



**MANAGE YOUR
CLEANING BUSINESS
WITH EASE
WHEREVER YOU ARE**

[How to Import your Customers and Schedule into Zenmaid from Your Previous System](#)

[How to Manually Add New Customers in the System](#)

[Understanding Customer Type or Status](#)

[How to Integrate Quickbooks](#)

[How to Create an Appointment](#)

[How to Create Employees](#)

[How to Create Teams](#)

[How to Add a Member to Teams](#)

[How to Assign Cleaners/Teams for an Appointment](#)

[How to Edit One-Time Appointments](#)

[How to Edit Recurring Appointments](#)

[How to Reschedule the Date and or Time of a Recurring Service](#)

[How to Edit the Address of a Recurring Appointment](#)

[How to Edit the Frequency of a Recurring Service](#)

[How to Reassign a Recurring Appointment](#)

[How to Inactivate Appointments](#)

[Zenmaid Templates](#)

[\(Invoice, Reminders, Follow Ups, Etc\)](#)

[Email Templates in Zenmaid](#)

[Text Templates in Zenmaid](#)

[How to Edit Email and Text Templates Overview](#)

[WildCards](#)

[How to Email Invoice to Customers](#)

[How to Send/Resend Appointment Confirmation](#)

[How to Send Work Orders](#)

[How to Send Appointment Reminders](#)

[How to Send Appointment Follow Ups](#)

[How to Edit Email Templates \(Step by Step Instructions\)](#)

[How to Edit Appointment Confirmation](#)

[How to Edit Booking Confirmation](#)

[How to Edit Appointment Reminder](#)

[How to Edit Work Order](#)

[How to Edit Appointment Follow Up](#)

[How to Edit Invoice](#)

[How to Edit Come Back Email](#)

[How to Edit Text Templates \(Step by Step Instructions\)](#)[How to Edit Text Appointment Reminder](#)[How to Edit Text Work Order](#)[How to Automate Sending of Email Templates](#)[How to Automate Sending of Appointment Reminders via Email](#)[How to Automate Sending of Work Orders via Email:](#)[How to Automate Sending of Appointment Follow Up via Email](#)[How to Automate Sending of Come Back Email](#)[How to Stop Sending Automated Emails For Certain Customers](#)[How to Automate Sending of Text Messages](#)[How to Automate Sending of Text Appointment Reminders](#)[How to Automate Sending of Text Work Orders](#)[How to Integrate Stripe with Zenmaid:](#)[How to Run Payroll](#)[How to Calculate Variable Fixed Rate](#)[How to Handle Day Offs and Holiday or Vacation Leaves \(2-Part Process\)](#)[Part 1: Create a Fake Job](#)[Part 2: Create a Status for the "Fake Job"](#)[Editing the Status of Recurring "Fake Jobs"](#)[How to Create Tasks](#)[How to Create and Customize Appointment Statuses](#)[How to Give Your Employees Log in to their Schedules](#)[How Employees Can Clock in and Out of Zenmaid](#)[How to Give Your Employees Access to the Clock in & Out Feature](#)[How to Create a Shortcut for Zenmaid LogIn on Your Mobile Devices](#)[For iPhone users](#)[For Android Users](#)[How to Print Work Orders](#)[How to Print Route Sheets](#)[How to View Your Appointments for An Entire Week/Weeks or a Month](#)[How to View Appointments for the Day via Dashboard](#)[Updating Outstanding Balance](#)

[How to Reflect Unpaid Balance on Appointments](#)

[2 Ways to Clear Balances or Mark Them as Paid](#)

[How to Mark Unpaid Appointments in Bulk](#)

[How to Mark Appointments Paid One by One](#)

[How to Fetch Revenue Reports](#)

[How to Connect to Mailchimp to Send Mass Emails](#)

[How to Add a Custom Field for Appointments](#)

ZENMAID BASICS

SIMPLE & EASY



Manual prepared by:



Last updated 10/19/2016

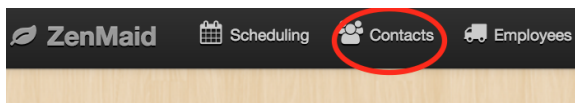
How to Import your Customers and Schedule into Zenmaid from Your Previous System

We offer a free concierge onboarding service so you don't have to manually transfer over your schedule and customer list from your previous system. We'll take care of that. All you have to do is give us a list of your customers and their information such as address, email address, phone number, and notes if any in a csv file or you can give us a temporary login on your current software and we'll take care of getting the information for you.

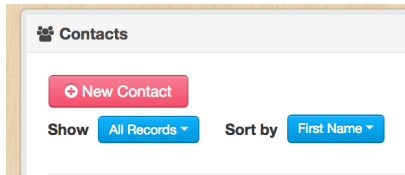
How to Manually Add New Customers in the System

To add any new customer in the system:

1. Click Contacts



2. Click + New Contact button



3. Fill in the details

+ New Customer

Contact Name First Name... Last Name...

Company Name

Marketing Source

+ Add Phone Number

+ Add Email Address

Access To Home

4. Tick on the box to automatically track the customer's records status (lead, one-time, recurring customer, or former customer)

Public Notes

These notes can be set to appear on work orders sent to your cleaners

☒ **Automatically track this record's status using calendar activity**

If checked, ZenMaid will classify this record automatically as a lead, one-time, recurring, or former customer based on your calendar activity. This information is used in various reports ZenMaid generates. If you track this information manually, it may affect the accuracy of these reports.

5. Once done filling out all your customer's information, click on Save

Service Locations

Street

City

State Zip

☐ Set as billing address

+ Add Service Location

Billing Address

Street

City

State Zip

Another way to add a new customer is from the calendar, when creating a new appointment. Click on the calendar and a sidebar pop up will appear. Choose New Record and click Proceed to next step. This'll take you to the page where you can put in the customer's details.

Employees

Filters **ON**

month week day >

Thu 12/22	Fri 12/23	Sat 12/24
	Run Payroll	
	7:00 - 1:00 Margare Fiona Dean Lezaja Jackson Hoobiall 222 7th : 9209 Chicago, IL 60669	7:00 - 8:00 8:45 - 1:00 Ebony Haydon
	10:45 - 1:00 Joe Nolan	

Create Appointment

Choose a Customer

New Record

Appointment time:
Thu, Dec 22 9:30am - 9:45am

You will be given the option to enter more information, set the recurrence, and edit the start and end time of this appointment on the next page

Understanding Customer Type or Status

We have the following Customer Types:

- **Lead** - A customer who has not made any appointment
- **One-time** - A customer who made 1 appointment
- **Recurring Customer** - A customer who's had more than 1 appointment
- **Former Customer** - A customer that has not made an appointment for more than 6 weeks

Zenmaid automatically assigns customer type based on their calendar activity so long as this part in the customer's records is ticked.

Public Notes

These notes can be set to appear on work orders sent to your cleaners

☒ **Automatically track this record's status using calendar activity**

If checked, ZenMaid will classify this record automatically as a lead, one-time, recurring, or former customer based on your calendar activity. This information is used in various reports ZenMaid generates. If you track this information manually, it may affect the accuracy of these reports.

