2018 End-of-Year Guidelines

Ready your ConnectWise Manage® for the new year:

Time for updating your ConnectWise Manage® settings, so your business operations roll seamlessly into 2019. Our goal is to help you verify that you've made the correct decisions and to show you how to properly prepare for the required updates and some optional updates to consider going into the new year.

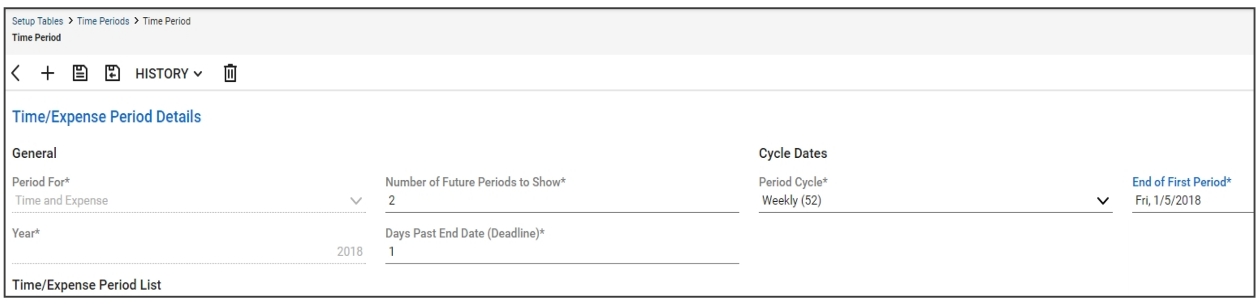
Required to submit time sheets Jan 1:

Optional – The following are suggested:

The following is a required action which needs to be set up before the last available period set up in your ConnectWise Manage System.

1. Setting up your Time and Expense Periods

a. Navigate to System > Setup Tables > Time Period**.**
b. Click the + symbol to add the new year.
c. Typically, the system will default to the prior year's set-up. If the past set-up meets your needs, just click save.
d. If your Time and Expense reporting periods are the same, select "Time and Expense." If these periods are different, then you will need to create an individual Time Period and another individual Expense Period.
e. Save and Close this table.



Choices are: Weekly (52)* – Bi-Weekly (26) – Semi-Monthly (24) – Monthly (12) (*Recommended)

Best Practice Tip:

If expenses are reimbursed with payroll, then expense reporting should match your time sheets. Otherwise, set up your expenses to reflect how often you'd like to reimburse your employees (i.e., Weekly, Semi-monthly, Monthly).

If approving time before invoicing, then make sure to not set timesheet periods for longer than how often you plan to invoice. *Example: If you want to invoice once per week, then time should be weekly. However, we recommend that time periods should align with payroll periods.*

Note: *A period can be deleted However we do not recommend doing this as you will lose any time record history. Verify your settings before allowing time entries to be made.*

2. Setup your 2019 Holidays

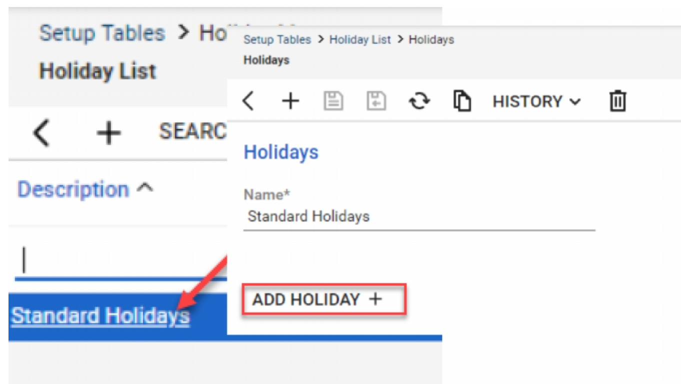
The holiday setup table defines the calendar views marking holidays as non-working days. This can affect workflows which are based on the "My Company Office Hours" selection. Holidays entered are only valid for future events.

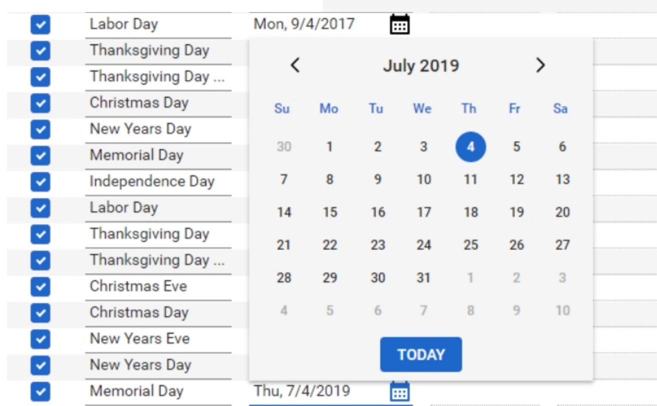
2019 Federal Holidays

Date	Holiday
Tuesday, January 1	New Year's Day
Monday, January 21	Birthday of Martin Luther King, Jr.
Monday, February 18*	Washington's Birthday
Monday, May 27	Memorial Day
Thursday, July 4	Independence Day
Monday, September 2	Labor Day
Monday, October 14	Columbus Day
Monday, November 11	Veterans Day
Thursday, November 28	Thanksgiving Day
Wednesday, December 25	Christmas Day

Source: opm.gov

a. Navigate to System > Setup Tables > Holiday List > Holidays
b. Select your Holiday list, typically named Standard Holidays.
a. Add your 2019 holidays to your current holiday schedule.
   Details needed are:
   - Description
   - Date
   - All Day or Partial Day
   - Start/End Time if Partial Day
b. Save and Close this table.





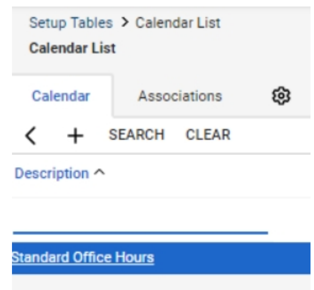
Best Practice Tip:

If your business has multiple locations, you may have different schedules or time zones. If so, perform the required actions for each schedule/zone separately, naming them appropriately.

