HELP

Office Manager is a user friendly and intuitive interface, requiring the minimum amount of training and support. However, these pages provide a comprehensive user guide to the system. Click on **search** to clarify any particular terms or functions. Always click on the **Home** link to take you back to the home page.

Clients

Clients can be individuals or companies. A company can have multiple logins, all of whom can log onto the system and upload work. When you first set up a client you enter the company and login details on the same screen (see below). You can set up additional logins for a particular client (i.e. where more than one person will log on to upload work), via the Logins link under Manage Clients.

- **Setting up a new client**
  - In **Administration Tasks** on the left of the screen, click on **Manage Clients**
  - Click on **Actions** and select **New client** – a new window will appear on your screen
  - Complete the client's contact details
  - **Account number** – this can be any combination of letters/numbers you wish to assign and will make up part of the client ref on your invoices
  - **Payment terms** – please state the terms agreed with the client (eg "30 days from receipt"); this will appear on invoices
  - **Contract type** – enter any information you require – eg ongoing, one-off
  - **Login name** – this is the name of the client's primary login which will be displayed when they log in
  - **Email address** – specific to this particular client login
  - **Password** – specific to this particular client login
  - **Notification method** – clients will be notified of when their work is ready for download – specify here whether you want them to be notified by email, text message (SMS) or both
  - **Show job costs** – when client log onto the system they will see a list of jobs they have submitted – indicate here whether you wish this list to include a note of cost for completed jobs
  - **Save** and **Close**

    NB – a client login is automatically created for the client once you save their new client record – you do not need to set up a login for them separately

Setting up additional client logins

- Under **Manage Clients** on the left of the screen, click on **Logins**
- Click on the down arrow to the right of the **Client Filter** and select the client for whom you wish to enter a login
- Click on **Actions** and **New client login** – a new window will appear on your screen
- Complete the login's contact details including the email address and password they will use to log onto the system
- **Notification method** – clients will be notified of when their work is ready for download – specify here whether you want them to be notified by email, text message or both
- **Client administrator** – tick this box if you want this login to be able to view all jobs uploaded by all the client's logins (not just his or her own); the initial login set up when the client is first set up will automatically be made a client administrator – if you wish to change this, click on the **Logins** link under **Manage clients** and follow the **Edit client login** steps below
- **Show job costs** – when clients log onto the system they will see a list of jobs they have submitted – indicate here whether you wish this list to include a note of cost for completed jobs
- **Save** and **Close**

Editing an existing client's details

- In **Administration Tasks** on the left of the screen, click on **Manage Clients**
- Click on the **Edit** button against the client whose details you wish to edit – a new window will appear on your screen – you can edit any details and click on **Save** to save them

Editing an existing client login's details

- Under **Manage Clients** on the left of the screen, click on **Logins**
- Click on the down arrow to the right of the **Client Filter** and select the client for whom you wish to edit a login
- Click on the **Edit** button against the login whose details you wish to edit – a new window will appear on your screen – you can edit any details and click on **Save** to save them

Documents

You can upload any number of documents to the system. These may be price lists, templates, examples, instructions etc. There are two types of document – general documents and client-specific documents.

- **Setting up a new document:**
  - In **Administration Tasks** on the left of the screen, click on **Manage Documents**
  - Click on **Actions** and select **New document –** a new window will appear on your screen
  - Click on the down arrow to the right of the client drop down box – you will be given the option to select an existing client or **General document.** General documents can apply to any client – eg. Lists of medical terminology, price lists, etc. Client specific documents may be templates, examples, instructions that are only applicable to that client
  - Having selected a specific client or general, you should name the document, enter a description, and browse your PC for the document
  - **Save** and **Close**

- **Editing an existing document**
  - In **Administration Tasks** on the left of the screen, click on **Manage Documents**
  - Click on the down arrow to the right of the **Client Filter** and select **All clients** if you wish to edit a general document, or select a specific client if you wish to edit a document relating to them
  - Click on the **Edit** button against the document whose details you wish to edit – a new window will appear on your screen – you can edit any details on the screen and click on **Save** to save them; alternatively you can browse to upload a new or amended document from your PC