You can also manually assign the customer type by unticking the box. Once unticked, you can choose which type you want to assign to the customer

☐ **Automatically track this record's status using calendar activity**

If checked, ZenMaid will classify this record automatically as a lead, one-time, recurring, or former customer based on your calendar activity. This information is used in various reports ZenMaid generates. If you track this information manually, it may affect the accuracy of

This record is a

Lead

One-time Customer

✓ Recurring Customer

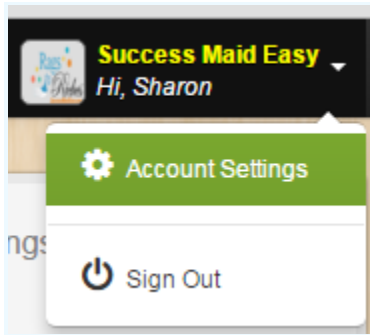
Former Customer

IMPORTANT NOTE:

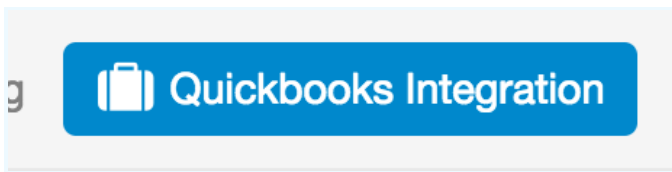
If you're manually changing your customer status to Former Customer, you'll have to inactivate the customer's all ongoing and future appointments first. Click here for [step by step instructions on how to inactivate ongoing and future appointments](#).

How to Integrate Quickbooks

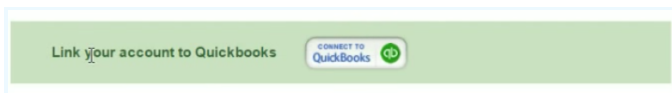
1. Click on the dropdown after your name and click Account Settings



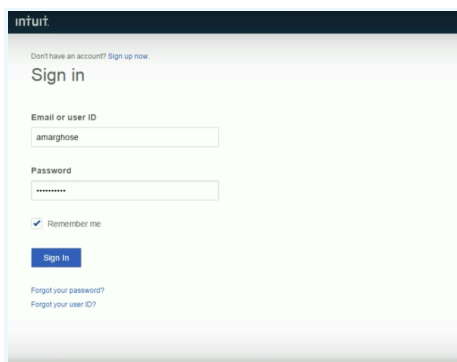
2. Click on Quickbooks Integration button



3. Click Connect to Quickbooks if you haven't yet linked it.



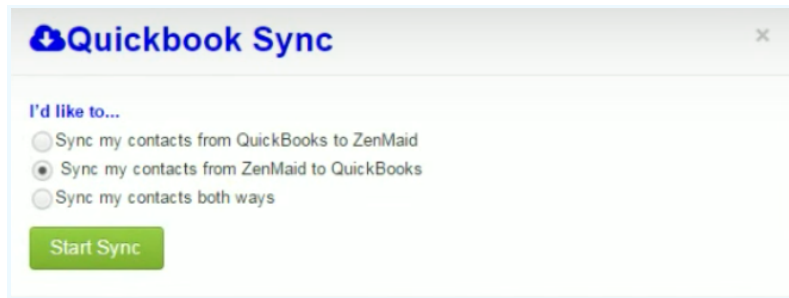
4. On the pop up, enter your login details for your Quickbooks online account



5. Go to your Contacts page and click Sync Customers with Quickbooks



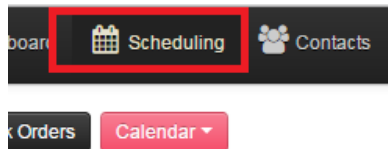
6. On the pop up, select how you want to sync then click Start Sync



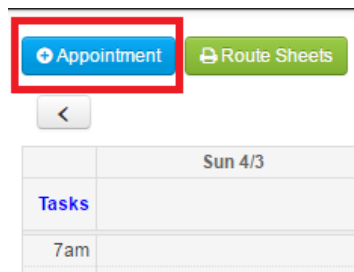
How to Create an Appointment

Creating an appointment in Zenmaid is so easy! See instructions below.

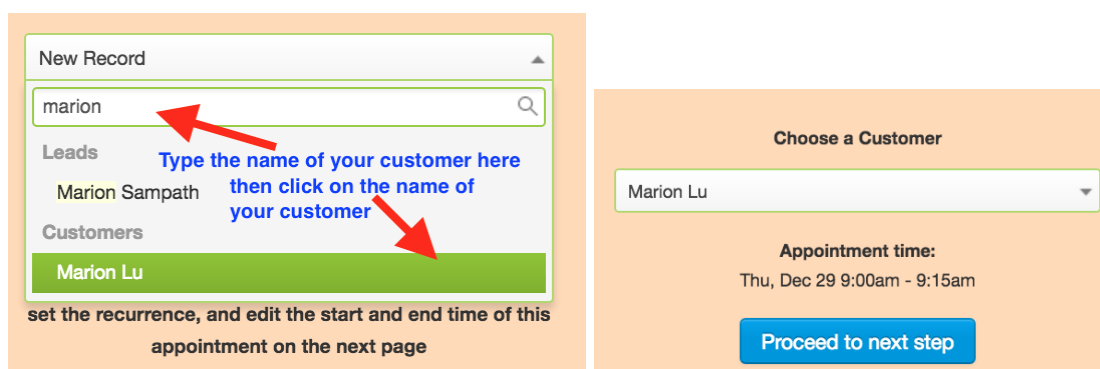
1. Click on Scheduling



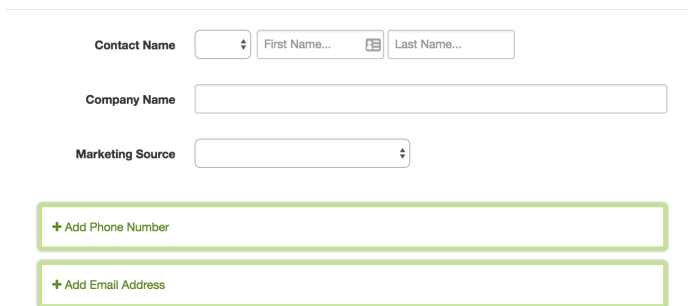
2. Click on the + Appointment button.



3. From the pop up sidebar (right part of the screen), type in the name of your customer on the search bar and click on it. You can also click on New Record (for new customers). Then click on Proceed to Next Step

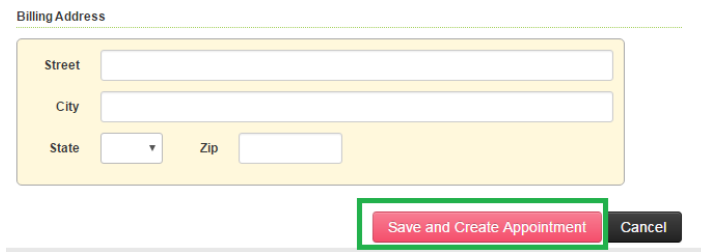


If you clicked on New Record, you will be taken to a new screen where you can enter all the customer details. It'll look like this (see below).



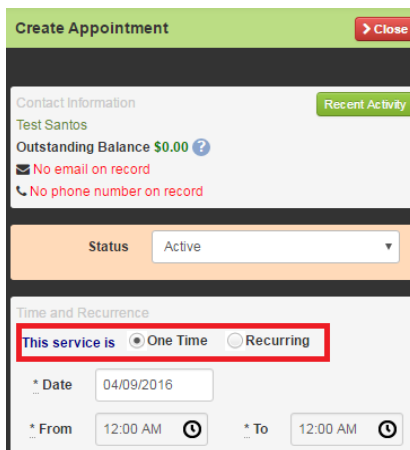
A form for entering customer details. It includes fields for Contact Name (with First Name and Last Name sub-fields), Company Name, and Marketing Source. Below these are two green-bordered boxes: 'Add Phone Number' and 'Add Email Address', each with a plus icon and a text input field.

After filling in all customer details, click on Save and Create Appointment



A form for entering billing address. It includes fields for Street, City, State (a dropdown menu), and Zip. Below the form is a green-bordered button labeled 'Save and Create Appointment' and a black 'Cancel' button.

