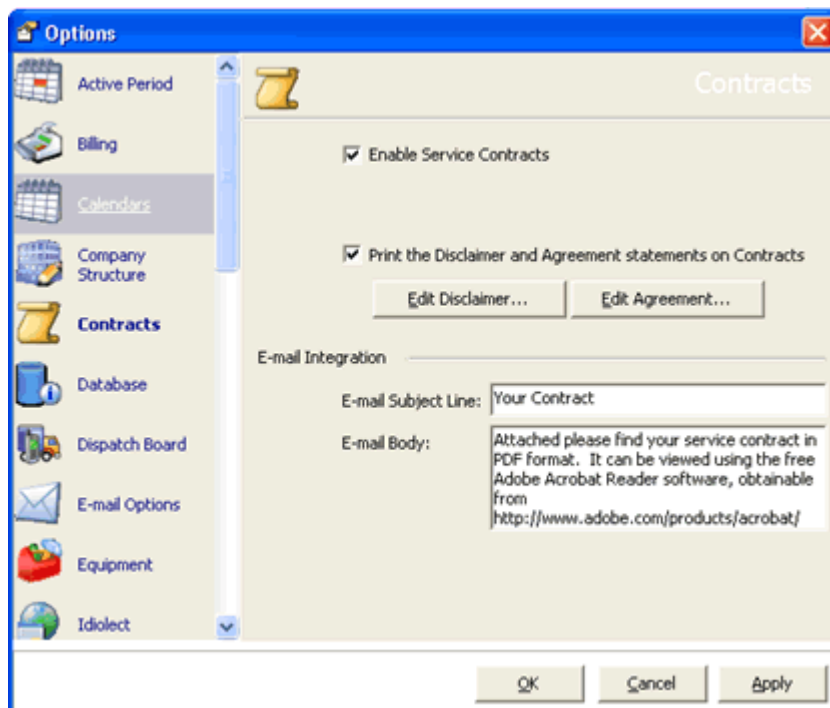
If a team has never performed any work, you can delete it by selecting it in the Team dialog box and clicking .

Enabling Service Contracts

You can use ServiceCEO to create service contracts for your customers. For more on Service Contracts, please read the Service Contracts topic of the ServiceCEO Help Systems.

To enable service contracts:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Contracts** from the Categories bar. The Contracts Options page appears.



3. Select the **Enable Service Contracts** check box to enable the use of service contracts.
4. Select the **Print the Disclaimer and Agreement statements on Contracts** check box to include the disclaimer and agreement on printed invoices.
5. Click **Edit Disclaimer**. The Edit Disclaimer dialog box appears.
6. Edit the disclaimer as necessary.
7. Click **Save**. The new invoice is saved.

8. Click **Edit Agreement**. The Edit Agreement dialog box appears.
9. Edit the agreement as necessary.
10. Click **Save**. The new agreement is saved.
11. Type the subject line for your e-mail message in the **E-mail Subject Line** field.
12. Type the text of the e-mail message in the **E-mail Body** field.
13. Click **OK**. The Contracts Options dialog box closes.

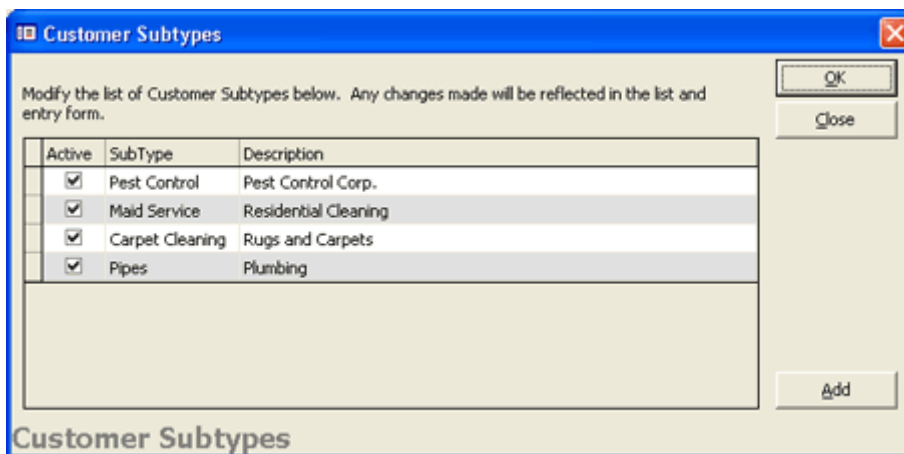
Defining Customer Subtypes

You can define subtype groups that organize your customers into groups beyond the individual/corporate distinction.

Note that while you cannot delete customer subtypes, you can make them inactive, meaning that you will no longer be able to assign them to customers.

Adding Customer Subtypes

1. Select **Tools > Lists > Customer Subtypes**. The Customer Subtypes dialog box appears.



2. Click **Add**. A blank row will appear.
3. The **Active** check box is selected by default. Deselect it if you do not want the team to be visible when assigning jobs.
4. Type a descriptive name for the new customer subtype in the **Subtype** field.
5. Type a description for the new customer subtype in the **Description** field.
6. Click **OK**.

Editing Customer Subtypes

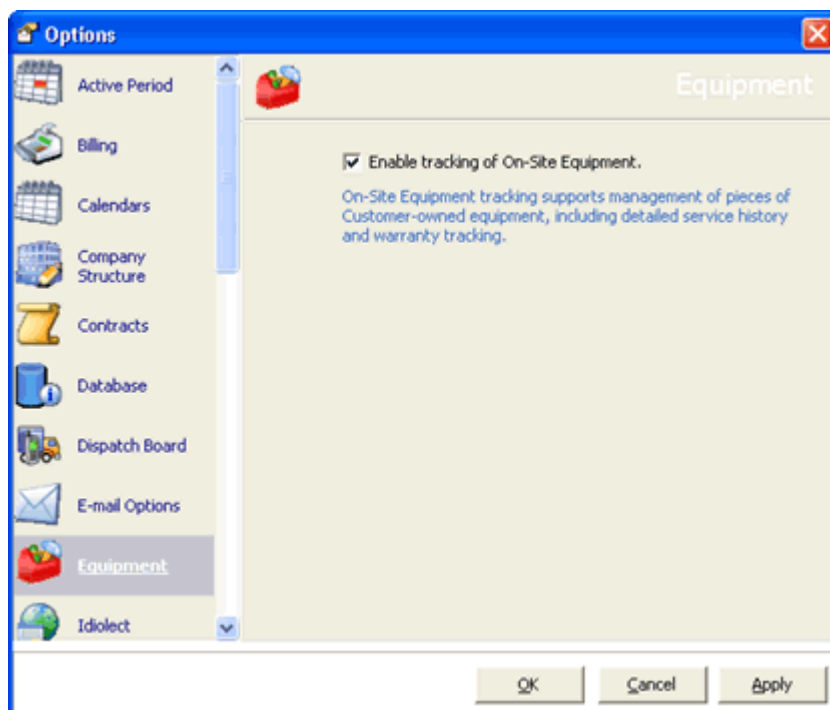
1. Select **Tools > Lists > Customer Subtypes**. The Customer Subtypes dialog box appears.
2. Edit any of the subtype fields as necessary.
3. Click **OK**.

Enabling Equipment Tracking

You can use ServiceCEO to track the equipment you have located at customer sites. Enabling equipment tracking will display Equipment tabs in several different locations in ServiceCEO. For more on equipment tracking, please read the Equipment topic of the ServiceCEO Help Systems.

To enable equipment tracking:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Equipment** from the Categories bar. The Equipment Options page appears.



3. Select the **Enable tracking of On-Site Equipment** check box to track your equipment.
4. Click **OK**. The Equipment Options dialog box closes.

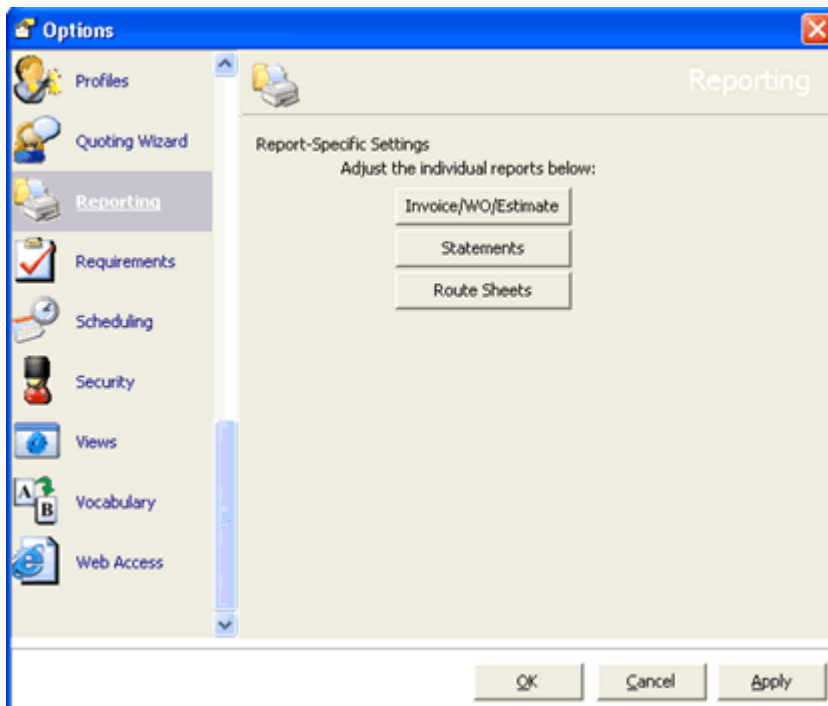
Configure Reporting Options

Defining Reporting Options

You can define the manner in which ServiceCEO's reports are displayed in the Reporting Options dialog box.

To define your report options:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Reporting** from the Categories bar. The Reporting Options dialog box appears.



3. Adjust the settings for individual reports as necessary. These include:
 - The Invoice/Work Order/Estimate Report
 - The Statements Report
 - The Route Sheets Report
4. Click **OK**.

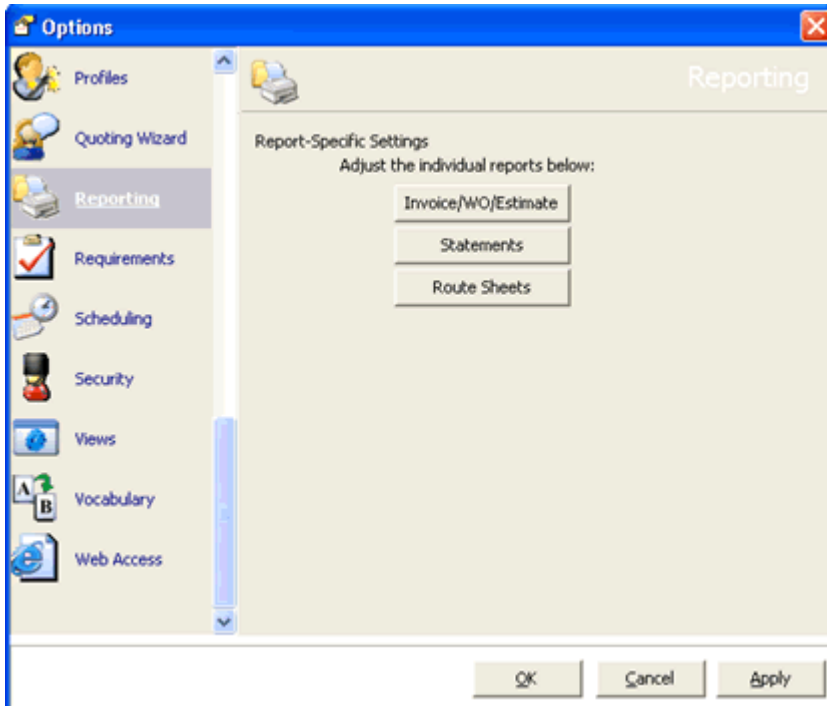
Adjusting Invoice/Work Order/Estimate Report Options

The Work Order, Invoicing, and Estimate reports contains all the information an individual or team of employees would need to know for a single job, including any customer or job notes. You can define all of the options for these reports on the Invoice/Work Order/Estimate Options page.

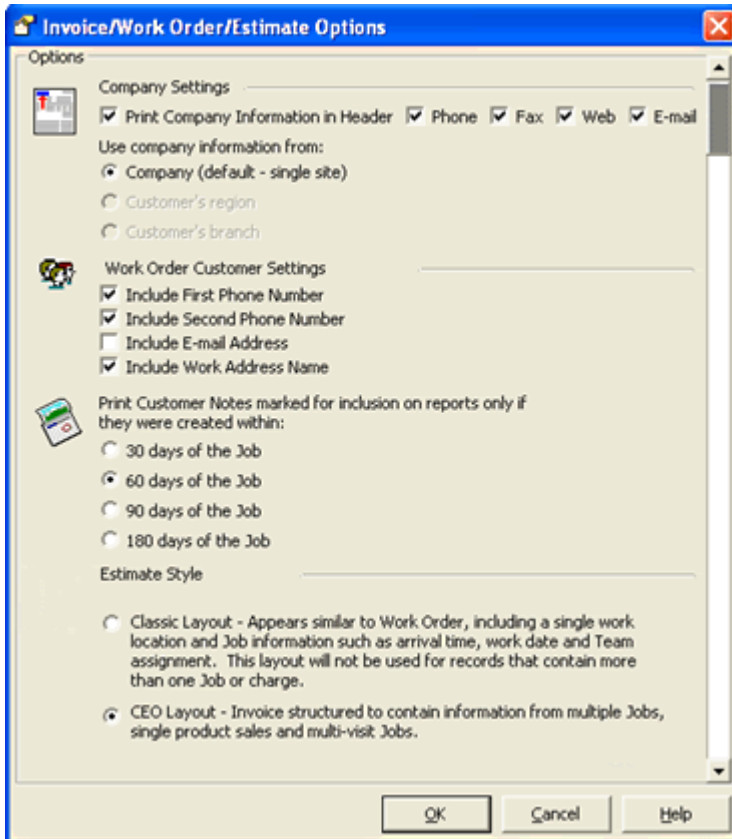
Implementation Checklist

To set the options for the Invoice, Work Order, or Estimate reports:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Reporting** from the Categories bar. The Reporting Options dialog box appears.



