Mhelpdesk for **Your Business**

A GUIDE TO GET STARTED

mhelpdesk.com | @mhelpdesk

Mhelpdesk Success Stories

"Mhelpdesk has allowed us to out-compete our competition big and small!

Before incorporating Mhelpdesk into our business, we were scattered between 3-4 different programs. This created a loss in time and inconsistencies being spread out among multiple applications. Mhelpdesk has allowed us to combine all of the much needed services into one place, allowing us to be much more organized and consistent."

Wow No Streaks

"To have a tool that meets my own level of organization, is tremendous.

Now, I don't have to think about being organized, Mhelpdesk does it for me. We used a lot of paper trying to keep track of logs and customer repairs. With Mhelpdesk, we have eliminated over 80% of our print outs. Mhelpdesk is so responsive to our needs. If we have a suggestion, Mhelpdesk replies right back with an update."

J2 IT Services

"We love Mhelpdesk because it has put everything into one place

AND the customer service is great! Biggest thing that Mhelpdesk has given us is TIME. It has streamlined our estimate process, and gives us the ability to scale our sales efforts to people."

Walls By Design

Get inspired. Read more stories at mhelpdesk.com/customers

Put Mhelpdesk to work for your business

Mhelpdesk is a powerful tool. A wide variety of businesses in the service industry--big and small-- use Mhelpdesk to simplify their daily workflow. Every day, dozens of businesses save time and money by going paperless with our cloud applications.

This guide is intended to help you understand how to use Mhelpdesk better. Mhelpdesk can help you get organized, streamline your workflow, and ultimately, grow your business.

We'll show you how in these three chapters.

1. GET STARTED

Enter your company info and upload your logo. This will automatically show on all emails, estimates and invoices you create in Mhelpdesk to help your customers stay connected with you.

2. TAILOR MHELPDESK TO FIT YOU

Learn about our available features to pick and choose what's right for your company. Customize Mhelpdesk to either amplify or simplify your workflow.

3. CONNECT WITH CUSTOMERS

Our online tools helps you stay connected with customers. Allow your customers to submit a payment, check the status of a job, or even schedule an appointment according to your schedule. Need emails to turn into service tickets? There's a tool for that too.

Get started

Understand how Mhelpdesk works so your business can actively and effectively move to the cloud.

Company Info

Fill out your company's contact info and upload a logo that will show up on all emails, estimates and service tickets.

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1. FILL OUT COMPANY INFO

To fill out your company's contact information, go to **Settings > My Company** in the top right corner. This information will show up in the PDF of your service tickets, estimates and invoices.

2. UPLOAD COMPANY LOGO

Upload your company logo under **Settings > My Company**. This logo will appear on PDFs of all service tickets, estimates and invoices. We recommend an img that is 300 x 100 pixels or fewer.

3. IMPORT CUSTOMER INFO

If you have your customer's CSV files, go to **Settings > Import from CSV** to transfer your customers to Mhelpdesk. Make sure you choose "tab delimited" when saving your CSV file, and that each entry follows these guidelines:

1. CustomerName
2. Address1
3. Address2
4. City
5. State
6. Zip
7. CountryCode
8. PrimaryPhone
9. SecondaryPhone
10. Fax
11. Email
12. ContactFirstName
13. ContactLastName
14. Notes

Need to capture more information for each Customer? Click on **Customize** to add new customized fields.

4. ADD PAYMENT PROCESSES

Mhelpdesk integrates with PayPal and Authorize.net. This means you can allow your customers to pay online, via the "Pay Online" button at the bottom of each Invoice Email. Navigate to Settings > Payment Processing.

Staff & Teams

Add staff members and create teams so your employees can sign in and view their jobs.

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1. ADDING STAFF

To add a Staff member or Administrator, navigate to **People > Staff** and begin entering their contact information. An active email address will be needed for them to sign in.

2. DELETING STAFF

Click on a Staff member and click the “delete” button. If you want to remove the actual license from your account you will need to update your billing under **My Account**.

3. STAFF PERMISSIONS

Users designated as Administrators have access to virtually everything; this includes: scheduling, financial transactions, all service tickets, customization, settings, and more. To apply permissions to staff members, navigate to **People > Staff** and scroll down to see the list of permissions you can give or deny staff members. For example, if you want staff members to only see jobs assigned to them--make sure the “Allow staff to see all appointments” box is unchecked.