4. On the screen pop up to your right, you can start entering the appointment details (date and time, recurrence - one time or recurring, etc.)



A 'Create Appointment' screen. It has a green header with 'Create Appointment' and a 'Close' button. Below is a 'Contact Information' section with 'Test Santos', 'Outstanding Balance \$0.00', and status messages 'No email on record' and 'No phone number on record'. There is a 'Recent Activity' button. Below that is a 'Status' dropdown set to 'Active'. The 'Time and Recurrence' section has a red box around 'This service is' with radio buttons for 'One Time' (selected) and 'Recurring'. It also has date and time pickers: 'Date' (04/09/2016), 'From' (12:00 AM), and 'To' (12:00 AM).

5. Click on edit to assign cleaners for the appointment. You can assign it to a team or specific cleaners. [To create teams click here](#). Tick on work items as needed. Put in the price (optional)

Assigned to
No Cleaners Assigned

Edit

Work Items

<input type="checkbox"/> Clean outside kitchen cabinets	<input type="checkbox"/> Clean outside bathroom cabinets
<input type="checkbox"/> Clean inside refrigerator	<input type="checkbox"/> Wet wipe baseboards
<input type="checkbox"/> Wet wipe baseboards	<input type="checkbox"/> Vacuum Furniture (One Room)
<input type="checkbox"/> Clean Fireplace	<input type="checkbox"/> Clean oven
<input type="checkbox"/> Wet wipe windowsills	<input type="checkbox"/> Wet wipe door facings and frames

Billing

Price ☐ Paid

6. You can put down notes such as special instructions. Once done, click on Create Appointment

Notes

Record notes here...

☒ Change contact from lead to customer after creating appointment?

Create Appointment

7. If there's an email address on the customer's file you will be asked if you want to send a confirmation email for this appointment. Click Yes, if you want to.

Send confirmation email for this appointment?

Email will be sent to santosmichee@gmail.com

Yes **No** **View Confirmation Email Template**

You can also send the confirmation email at a later time. Just click on the appointment. From the sidebar pop up, click on Send Email, choose Appointment Confirmation & click Generate Email

Actions

Send Text **Send Email**

Select Email Type

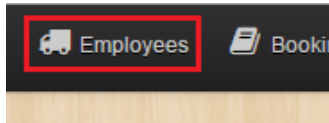
☒ Appointment Reminder
☒ Work Order
☒ **Appointment Confirmation**
☐ Appointment Follow-Up

Generate Email

The confirmation email and other email templates as well as text templates can be edited and automated. [For instructions on how to edit templates, click here](#).

How to Create Employees

1. Click on Employees



2. Click on + New Employee



3. On the next page, you can start filling in your employee details such as Name, Contact details, Pay type, etc.

A screenshot of the employee creation form. It contains several input fields: 'First name' (with a small icon on the right), 'Last name', 'Phone number', and 'Email'. Below the 'Email' field is a small note: 'Cleaners can use this email address to sign in here and view their schedule'. There is a checkbox labeled 'Allow this employee to sign in and view their schedule?'. Below these fields is a section titled 'Additional Information' which includes a 'Pay type' dropdown menu (currently set to 'Hourly') and a note: 'The pay type for this cleaner will be used to calculate their job wages for their assigned cleanings'. At the bottom of this section is an 'Hourly Rate' input field.

The email is necessary for your employee to receive [work orders via email](#), view their schedule and also to clock in and out on every job. [Here's how you can give your employees access to the clock in and out feature of zenmaid](#). The clock in and out information they enter is connected to Zenmaid's payroll. [Learn how to run payroll here](#).

Your customer's phone number allows them to receive [text work orders](#)

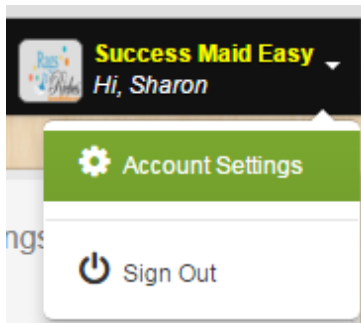
4. Once done, click on Create Employee



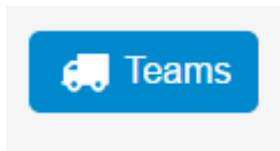
How to Create Teams

You can also create teams. First, make sure that you've already added all your employees in the system. [Click here to learn how to Create Employees.](#)

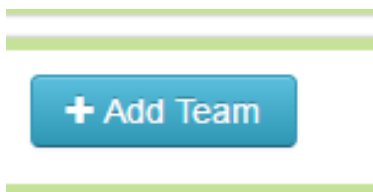
1. Click on the dropdown after your name and click Account Settings



2. Click on Teams



3. Click on + Add Team



4. Give the team a name and assign a color for the team for the calendar

A screenshot of the ZenMaid software interface showing the team creation form. It has a label "Team Name" above a text input field with the placeholder text "Type in the name of the team here". Below the input field is a section labeled "Calendar Color" with a small blue square icon next to it. This section is highlighted with a red rectangular border.

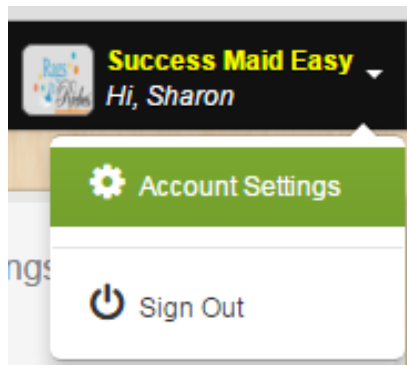
5. Assign team members by ticking on the box before the employee name then click Save Changes.

Team Members

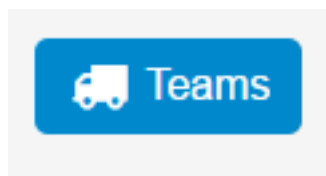
- | | |
|--|--|
| <input checked="" type="checkbox"/> Alexis | <input type="checkbox"/> Amar Ghose |
| <input type="checkbox"/> Arun | <input checked="" type="checkbox"/> Darren |
| <input checked="" type="checkbox"/> David | <input checked="" type="checkbox"/> Debbie |
| <input type="checkbox"/> Gerard | <input type="checkbox"/> Iniesta |
| <input type="checkbox"/> Jessi | <input type="checkbox"/> Jessica |

How to Add a Member to Teams

1. Click on the dropdown after your name and click Account Settings



2. Click on Teams



3. Under the team where you want to add an employee, tick on the name of the employee or employees.

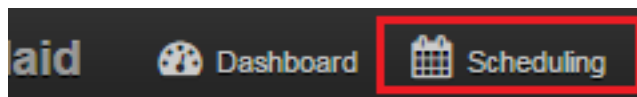
Team Members

- | | |
|--|--|
| <input checked="" type="checkbox"/> Alexis | <input checked="" type="checkbox"/> Amar Ghose |
| <input type="checkbox"/> Arun | <input type="checkbox"/> Darren |
| <input type="checkbox"/> David | <input type="checkbox"/> Debbie |
| <input type="checkbox"/> Gerard | <input type="checkbox"/> Iniesta |
| <input type="checkbox"/> Jessi | <input type="checkbox"/> Jessica |

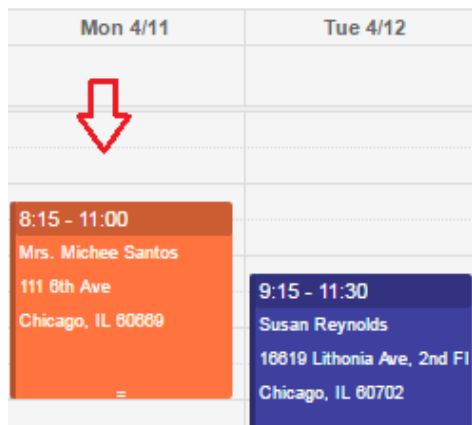
How to Assign Cleaners/Teams for an Appointment

You can assign cleaners or teams for each cleaning appointment.