3. Click **Invoice/WO/Estimate**. The Invoice/Work Order/Estimate dialog box appears.



Company Settings

1. Select the **Print Company Information in Header** check box to include company information in the header of all printed Invoices, Work Orders, or Estimates.
2. If you selected the **Print Company Information in Header** check box, next select the check boxes corresponding to the information you want to include in the header. These options include:
 - Phone
 - Fax
 - Web
 - E-mail



Tip:

The specific values for these fields are defined in the Company Information dialog box. See the Defining Company Information section for details.

3. Select the option button corresponding to the company segment from which you want to pull the company information.

Implementation Checklist



Note:

You can only select the Customer's region or Customer's branch option buttons if you are running ServiceCEO Enterprise.

4. Type your billing terms into the **Enter Billing Terms** field. Billing terms refers to the description of when the payment of the Invoice, Work Order, or Estimate is due (i.e. Net 30, upon receipt, etc.).

Customer Settings

1. Select the **Include Day Phone Number** and **Include Evening Phone Number** check boxes to include the company's phone number(s) on your work orders and classic invoice reports.
2. Select the **Include E-mail Address** check box to include the company's e-mail address to your work orders and classic invoice reports.
3. Select the **Include Work Address Name** check box to include the name of the company's work address to your work orders, invoices and estimates.
4. Select the length of time you would like Customer Notes added to Work Orders by selecting the appropriate option button.

Invoice/Estimate Style

Select the option button corresponding to the style in which you want to display your invoices and estimates. Your options are:

- **Classic Layout.** This option will display the Invoice similar to a Work Order. Only a single work location and job information (arrival time, work date, etc.) is displayed. Note that this options will NOT display kits as a single line item despite which Invoice As option you have selected.
- **CEO Layout.** This option can display multiple jobs, products, and multi-visit jobs. This option can also display kits as a single line item (if that option is selected in the Kit's **Invoice As** drop-down list).

Work Orders

1. Select the **Print Charges on Work Orders** check box to display all of the charges on a printed work order.
2. Select the **Print Add-On Section** check box to include additional blank lines to printed work orders.
3. If you selected the **Print Add-On Section** check box, type the number of lines you want to add in the **lines** spin control box.

4. Select the **Print unmarked alarm code beneath Work Order number** to include the alarm code under the work order number. This number will not be labeled.



Note:

The alarm code appears without a label on the report so that your Customer's sensitive information is not compromised if the report is lost or stolen in the field.

Footers and Disclaimer Statements

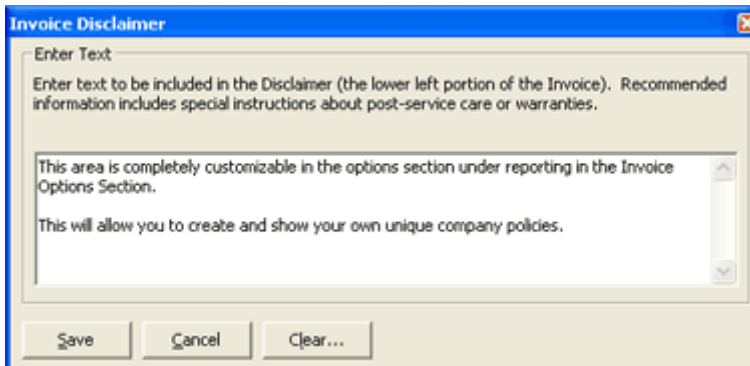
1. Select the **Print the Disclaimer and Agreement statements on Invoices** check box to include the disclaimer and agreement on printed invoices.



Caution:

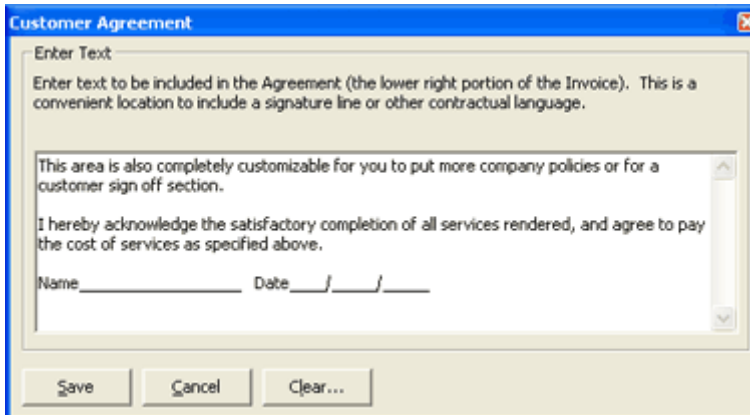
The Disclaimer and Agreement statements are shipped with default text. Thus, if you select the **Print the Disclaimer and Agreement statements on Invoices** check box, you must edit the disclaimer and agreement text.

2. Click **Edit Disclaimer**. The Edit Disclaimer dialog box appears.



3. Edit the invoice disclaimer as necessary.
4. Click **Save**. The new invoice is saved.
5. Click **Edit Agreement**. The Edit Agreement dialog box appears.

Implementation Checklist



6. Edit the customer agreement as necessary.
7. Click **Save**. The new agreement is saved.
8. Repeat steps 1-7 for the Work Order and Estimate statements.
9. Type the text for your estimate's footer in the **Estimate Footer Line** field.

E-mail Integration - MS Outlook

1. Type the subject line for your e-mail messages in the **E-mail Subject Line** field.
2. Type the body for your e-mail messages in the **E-mail Body** field.

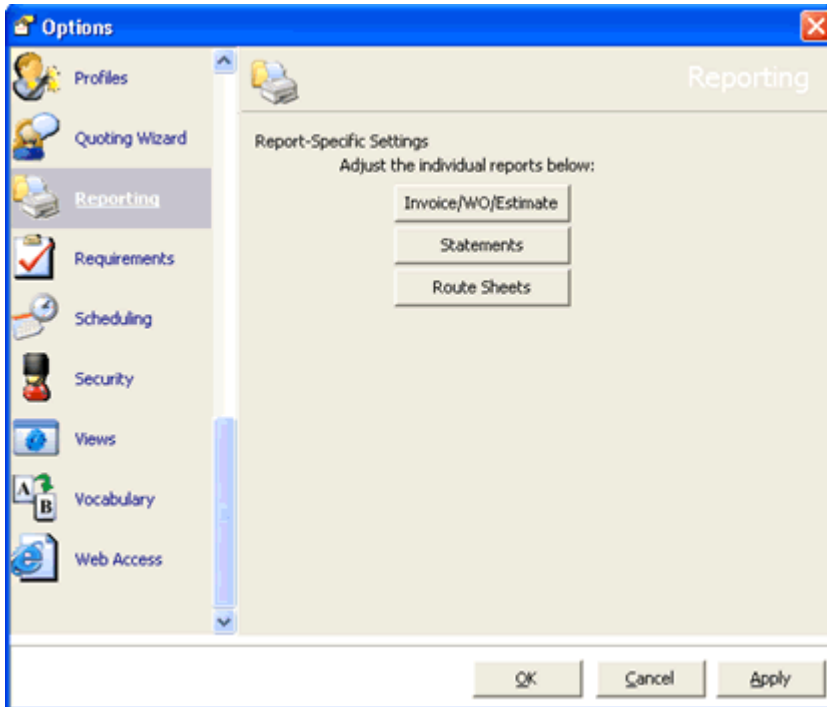
When you have finished customizing your Invoice, Work Order, and Estimate reports, click **OK**. The Invoice/Work Order/Estimate dialog box closes.

Adjusting Statements Report Options

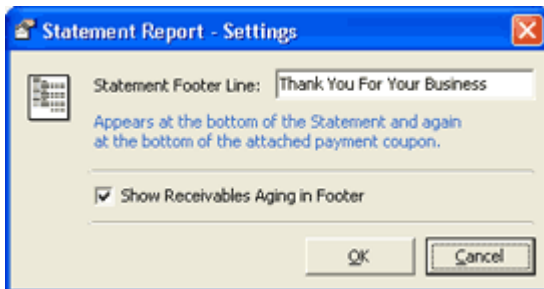
The Statement report provides a summary of all invoices created during a date range. These reports can be used for general information purposes or as actual bills to be sent to the customer for remittance.

To adjust the statement report options:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Reporting** from the Categories bar. The Reporting Options dialog box appears.



3. Click **Statements**. The Statement Reports - Settings dialog box appears.



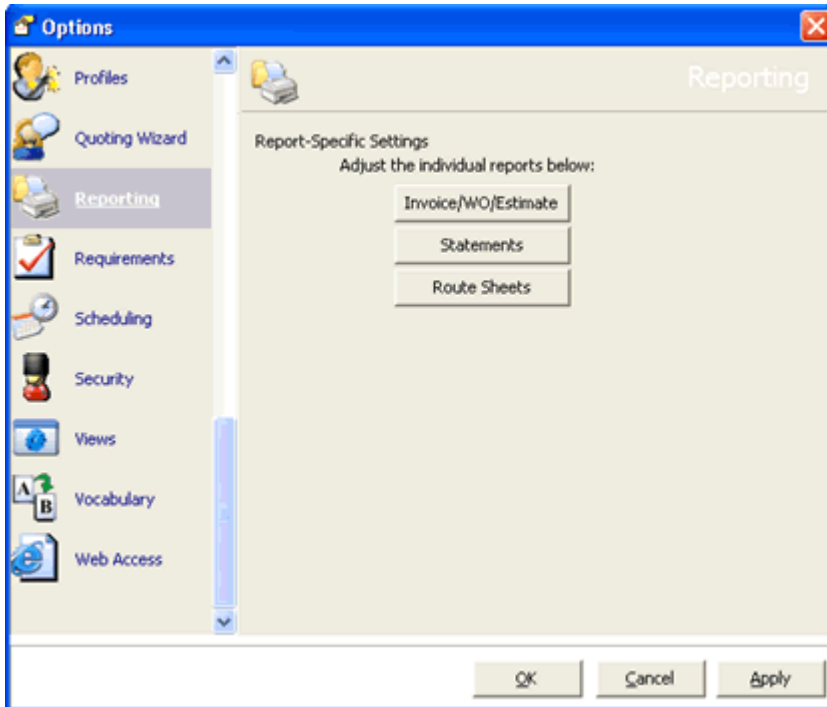
4. In the **Statement Footer Line** field, type the text you want to appear as a footer in both the Statement and the bottom of the payment coupon.
5. Select the **Show Receivables Aging in Footer** check box to break down the account by time. If selected, the report will display what the customer currently owes you.
6. Click **OK**. The Statement Reports - Settings dialog box closes.

Adjusting Route Sheets Report Options

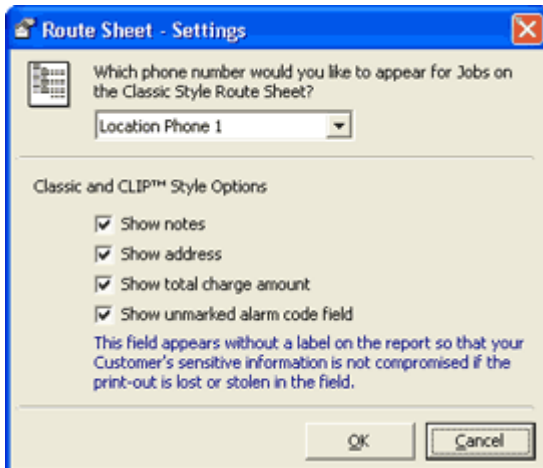
The Route Sheets report is a summary of all service jobs within a given date range. You can customize this report to suit your company's needs.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Reporting** from the Categories bar. The Reporting Options dialog box appears.

Implementation Checklist

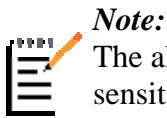


3. Click **Route Sheets**. The Route Sheets - Settings dialog box appears.



4. Select the phone number you want to display on the Classic style route sheet from the drop-down list.
5. Select the **Show notes** check box to display the job's notes on the Classic and CLIP™ style route sheets.
6. Select the **Show address** check box to display customer addresses on the Classic and CLIP style route sheets.
7. Select the **Show total charge amount** check box to display the total amount charged to the customer for the job on the Classic and CLIP style route sheets.

8. Select the **Show unmarked alarm code field** check box to display the alarm code on the Classic and CLIP style route sheets.

**Note:**

The alarm code appears without a label on the report so that your customer's sensitive information is not compromised if the report is lost or stolen in the field.

9. Click **OK**. The Route Sheets - Settings dialog box closes.

Security Rights / User Groups

Security Overview

Keeping your data secure is essential, which is why security is an extremely important element of ServiceCEO. The ServiceCEO user security system allows you to clearly define what information can be viewed, modified, or entered by each user with access to the application.

The ServiceCEO administrator can set access rights (user names and passwords) and permissions for all other users. In other words, the administrator determines not only who has access to ServiceCEO but also who access to the application's individual features.

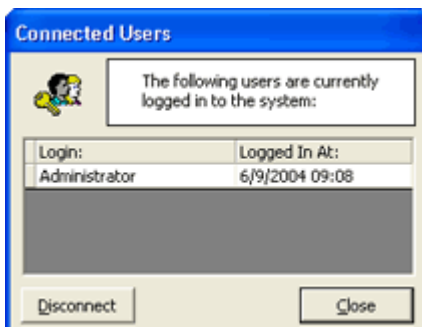
To access the security area, log on as the Administrator and selecting **Tools > Options > Security**. User Access Rights dialog box appears. The dialog box has two subsections:

- **Groups** - A grouping of users with identical security access rights. See the Managing User Groups section.
- **Users** - The individual people who will be accessing the system. See the Managing Users section.