4. CREATING TEAMS

Creating teams can be helpful when assigning jobs to multiple users. While you could assign multiple users to a job one at a time,, creating a “Billing Team” or “Technical Team” of users who normally need to be assigned to certain jobs together can save you time. To add a team, navigate to **People > Teams**.

5. USER NOTIFICATIONS

To pick and choose which users receive email notifications on status changes, new logs or new updates--go to **Settings > Notifications**.

Anatomy of a Service Ticket

The service ticket is where your workflow should begin. Here, you can capture details of a job, create an estimate, invoice and receive payment. You can also keep time-stamped logs and send messages to your customer.

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1. CREATING A SERVICE TICKET

To add a Staff member or Administrator, navigate to **People > Staff** and begin entering their contact information. An active email address will be needed for them to sign in.

2. KNOW YOUR WAY AROUND

There are multiple tabs in a service ticket to organize all associated information in one window. Here is some basic information on how these tabs and features can help you.

SERVICE TICKET
Here, begin entering your customer's contact information and service location. Pick an issue type relevant to the job, and then enter the details. *Don't see the details? Click "See More" above the save button*.
Now assign this service ticket to a staff member. Pick and choose from a list of your staff members next to "Assign/Appointment", and then schedule and appointment according to his schedule.
Need to capture more information with customized fields? Go to **Settings > Custom Fields**.

ESTIMATE
In the Estimate tab, your customer's information will automatically be brought over from the service ticket. Here, you can begin adding items to the estimate, then email it to your customer for review. In our mobile application, you can also receive a customer's signature on site by having them sign with their finger.

INVOICE
Once the job is finished, you can create an invoice from the estimate by clicking "**Add an Invoice for this Job**" in the Invoice tab. You can edit or remove items from the estimate, and you can add a P.O. number or change the invoice number by clicking "**Show More"**.
Similar to the Estimate tab, you can also download a PDF of the Invoice, or Email it to your customer using the buttons at the bottom of the page. Need a quick signature? Ask your customer to finger sign the estimate using our Mobile App! Invoices will either be labeled "paid" or "unpaid" at the top left.

PAYMENT
Ready to add a payment? Simply click the payment tab, and click the **Add Payment** button and follow the directions. To allow your customers to pay online, simply email the invoice to your customer. At the bottom of your email, there will be a "Pay Online" button for your customer to click.

TIME & MATERIALS
Here, you can access our Time Tracking feature to track the amount of time spend on a job. Simply click "Add time", fill out the details and click "Save & Start". When the job is complete, hit the "Stop" button. This will automatically show up in your invoice as "Show Outstanding Billable Time & Materials" on top. To add this to your invoice, click the link, check the box and click "Add".

LOG/NOTES
This is where you can send time-stamped messages and updates to all users assigned to that particular service ticket. Customers will not see any log or notes.

MESSAGES
To send a message to your customer regarding a particular service ticket, click on "Messages" to type and send your message. Your customer's email will autopopulate in the "To:" field, but if you need to send to more than one email address--separate each email with a comma and no space.

FILES
Upload files specific to each service ticket (whether they're documents, photos or zip files) through the Files tab. Currently, the file types allowed for uploading are: jpg, jpeg, png, gif, tiff zip, 7z, rar, xls, xlxs, doc, docx, txt, pdf under 8 MB.

3. NOW CUSTOMIZE IT

Don't like the way your PDF's look? Navigate to **Settings > Templates** to add, remove or customize the way your printed invoice, email, estimate or service ticket template looks like.

Don't need the Estimate, Invoicing or Time & Materials tab? Turn features on or off by going to **Settings > Turn On/ Off Features**.

Scheduling

View your calendar and manage all appointments using our drag-and-drop scheduler.

1. SCHEDULE AN APPOINTMENT

When scheduling an appointment, simply click a block on the calendar. In the appointment details, you can give the appointment a name, assign it to a user or team, schedule an email alert for the assigned staff member(s), and choose whether you want it to be a recurring appointment.

2. MOVE AN APPOINTMENT

To move the appointment, simply drag the block to a different time or date.