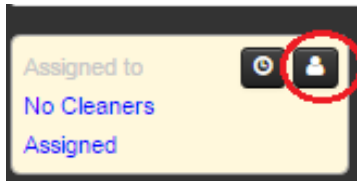
1. Click on Scheduling



2. On your calendar, click on the appointment



3. From the sidebar screen on your right, click on the person icon. The assign cleaners pop up will appear.



4. From the pop up, choose whether you want to assign a team or individual/individuals for the appointment. To assign a cleaner or cleaners, tick the box beside the name of the cleaner. To assign a team (make sure that you've set up teams first. [Click here for instructions on how to create teams](#)) click on the Team dropdown and choose the team you want.

Assign Cleaners To assign a team, click on the dropdown arrow and click on the team you want

Team

☒ Alexis **To assign individual/individuals:** ☒ Amar Ghose
Tick on the box before the name of the cleaner
☐ Arun ☐ Darren
☐ David ☐ Debbie

5. If it's a recurring service and you want to assign the appointment to the same team or cleaner/cleaners you've chosen, tick on the box otherwise leave it unticked. Then click on Assign Cleaners.

☐ Assign selected cleaners to all future appointments in this recurring service?

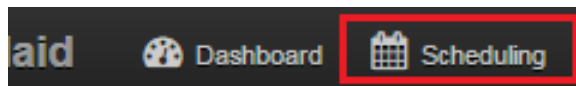
Assign Cleaners

How to Edit One-Time Appointments

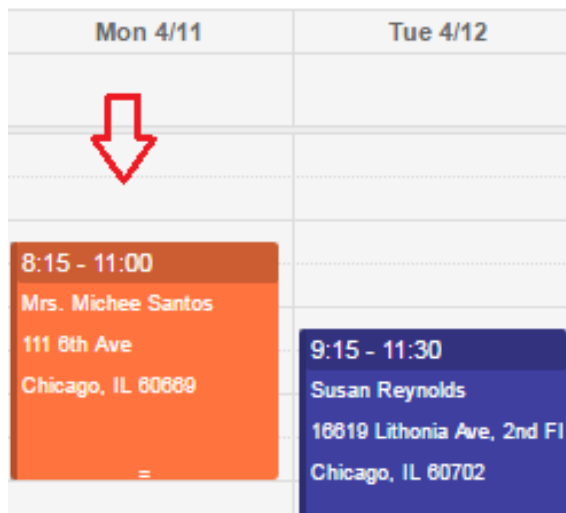
If you need to edit the date and or time of the appointment:

1. Click and drag the appointment to the new day and or time.

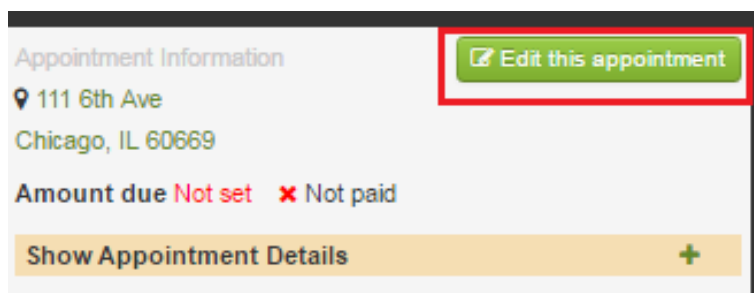
1. Click on Scheduling



2. On your calendar, click on the appointment



3. From the sidebar popup (right of your screen) click on Edit this appointment



4. On the next screen, you'll have a chance to make the necessary changes such as date change, time change, work order details, and pricing.

Time and Recurrence

This is a **one-time** service

Date

04/10/2016

From

2:00 PM

To

4:00 PM

Details and Work Order

Status

Active

Work Order

Assigned to

No Cleaners Assigned

Edit

☐ Clean outside kitchen cabinets
 ☐ Clean inside refrigerator
 ☐ Wet wipe baseboards
 ☐ Clean Fireplace
 ☐ Wet wipe windowsills

☐ Clean outside bathroom cabinets
 ☐ Wet wipe baseboards
 ☐ Vacuum Furniture (One Room)
 ☐ Clean oven
 ☐ Wet wipe door facings and frames

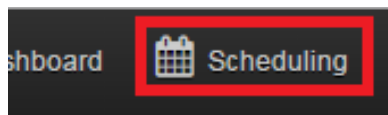
Notes

5. Lastly Click Save Changes

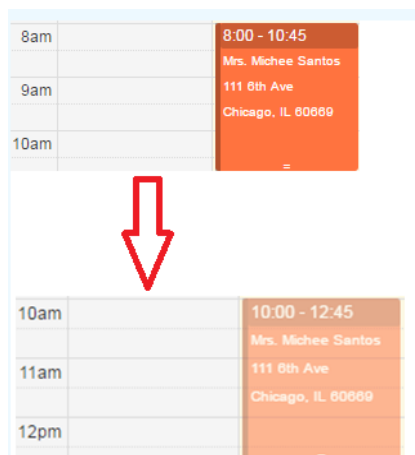
How to Edit Recurring Appointments

How to Reschedule the Date and or Time of a Recurring Service

1. Click on Scheduling



2. From your calendar click and hold simultaneously on the appointment and drag it down.



3. A pop up will appear where you can edit the date and time of the appointment

Reschedule Appointment To...

* Date	<input type="text" value="4/11/2016"/>		
* From	<input type="text" value="10:00 AM"/>	* To	<input type="text" value="12:45 PM"/>

4. If you want the changes saved for all appointments, tick “This and all future appointments in the series”.

Apply change to

- ☐ Only this appointment
- ☒ This and all future appointments in this series

5. If it's just for this specific appointment, then tick on only this appointment.

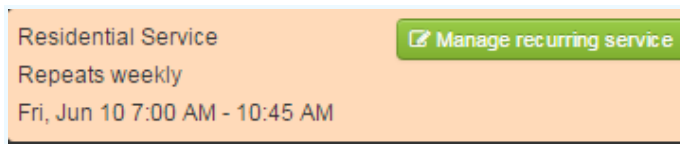
Apply change to

- ☒ Only this appointment

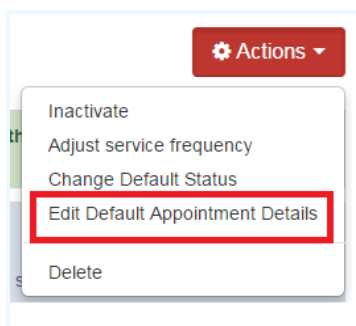
6. Lastly, click Save

How to Edit the Address of a Recurring Appointment

1. Click on the appointment and from the sidebar pop up click on Manage Recurring Service



2. Top right of your screen, you'll see Actions. Click on the dropdown menu and click on Edit Default Appointment Details




3. Top right of your screen, you'll see Service Address. Put in the new address here.

Service Address

Street

City

State **Zip**




4. Scroll down and click on Save Changes



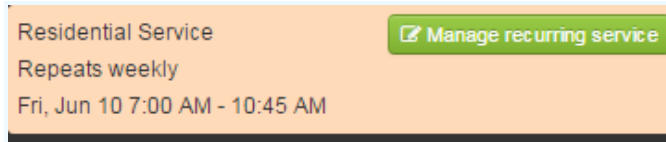
You will then get a confirmation of the address change you made

Default appointment information has been successfully changed! A new recurring service has been created to manage this new appointment data and the old service has been disabled.