We recommend adding to the current list instead of making additional as doing so will require further configuration in the system.

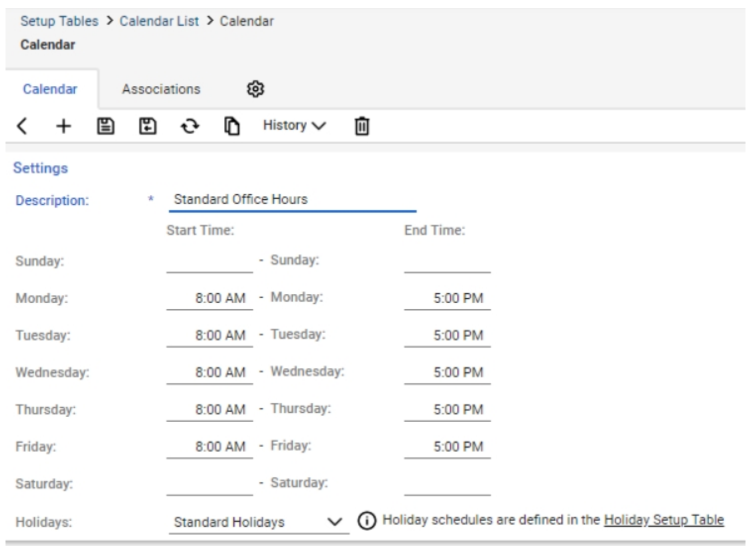
3. Update your Calendar Hours

Have your office hours changed? Have you added locations? It's a good idea to verify that everything is still current.



a. Navigate to System > Setup Tables > Calendar List > Calendar.
b. Verify your hours of operation.

If you have not changed anything, then it is doubtful that anything will need updating, but it is a good practice to verify these settings.



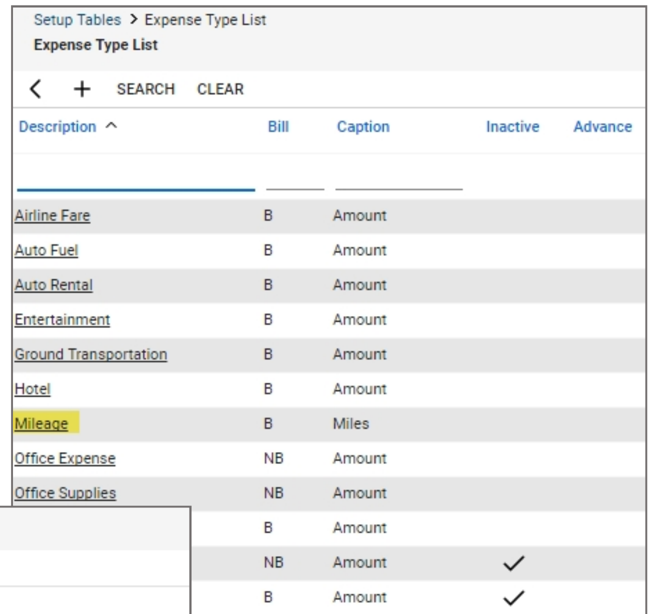
Best Practice Tip:

If your business has multiple locations, you may have different schedules or zones. If so, perform the above actions for each schedule/zone. Calendar hours are used for calendar views and workflows.

4. Update your Mileage Reimbursement Rates*

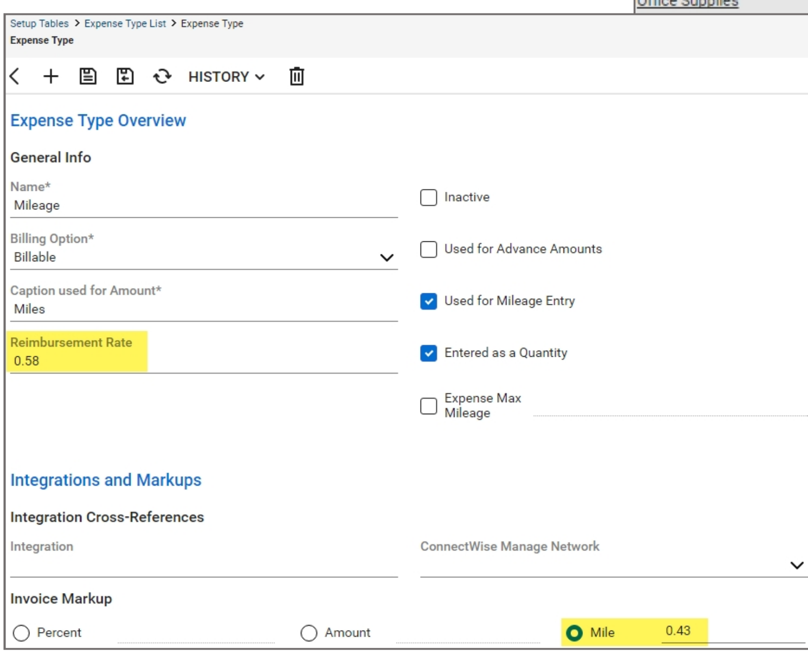
Changing rates before January 1 will start reimbursement at the new rate <u>immediately</u>. **Perform this on the first day back or during your holiday break.**

a. Navigate to System > Setup Tables > Expense Type List.
b. Select Mileage and update the required fields.
c. If you have any other expense types that have reimbursement rates, this is the time for reviewing those as well.
d. Save and close this table.