Work types

You may undertake different types of work for different clients. Using this feature, you can list the work types or services you offer (eg audio transcription, copy typing, data entry, proof reading etc), and assign them, together with your charging rates, to specific clients. ***Please note: you must set up Work Types before you can assign them to clients, and clients must be assigned at least one work type before they can upload their first job***

- **Setting up a new work type**
  - In **Administration Tasks** on the left of the screen, click on **Manage Work Types**
  - Click on **Actions** and select **New client work type–** a new window will appear on your screen
  - Name the work type – eg "copy typing" – and give a brief description if required
  - **Per Unit Text** – enter here the unit by which you will charge for this type of work – eg page, minute, line, call etc
  - **Save** and **Close**

- **Assigning work types to clients**
  - In **Administration Tasks** on the left of the screen, click on **Work Types** under **Manage Clients**
  - Click on the down arrow to the right of the **Client Filter** and select the client for whom you wish to assign a document
  - Click on **Actions** and select **New client work type** – a new window will appear on your screen
  - Select the work type from the drop down box
  - Enter the standard rate that you will charge this client for this work per unit
  - If you will charge a higher rate for speedier turnaround of work, tick the **Apply urgent rate** box, enter the urgent rate that you will charge this client for this work per unit and, against **Urgent rate cut off**, enter the number of hours below which you will charge the urgent rate rather than the standard rate (i.e. 24.00 if anything completed within 24 hours is charged at the urgent rate and anything completed after 24 hours is charged at the standard rate)
  - **Save** and **Close**

Communications

This feature enables you to keep a record of any important communications between yourself and your clients, both incoming and outgoing.

- **Entering a Communication record**
  - In **Administration Tasks** on the left of the screen, click on **Communications** under **Manage Clients**
  - In the **Client Filter** box select the Client for whom you are going to enter a communication

- Click on **Actions** and select **New client communication** – a new window will appear on your screen
- Enter the **date** of the communication
- Against **Message** Type identify whether the message is **incoming** or **outgoing**
- Against **Communication Type**, specify how the message was received/sent – eg. Email or letter etc
- Against **Subject** enter a subject heading
- You can browse for a file attachment – eg a letter in MS Word format, the text of an email etc
- Against **Comments**, enter any details about the message which you may wish to search on at a later date
- **Save** and **Close**

*NB – you can use the **Send a Message** function under **Common Actions** to send a message via email, text message and/or your homepage dashboard; this message can also be added to your **Communication Record** if you wish*

- **Searching for a communication record**
  - In **Administration Tasks** on the left of the screen, under **Manage Clients**, click on **Communications** on the left of the screen
  - Click on the down arrow next to the **Client Filter** box and select the Client for whom you are going to search for a communication
  - In the **Search Text** box type in the text on which you wish to search
  - Click on **Search**

Manage Jobs

- **Accessing your work**
  - Select **Manage Jobs** under **Common actions** – a list of all jobs will appear on screen, split into **New**, **Logged**, **In Progress**, **For Review** and **Approved/Returned** tabs

- **Setting up a new job for a client**

  Clients will normally upload their own jobs; however there is a feature whereby you can upload jobs for them

- In **Common Actions** on the left of the screen, click on **New Job** – a new window will open on your screen
- Select the **Client**, the **Client login** and the **Job Type** from the drop down boxes
- Enter a **document name** and a date and time required
- Click on **browse** to locate any file that is associated with the job (this may be a sound file for audio transcription, for example, or a spreadsheet to be completed etc)
- In **Job/Document Notes** add any relevant details about the job
- **Save** and **Close**

Logging a job

- In **Common Actions** on the left of the screen, click on **Manage Jobs**
- In the **New Jobs** tab, click on the **click for info** link in the **Job Details** column – a new screen will open displaying the job details. From here you can open the file uploaded by the client (or by you on the client's behalf) and save it to your desktop if required
- Once you have checked the details and downloaded the file, close that window
- Click on the icon in the **Log job** column – a new window will open on your screen
- Enter the number of units – eg. 12 for a 12-minute sound file or 12 pages of copy typing
- Next to **Transcriber** select your own name (this feature is here to enable you to upgrade your system in the future and add transcribers to whom you may assign work)
- Enter the **date** and **time** by which you require the job to be ready for review and the **date** and **time** you estimate the job will be completed
- In **Job / Document Notes** add any details which may be of assistance to you in completing the job
- **Save** and **Close**