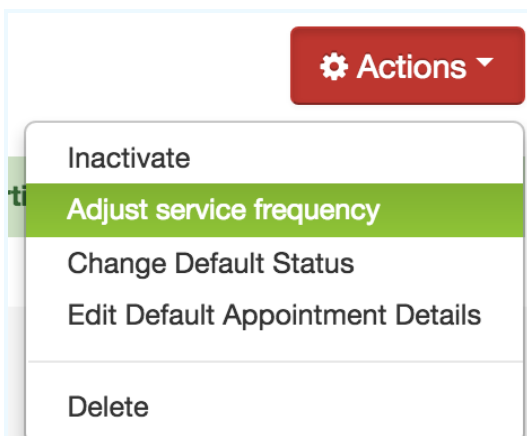
<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc; margin-bottom: 10px;"> Customer Information kmar ZenMaid (Zenmaid.com Software) Outstanding Balance \$101,000.00  ✉ amarghose@gmail.com 📞 No phone number on record </div> <div style="background-color: #fff9c4; padding: 5px; border: 1px solid #ccc;"> Default Assigned Cleaners ↓ Jessi Julie </div>	<div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <div style="border: 2px solid red; padding: 5px; margin-bottom: 10px;"> Default Appointment Information 📍 4120 Park Blvd Palo Alto, CA 94306 </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> WORK ITEMS Clean oven Clean inside refrigerator Status Active Owed \$185.00 ✖ Not paid Notes </div> <div style="width: 35%; text-align: right;"> CUSTOM FIELDS </div> </div> </div>
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How to Edit the Frequency of a Recurring Service

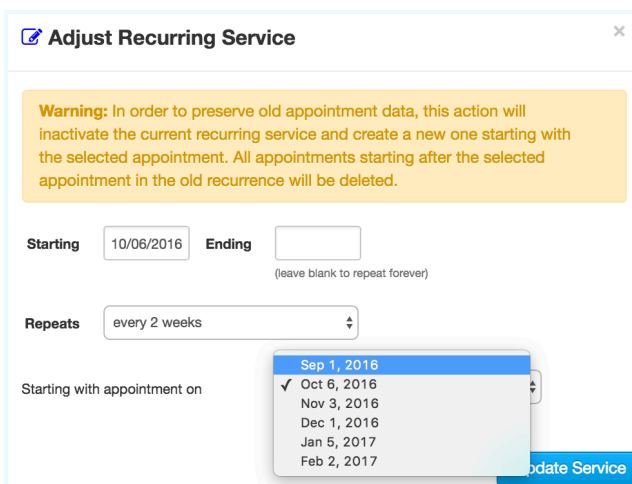
1. Click on the appointment and from the sidebar pop up click on Manage Recurring Service



2. Top right of your screen, you'll see Actions. Click on the dropdown menu and click on Adjust Service Frequency



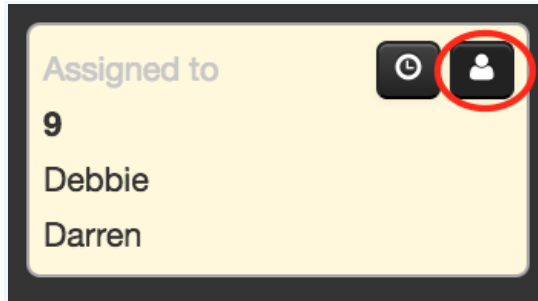
3. From the pop up, choose the new frequency under "Repeats" and for "Starting with appointment on" click on the dropdown arrow as to when this change will take effect. Once you've chosen a date from the dropdown arrow, you can also type in the same date for the box that says "Starting"



4. Lastly, click on Update Service

How to Reassign a Recurring Appointment

1. Click on the appointment and from the sidebar pop up click on the person icon



2. On the next page you can reassign either to a new team or to another cleaner or cleaners.

Assign Cleaners

Team

To reassign to another team, click on the Team's dropdown arrow and click on the new team you want to assign the appointment to

<input type="checkbox"/> Alexis	<input type="checkbox"/> Amar Ghose
<input type="checkbox"/> Arun	<input checked="" type="checkbox"/> Darren
<input type="checkbox"/> David	<input checked="" type="checkbox"/> Debbie
<input type="checkbox"/> Gerard	<input type="checkbox"/> Harriet
<input type="checkbox"/> Iniesta	<input type="checkbox"/> Jessi
<input type="checkbox"/> Jessica	<input type="checkbox"/> Joe
<input type="checkbox"/> Joey Barton	<input type="checkbox"/> Julie
<input type="checkbox"/> Karine	<input type="checkbox"/> Kumar
<input type="checkbox"/> Lindsey Baller	<input type="checkbox"/> Lionel
<input type="checkbox"/> Lisa	<input type="checkbox"/> Lolita

To reassign to another cleaner or cleaners, untick the current cleaners first and then tick the names of the ones you want to reassign the appointment to.

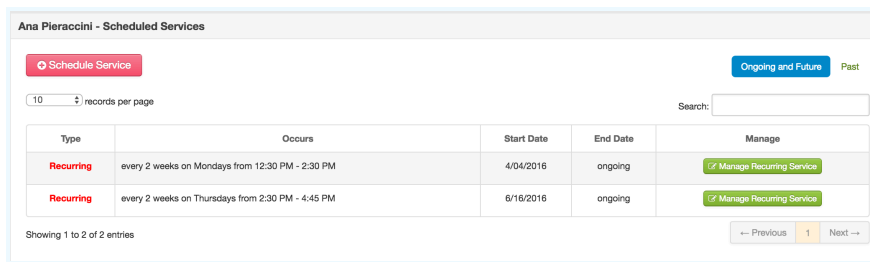
3. Scroll down and if you want the entire series of appointments assigned to the new cleaners, tick on the box for "Assign selected cleaners to all future appointments in this recurring service" otherwise leave it untick. Lastly, click Assign Cleaners.

☐ Assign selected cleaners to all future appointments in this recurring service?

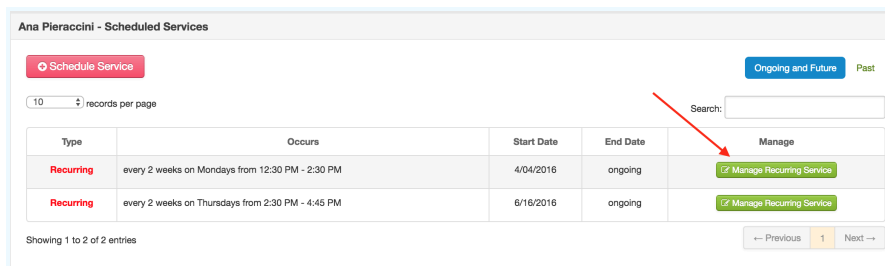
Assign Cleaners

How to Inactivate Appointments

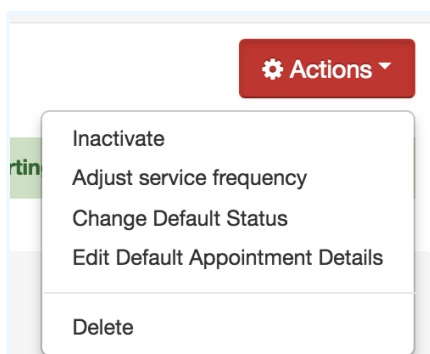
1. Go to the contacts page, click on the name of the customer and click on Edit. Scroll all the way down until you see the Scheduled Services of your customer.