Users are assigned to groups, and security rights and access levels are assigned to the groups.

Show Connected Users

On both the Groups and Users tabs, you can display all of the users that are currently connected to the application by clicking **Show Connected Users**. The Connected Users dialog box appears.



Implementation Checklist

This dialog box displays all of the users that are connected to the system.

To disconnect a user, select their name and click **Disconnect**. The user will be immediately disconnected from ServiceCEO.

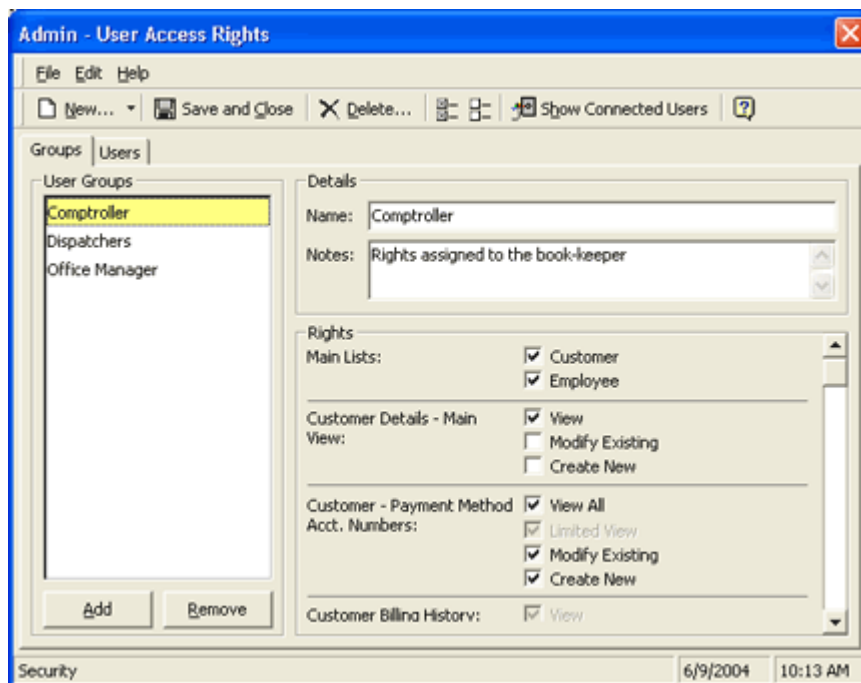
Managing User Groups

A user's user group controls the user's access rights. In other words, access rights are not defined via individual users but by the user group or groups to which that user belongs. To change a user's security rights, you can edit the groups to which a user belongs or edit the security rights of the entire group. However, note that editing the security rights of an entire group will affect every member of that group.

Adding New User Groups

New users can be added to ServiceCEO by the Administrator.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Security** from the Categories bar. The Admin - User Access Rights dialog box appears.





3. Click **New**, press **CTRL+G**, or select **File > New > New Group**. The Details and Rights sections will become active.
4. Type the group's name into the **Name** field.
5. Type a description of the group in the **Notes** field.

6. Select the appropriate check boxes in the Rights section to determine the security rights of each user that will be assigned to this group. An explanation of each security setting is located in the Security Rights Table.



Tip:

To quickly assign all rights to the group, click . To quickly remove all access rights from a group, click .



7. Repeat steps 3-6 to add additional groups.
8. When complete, click **Save and Close**.

Editing User Groups

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Security** from the Categories bar. The Admin - User Access Rights dialog box appears.
3. Select the user group you want to edit.
4. Make any changes to the user group as necessary. An explanation of each security setting is located in the Security Rights Table topic of the ServiceCEO Help System.



Tip:

To quickly assign all rights to the group, click . To quickly remove all access rights from a group, click .

5. Repeat steps 3-4 to edit additional groups.
6. When complete, click **Save and Close**.

Deleting User Groups

You can delete any user group in ServiceCEO. No confirmation notice appears, so be sure you want to delete the user group before you click Delete. Note that deleting a user group will automatically remove the security rights of that group from all users assigned to that group.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Security** from the Categories Bar. The Admin - User Access Rights dialog box will appear.

Implementation Checklist

3. Select the name of the group you would like to delete.
4. Click **Delete**.
5. Click **Save and Close**.

For a complete listing of all of the security rights in ServiceCEO, please see the Security Rights Table topic of the ServiceCEO Help System.

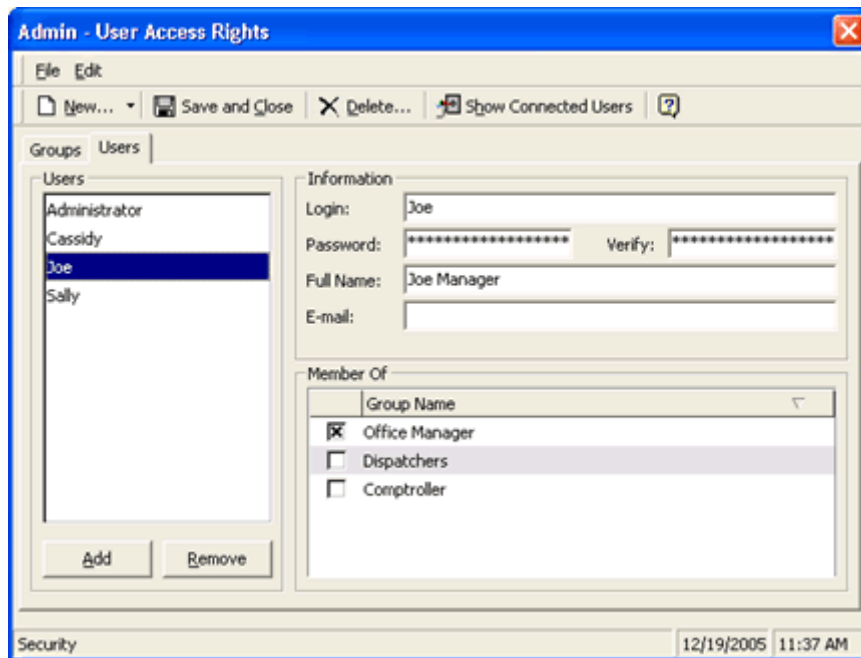
Managing Users

On the users tab of the Security Options window, you can define user accounts for all people using ServiceCEO. Any person logging into ServiceCEO will need a Login and Password combination. This combination can only be used by one person at a time. In addition, you will need to have a user license for every Login in ServiceCEO. The number of users for which you are licensed is controlled by your Activation Code. If a user attempts to login with a Login name that is already in use, or if the number of allotted users has been exceeded, you will receive an error message.

Adding New Users

New users can be added to ServiceCEO by anyone with right to edit security settings.

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Security** from the Categories bar. The Admin - User Access Rights dialog box appears.
3. Click the **Users** tab.



4. Click **New**, click **Add**, press [CTRL]+U, or select **File > New > New User**. The **Information** and **Member Of** sections becomes active.
5. Type a login name for the user in the **Login** field. What is used as the login name is entirely up to the discretion of the individual creating the new user. However, we advise you use standardized login names.
6. Type a password for the user in the **Password** field. The password will appear as asterisks for added security.
7. Retype the password in the **Verify** field to ensure that the password was spelled accurately.
8. Type the user's complete name into the **Full Name** field.
9. Type the user's e-mail address in the **E-mail** field.



Caution:

For security reasons, we highly recommend that you edit the Administrator's password from its default value.

10. Select the check boxes for each user group you want to assign to this customer from the **Member Of** section. The user groups control what security rights the user will have.



Note:

If a user is a member of two groups, one group with a particular security right (X) and the second without security right X, the user will have that security right.

11. Repeat steps 4-10 to add new users.
12. When you have finished adding users, click **Save and Close**.

Editing Users

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Security** from the Categories bar. The Admin - User Access Rights dialog box appears.
3. Click the Users tab.
4. Select the user who you would like to edit from the Users list.
5. Make any appropriate changes to the user as necessary. Add or remove the user from groups as needed by selecting or deselecting the appropriate check boxes in the **Member Of** section. Note that this will affect the user's security rights.

Implementation Checklist

6. When you are finished, click **Save and Close**.

Removing Users

In order to ensure data integrity, you cannot delete users after they have been created. Given this limitation, if you want to block a user from accessing ServiceCEO, we recommend you change the user's password and deselect all of their User Group check boxes. This will effectively prevent them from logging into the program.

Accounting Integration

Accounting Integration Overview

ServiceCEO's accounting integration is designed to give you the tools to keep your company ledger and balance sheet correct at all times without duplicating data entry between ServiceCEO (your management application) and your accounting, banking and payables systems. To this end, ServiceCEO can link up with many General Ledger (GL) applications in order to transfer data between the two programs. In general, this will be a one-way transfer of data from ServiceCEO into the GL application.

Note:



ServiceCEO was designed and built for accrual-based accounting, meaning that sales are recorded when the sale occurs, regardless of when you are paid for that sale. When you receive goods or services, you record an expense, regardless of when you pay for that expense.

The GL application that can be most closely integrated with ServiceCEO is QuickBooks®. QuickBooks is a popular accounting software program developed by Intuit. ServiceCEO can quickly and easily connect with and update the QuickBooks general ledger after financial actions are performed within ServiceCEO (i.e., jobs are closed, deposits are made, etc). This integration helps reduce errors often associated with double entry and cuts down on amount of accounting work that is required to run your business.

XML Integration

If you are using a GL application other than QuickBooks, ServiceCEO will export a representation of your financial transactions in an XML format, saving these transactions to a .xml file. Extensible Markup Language (XML) files will be created and saved to a designated directory (identified during accounting integration - see the Configuring XML Integration topic for details). The XML files are marked with the event date and a serial number. These XML files can then be imported into an accounting package.

This XML Integration does not automatically integrate with any applications, nor is it a web service. Rather, it is a manual process that begins with a user clicking an Export button in ServiceCEO.

Since ServiceCEO does not directly import the XML files into your accounting application; you, or your systems integrator, will need to create or purchase an application that performs the following actions:

1. Monitor the directory (as defined in ServiceCEO) for created XML files (aka, a "file drop").
2. Open the XML file and parse the information out of the file.
3. Load the data from the XML file into an object.
4. Validate the information. If there are errors, the user should be made aware of these errors.
5. Import the information stored in the object into your accounting package. This will most likely require the ability to integrate with your accounting package as well as the ability to map fields from the object to the proper fields within your accounting application.

While one example of such a tool is Microsoft® Great Plains® Integration Manager, we do not currently recommend any applications that could import XML into an accounting package for you.

Caution:



ServiceCEO exports the GL information into an XML file, but does nothing with that file once it is created. You, or your systems integrator, will need to install and configure a tool to load data from ServiceCEO XML files into your general ledger database.

For more information about these XML Files, download the XML Software Development Kit (SDK). This compressed file contains:

- **ServiceCEOXML.zsd.** This XSD file explains the structure of the XML export files.
- **Sample XML files.** Currently, this includes an example of exported deposits, inventory adjustments, paychecks, purchase orders, and two invoice exports (identified as **Sales** and **Sales2**).

Exporting Data

Data can be exported from three locations within ServiceCEO, all located in the Office Duties area:

- Invoices, Transactions, and (if tracking Inventory) Inventory Adjustments through the Sales Exports tab.
- Deposits, including customer payments, through the Deposits tab.
- Paychecks (gross wage data) through the Paychecks tab.

Implementation Checklist

If you are using ServiceCEO's Inventory module, you can also export your Purchase Orders from the Purchase Order record.



Tip:

While you do not need to be logged into ServiceCEO as an administrator to export data an accounting package, only users with the proper security settings can export data from ServiceCEO. See the User Groups section for details about security settings.

QuickBooks Overview

QuickBooks® is a popular accounting software program developed by Intuit. ServiceCEO can quickly and easily link up with your QuickBooks application to facilitate data sharing between the two programs. Basically, you can export financial information from ServiceCEO to the QuickBooks general ledger when certain financial actions are performed within ServiceCEO (i.e., invoices are posted, deposits are made, etc). While this integration is limited to only financial data - ServiceCEO does not export customer information or payment application information - sending financial data from ServiceCEO to QuickBooks helps reduce errors associated with double entry and cuts down on the amount of accounting that needs to be done.



Caution:

Due to limitations with the QuickBooks import utility, ServiceCEO cannot export payroll into QuickBooks.

Before you integrate QuickBooks with ServiceCEO:

- You will need QuickBooks 2002, 2003, 2004, 2005, 2006, 2007, or 2008. Note that ServiceCEO does not integrate with the Basic, Simple Start, or Online editions of QuickBooks.
- A version of QuickBooks must be installed on every computer using ServiceCEO to export data to QuickBooks.
- You will need to know the location where QuickBooks is installed. The QuickBooks database has a ".qbw" file extension. This file is usually found in your QuickBooks directory folder. The default location for this folder is:
C:\Program Files\Intuit\QuickBooks\databasename.qbw.
- Read the QuickBooks Deployment Best Practices White Paper (PDF) for tips on how to configure your QuickBooks network for maximum efficiency and performance.
- Integration with QuickBooks UK is in an indefinite beta, due to two known issues. For details, please read this topic in the Insight Direct Discussion Boards.

Caution:

To integrate the applications, you must be logged into both ServiceCEO and QuickBooks as an **Administrator**. After the programs are integrated, any user with the proper Security Rights can export data from ServiceCEO into QuickBooks.

**Note:**

You can view a training video that covers QuickBooks integration in the Member Center.