3. SCHEDULING A NEW SERVICE TICKET

In your calendar, click on the “Assign” view. Here, you’ll have a list of unassigned service tickets, and a calendar of columns with all staff members. Simply drag a service ticket under one of these columns to automatically assign it to a staff member or team.

3. ONLINE SCHEDULER

Navigate to **Calendar > Online Scheduler** to create an online scheduler for your customers. Pick and choose who you want to allow your customers to schedule appointments with, and then designate his available hours. Copy and paste the generated code somewhere on your website to allow customers to schedule appointments with a staff member according to his or her schedule.

Transactions

Access all invoices and payments through the transaction tab.

1. COMBINE INVOICES

To combine invoices into one PDF, go to **Transactions > Invoices > Combine Invoices**. Choose the customer you'd like to combine invoices for, and then pick the invoices you'd like to combine.

2. CREATE RECURRING INVOICES

To add a recurring invoice, go to **Transactions > Recurring Invoices > Add Recurring Invoice**.

3. SEND TO QUICKBOOKS

If you are using Quickbooks, you need to follow the Quickbooks Import instructions first, before exporting anything from Mhelpdesk. Go ot **Settings > Import from Quickbooks.**

When you are ready to export invoices to Quickbooks, go to **Transactions > Invoices > Quickbooks View** and choose the invoices you'd like to send. Mhelpdesk will help you remember which were sent and which are ready to send. Finally, click "Sent To Quickbooks" to export your Mhelpdesk invoices.

Need your invoice numbers to start at the last number of your latest invoice in Quickbooks? Go to **Settings > Numbering** to enter the last invoice number you created in Mhelpdesk, and even add a prefix name, like "MHD" so you know which invoices in Quickbooks were created in Mhelpdesk.

Tailor To Fit

Customize Mhelpdesk to fit your company’s needs.

ADD OR REMOVE FEATURES

CUSTOMIZE TEMPLATES

INTEGRATION TOOLS

CUSTOM FIELDS & FORMS

Add or remove features

Mhelpdesk can amplify or simplify your daily workflow. Find out which features are right for your business.

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1. ESTIMATES & INVOICING

If your company does not send out estimates or invoices, turn this feature off to simplify your service tickets. Go to **Settings > Turn On/Off Features** and uncheck either or both the **Enable Estimates** or **Keep Track of Invoices & Payments** check box.

2. BUSINESS UNITS

If your company has multiple locations, the Business Units feature can distinguish which service ticket belongs to the correct business location. This will allow you to have different company addresses on Invoice and Estimate PDFs.
Note: This feature is available to customers under the *Business* and *Enterprise* plan. To enable this feature, submit a ticket at mhelpdesk.com/support.

3. SERVICE ITEMS

The Items To Service tab allows you to generate barcodes for items that need to be serviced. For example, if a customer brings in a laptop that needs to be repaired--the service item tab will allow you to enter the details of the laptop, create a service ticket from it, and generate a barcode that can be printed and attached to the item that can be scanned later to bring up its service ticket. To turn this feature on or off, go to **Settings > Turn On/Off Features**.

4. TIME TRACKING

To track billable hours spent on a job, use the Time & Materials tab in your service ticket. These hours will show as “Outstanding Billable Hours & Materials” in your invoice. To turn this feature on or off, go to **Settings > Turn On/Off Features**.

5. CUSTOM FORMS

Having customized forms will allow you to have different custom fields autopopulate for specific issue types. For example, when choosing “Installation” as an issue type in your service ticket, you can have specific customized fields shown at the bottom of the service ticket, like “Model Number”, “Brand Name”, and “Temperature”.
Note: This feature is available to customers under the *Professional*, *Business* and *Enterprise* plan. To enable this feature, submit a ticket at mhelpdesk.com/support.

Customizing templates

Change the way your printed invoice, service ticket or estimate looks.

1. ADD OR REMOVE KEYWORDS

Navigate to **Settings > Templates,** and choose which template you'd like to change. Using the keywords on the right hand side, you can add or remove certain information on your PDF template.

2. FORMATTING

Either create your template from scratch with our keywords in the HTML view, or use our style buttons at the top of our "Design" view.

3. HEADER & FOOTER

In your template, you can add either a header or footer by going to **"Settings > Templates"** and choosing the template you'd like to edit. Similar to editting the body of the template, click either the header or footer button to add one.