2. Click on Manage Recurring Service or Manage Appointment



3. On the next page, top right of your screen, click on the **Actions** button's dropdown arrow and click **Inactivate**



4. On the pop up warning prompt, the date when you want the service inactivated as necessary and then click Inactivate

 **Inactivate Recurring Service** 

Warning: This action will PERMANENTLY delete all appointments in this service scheduled after the selected date!

Inactivate service on

Inactivate

5. You'll have to do the same for all ongoing and future appointments the customer has.

Zenmaid Templates (Invoice, Reminders, Follow Ups, Etc)

**Communication made
easy between you and
your customers
&
between you and
your cleaners**



Email Templates in Zenmaid

You can send these email templates manually or automatically. You can edit what you'd like to appear in these templates and if you automate you can choose the time they get sent out. [To edit email templates, click here.](#)

- Work Order - Send to your employees/cleaners assigned
- Appointment Confirmation - Sent to customers confirming scheduled appointment
- Booking Confirmation - Zenmaid offers a booking form (included in premium and buy it once plans) that can be put up on the customer's website. You will need to fill out a survey form to set this up.
- Comeback - You can send the comeback template to previous customers who haven't scheduled a cleaning with you in a while.
- Appointment Follow Up - You can send this to customers after cleaning to get a feedback from them.
- Appointment Reminder - Send this to your customers to remind them of an upcoming appointment with you.
- Invoice - Send invoices via email

Text Templates in Zenmaid

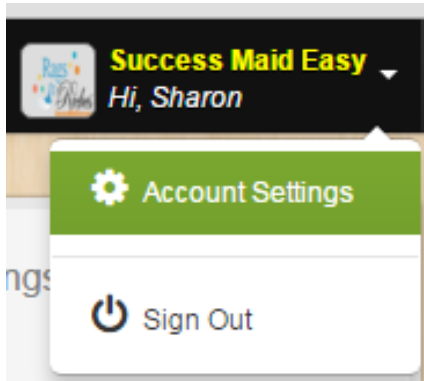
You can send these text templates manually or automatically. You can edit what you'd like to appear in these templates and if you automate, you can choose the time they get sent out. [To edit text templates, click here.](#)

- Work Order - Sent to your employees or cleaners assigned
- Appointment Reminder - Remind your customers of an upcoming appointment by sending this template

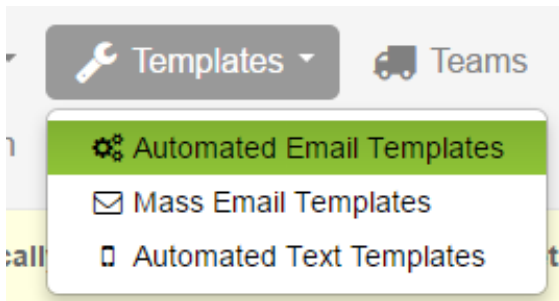
IMPORTANT NOTE: Please remember that text messages are limited to 140 characters only.

How to Edit Email and Text Templates Overview

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates or Automated Text Templates



3. Click on the template you want to edit (e.g. work order, appointment confirmation, appointment reminder, etc)

Automated Email Templates

Work Order

Appointment Confirmation

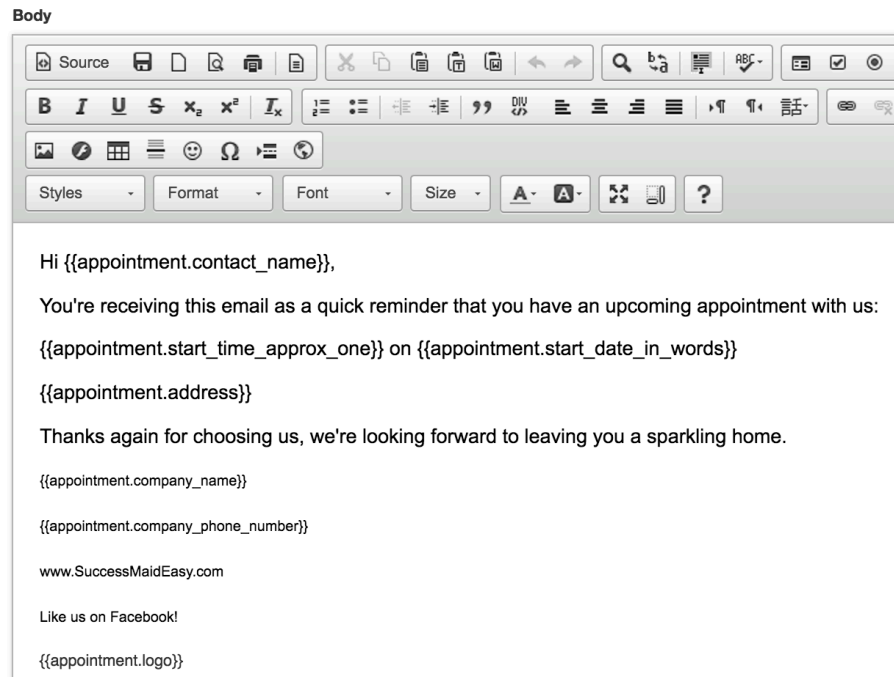
Booking Confirmation

Come Back

Appointment Follow-Up

Appointment Reminder

4. Under Body, you'll see that we have supported wildcards (or those inside the double curly brackets) which automatically puts in the information of the customer and appointment details. You can choose to leave out wildcards as you please and edit the template as needed.



5. Click Preview to see how the actual template looks like. Don't forget to click Save Changes



WildCards

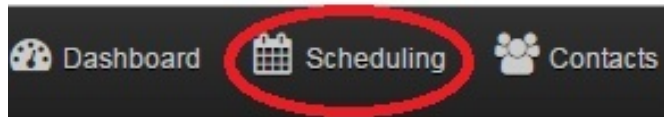
IMPORTANT NOTE: Those in curly brackets (e.g. {{appointment.start_time}}) are called wildcards. They tell the system where to put the corresponding information for each appointment. Currently, the system supports the following wildcards:

- {{appointment.start_time}} - exact appointment start time (e.g., 12:30 PM)
- {{appointment.start_time_approx_one}} - approximate appointment start time (e.g., 12 PM - 1 PM)
- {{appointment.start_date}} - date of appointment (e.g., 10/3/2013)
- {{appointment.start_date_in_words}} - date of appointment in words (e.g., Thursday, Oct 3)
- {{appointment.address}} - address of appointment
- {{appointment.contact_name}} - name of client (e.g., John Smith)

You can send an email to amar@zenmaid.com if the information you want to add is not a supported wildcard.

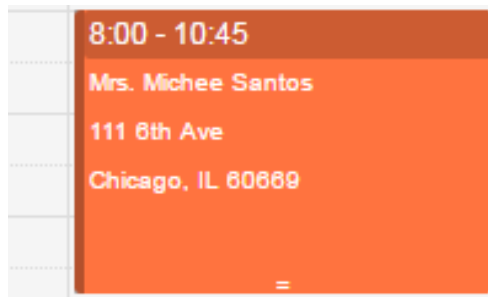
How to Email Invoice to Customers

1. Click on Scheduling

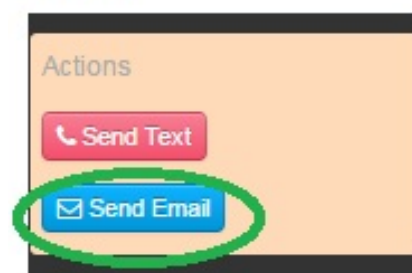


Mon 3/14	Tue 3/15

2. Click on the appointment



3. On the sidebar pop up (right of your screen) under Actions, click on Send Email



4. Select the "invoice" template in the dropdown then next. You'll have the opportunity to edit the invoice on the following page before sending.