Articles and links on this subject:

- [Standard Mileage Rates at a Glance]
- [irs.gov]



5. Verify and update your tax codes, if applicable

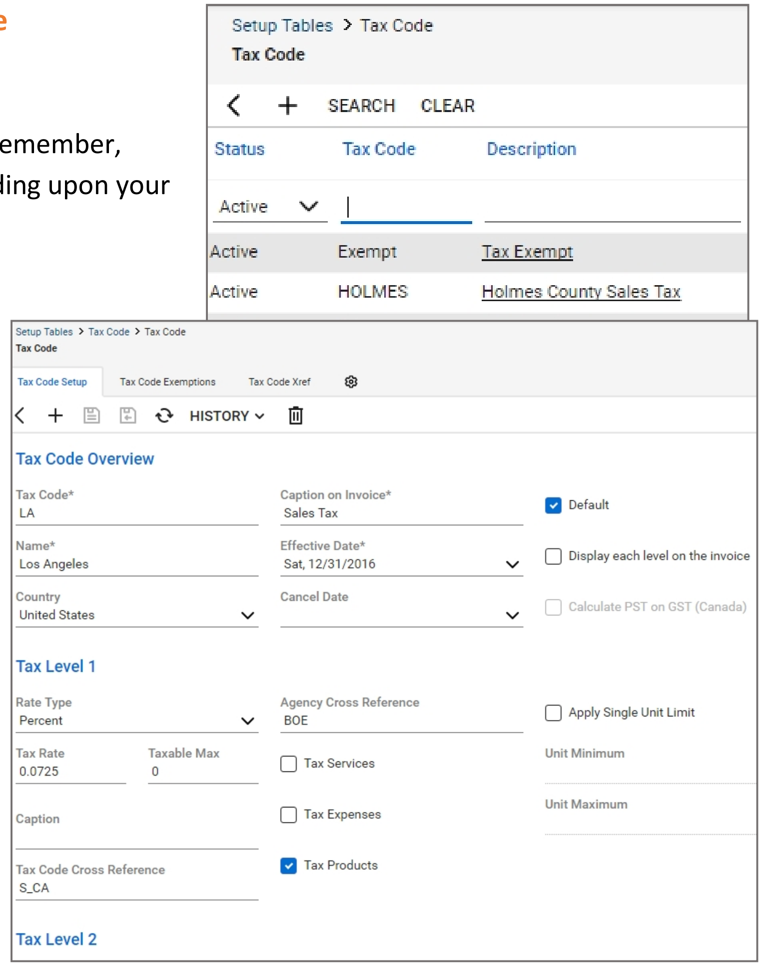
a. Navigate to System > Setup Tables > Tax Code.

b. Confirm each Tax Code is set to the current rate. Remember, some Tax Code IDs can have multiple levels depending upon your State and or Locality.

If a Tax Code is not the correct rate, DO NOT CHANGE IT. Updating the existing rate will affect all invoices that ever used that rate, even closed ones.

Instead, mark that tax code inactive and create a replacement

c. Save and close this table.



Best Practice Tip:

Our website resources page has lots of great information:

- Watch our videos on how to update tax rates: www.visionary360.com/resources
- Find your state tax information on our resources page: https://www.visionary360.com/us-sales-tax-information
- *We always suggest you discuss all financial matters with your CPA.*

Mass Maintenance Booster

www.visionary360.com/mmb

Have multiple tax rates to change?
Take a look at our productivity tool Mass Maintenance Booster (MMB) to help simplify this daunting task.

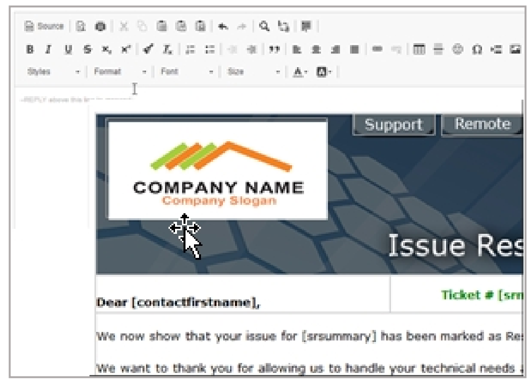
While not required, now would be a great opportunity to start the new year with a fresh image. ConnectWise Manage communicates with your customer base through various modules. Here are some of those that we suggest reviewing for implementing updated messages and or graphics.

Best Practice Tip:

Using a third-party HTML editor can help with the design process.
Images must be hosted externally; they cannot be embedded. We suggest using simple HTML only, no CSS.

6. Update your ticket status messages

Updating your logos? Want a new look for the new year? Now is a great time to give your client-facing communications an upgrade. Differentiate yourself from the area competitors – your customers will notice the professionalism!

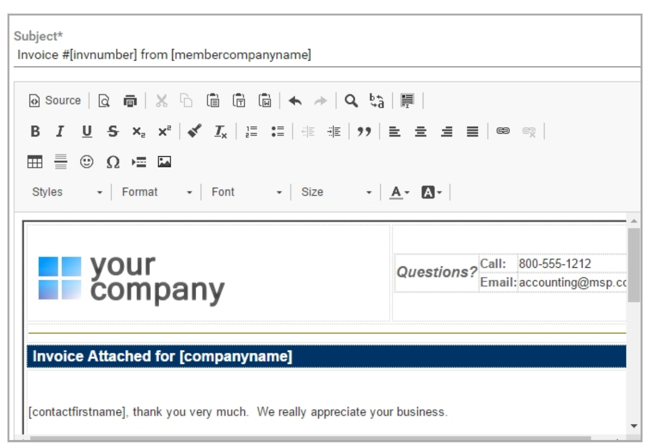


a. Navigate to System > Setup Tables > Service Board.
b. Select desired board.
c. Select a status that is using “External Contact Notifications”.
d. Navigate to “Email Template Setup”. Here you can modify your current template. Content can be text- or html-based.
e. Save and close this table.

7. Update your invoice email templates

Did you know that the emails which have the invoice attached can be modified? Using a similar approach as with your ticket status emails, your invoice email can have the same look and feel.

a. Navigate to System > Setup tables > Email Formats – Invoicing.
b. Select the appropriate Invoice Template.
c. From here you can modify the email template just like in your service boards.
d. Save and close this table.