Putting a job in progress

- From the **My Jobs** screen, click on the icon in the **Start job** column and a new window will open on your screen
- Tick the **Job has started** box and adjust the started **date** and **time** if necessary
- **Save** and **Close**

Completing a job

- Click on the icon in the **Complete job** column and a new window will open on your screen
- Tick the **Job completed** box

- Adjust the **job units** if necessary to ensure they are accurate
- Click on **Browse** and browse for the file containing the completed job
- In **Job / Document Notes** enter any information which may assist the Administrator at reviewing stage
- Click on **Save** and **Close**

Reviewing a job

This facility enables you to make changes to completed jobs before returning them to the client

- From the **My Jobs** screen, click on **Manage Jobs** – a list of all jobs will appear, split into **New**, **Logged**, **In Progress**, **For Review** and **Approved/Returned** tabs
- In **Jobs for Review**, click on the **click for info** link in the **Job Details** column – a new screen will open displaying the job details including any additional comments/notes you have added to assist yourself in reviewing the file, and a link to the completed file, where one exists.
- From here you can review the file by clicking on the file name next to **Download file** (NB - you can also open it by clicking on the icon under **Review File**)
- Once you have checked the details and downloaded the file, close that window
- Having reviewed and saved the reviewed job, click on the icon in the **Complete review** column – a new window will open on your screen
- Tick the **Review successful** box
- Adjust the total the number of units if necessary
- If you have made any amendments to the original file uploaded, browse for the amended version; if you had not made any changes you do not need to browse for another file – the system retains the original one
- Add any additional **Job / Document notes** that you may need to refer to in the future
- **Save** and **Close**

Returning an approved job

Once you have completed the review stage, the job will be available for your client to download

- In **Approved/Returned jobs**, click on the icon in the **Notify client** column – a new window will appear on your screen
- Add any additional information you want to the message screen and press **Send** - a notification email and/or SMS will be sent to the client

- When a client has downloaded a completed job, the date and time downloaded appears in the **Downloaded** column of the **Approved/Returned Jobs** screen

NB – jobs remain in the Approved/Returned Jobs screen for 7 days following download by the client; thereafter they can still be accessed via the ***View All Jobs*** *link under* ***Common Actions***

Invoicing

Invoices can be produced at any time for any client for whom completed, as yet un-invoiced jobs are outstanding

- **Producing an invoice**
  - In **Administration Tasks** on the left of the screen, under **Manage Clients**, select **Invoices**
  - From the **Client Filter** drop down box select the client to be invoiced
  - Click on **Actions** and select **New client invoice –** a new window will appear on your screen
  - Against **Invoice Reference** insert the number of the invoice (if you do not change the default, invoices will be numbered with your account code and then consecutively)
  - Against **Client Invoice Reference** overtype the client invoice ref (if you do not overtype the system will default to the client's account number, followed by a client-specific consecutive number)
  - Against the heading **Job List** will appear all completed jobs which have not yet been invoiced
  - Tick the boxes next to the jobs you wish to appear in this invoice
  - If the client has paid "upfront", you can enter the **invoice paid** date at this stage
  - Click **Save** and **Close**
  - To view the invoice, click on the icon in the **download** column **–** a new window will appear on your screen
  - Click on the **click to download** link to view/save/print the invoice; you can choose whether to save as a Word or pdf document.

- **Editing an invoice**
  - In **Administration Tasks** on the left of the screen, under **Manage Clients**, select **Invoices**
  - From the **Client Filter** drop down box select the client to be invoiced

- Click on the icon in the **Edit** column – a new window will open on your screen showing the invoice details which may be amended as required.
- NB – you can also enter the invoice paid date at this stage for your records

Reports

The following reports are currently available:

- Outstanding job list – a record of all outstanding jobs, with an note of their status and due date
- Completed job list – a list of all jobs completed to date
- Client list – a list of all clients set up on the system to date
- Invoice history – a record of all invoices produced to date