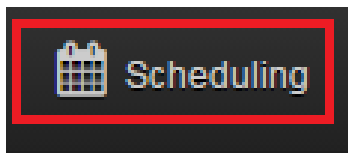
How to Send/Resend Appointment Confirmation

IMPORTANT NOTE: Appointment confirmation is sent manually. After creating the appointment in your calendar, a prompt will appear asking you if you want to send an appointment confirmation. Click Yes to do so.

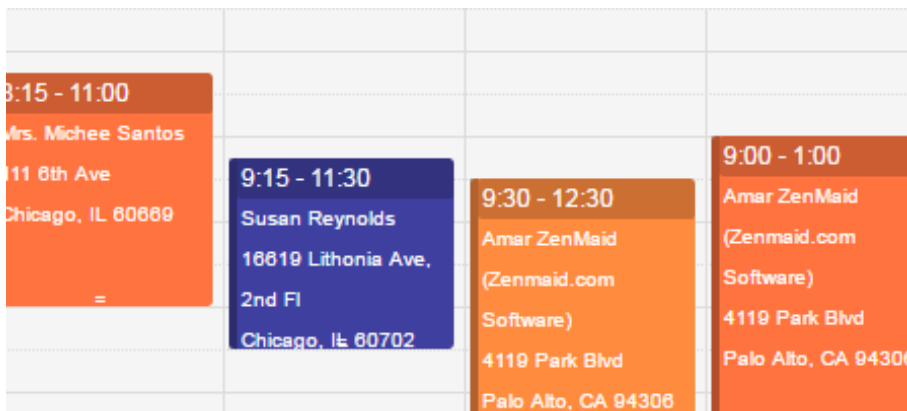
If your customer has made changes to a scheduled appointment, you'll have to manually send a new appointment confirmation with the changes made.

To resend appointment confirmation:

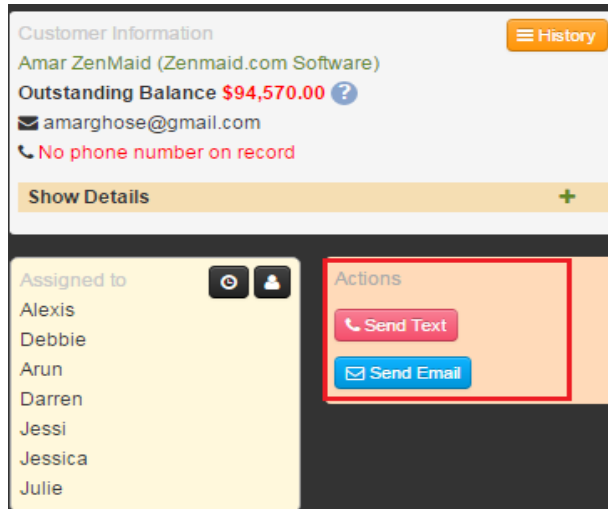
1. Click on the Scheduling tab.



2. Click on the appointment

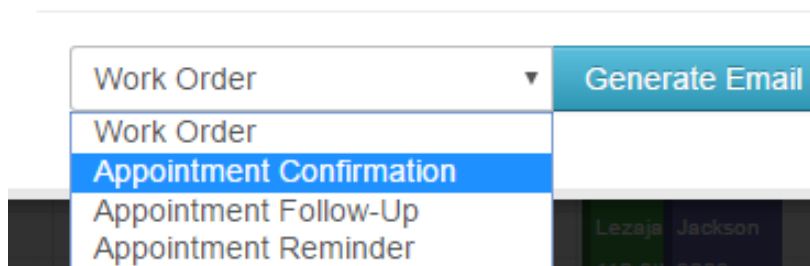


3. On the right side of your screen, a pop up will appear. Under Actions, click on Send Email



4. Choose Appointment Confirmation from the dropdown choices and click on Generate Email

Select Email Type



5. On the next page, you'll have the chance to edit the confirmation email and put in the changes made. Make sure that the Send to box is ticked then hit Send Email

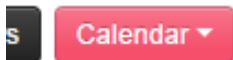
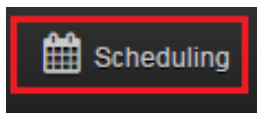
Send email to:

☒ Allison Butts <santosmichee@gmail.com>

How to Send Work Orders

You can send work orders to your employees via text or email. You can also automate sending the work orders out. [Click here for instructions on how to automate sending of work orders via email](#) and [here for text](#).

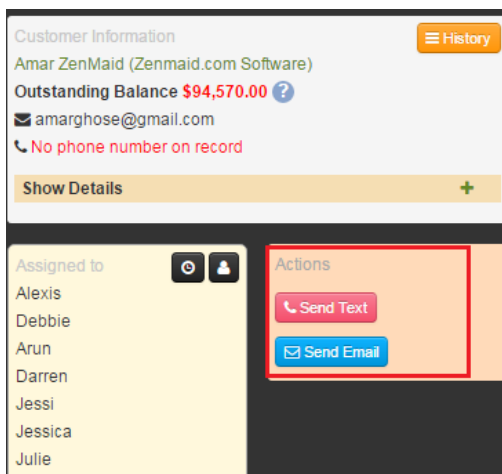
1. Click on the Scheduling tab.



2. Click on the appointment

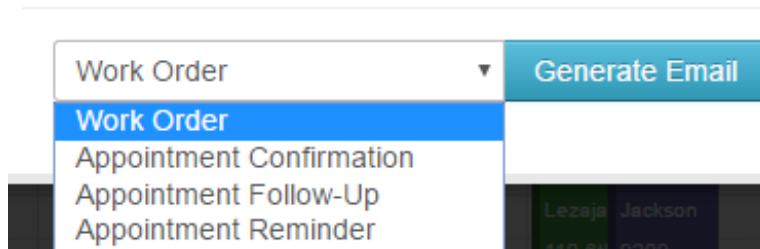
8:15 - 11:00 Mrs. Michee Santos 111 6th Ave Chicago, IL 60609	9:15 - 11:30 Susan Reynolds 18619 Lithonia Ave. 2nd Fl Chicago, IL 60702	9:30 - 12:30 Amar ZenMaid (Zenmaid.com Software) 4119 Park Blvd Palo Alto, CA 94306	9:00 - 1:00 Amar ZenMaid (Zenmaid.com Software) 4119 Park Blvd Palo Alto, CA 94306
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3. On the right side of your screen, a pop up will appear. Under Actions, click on Send Text or Send Email



4. Choose Work Order from the dropdown choices and click on Generate Email or Generate Text

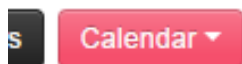
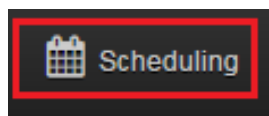
Select Email Type



How to Send Appointment Reminders

You can send appointment reminders via text or via email. You can also automate sending them out. [Click here for instructions on how to automate sending of Appointment Reminders](#)

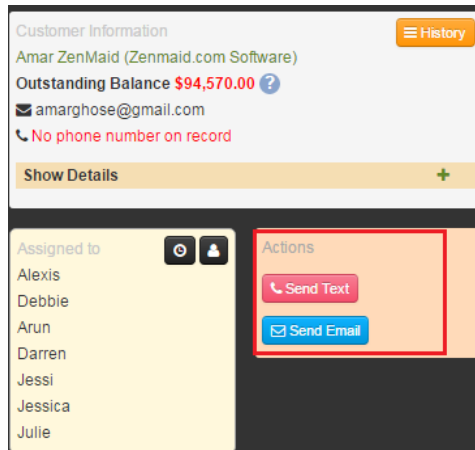
1. Click on the Scheduling tab.