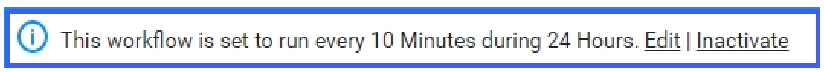


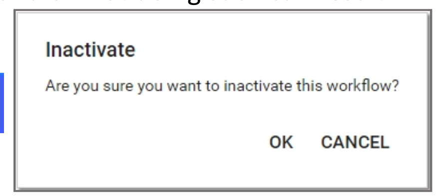
8. Update your workflow templates

Any workflow that contains an “Action” that sends client-facing emails will be a candidate for updating.
If you are unsure which rules contain these actions, we strongly suggest you take this opportunity to document your workflows. *(Better now than in a time of need. Trust us, you will thank us later.)*

a. Navigate to System > Setup Tables > Workflow Rules

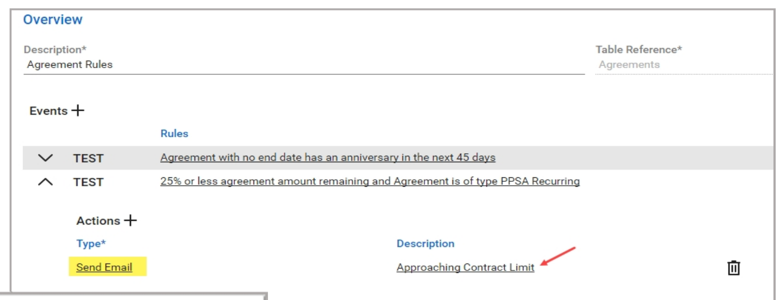
b. Before navigating into any workflow rule, you must Inactivate the rule. Not doing such can result in corruption of the rule.

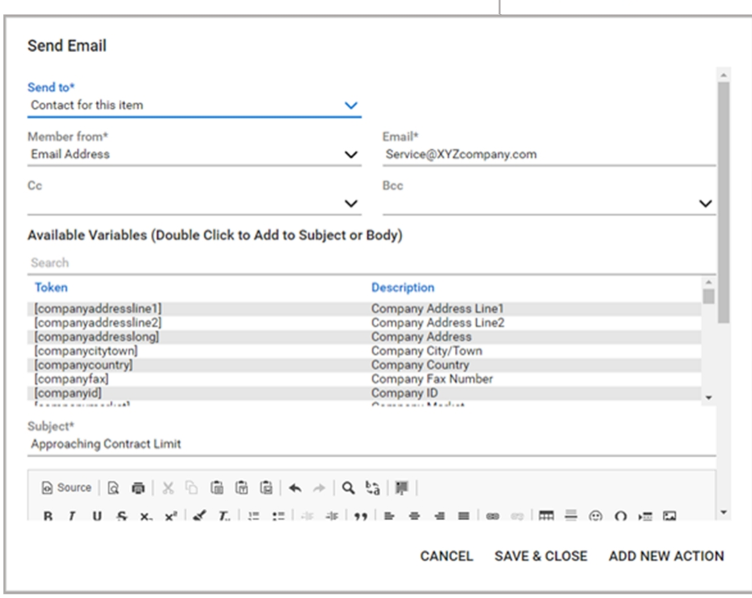




c. Click Inactivate, then answer OK in the pop-up window.

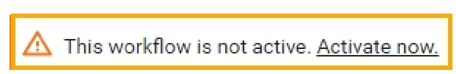
d. For each rule, expand the rule set to see the Actions list. If you see “Send Email” as an Action Type, then click the description to open the editor and make the required changes.





e. Once completed, reactivate the workflow.

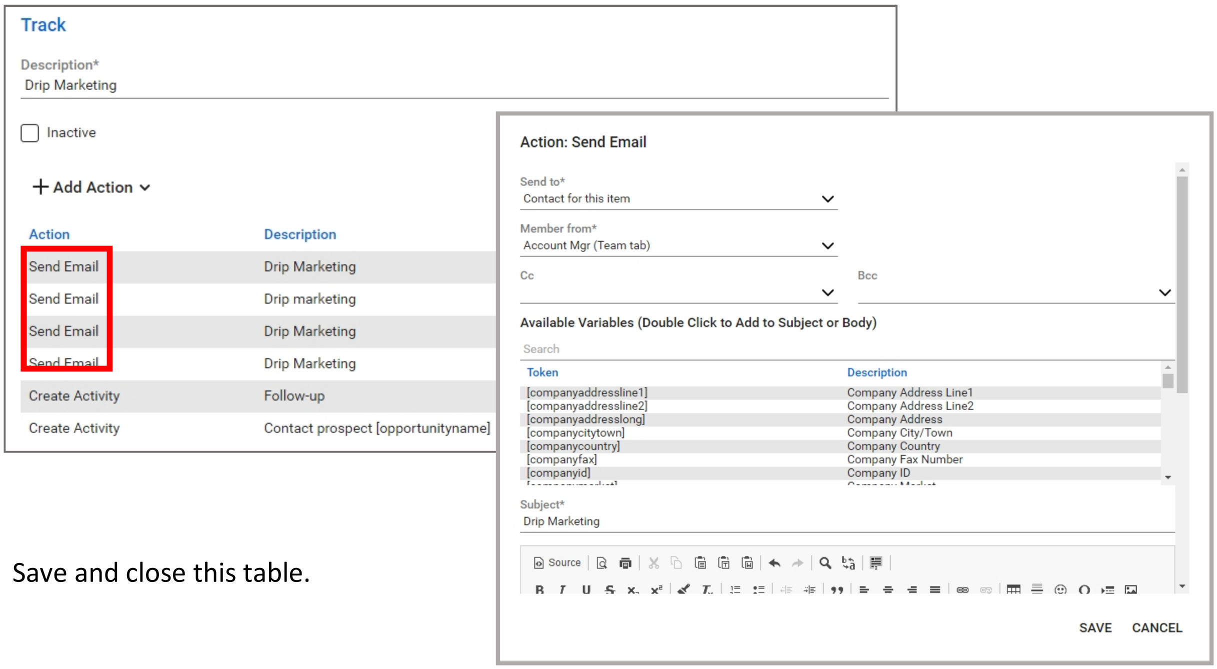
f. Save and close this table.