Configuring Accounting Integration

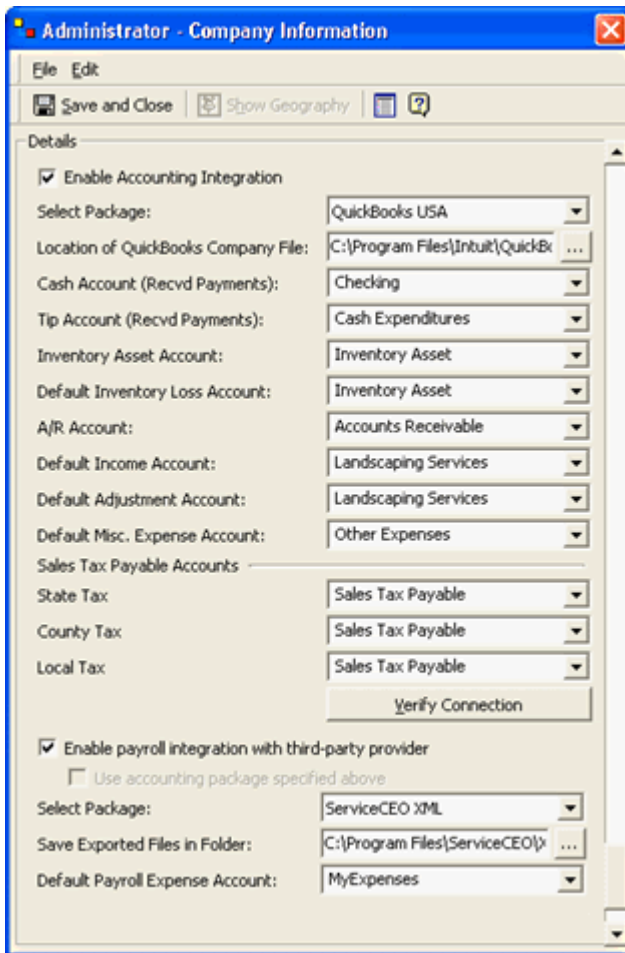
When integrating with a General Ledger (GL) application with ServiceCEO, you need to enter or select the GL account names/numbers to which you want to send different types of data. This is described in detail in the Integrations sections below.

If you are integrating with QuickBooks, ServiceCEO imports the account names from QuickBooks so that they are synchronized between the two applications. See the Configuring QuickBooks Integration section for more. In addition, if you are using Inventory Tracking, you can synchronize your vendor information between QuickBooks and ServiceCEO. See the Integrating Inventory with Accounting section for details.

To integrate ServiceCEO with an accounting program, either QuickBooks or a General Ledger Application, follow these steps:

1. Log into ServiceCEO as the administrator.
2. Select **Tools > Options** or press **CTRL+O**. The Options page appears.
3. Click **Company Information** from the Categories Bar. The Company Information dialog box appears.
4. Scroll down to the bottom of this dialog box.

Implementation Checklist



You can integrate two aspects of ServiceCEO with your accounting application:

- **Sales, purchasing and Accounts Receivable.** Can be linked to XML or QuickBooks. To integrate with QuickBooks, please read the Configuring QuickBooks Integration section. To integrate with XML, please read the Configuring XML Integration section.
- **Payroll Integration.** Please read the Configuring XML Integration section to learn how to integrate payroll with a GL application.

Once integrated, you can export the data to the accounting application:

- **Accounts Receivable and Adjustments.** See the Export Sales topic of the ServiceCEO Help System.
- **Payments.** See the Export Deposits topic of the ServiceCEO Help System.
- **Purchase Orders.** See the Exporting Purchase Orders topic of the ServiceCEO Help System.
- **Paychecks.** See the Exporting Paychecks topic of the ServiceCEO Help System.

Configuring QuickBooks Integration



Caution:

If you are running Microsoft® Vista®, you need to have the User Account Control (UAC) enabled in order to integrate with QuickBooks®. If the UAC is disabled, you will receive an error.

To integrate ServiceCEO with QuickBooks:

1. Select **Tools > Options**. The Options dialog box appears.
2. Click **Company Information** from the Categories Bar. The Company Information dialog box appears.
3. Scroll down to the bottom of this dialog box.
4. Select the **Enable Accounting Integration** check box. A group of additional fields appears.
5. Click the "three dots" button next to the **Location of the QuickBooks Company File** field. The Select Company File dialog box appears.
6. Navigate to the location where your QuickBooks database is located. The default location is C:\Program Files\Intuit\QuickBooks\databasename.qbw.

Tip:



If you are running ServiceCEO on a network and want multiple users to be able to access the same QuickBooks database, the QuickBooks database file (a .qbw file) must be located on a mapped network drive so that it is located on the same path for all ServiceCEO users.

If not, only the user operating the computer with the QuickBooks database can export information to QuickBooks.

7. Click **Open**. A warning dialog box appears, reminding you that you must have QuickBooks open.
8. Click **OK**.
9. Select the appropriate version of QuickBooks from the **Select Package** drop-down list.
 - **QuickBooks USA**. Select this option if you are running the U.S. version of QuickBooks.
 - **QuickBooks Canada**. Select this option if you are running the Canadian version of QuickBooks.
 - **ServiceCEO XML**. For details on configuring XML accounting integration, see the Configuring XML Integration topic.

Implementation Checklist



Note:

By default, ServiceCEO installs QBFC5, the latest QuickBooks Integration Pack. This program enables ServiceCEO to integrate with all versions of QuickBooks up to QuickBooks 2007.

10. Click **Verify Connection**. ServiceCEO will attempt to retrieve the chart of accounts from the QuickBooks database (the one displayed in the **Select Package** field). If this is the first time you are integrating your application with QuickBooks, a Create New QB Customer? dialog box appears.
11. Click **Yes**. QuickBooks will create a customer record called "ServiceCEO". A Success dialog box appears.

Note:

The ServiceCEO customer record is the customer account that will keep your Accounts Receivables balance in QuickBooks. Due to a QuickBooks limitation, ServiceCEO only links up with QuickBooks' General Ledger and Chart of Accounts, and that the ServiceCEO customer record will act as a generic customer record for all of your sales activities. Specific customer and invoice information linked to exported sales will *not* be transferred to QuickBooks, since you will have access to all customer information in ServiceCEO (including invoices, balances, and accounts receivables). The ServiceCEO and QuickBooks integration is designed to give you the tools to keep your company ledger and balance sheet correct at all times without duplicating data entry between ServiceCEO (your management application) and QuickBooks (your accounting application).



Caution:

If you receive this error after clicking Yes: **Error 91 - Object variable or With block variable not set**



You may have a customer or vendor with the name ServiceCEO already in your QuickBooks file. Since QuickBooks does not allow duplicate customer\vendor names, you will need to open change the name of the ServiceCEO customer\vendor in QuickBooks. Once the name is changed, you will be able to integrate the two applications.

12. Click **OK**. The Company Information dialog box reappears.

13. Select the appropriate default accounts from the following drop-down lists. The accounts you select here will be the default accounts to which your accounting information will be exported. You can overwrite these defaults for specific Master Products/Services, Master Categories, etc.) as well as when you export the data.
- **Cash Account.** All of your customer's Cash, Checks, and Credit Card payments will be exported to the account indicated here. Logical accounts for the Cash Account field include any Asset or Bank accounts.
 - **Tip Account.** All money collected as tips in ServiceCEO. Example accounts for the Tip Account field are Cash Expenditures (if you pay your employees their tips in cash) or Other Current Liability (if you include tips in your employee's payroll checks).
 - **Inventory Asset Account.** The default Inventory asset account; typically linked to an Other Current Liability account. Can be overwritten when defining Inventory for a Master Product.
 - **Default Inventory Loss Account.** All lost, damaged, or stolen inventory will be exported to the expense account selected here. If your inventory loss is for an inventory revaluation, this should be linked to an Asset account. If the loss is to indicate the loss of stock, then it can be linked to an Expense account.
Note that this account can be easily changed in the Inventory Loss management screen every time you reduce Inventory, so the account you select here is for default purposes only.
 - **AR Account.** Almost all ServiceCEO users link this field to their Accounts Receivables account.
 - **Default Income Account.** Link this account to an Income account. Note that this account is for default purposes only - you can change it for each individual service line that you offer to your customers. See the Integrating Products and Services section for more.
 - **Default Adjustment.** Used to track all adjustments in ServiceCEO. Typical linked accounts are Expense accounts.
 - **Default Misc. Expense Account.** Used for products that are *not* included in inventory tracking when the inventory tracking module is enabled. Typically linked to an Other Expense account.
 - **Sales Tax Payable Accounts.** One of these accounts will appear for each ServiceCEO Tax Code you have configured. Link these to a Long Term Liability or Other Current Liability account.
Note that to view the Sales Taxes in QuickBooks after they have been exported, select **Reports > Vendors & Payables > Sales Tax Liability** and drill into the Sales Tax Payable column.

Implementation Checklist



Note:

The Inventory Asset Account, Default Adjustment, and Default Misc. Expense Account drop-down lists will only appear if you have Inventory Tracking enabled.



Caution:

If any of your QuickBooks account names contain more than 50 characters, an error will be generated when you attempt to export sales or deposit to QuickBooks.

14. Click **Save and Close**.

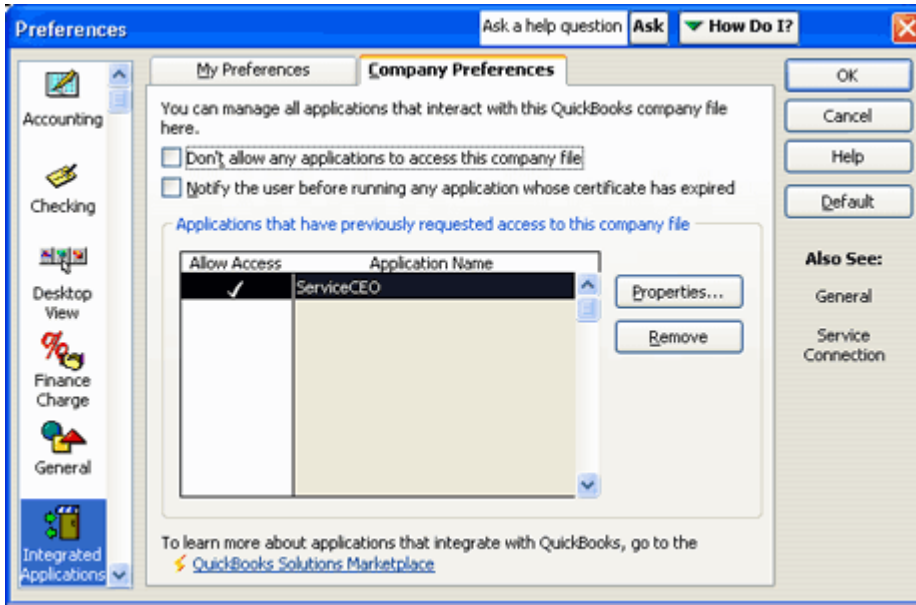
QuickBooks Configuration Settings

If multiple ServiceCEO users are going to be exporting information to QuickBooks, you will need to enable multi-user mode in QuickBooks. To do so:

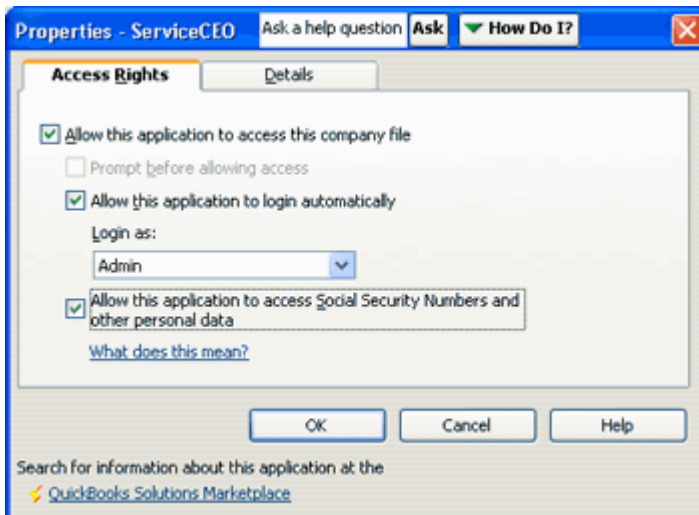
1. Open QuickBooks.
2. Select **File > Switch to Multi-user Mode**.

If you want to export information to QuickBooks when the QuickBooks file is not open, you must configure QuickBooks to accept data transfers when it is not open. To do this:

1. Open QuickBooks.
2. Select **Edit > Preferences**. The Preferences dialog box appears.
3. Click **Integrated Applications** on the left side of the dialog box.
4. Click the **Company Preferences** tab.



5. Verify that ServiceCEO is selected in the Application Name column. If not, select it now.
6. Click **Properties**. The Access Rights tab appears.




7. Select the **Allow the application to login automatically** check box.
8. Select the **Allow this application to access Social Security Numbers and other personal data** check box.
9. Click **OK**.
10. Click **OK**.

Configuring XML Integration

Before you begin, you should know or have access to:

- The location (folder on your computer or network) to which the ServiceCEO XML files should be exported. ServiceCEO Enterprise users can configure one directory per branch.
- Account numbers from the accounting system, such as information about the chart of accounts. These account numbers will need to be entered in ServiceCEO.

To integrate Sales, purchasing and Accounts Receivable with XML:

1. Select **ServiceCEO XML** from the Enable Sales, Purchasing, and A/R integration with drop-down list.
2. Click  next to the Save Exported Files in Folder field. The Select Company File dialog box appears.
3. Navigate to the location where you want to save your exported XML files.

Tip:



If you are running ServiceCEO on a network and want multiple users to be able to access the same XML folder location, the export folder must be located on a mapped network drive so that it is located on the same path for all ServiceCEO users.