Integration Tools

Mhelpdesk integrates with programs you might be currently using. Find out which ones can connect to Mhelpdesk.

1. QUICKBOOKS

To import your products and services from Quickbooks, go to **Settings > Import from Quickbooks** and follow the instructions.

2. GOOGLE CALENDAR

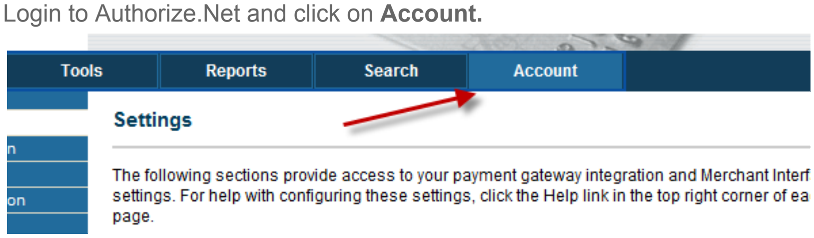
To push all your Mhelpdesk appointments to your Google Calendar, navigate to **Settings > My Account**. Under **Google Calendar Integration**, check **Yes**. Enter your Google Calendar credentials and click Update. Open your Google Calendar and check for an event titled **Mhelpdesk Connected**.

3. PAYPAL

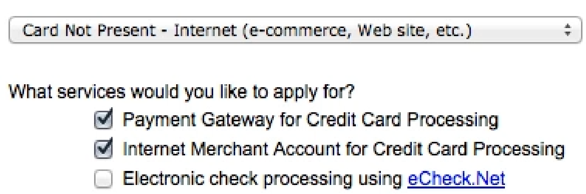
Mhelpdesk can allow your customers to pay online. After you've enabled PayPal, each time you send out an invoice to your customer, there will be a "**Pay Online**" button at the bottom of the email. To enable PayPal, go to **Settings > Payment Processing** and check the box **Enable PayPal**. Enter your credentials and save.

3. AUTHORIZE.NET

Login to Authorize.Net and click on **Account.**



Under Security Settings, click **API Login ID and Transaction Key.** Enter the **API Login ID** and **Transaction Key** into Mhelpdesk. Check the box only next to the cards you accept. Uncheck the box **This is a test API Login ID.** Click **Save.** Verify everything works by sending yourself an invoice and paying for it Applying for an Authorize.Net account. Click here to register for a new account. Click the **Create Login ID** button. Login with your new username and password. At a minimum check the two boxes seen below:



Continue filling out the rest of the application. Once your account

has been approved, follow the instructions above.
Note: On the last step of the application, you must click the links in their agreement to open the agreement forms. If you don't, you will not be able to submit the application.

4. CREDIT CARD SWIPERS

Any swiper that supports **keyboard emulation** will work. Attach your Keyboard Emulated Credit Card Swiper to your computer, and navigate to the payment tab of an invoice you'd like to accept payment for.Once the credit card is swiped in the Payment page, the credit card's information will automatically be filled.

Suggest another integration at mhelpdesk.com/feature-requests

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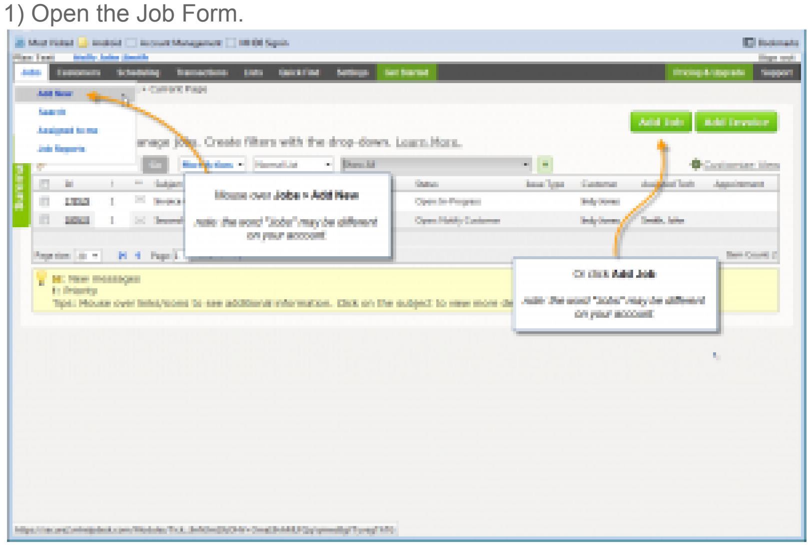
Custom Fields & Forms