9. Update your track templates

If your company uses Tracks for any drip marketing functions, you should review these for any needed updates. Tracks can be used for customer onboarding, welcome messages, training and many more functions than sales marketing.

a. Navigate to System > Setup tables > Tracks.
b. Review each track for "Send email"; modify as needed using the content editor or supplied content.



c. Save and close this table.

Best Practice Tip:

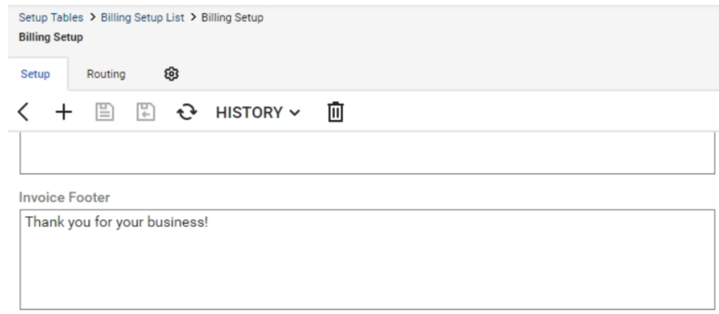
- Do you have any yearly tracks that need to be "reset" so they will continue to work? Do it now rather than later!
- Add either an email or create an activity to the end of your tracks to let you know they are expiring.
- Build a code # which would be part of the Track ID, add this number in an x-small text at the bottom of the track email content to help identify which track it came from.

10. Update your invoice templates

Two options are available for adding messages to the invoice areas. Billing setup and Invoice templates, both are in the setup table area.

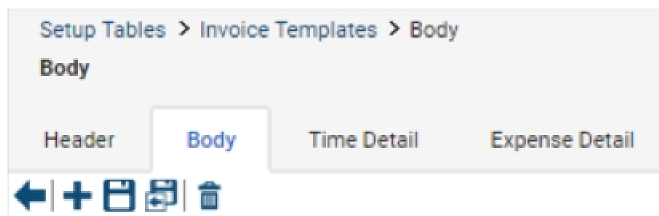
Billing Setup (Preferred)

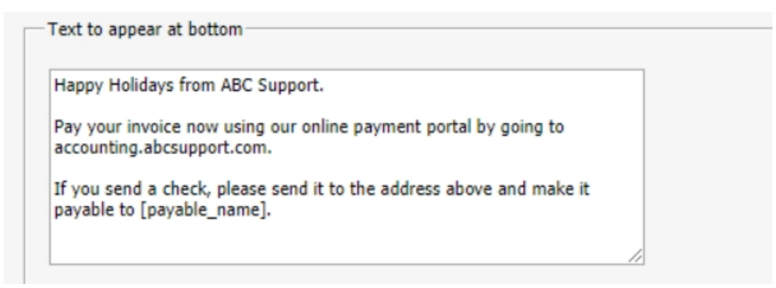
a. Navigate to System > Setup Tables > Billing Setup List > Billing Setup
b. Select the correct Division if you have more than one. (Repeat these steps if you have more than one)
c. Scroll down to Invoice Details
d. Adjust the content in the Invoice Footer area. Holiday messages promote your referral program, the sky is the limit.



Invoice Templates

a. Navigate to System > Setup Tables > Invoice Templates.
b. Select a template. (Repeat these steps if you have more than one)
c. Select the Body tab.
d. Scroll down to the bottom.
e. Adjust the content in the area labeled "Text to appear at the bottom."

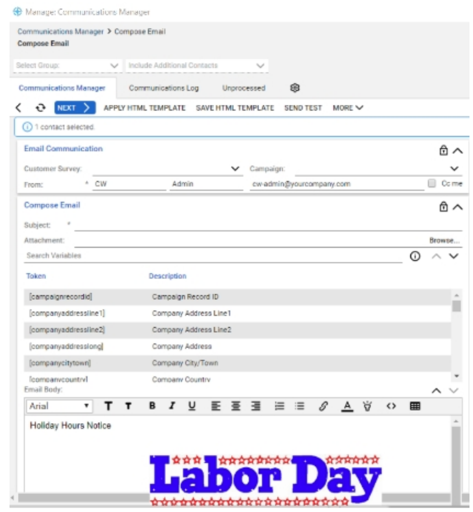




Best Practice Tip:

Set a reminder using Activities for when to change the message.

11. Update your communications manager templates



Communications Manager (Formally Marketing Manager) can hold simple templates that your team can use for instant message delivery. Security Notices, Maintenance Notifications and Holiday notices are just some of the ways this module can be utilized. Predefined templates allow consistent message delivery which follows your marketing guidelines.

a. Navigate to Marketing > Communications Manager

b. To get to your templates, you will need to add a contact. Select any contact then click "Compose Email".

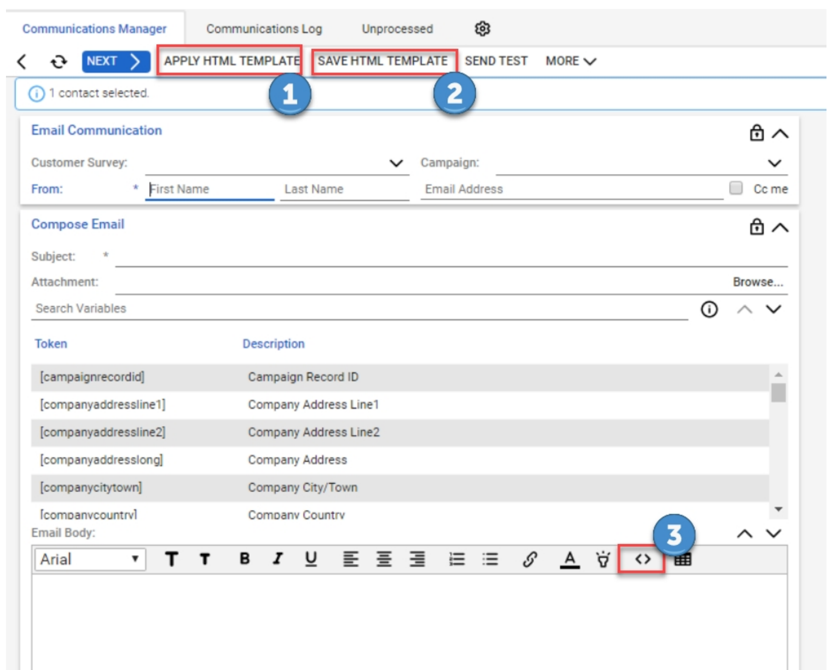
Options available at this point:

1. Apply HTML Template – Gives the option to review and delete stored templates. The browse option allows importing a saved template directly into the editor.

2. Save HTML Template – Once a template or design is finalized, using this option will save the template for future use.

3. Copy/Paste HTML into editor

c. Manage your templates using the options above.

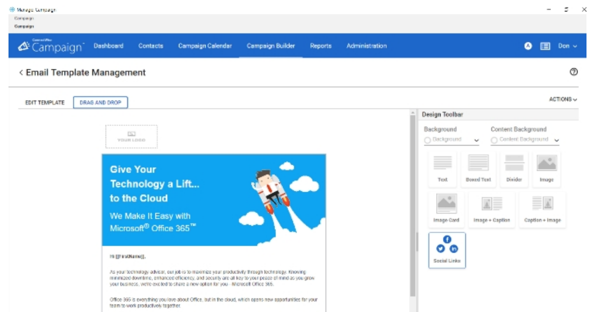


Best Practice Tip:

- Create rapid response templates using <Insert text> areas. This allows emails to be sent quickly using professional looking templates which allow a team member without HTML experience to add notes quickly.

12. Update your ConnectWise Campaign templates

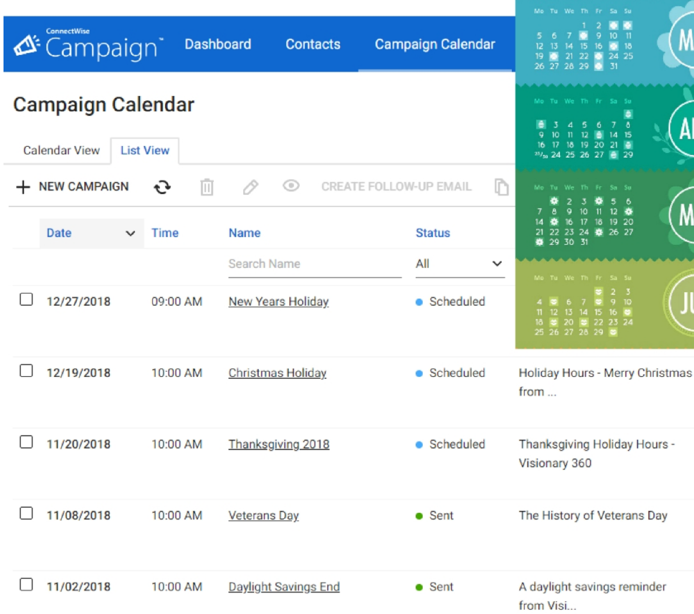
ConnectWise Campaign is an add-on module for ConnectWise Manage that can assist in marketing functions. Using the same logic as discuss in #11 Update your communications manager templates, this also applies to ConnectWise Campaign or similar marketing products.



13. Preload your marketing system with holiday notices for 2019

No matter what marketing solution you use, consider preloading your system with your holiday and other event notices now instead of at the last minute.

- Holiday closings
- Webinars
- Community events
- Road shows
- Security training