4. Type the name of the file to which you want to export each type of account from the appropriate fields lists. These are detailed in step 13 in the Configuring QuickBooks Integration section. The name you type here will be the name of the XML file generated after the export.

Note:



No information will appear in these drop-down lists. This functionality is only used with QuickBooks integration. Type the name of the XML file directly into the field.

To integrate your payroll with XML:


1. Select the **Enable payroll integration with third-party provider** check box.

Note:

You cannot integrate your payroll with QuickBooks, only with XML integration. Therefore, you can only select the **Use accounting package specified above** check box if you have selected **ServiceCEO XML** from the previous Select Package drop-down list.



If the Use accounting package specified above check box is active, selecting it will automatically populate the three fields in this section with the values from the section above it.

2. Select **ServiceCEO XML** from the Accounting Package drop-down list.
3. Click  next to the Save Exported Files in Folder field. The Select Company File dialog box appears.
4. Navigate to and select the location where you want to save your exported XML files.
5. Click **OK**.

Tip:

If you are running ServiceCEO on a network and want multiple users to be able to access the same XML folder location, the export folder must be located on a mapped network drive so that it is located on the same path for all ServiceCEO users.

6. Enter the appropriate default account numbers in the Default Payroll Expense Account field.
7. Click **Save and Close**.

You have now integrated ServiceCEO with an accounting package using default settings. You can define detailed integration settings, as detailed in the following sections:

- **Accounts Receivable and Adjustments information.** See the Export Sales topic of the ServiceCEO Help System.
- **Payments.** See the Export Deposits topic of the ServiceCEO Help System.
- **Purchase Orders.** See the Exporting Purchase Orders topic of the ServiceCEO Help System.
- **Paychecks.** See the Exporting Paychecks topic of the ServiceCEO Help System.

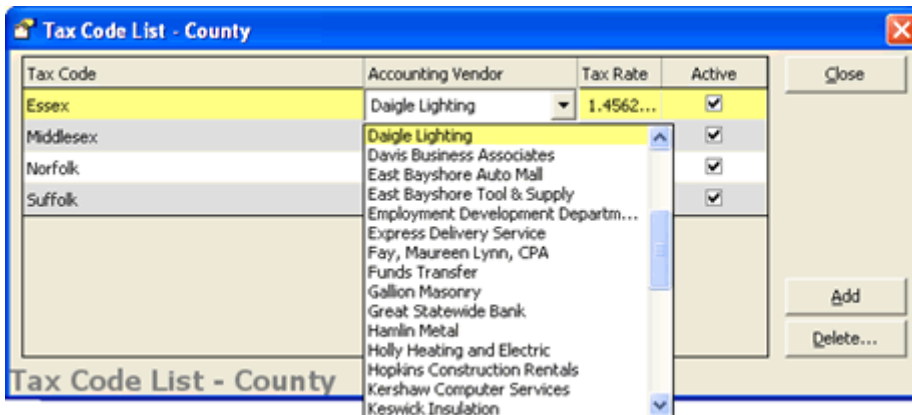
Integrating Taxes with Accounting

The final requirement for integrating a GL application with ServiceCEO is to associate every tax code with a vendor record. This linking will enable you to export tax liability information (via the Export Sales tab) so you can track how much sales tax you owe to the government.

Implementation Checklist

To deposit ServiceCEO's tax information into an accounting account, you need to map every Tax Code in ServiceCEO with a matching account in your accounting application. To do this:

1. Select **Tools > Lists > Tax Codes**. The Tax Codes dialog box appears.
2. Click **...** in the Tax Code List field for the tax type that you want to integrate. The Tax Code List dialog box appears.



3. Select an appropriate account from the Vendor drop-down list for every tax code. If integrated with QuickBooks, the vendors will be pulled from QuickBooks. If integrated with XML, type the name of the vendor into the Accounting Vendor field.
4. Click **Close**.
5. Repeat steps 2-5 to integrate the tax codes for each active tax type with GL vendors.
6. Click **OK**.

When taxes are exported to a GL application, they will be sent to the Vendor indicated here as well as the account as defined in the Company Information dialog box.

Integrating Specific Areas

Integrating Master Categories with Accounting

When you link a master category to an accounting account (be it a QuickBooks or XML account), all products and services in the master category will also be linked to the same account. This feature is useful because identifying an account for the master category will update every product and service to a new account without having to define the account for every individual service. However, note that you can define a different account for specific products and services; see the Integrating Master Products and Services section.

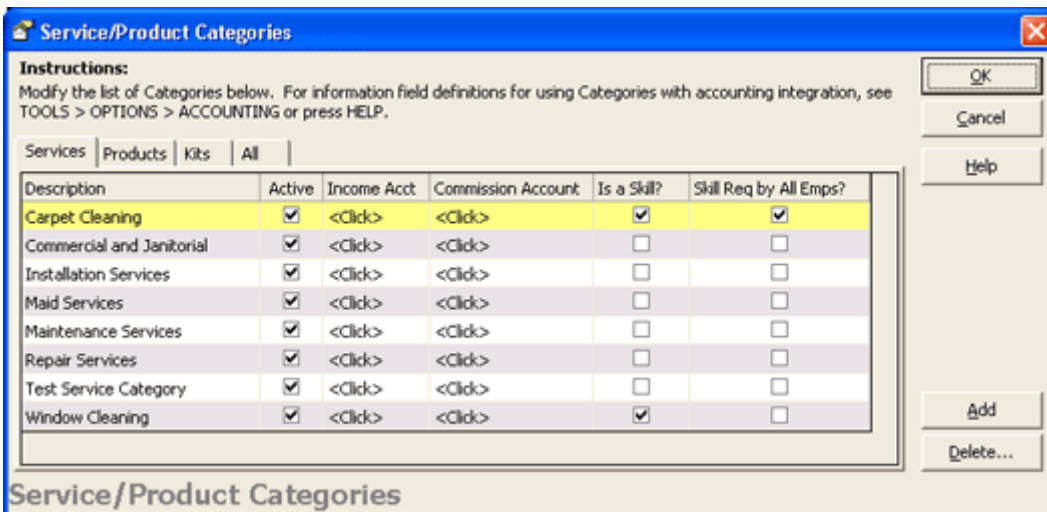


Note:

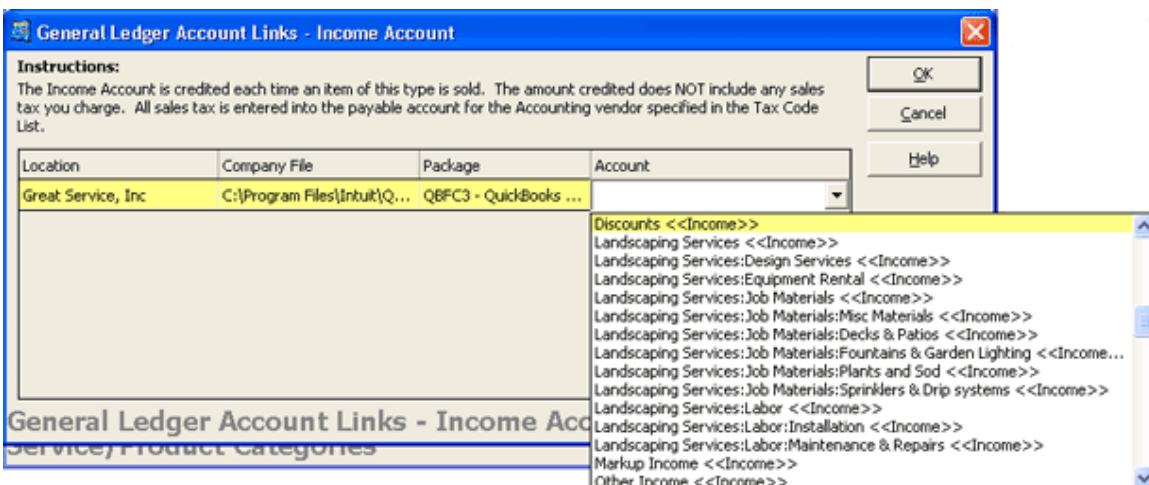
Before you can associate a master category with an accounting package, you must have first integrated the package with ServiceCEO.

To configure an accounting account for your Master Categories:

1. Perform one of the following actions:
 - o Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - o Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Click **Master Categories**. The Service/Product Categories dialog box appears.

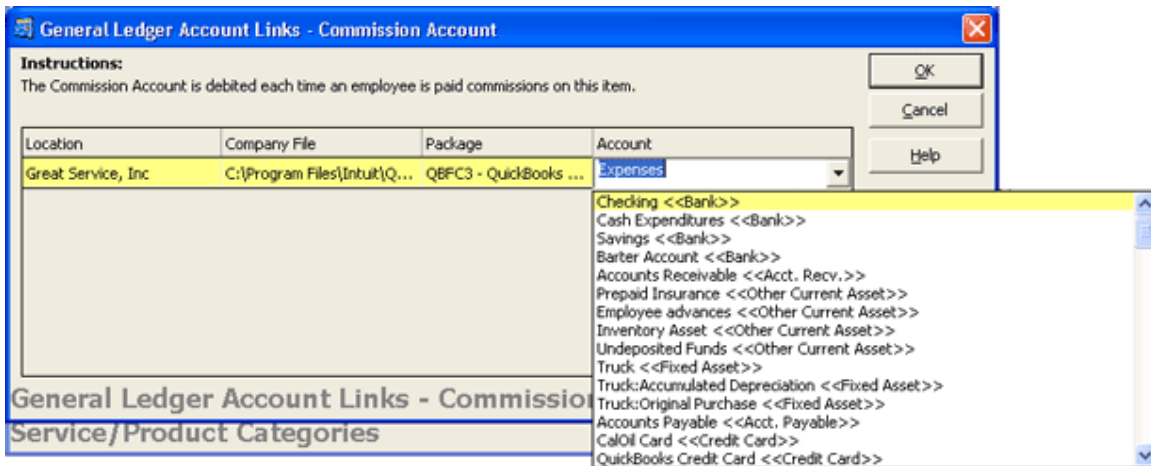


3. To link a master category to a GL Account, click the appropriate **Income Acct** field. The General Ledger Account Link dialog box appears.



Implementation Checklist

4. Select the account you want to attach to the category from the **Account** drop-down list.
5. Click **OK**.
6. Repeat steps 3-5 to link additional master categories to General Ledger accounts.
7. Click the **Commission Account** field for the master category for which you want to identify a commission account. The Commission Account dialog box appears.



Caution:

There is no default commission account.

8. Select the account you want to be debited every time an employee is paid commissions for any product or service in this category from the Account drop-down list.
9. Click **OK**.
10. Repeat steps 7-9 to link additional master categories to commission accounts.
11. Click **OK**.
12. Click **OK**.

Integrating Products and Services with Accounting

You can map any individual product and service to a General Ledger (GL) account.

Note that if the product or service is part of a master category, and that master category has already be integrated with an accounting account, then the product or service will already have defined accounts. You can overwrite the default accounts for individual products and services at any time; however, if you ever select a new account for the master category, any changes you made for individual products and services will be overwritten.

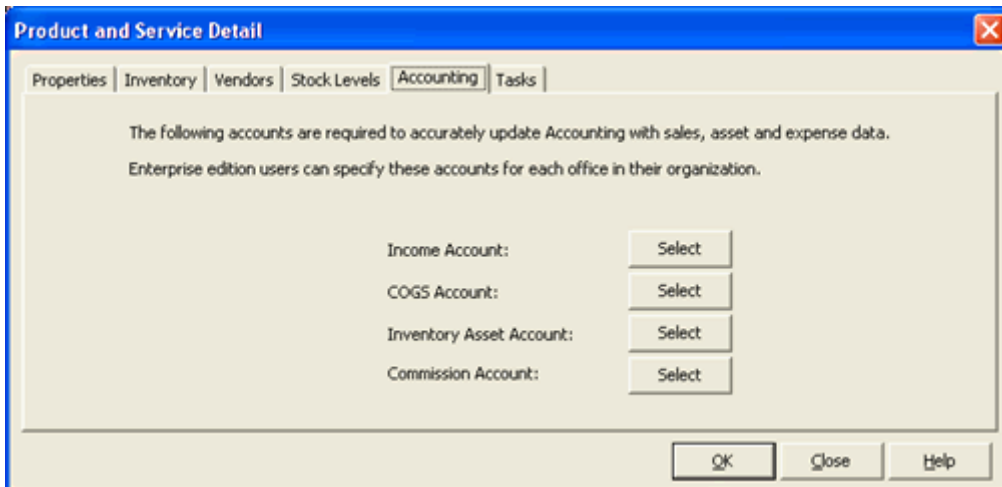


Note:

Before you can associate a master product or service with an accounting account, you must have first integrated it with ServiceCEO.

To link an individual product or service with a GL account:

1. Perform one of the following actions:
 - Select **Tools > Lists > Master Services List** or press **CTRL+F4**. The Services tab of the Products and Services page appears.
 - Select **Tools > Lists > Master Products List** or press **CTRL+F5**. The Products tab of the Products and Services page appears.
2. Double-click on the service or product that you want to link to a GL package. The Product and Service Detail dialog box appears.
3. Click the Accounting tab.