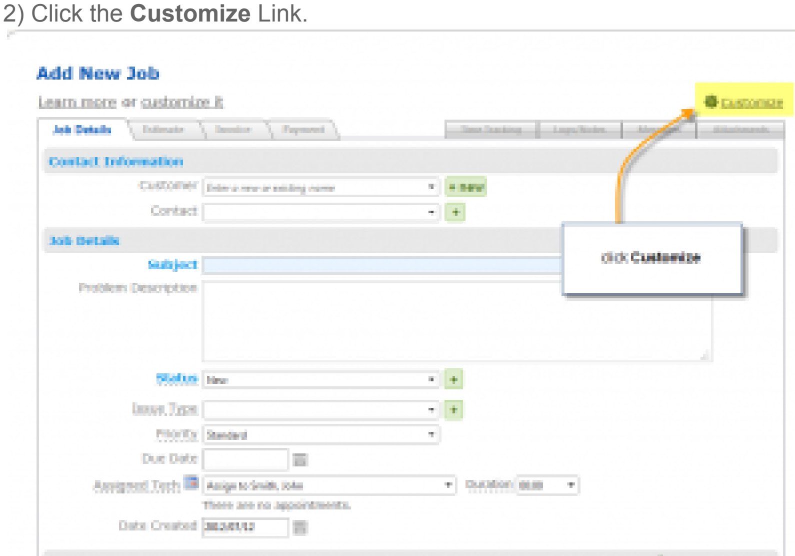
Use our custom fields and forms feature to capture more information in your service tickets.

Mhelpdesk works for virtually any type of business. Naturally, the interface is also customizable. One of the first things you'll want to do is customize your Job (Service Request, Ticket) form. Here's how:

1) Open the Job Form.

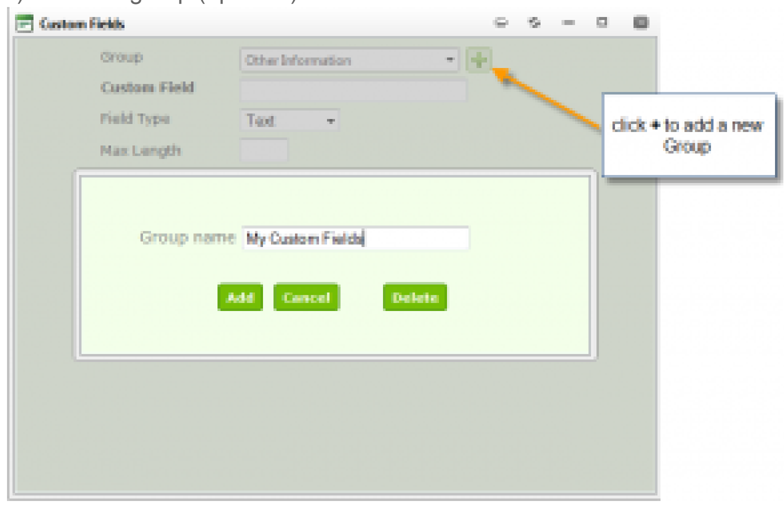


2) Click the **Customize** Link.