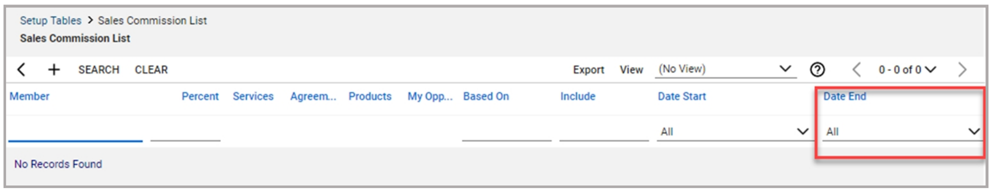


Sales

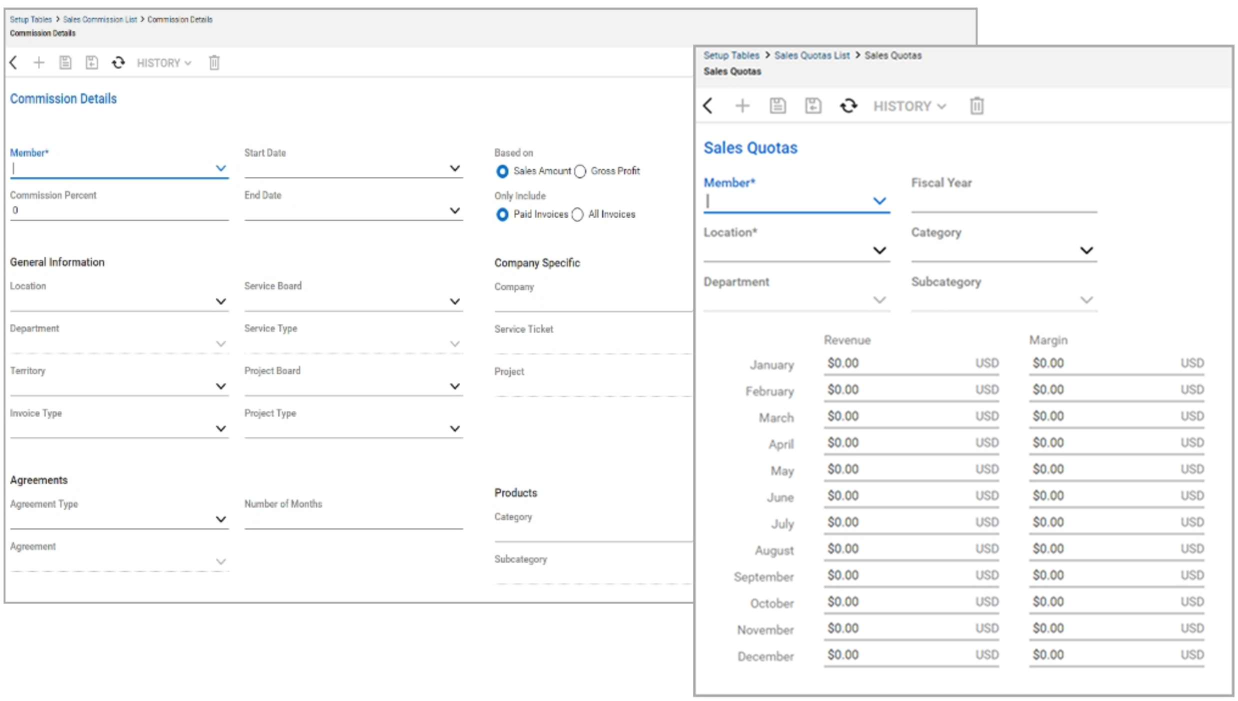
Out with the old and in with the new. Time to review your sales objectives and configure the system for 2019.

14. Update sales Commissions

a. Navigate to System > Setup Tables > Opportunities > Sales Commission list



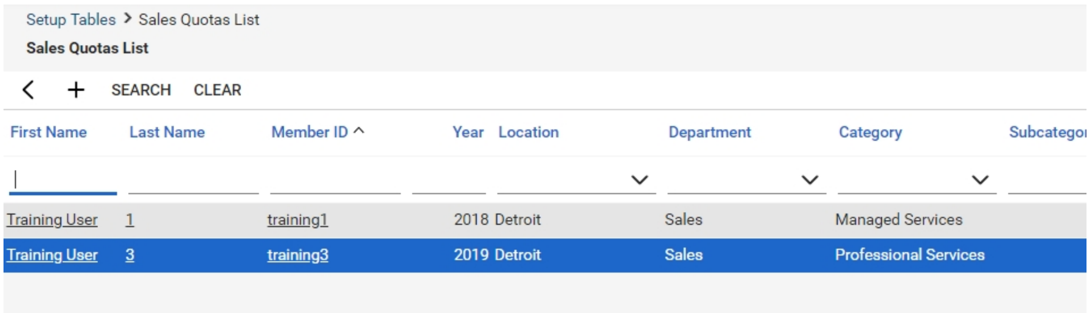
Sales commissions may have an expiration date. Review your list and check the expiration dates



b. Update any commissions expiring before January 1, 2019.
c. Save and close this table.

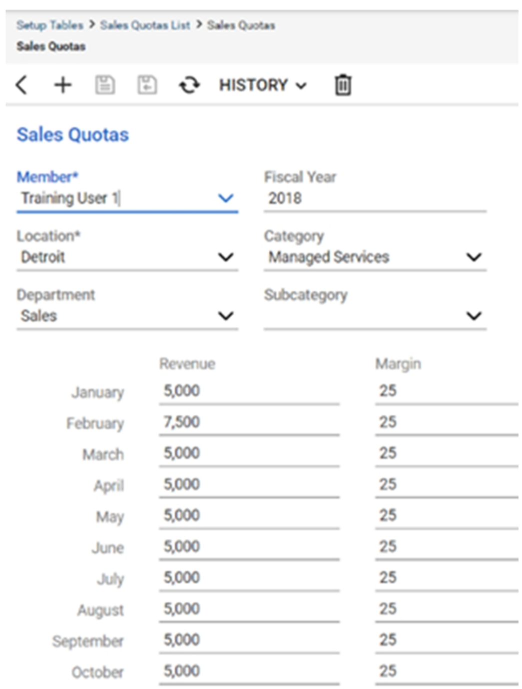
15. Update sales quotas

a. Navigate to System > Setup Tables > Opportunities > Sales Quota List



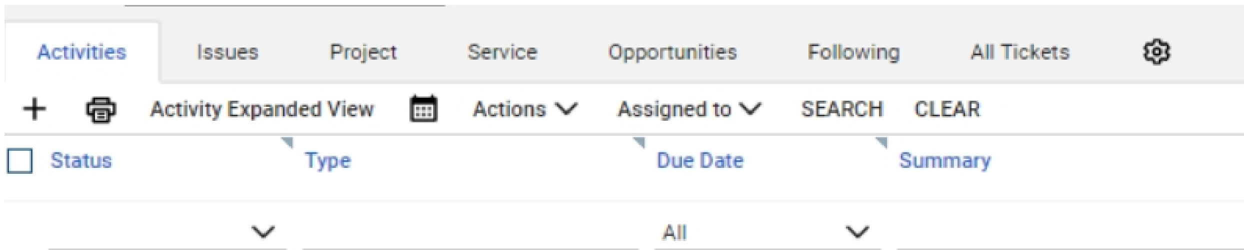
Sales quotas must be set up each year.
(Quotas are used for reporting on the Sales dashboard and planning screens.)

b. Create any new Sales Quotas for 2019.