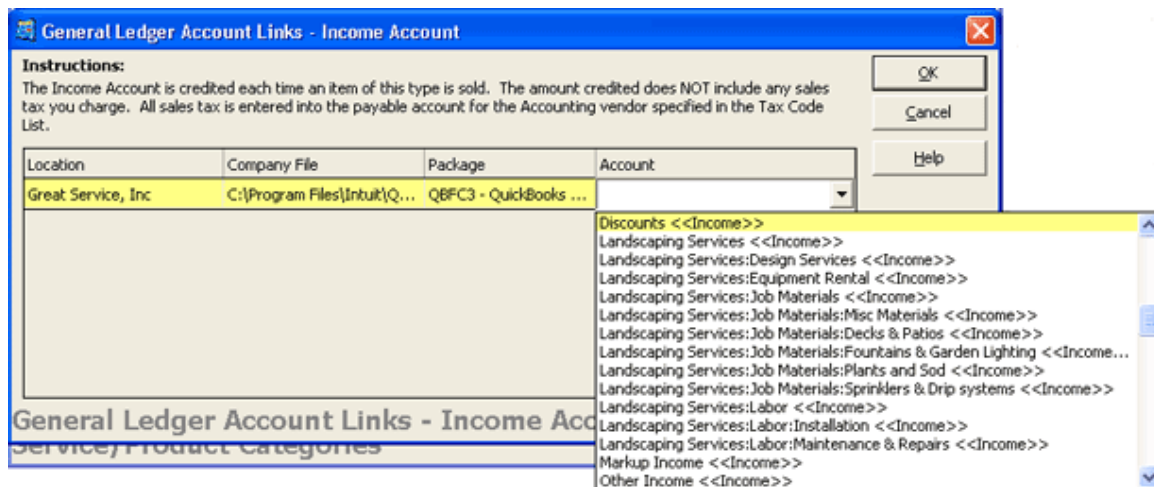
Note:

The COGS and Inventory Asset accounts will only appear for products for which you have Inventory Tracking enabled.

Implementation Checklist

4. Click **Select** for the account you want to add/edit. The accounts are:
 - **Income Account.** Tracks the income generated by this product/service.
 - **COGS Account.** The Cost of Goods Sold account. Tracks the cost of all inventory products.
 - **Inventory Asset Account.** The Inventory Asset account. By default, controlled by what you defined in the Company Information dialog box.
 - **Commission Account.** Tracks all commissions paid for the sale of this product/service.

The General Ledger Account Links dialog box appears.




5. Select the account into which you want to export the value from the **Account** drop-down list.
6. Click **OK**.
7. Repeat steps 4-6 to link additional accounts to specific GL accounts.
8. Click **OK**.
9. Repeat steps 2-8 to edit the GL accounts for additional products or services.

Integrating Time Codes with Accounting

To help you integrate your payroll with accounting, you can link your time codes to a General Ledger (GL) account. To do so:

1. Open the Time Code Setup dialog box. Depending on the level for which you want to define time codes, you access it from different places:
 - For the entire company, select **Tools > Lists > Time Codes**.
 - For an individual employee, click **Time Codes** from the employee record.

2. To link a time code with a particular accounting account, click  in the General Ledger Account column and type the name of the XML account into which this data should be exported from the subsequent dialog box. (Note that the General Ledger Account column appears only if Accounting Integration is enabled.)
3. When complete, click **OK**.

Once time codes are integrated, payroll will be exported to the defined accounting accounts when you create and export paychecks. See the Exporting Paychecks topic of the ServiceCEO Help System for details.

Additional Integration

Integrating Overtime Rules with Accounting

To export payroll generated via overtime rules, you must integrate each overtime rule with a General Ledger (GL) account. By default, all overtime rules will be integrated with the Default Payroll Expense Account as selected in the payroll integration section of the Company Information Options dialog box. See the Configuring XML Integration section for more details.

Tip:



For more detail on overtime rules, please see the Defining Overtime Rules topic of the ServiceCEO Help System.

For a detailed explanation of generating payroll with overtime, read the Payroll and Overtime topic of the ServiceCEO Help System.

To integrate an overtime rule with a new accounting account:

1. Select **Tools > Lists > Overtime**. The Overtime Setup dialog box appears.
2. Select the overtime rule you want to integrate with an accounting account.
3. Click the **Accounting** tab.
4. Click **Select Payroll Expense/Debit Account...** The General Ledger Account Links dialog box appears.
5. By default, the overtime rule will be integrated with the Default Payroll Expense Account as selected in the payroll integration section of the Company Information Options dialog box. To change the default value, click in the Account field and type the name of the new accounting account.
6. Click **OK**.
7. Repeat steps 2-6 to integrate other overtime rules with accounting accounts.
8. Click **OK**.

Integrating Payroll Adjustment Types with Accounting

For a variety of reasons, there are times when you will need to manually adjust an employee's payroll. When you do so, you can link these adjustments to an adjustment type that you define. Doing so enables you to track particular adjustment types and export each adjustment type to a unique account.

To integrate payroll adjustment types with an accounting account:

1. Select **Tools > Lists > Payroll Adjustment Types**. The Payroll Adjustment Types dialog box appears.
2. Click the Accounting Account field for the payroll adjustment type you want to integrate. The Payroll Adjustment Account dialog box appears.
3. By default, this adjustment type will be integrated with the Default Payroll Expense Account as selected in the payroll integration section of the Company Information Options dialog box. See the Configuring XML Integration section for more details.
To change the default, click in the Account field and type the name of the new accounting account.
4. Click **OK**.
5. Repeat steps 2-4 to add additional adjustment types
6. Click **OK**.



Integrating Company Profiles with Accounting

If you are using multiple profiles in ServiceCEO, you can export data to a different accounting application database for each company profile. For example, if you have two locations, each one with a unique location, you can export data from each location into a separate QuickBooks database (.qbw file). The one catch is that all vendor and account names must have identical names in each accounting database.

If a profile's data is not explicitly associated with an accounting database, all accounting exports will be sent to the account's default company (as configured in the Company Information section). See the Configuring Accounting Integration section for details.

To integrate company profiles with other accounting application databases:

1. Select **Tools > Options** or press **CTRL+O**. The Options dialog box appears.
2. Click **Profiles** from the Categories Bar. The Company Profiles Options dialog box appears.
3. Click **Edit Profiles**. The Admin - Company Profiles dialog box appears.

4. Select the company profile that you want to integrate with a accounting application database from the Profiles list box.
5. Scroll down to the bottom of the Details list box.
6. Select the **Use alternate Accounting Company File** check box.
7. Select the accounting package you are using from the Select Accounting drop-down list.
8. If you are using ServiceCEO XML, click  next to the Save Exported files in Folder field. The Select Company File dialog box appears. Navigate to the location where you want to save your XML files. Click **OK**.
9. If you are using QuickBooks:
 - Click  next to the Location of QuickBooks Company File field. The Select Company File dialog box appears.
 - Navigate to the location where your QuickBooks database is located. The default location is **C:\Program Files\Intuit\QuickBooks\[databasename].qbw**.
 - Click **Open**. A warning dialog box appears, reminding you that you must have QuickBooks open.
 - Click **OK**.
10. Repeat steps 4-9 to integrate additional profiles with other accounting databases.
11. Click **Save and Close**.
12. Click **OK**.

For more on Company Profiles, see the Creating Multiple Company Profiles topic of the ServiceCEO Help System.

Creating a New Customer

To create a new customer:

1. Click **Customers** from the Navigator bar. The Customer List appears.
2. Click **New** or select **File > New Customer**. The General tab of a blank customer record appears. Some default information may be populated if the Customer Defaults section was filled out. See the Defining Requirements section for details.

Implementation Checklist

3. Define all of the necessary fields in the customer record. For more, see the appropriate sections:
 - Customers General tab
 - Customers Detail Tab
 - Customers Jobs Tab
 - Customers Notes Tab
 - Customers Links Tab
 - Customers Billing History Tab
 - Customers Equipment Tab
 - Customers Service Contracts Tab
4. After you've defined all of the customer's information, click **Save**.

Importing Data

Importing Data into ServiceCEO Overview

Currently, you can import three types of data into ServiceCEO:

- Customer Records
- ZIP Codes
- Inventory Parts/Vendor Catalogs

While the general importation process is similar for these three types of data, some specific changes may be needed to import each type. For details, please see the specific sections below, and then click the Next Topic links to read the general sections for details on the import process.

We support importing from five data source formats:

- Microsoft® Access® databases (*.MDB)
- Fixed-width text files (*.TXT)
- Comma-delimited text files (*.CSV)
- Tab-delimited text files (*.TAB)
- A previous import configuration file (*.XML)

For the best results, we recommend using a Microsoft Access file.



Tip:

Microsoft Excel® data sources are not directly supported; however, you can use the “Save As...” option to save an Excel spreadsheet as a CSV file. You can then import this CSV file into ServiceCEO.

For sample import information, please download the ServiceCEO Import Template.xls spreadsheet: [Download File](#)

**Caution:**

Date/time stamp values are not imported correctly. The date will be kept, but the time stamp will be changed to midnight of that date.

Importing Customers

Keep these items in mind when importing customers:

- The first imported customer location will be set as that customer's Primary and Bill To location. All subsequent locations will not be either the Primary nor the Bill To location.
- Do not use the same location name for different locations for a single customer.
- If there is a value in the Company Name field, the customer record will be marked as a Corporate record; if no value appears in the Company Name field, then the customer record will be marked as a Residential record.
- All imported customers will have a status of Prospective.
- When Mapping Fields, we recommend you configure several (one to three) Key fields at the customer, location, and contact levels. See the Mapping Fields topic for details.

Importing ZIP Codes

Note that if you are mapping the same data field in the source file to all three Tax Codes, only the first the Tax code is updated; Tax Code 2 and Tax Code 3 will not updated.

Caution:

Since Australia does not have a default city for each Post Code, importing Australian Post Codes will not automatically setup the auto-population via ZIP Code in the Customer Address screen. You will need to map the City, State, tax codes and Zones for each imported code in the Zone Manager.

Importing Inventory Parts/Vendor Catalogs

It is very important that you understand the unique relationship between Master Products and Vendor Catalog Items before importing inventory data. To that end, we recommend that you read the Master Products vs Vendor Catalogs and the Creating New Master Products from the Vendor Catalog topics before starting to import inventory.

Note that before you can import inventory, you must first enable Inventory Tracking.

When configuring your data file, be sure to provide each column with a clear, self-descriptive name so that you can easily map the data by column name into the Vendor Catalog.

Before You Begin

Before you can import data into ServiceCEO, you need to generate the data file. Typically, this involves exporting the data from the CRM product you used before ServiceCEO to one of the data source formats listed above. The file that contains your data is called the data file.

Once you have your data file, you may need to tweak the data a little bit in order to make sure it imports smoothly into ServiceCEO. To learn how to do this, see the above sections, the Select Data Source topic, and the ServiceCEO Import Template.xls spreadsheet.



Note:

Column names in text file data sources should not contain spaces or irregular (non-alphanumeric) characters.

Select Data Source

The first step of importing data into ServiceCEO is to select the data file that contains the information you want to import. Typically, this is

This is done on the first page of the Data Import Wizard. Accessing the Data Import Wizard varies depending on the type of data that you want to import:

- To import customers, select **Tools > Customer Import** from the Customer list.
- To import ZIP Codes, select **Tools > Import ZIP Codes** from any tab of the Zone Manager.
- To import inventory, open the Parts Catalog tab for the Vendor whose Catalog you want to add to or update and click **Import Parts**.

Regardless of how you access it, the Data Import Wizard appears.



The Data Source Configuration wizard will enable you to choose the file that contains the data you want to import and configure it for importation into ServiceCEO. There are three basic types of files:

1. Importing Data from a Text File
2. Importing Data from a Microsoft Access file
3. Importing Data from a Import Configuration File

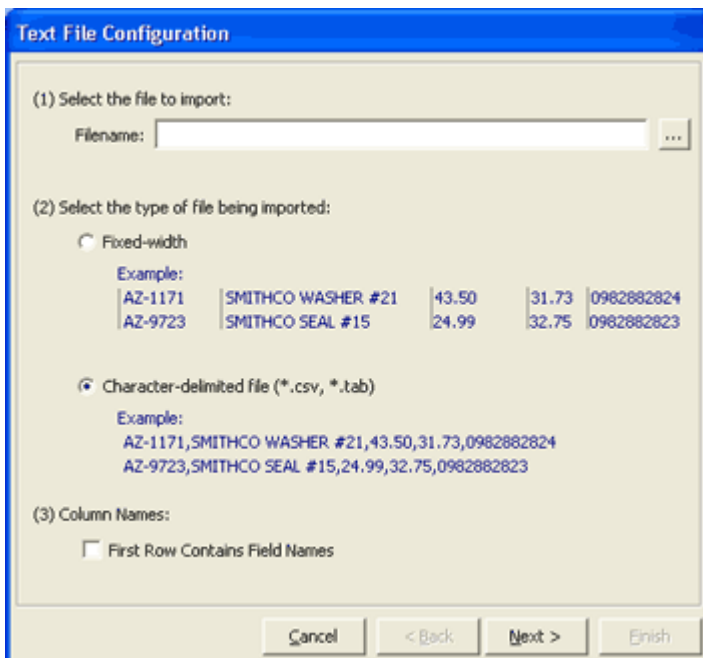
Importing Data from a Text File

The following text file formats can be imported into ServiceCEO:

- Fixed-width text files (*.TXT). A text file where your values are separated by a fixed distance (i.e., five spaces).
- Comma-delimited text files (*.CSV). Note that CSV files cannot have any spaces in the column names. If any column names contain a space, you will receive an error message.
- Tab-delimited text files (*.TAB)

To configure a TXT, CSV, or TAB file:

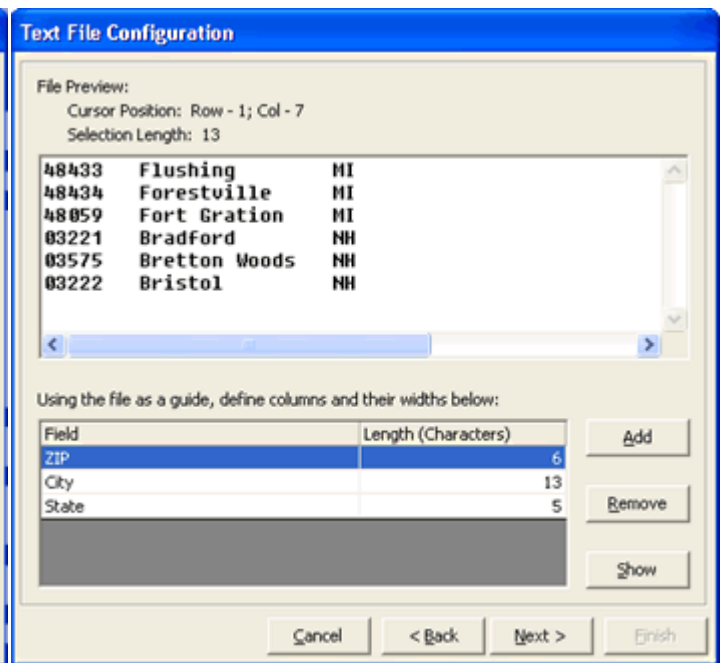
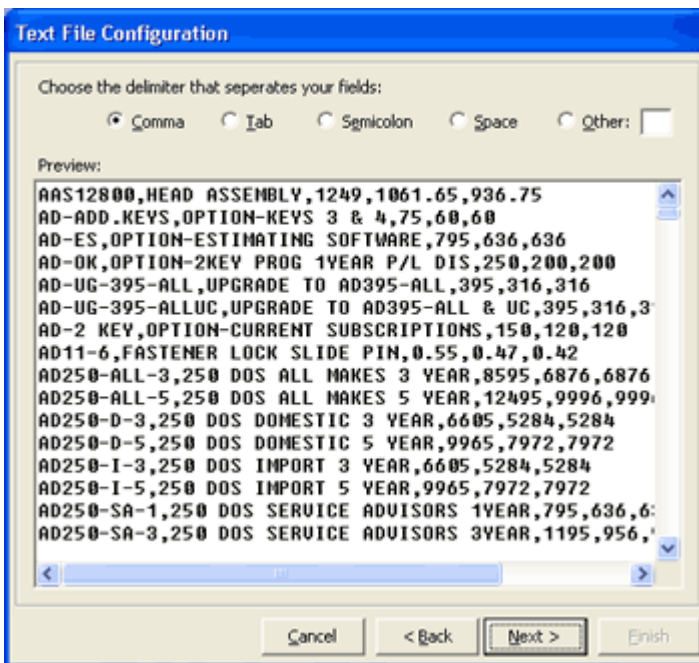
1. Click **Configure**. The Text File Configuration dialog box appears.



2. Click **...**. The Select File dialog box appears.
3. Navigate to and select the file you want to use.

Implementation Checklist

4. Click **OK**. The file appears in the **Filename** field.
5. Select the option button corresponding to the type of file you are importing. Depending on what you select, the name of the check box in section (3) will change.
6. If you are importing a character-delimited file, click the **First Row Contains Field Names** check box if the first row of the file contains the names of the fields you are importing.
If you are importing a fixed-width file, click the **Skip First Row** check box to skip the first row when importing data. Typically this is done if the first row contains the names of the import fields.
7. Click **Next**. The second page of the Text File Configuration dialog box appears. Depending on the option you selected in step 5, the screen will appear differently:

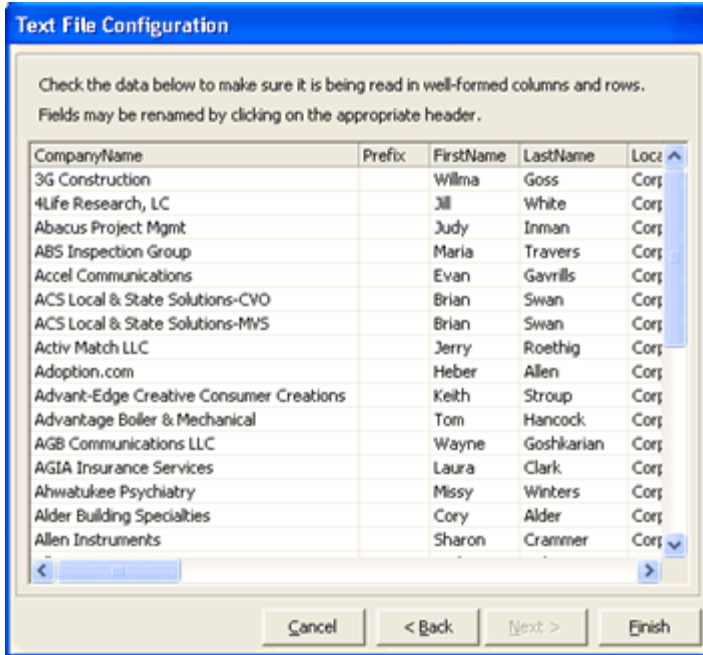


The second page of the Text File Configuration dialog box, if you selected **Character-delimited file**

- Select the option button corresponding to the character that separates the values in your file.
- Click **Next**. The third page of the Text File Configuration dialog box appears, displaying the data separated by their fields.

The second page of the Text File Configuration dialog box, if you selected **Fixed-width**

- Click **Add**. A new row appears.
- Type a name for the row.
- Type the length of the fixed-width segment.
- Repeat the above steps to define all segments.
- Click **Next**. The third page of the Text File Configuration dialog box appears, displaying the data separated by their fields.



10. Review your information. If you are importing a fixed-width file and you need to adjust your column widths, click **Back** and make any necessary adjustments.



Tip:

Be sure to scroll to the right to view all of the available fields.

Note that you can edit the column headers by clicking into the header and editing the name of the field.

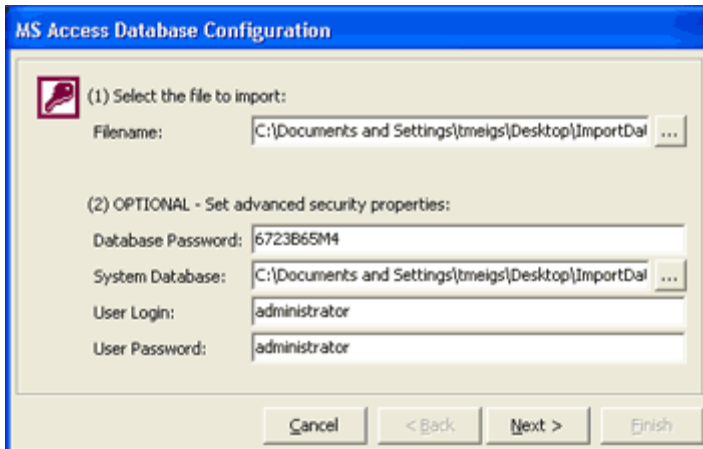
11. Click **Finish**. The first page of the Data Import Wizard reappears.
12. Click **Next>**. The second page of the Data Import Wizard appears. Continue by following the steps in the Mapping Fields section.

Importing Data from a Microsoft Access file

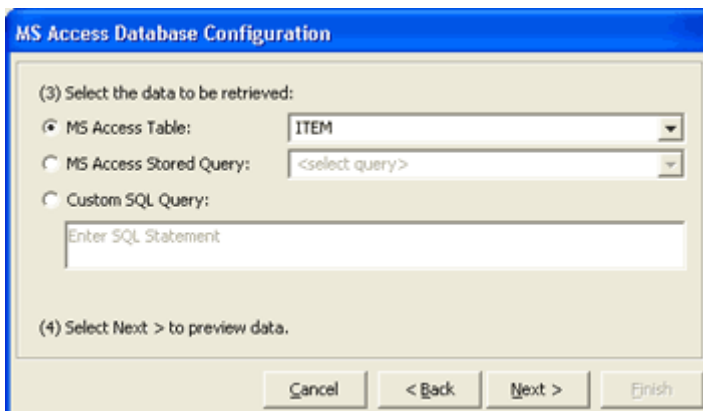
To import inventory data from an Access database (a .MDB file):

1. From the first page of the Inventory Data Import Wizard, select the **Import data from an Access database** option button.
2. Click **Configure**. The MS Access Database Configuration dialog box appears.

Implementation Checklist



3. Click **...**. The Select File dialog box appears.
4. Navigate to and select the MS Access database file (*.MDB) you want to import.
5. Click **Open**. The file path appears in the **Filename** field.
6. Enter the optional security properties, if necessary.
7. Click **Next>**. The second page of the MS Access Database Configuration dialog box appears.



8. Select the option button corresponding to the query or table you want to use.

Note:



The table or query you select in this dialog box will control the data that is imported from the database. If the database contains more than one table, you can select the table you want to import from the drop-down list. If you want to limit the data you import, you can select or enter a query.

9. Select or enter the table or query you want to use.

10. Click **Next>**. The third page of the MS Access Database Configuration dialog box appears, previewing your data.
11. Verify this information is correct. If not, click **<Back** to edit your import settings.
12. Click **Finish**. The data will be imported.

Importing Data from a Import Configuration File

To import inventory from a previous import file (.XML):



Tip:

See the Preview Import section for details on saving an import file

1. Click the **Load a previous Import Configuration File** option button.
2. Click **Load**. A Select File dialog box appears.
3. Navigate to and select the appropriate .XML file.
4. Click **Open**.
5. Click **Next>**. The second page of the Inventory Data Import Wizard appears. Continue by following the steps in the Mapping Fields section.

Mapping Fields

The second step of importing data into ServiceCEO is to map the fields from your data source (the text, Access, or XML file) to corresponding fields in the ServiceCEO database.

1. Click **Next** from the first page of the Data Import Wizard to display the second page of the wizard.

Implementation Checklist



Be sure to read the instructions on this screen of the wizard carefully.

2. Select the **Key** check box to mark the field as a Key field if you are updating existing data instead of adding new data. Existing records that have matching Key Field values will be updated instead of adding new records to the catalog. If the Key field's value has no corresponding value in ServiceCEO, a completely new record will be created for that part.
Note that some fields are Key fields by default. A complete description of all fields, including the default key fields, is located in the ServiceCEO Import Template.
3. If you are importing customers, you should configure several (one to three) Key fields, typically at the customer, location, and contact levels.
4. Select or type a value in the appropriate Map this Field field. See the ServiceCEO Import Template for details.
A field marked as a Key field must contain a mapped column. Note that this column cannot contain any null values; a zero value is acceptable, but a null value will generate an error.
If you have no data that you want to import into a Key field, simply link the Key field to a blank column in the import file.

Tip:

When mapping your fields, you can manually enter a field value for all imported records. For example, if your data source has no field corresponding to the ServiceCEO **Credit Problem?** and/or **Cost Taxable** field, you can type yes, no, true, or false into its corresponding **Map This Field** field to set all imported records to that value. Another good use of this feature is to create a new demographic containing all of the customers being imported by typing a name for the new demographic in the Map this Field column for the NewDemographicName field.



Warning: This is a powerful feature. Be very sure that you want every imported record to be updated to the value you enter before continuing.

See the Creating New Master Products from the Vendor Catalog topic of the ServiceCEO Help System for details about mapping fields for inventory imports.

Once you've completed mapping the fields, click **Next**. The next page of the Data Source Configuration wizard previews your import using the defined data mapping you just created. See the Preview Import section for more.

Preview Import

Click **Next** from the second page of the Data Import Wizard to display the third page of the Data Import Wizard. This page previews the results of the import you just created.

The icons that appear in the Action column are designed to inform you of the action that will take place when you click Next. They are:

- **Recycling symbol.** Will update all records. For customer imports, will update the customer, location, and contact.
- **X symbol.** For customer imports, will update the customer and location, inserting a contact.
- **Check Mark.** For customer imports, will update the customer, inserting the location and contact.
- **Arrow.** Will insert a new record. For customer imports, will insert the customer, location and contact.

Implementation Checklist

Include	Action	Vendor	PartNo	Description	Cost	SellPrice	Available?	Cost/Taxable?	Manufac	ManufacModelNo	Warn
<input checked="" type="checkbox"/>	→	Pynchon Industries	AAS12800	HEAD ASSEMBLY	\$1,061.65	\$1,249.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD-ADD.KEYS	OPTION-KEYS 3 & 4	\$60.00	\$75.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD-ES	OPTION-ESTIMATING SOFTWARE	\$636.00	\$795.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD-OK	OPTION-2KEY PROG 1YEAR P/L DIS	\$200.00	\$250.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD-UG-395-ALL	UPGRADE TO AD395-ALL	\$316.00	\$395.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD-UG-395-ALLUC	UPGRADE TO AD395-ALL & UC	\$316.00	\$395.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD-2 KEY	OPTION-CURRENT SUBSCRIPTIONS	\$120.00	\$150.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD11-6	FASTENER LOCK SLIDE PIN	\$0.47	\$0.55	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-ALL-3	250 DOS ALL MAKES 3 YEAR	\$6,876.00	\$8,595.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-ALL-5	250 DOS ALL MAKES 5 YEAR	\$9,996.00	\$12,495.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-D-3	250 DOS DOMESTIC 3 YEAR	\$5,284.00	\$6,605.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-D-5	250 DOS DOMESTIC 5 YEAR	\$7,972.00	\$9,965.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-I-3	250 DOS IMPORT 3 YEAR	\$5,284.00	\$6,605.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-I-5	250 DOS IMPORT 5 YEAR	\$7,972.00	\$9,965.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-SA-1	250 DOS SERVICE ADVISORS 1YEAR	\$636.00	\$795.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-SA-3	250 DOS SERVICE ADVISORS 3YEAR	\$956.00	\$1,195.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD250-SA-5	250 DOS SERVICE ADVISORS 5YEAR	\$1,196.00	\$1,495.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD295-ALL-1	295 WINDOWS ALL MAKES 1 YEAR	\$1,596.00	\$1,995.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD295-ALL-3	295 WINDOWS ALL MAKES 3 YEAR	\$6,876.00	\$8,595.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD295-ALL-5	295 WINDOWS ALL MAKES 5 YEAR	\$4,716.00	\$5,895.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD295-D-3	295 WINDOWS DOMESTIC 3 YEAR	\$5,284.00	\$6,605.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	AD295-D-5	295 WINDOWS DOMESTIC 5 YEAR	\$7,972.00	\$9,965.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	→	Pynchon Industries	B404T-01-GLV	BRAKE TESTER-TRK (4)PLATE GLV	\$40,670.00	\$58,100.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

You can edit any field in the preview grid. Be sure to scroll to the right to view all of the fields in the import.