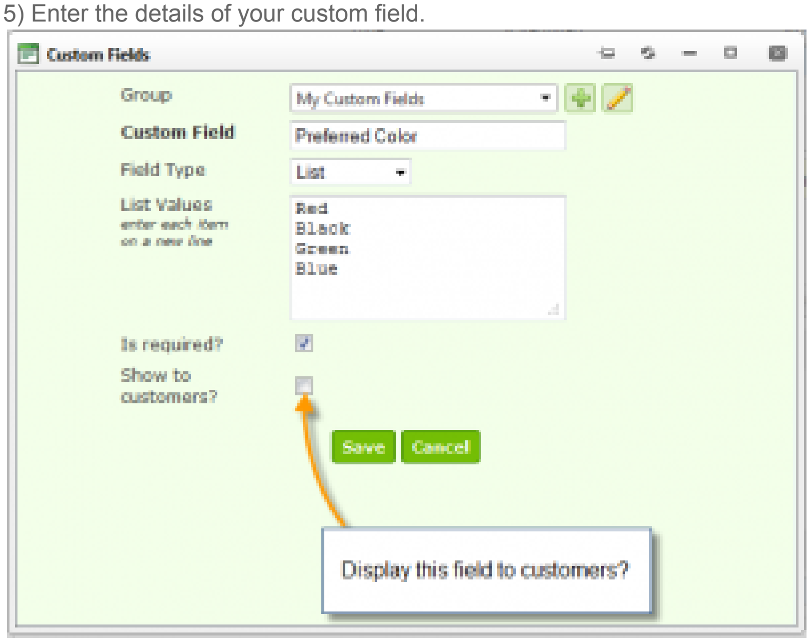


3) Click Add New Field.

4) Create a group (optional)



5) Enter the details of your custom field.



6) Click **Save.**

To add custom fields to a certain form, go to Settings > Custom Forms and pick which issue type you'd like your custom fields to fall under. Check the fields you want to add and save.

Repeat these steps for each issue type.

Connect with customers

Allow your customers to submit a payment, check the status of a job, or even schedule an appointment according to your schedule.

CUSTOMER PORTAL

ONLINE SCHEDULER

ONLINE SERVICE REQUESTS

Customer Portal

Our online customer portal allows customers to sign in, check the status of a job, submit tickets and pay online.

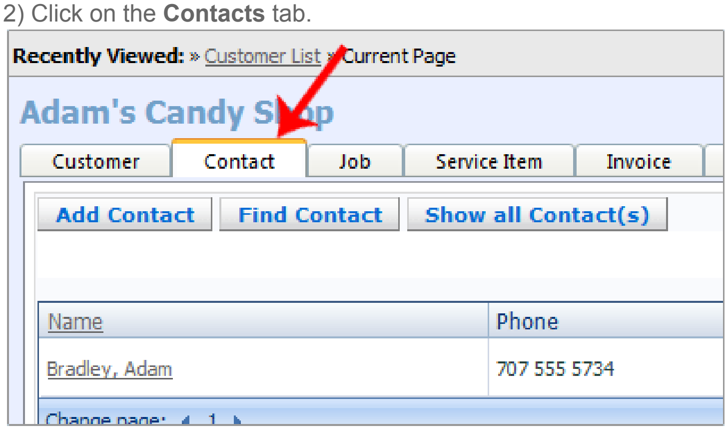
1. WEBSITE INTEGRATION

Go to **Settings > Website Integration** to copy and paste the customer portal code on to your website. Now, customers can sign in to view the status of a job, view their service ticket history, submit a request or pay online.

2. ADD CUSTOMER LOGINS

To give a customer a login:

1) Open the Customer Details page for any customer.
2) Click on the **Contacts** tab.



3) Click on the name of the Contact that you want to give Login access to.

4) Check the Box **Allow Login** and assign this contact a **Password**. Make sure you enter a valid email address for the contact so they can receive an email with login instructions.

Online Scheduler

Our online scheduler allows customers to schedule appointments according to your schedule.

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1. SETUP

Navigate to **Calendar > Online Scheduler** to create an online scheduler for your customers. Pick and choose who you want to allow your customers to schedule appointments with, and then designate his available hours. Copy and paste the generated code somewhere on your website to allow customers to schedule appointments with a staff member according to his or her schedule.

Online Service Requests

Our online scheduler allows customers to schedule appointments according to your schedule.

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1. SETUP

The online Service Request Form allows your clients to submit their own tickets. Once submitted, this request will be added to your queue as a new item. You can even add custom fields to the form to collect more info about the job. Make sure these fields are marked “Show To Customer”.

Browse to **Settings > Customize > Website Integration**.
Copy the code in the box **Embed Online Request Form**.
Paste the code into the webpage that will be used for MHelpdesk.

2. AUTO-ASSIGN WEB SUBMITTED REQUESTS

When a customer fills out the online request form, it’s a good idea to auto-assign these tickets to the correct technician. This ensures that web requests don’t get lost. To auto-assign service requests made on the web:

Navigate to **Settings > Automation > Auto-Update Rules**
Set the Assign To drop-down to your desired technician
When new requests come in, it will be auto-assigned to this tech.

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