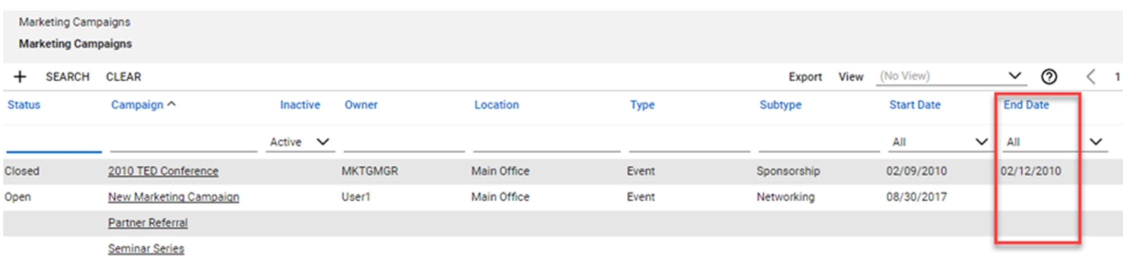
16. Update sales lists (Activities)

Just like email inboxes, your activities list would appreciate a little hygiene. Change the Due Date to "All" to see everything still open in your list.



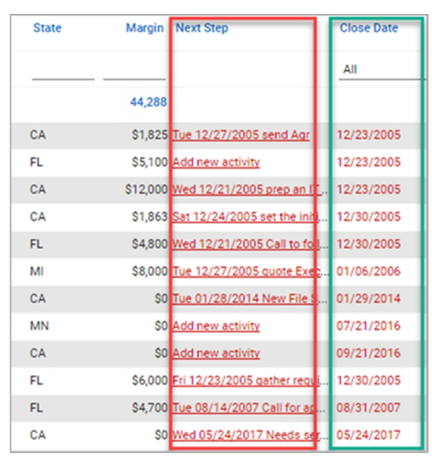
17. Update sales campaigns

a. Navigate to Marketing > Marketing Campaign.
b. Using the list view, review the end dates for all of your campaigns.



c. Closeout any campaigns ending before January 1, 2019.
d. If necessary, create new campaigns to replace the closed campaigns.

18. Update sales opportunities

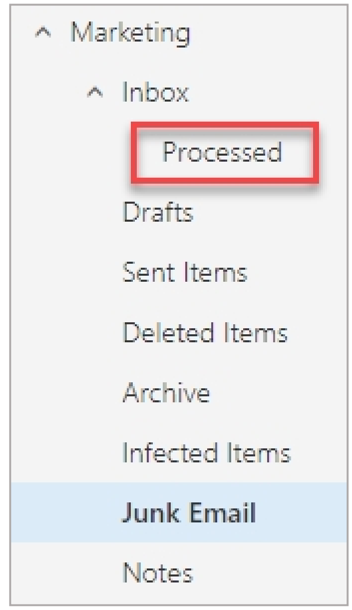


Your company should have its protocol for how your Opportunities are cleaned up, but we do suggest you look at the following:

a. Navigate to Sales > My Opportunities
b. Show opportunities for all members
c. Review Next Step – Anything Red is past due. Either update the activity or close it.
d. Review the close date – Your company should have its policy for how long an opportunity may remain open. Check to make sure no opportunities exceed your company's time frame policy.

Email Connector

19. Email connector housekeeping



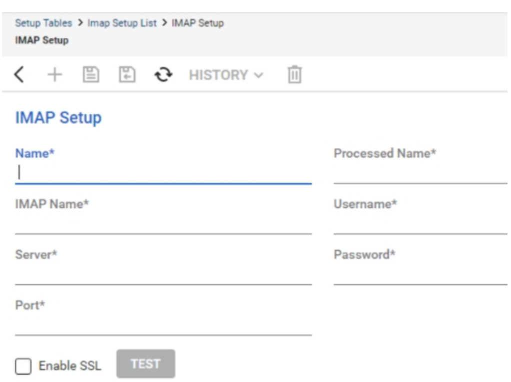
The email connector system for ConnectWise Manage® uses the Inbox folder and an additional folder called "Processed." Each IMAP enabled mail account will have this set-up.

After an email is processed by the email connector robot, it is moved to the processed folder.

While this is a great way to do auditing, there is no function to automatically remove emails from this folder, so and after time, thousands of emails can accumulate.

Your company should develop a retention policy which determines how long these emails should be kept and purge anything that falls outside of this timeline. Think of a retention policy you would establish for a backup system
and use similar guidelines for this.

20. Update email connector security

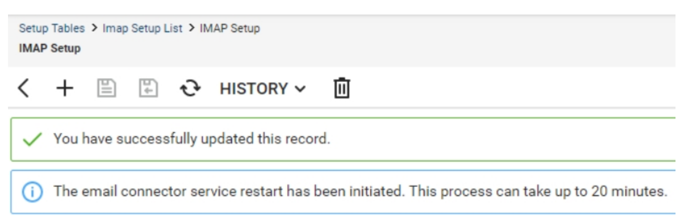


When was the last time you changed the passwords on your email connector accounts? Update using a secure password which consists of complex alphanumeric, numbers and special characters.

Email connectors use the IMAP protocol. Security is limited by the abilities of the email provider.

Update the email connector connection via the IMAP setup table

a. Navigate to Setup Tables > IMAP Setup List.
b. Chose the IMAP connection that corresponds to the email connector needing updated.
c. Update the password in the IMAP setup
d. Update the password on your email provider's system.



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At Visionary 360, our claim to fame is providing stellar business consulting services for IT firms, but that description barely scratches the surface of what we do. From ConnectWise Manage® implementation and integration to accounting services to productivity solutions, we use our past experience as managed services providers and our knowledge of the IT industry to help our customers become structured, organized, efficient, and the best in the field.

At Visionary 360, we understand the importance of consistency. It's great when the job gets done correctly; it's even better when the job gets done correctly *every time*. Whether you have 2 employees or 100, when every member of your team performs the same task with uniformity, productivity goes up. Inaccuracies are reduced, and on the rare occasion when a problem does occur, it is easy to find where the mistake was made.

The topics covered in this document are based on our own best practices and standard implementations. While we encourage every company to find what works best for them, these tried-and-true procedures have provided fantastic results for many of our clients – and for us!

Have any questions or need any assistance implementing anything in this manual? Call us at 818-459-3950 or email at consulting@visionary360.com.