Tip:

You can use the **Tab** key to move quickly between fields.

Inventory Note:

New Master Product entries will only be created when you specify a Master Category. For that reason, if you are importing new parts (as opposed to just updating vendor pricing) and need to create new Master Products, you will need to manually specify a Master Category for each line from the **New Mstr Prod Category** drop-down list. Alternatively, you can use the **Use this category for all new Master Products** drop-down list (located at the bottom right corner) to define a default Master Category for all imported items.

To link imported items to existing Master Products rather than creating new ones, select an existing part number from the **Master Product Part No** column. If no values were mapped to this column from your data source, you can manually enter existing Master Product Part Numbers or select them from a drop-down list.

Note that the Part No.'s are not filtered by the Master Product Category you select. In other words, all part numbers appear regardless of the product category you select. Make sure these correspond before continuing.

Alternatively, you can import the items without creating a new Master Product. You can always create a new master product with inventory after the import is created - see the Creating Master Products with Inventory topic of the ServiceCEO Help System for details. To do this, leave the Master Product field empty.

1. Select the **Include** check box to include an item in the import. If this check box is deselected, the item will be excluded from this import (it will not be imported or updated). Note that the **Select All** and **Select None** buttons will select or deselect the **Include** check box for all items.
2. When you have completed previewing the import, click **Next**. The fourth page of the Data Import Wizard appears.



3. Click the **Save Import Configuration** check box to save your import configuration to an XML file. Doing so provides you with the ability to reload the XML file if you need to re-import the information.
4. Click **Finish** to complete the import.

Data Import Wizard Troubleshooting

The following tips and warnings will help you perform your data imports without errors.

Text files have the following limitations:

- Data in text files can't contain irregular, or non-alphanumeric characters. For example: &, %, *, /
- Column headers cannot contain spaces
- The title of the text file cannot contain periods

To fix these problems, we recommend you take one or more of these steps:

- Remove the spaces or irregular characters
- Replace spaces with underscores or dashes
- Surround the problematic text with double quotes (")
- Import the text file into Microsoft® Access®

Implementation Checklist

If you find that some data is missing after importing a text file into ServiceCEO, the problem may be because the columns and/or fields in the text file have different formats. For example, if you have one column where some fields are letter-based but others are number-based, some of these values may be dropped when importing into ServiceCEO. To fix this issue, put quotes around all of your values. If you have large number of fields and/or columns where this problem occurs, we recommend you import this file into Microsoft Access, format each field correctly, and then import the Access file into ServiceCEO.

You may encounter problems if you import a text file larger than one megabyte. Please either split your file into multiple one megabyte files or import the data into Microsoft Access and import the Access file.

Any nulls (i.e., a field with no value) in the selected key fields will generate errors. Replace any null values with either a zero or a space to avoid these errors.



Note:

For details on formatting fields in Microsoft Access, please review your Access documentation.

Invalid Importation Data

Customer Importing

- Time stamp values are not imported correctly. The date will be kept, but specific time information will be changed to midnight of that date.
- Do not use the same location name for two different customer locations.
- Any nulls (i.e., a field with no value) in the selected key fields will generate errors. Replace any null values with either a zero or a space to avoid these errors.
- You may encounter problems if you import a text file larger than one megabyte. Please either split your file into multiple one megabyte files or import the data into Microsoft Access and import the Access file.

If you have customers with identical names but different addresses in your import file that you want to import as separate customers (not two locations for the same contact), you will need to map an extra customer-level field to the address as a key field on the second page of the Data Import Wizard. We recommend you use one of the custom fields (one of the "Extra" fields).

Inventory Importing

The product description cannot contain more than 255 characters, including spaces, or an error will result.

Credit Card Processing

The CC Processing tab of the Office Duties topic of the ServiceCEO Help System enables you to process credit cards through ServiceCEO. In order to process credit cards within ServiceCEO, you will need to enable integration with one of the Credit Card vendors that integrate with ServiceCEO.

To learn more about ServiceCEO's credit card processing capabilities, please point your browser to <http://www.insightdirect.com/services/credit-card-processing/>.

To apply for a merchant account and begin processing credit cards, please fill out the Pre-Application form, located at: <http://www.insightdirect.com/accepting-credit-cards/>.

After you have been issued a new activation code containing the Credit Card Integration license, but before you install the Credit Card vendor software, you will need to perform two steps:

- **Activate Credit Card Integration.** Select the **Use Integrated credit card processing** check box and indicate the folder you are using as the transaction folder. For details, see the Defining Payment Types section.
- **Provide Users Security Rights.** Provide your users the proper rights to process credit card payments. See the Managing User Groups section for details. The security rights you will need to assign are called "Credit Card Processing".



Caution:

ServiceCEO only exports the first 20 characters of the first address line, as defined in the Address Information dialog box.

Once you have set up the vendor software, read the Processing Credit Card Payments topic.

Glossary

A

Activation Code: The code - a string of letters and numbers - that validates ServiceCEO so it can be used beyond the initial 14-day trial period.

Active Period: The Active Period defines the date range for visible items within the application. In other words, only jobs that occur within this active period will be visible. This limitation ensures that the system will maintain a manageable volume of active schedule data while sustaining reasonable performance.

Adjustment: A change to an invoice or customer's account balance.

API: Short for Application Programming Interface. The ServiceCEO API is designed so that developers can extend ServiceCEO's functionality by writing their own programs (or web services) that use the API to integrate with ServiceCEO.

C

Campaign: A campaign is a specific marketing activity. You can define its start date, end date, budget, and related tasks.

Charge: A fee that is assessed to a client for a service or product. It is designed to cover a single (billable) Product, Service, Entire Service Contract, or miscellaneous charge. There are two types of charges: Fixed and Variable.

Client Computer: Any computer running ServiceCEO that is not hosting the ServiceCEO database. All client computers must connect, via a network, to the server in order to see the ServiceCEO database.

Commission: A commission is a rate of pay based upon the percentage of the total sale of a the commissionable product\service on a job. The Completion Wizard automatically processes commissions during job completion, calculating employee's pay and, if necessary, automatically dividing up the commission amongst multiple employees. Note: The method of splitting commissionable charges can be changed in the Payroll Options dialog box.

Cost: The wholesale price of a product. The retail price is called the selling price.

CPU: Short for Central Processing Unit.

CSV: Comma Separated Value.

Customer: Corporations or individuals for whom services or products are provided. ServiceCEO tracks customers' address and contact data, billing information, and scheduled appointments.

Customer List: The Customer List is a complete listing of client records - both active and inactive records. The list can be sorted by status using a filter. The purpose of this list is to assist the user in locating a particular Customer Record.

D

Demographic: A selected group of customers based on characteristics and/or filters you define.

Dispatch Board: The Dispatch Board is a single screen where all users can view and manage team assignments for a given day. It displays all of an organization's teams along with all of the employees and jobs assigned to each team. This configuration allows users to easily see what is scheduled to take place during the selected day. In addition, users can use the Dispatch Board to easily manage their teams within ServiceCEO.

Duration-Based: This method of recording the length of a job displays the length of time it takes to complete a job. The duration of each job will be constant; adding and removing team members assigned to that job will not alter the duration of that job. (It will, however, alter each employee's man-hours.)

E

Employee: Default term for people employed to perform work for clients.

Employee Record: Tracked in the Employee List, an Employee Record is the complete set of information for an individual. The record will track the employee's address, phone numbers, social security number, e-mail address, emergency contacts, payroll history, job performance notes, and more.

Estimate: An internal record of proposed work for a customer. An estimate is identical to a job but, because it records proposed rather than planned work, it does not appear on the calendar. Not to be confused with a Quote.

F

Filter: A Filter limits what data is displayed on a particular page based on criteria that you define.

Fixed Charge: A charge that is only entered once and will not change as work is performed or completed. It will remain the same regardless of the amount of man-hours or the number of visits in which it takes to complete a job or service.

G

General Ledger: The general ledger is the main accounting record of a business which uses double-entry bookkeeping. It consists of accounts for fixed assets, current assets and liabilities, profit and loss or income and expenditure items, and funds or reserves. The general ledger is a summary of all of the transactions that occur in the company.

H

HTML: Short for HyperText Markup Language. Much of the web is written in HTML or one of its derivatives.

I

Idiolect: Idiolect is a unique linguistic pattern unique among speakers of a language or dialect. In terms of ServiceCEO, the Idiolect option enables you to customize your application based on the country or region in which you are operating.

Invoice: A detailed list of goods shipped or services rendered, with an account of all costs.

Internet via a modem and browse the Internet.

J

Job: A unique service visit. It contains all information about the products and/or services that will be provided to a customer. A series of jobs can be created by a schedule (a job with a defined frequency). Note that the term Job is customizable. For details, see the Defining Vocabulary topic of the ServiceCEO Help System.

Job Window: The leeway, in hours, for starting the job, as defined in the General tab of the job record. For example, if the job is scheduled to start at 2:00 and has a window of .5 hours, the job must be started at some point between 1:30 and 2:30.

K

Kit: A Kit is a grouping of related services and/or products together in a group so that they can be added to a job as a bundle rather than as an individual line-item.

M

Man-Hour: This method of recording the length of a job displays the total number of hours it takes to complete a job. This number is calculated by multiplying the length of the job by the total number of employees assigned to the job.

Master Category: A user-defined grouping of individual services and products.

MDB: Short for Microsoft Access database.

N

Navigator bar: The Navigator bar is the list of icons on the left side of all ServiceCEO pages that links to all of the major sections of the application.

O

ODBC: Short for Open DataBase Connectivity. ODBC is a standard database access method developed by Microsoft®. ODBC enables access to any data from any application, regardless of which database management system (DBMS) is handling the data.

P

Price Level: A method of marking up or down the price of products or services on a job by a certain percentage.

Product: A commodity that is sold to a customer.

Project: A job that consists of multiple visits or days of service.

Q

QuickBooks: QuickBooks® is a popular accounting software program with which ServiceCEO can integrate, updating QuickBooks' general ledger when financial actions are performed within the application (i.e., jobs are closed, deposits are made, etc).

R

Role: The duties the employee performs on any given job. Depending on which role the employee is assigned to when working on a job, the employee may have different payroll settings. Payroll for different roles can be defined in the employee's Payroll Setup tab.

RTF: Short for Rich Text Format. RTF is the format used for entering enhanced notes. For more about RTF, please point your browser to http://en.wikipedia.org/wiki/Rich_Text_Format.

S

Sales Representative: An employee who sells the jobs and/or schedules that you service.

Schedule: A job with a frequency (service plan). Saving a schedule will create a series of jobs, depending on the frequency settings. The term Schedule is customizable. For details, see the Defining Vocabulary topic of the ServiceCEO Help System.

Service: A category of work or duties performed for a customer.

Service Unit: A Service Unit is a method of breaking down or measuring a service, usually for payment purposes.

Implementation Checklist

ServiceCEO Enterprise: ServiceCEO Enterprise is an expanded version of ServiceCEO with enhanced functionality designed to help you to manage an organization with multiple locations. The main difference between ServiceCEO and ServiceCEO Enterprise is the company structure - ServiceCEO Enterprise has a hierarchical organization model, starting at the top with the Organization, and then moving down into Regions, Branches, and Zones. Each organization can have an unlimited number of regions or branches.

Skills: The abilities that a particular employee possesses, as defined on their Skills tab.

SmartList: Enabling the SmartList feature (located on the Schedule General tab when creating new schedules) displays only teams or employees working in the customer's specific branch and/or zone.

Status: The condition of a customer or employee record in the system. Status cannot be controlled by users; it depends on the condition of various items, including active jobs, estimates and account balance.

Substatus: A code that further expands existing job, task, and estimate statuses.

T

Task: An action that needs to be performed outside of the scope of a job or schedule.

Team: The default term for a group of employees that work together. Teams are assigned to jobs, so all employees assigned to team will be work on that job. If you are tracking inventory, a team can also be a stock location.

Time Block: A block of time that indicates the employee's status for that time. Each time block is associated with one time code.

Time Code: Time codes contain attributes that can apply to a particular block of time: Employee Availability, Payroll Eligibility, and General Ledger Account integration. See the Defining Time Codes topic of the ServiceCEO Help System for details.

Transaction: A financial transaction not directly related to a job

TXT: Short for text file.

V

Variable Charge: A charge that is incurred incrementally as work is completed. When defined, the charge will be scheduled and will appear on the invoice as Projected, but the charge will not be applied against the customer's account until the service is completed or the product is delivered.

W

Window Time: The proposed length of time during which the employee or team of employees will be arriving to complete the job or deliver a product.

Work Order: A grouping of job tickets what can be printed and sent with the employee or team as a statement of work. A work order can include directions to the customer, the customer's billing information, and other miscellaneous instructions.

Z

ZIP Code: A series of numbers added to an address to help deliver the mail in the United States. Known as Postal Code outside of the United States.

Zone: A user-defined geographic territory. Zones enable you to strategically associate teams of employees in a particular zone with customers in the same zone to facilitate easy and efficient dispatching.

Zone Pricing: A method of controlling the pricing of products and services based on location.