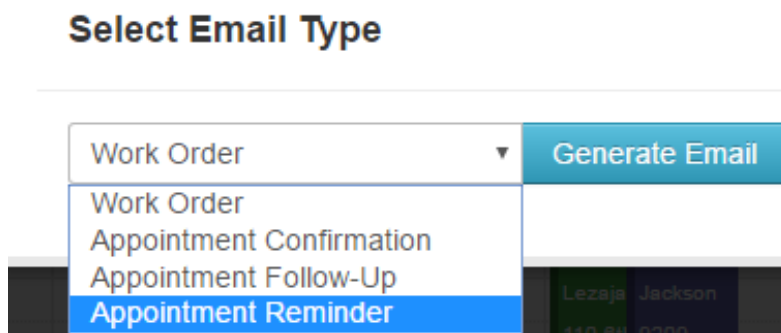
2. Click on the appointment

8:15 - 11:00 Mrs. Michee Santos 111 6th Ave Chicago, IL 60609	9:15 - 11:30 Susan Reynolds 18819 Lithonia Ave. 2nd Fl Chicago, IL 60702	9:30 - 12:30 Amar ZenMaid (Zenmaid.com Software) 4119 Park Blvd Palo Alto, CA 94306	9:00 - 1:00 Amar ZenMaid (Zenmaid.com Software) 4119 Park Blvd Palo Alto, CA 94306
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3. On the right side of your screen, a pop up will appear. Under Actions, click on Send Text or Send Email



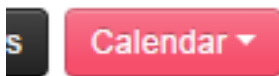
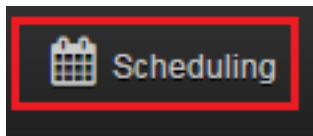
4. Choose Appointment Reminder from the dropdown choices and click on Generate Email or Generate Text



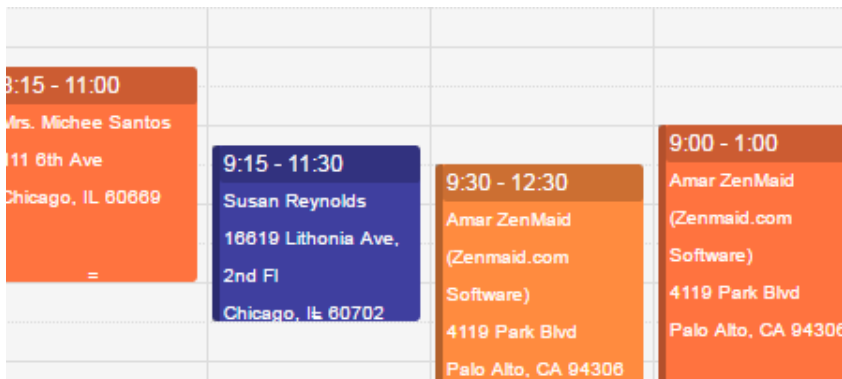
How to Send Appointment Follow Ups

[You can also automate emailing of appointment follow ups. Click here for instructions](#)

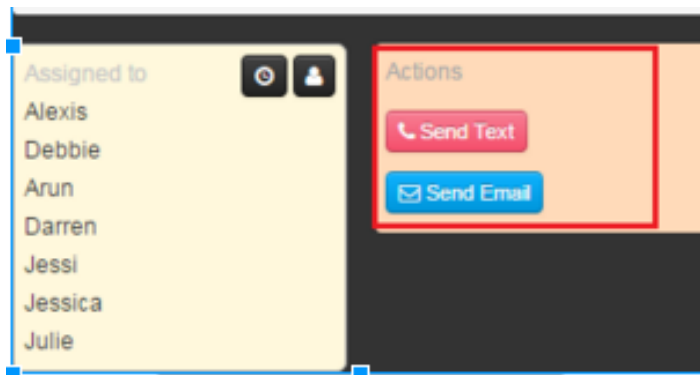
1. Click on the Scheduling tab.



2. Click on the appointment



3. On the right side of your screen, a pop up will appear. Under Actions, click on Send Email



4. Choose Appointment Follow Up from the dropdown choices and click on Generate Email

Select Email Type

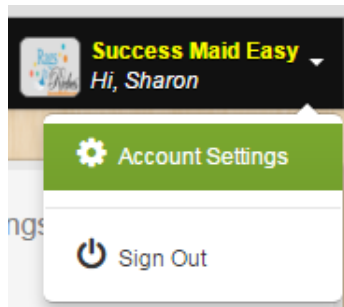
Appointment Follow-Up ▼	Generate Email
Work Order	
Appointment Confirmation	
Appointment Follow-Up	
Appointment Reminder	

How to Edit Email Templates (Step by Step Instructions)

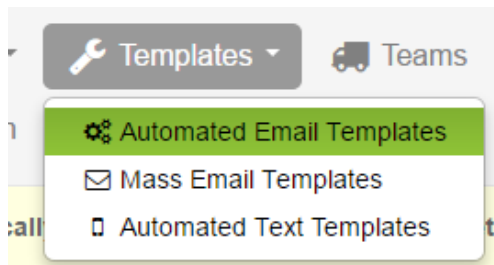
You can edit the email templates in Zenmaid to suit your needs.

How to Edit Appointment Confirmation

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Appointment Confirmation

Automated Email Templates

Work Order

Appointment
Confirmation

Booking Confirmation

4. Make the necessary edits in the Body Section. Use wildcards to assign information to be included in the template. (Click [here](#) to find out what wildcards are)

Body

Hi {{appointment.contact_name}},

Thank you again for choosing {{appointment.company_name}} to handle your home cleaning needs. You're receiving this email to confirm your appointment on {{appointment.start_time}} on {{appointment.start_date_in_words}}. The address we have is:

{{appointment.address}}

Please notify us as early as possible if you need to change this appointment or reschedule for any reason. You can contact us directly by responding to this email, calling us at [company phone] or sending us an email directly at [company email].

Thanks again for booking with {{appointment.company_name}}, we're looking forward to leaving you a sparkling home.

{{appointment.company_name}}

{{appointment.company_phone_number}}

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Like us on Facebook!

5. Make sure that the box Prompt for confirmation email after scheduling appointment is ticked. Click Preview to see the changes you made and lastly click Save Changes

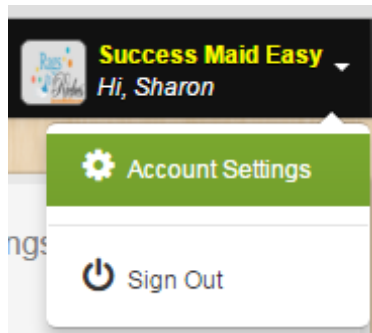
☒ Prompt for confirmation email after scheduling appointment?

Preview

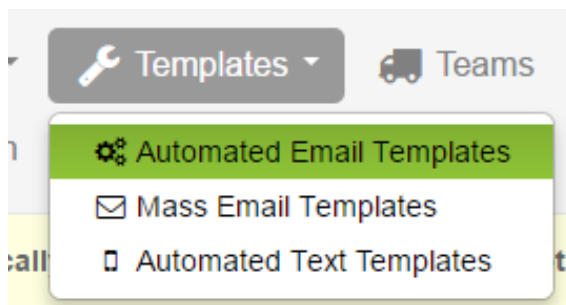
Save Changes

How to Edit Booking Confirmation

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Booking Confirmation

Automated Email Templates

Work Order

Appointment
Confirmation

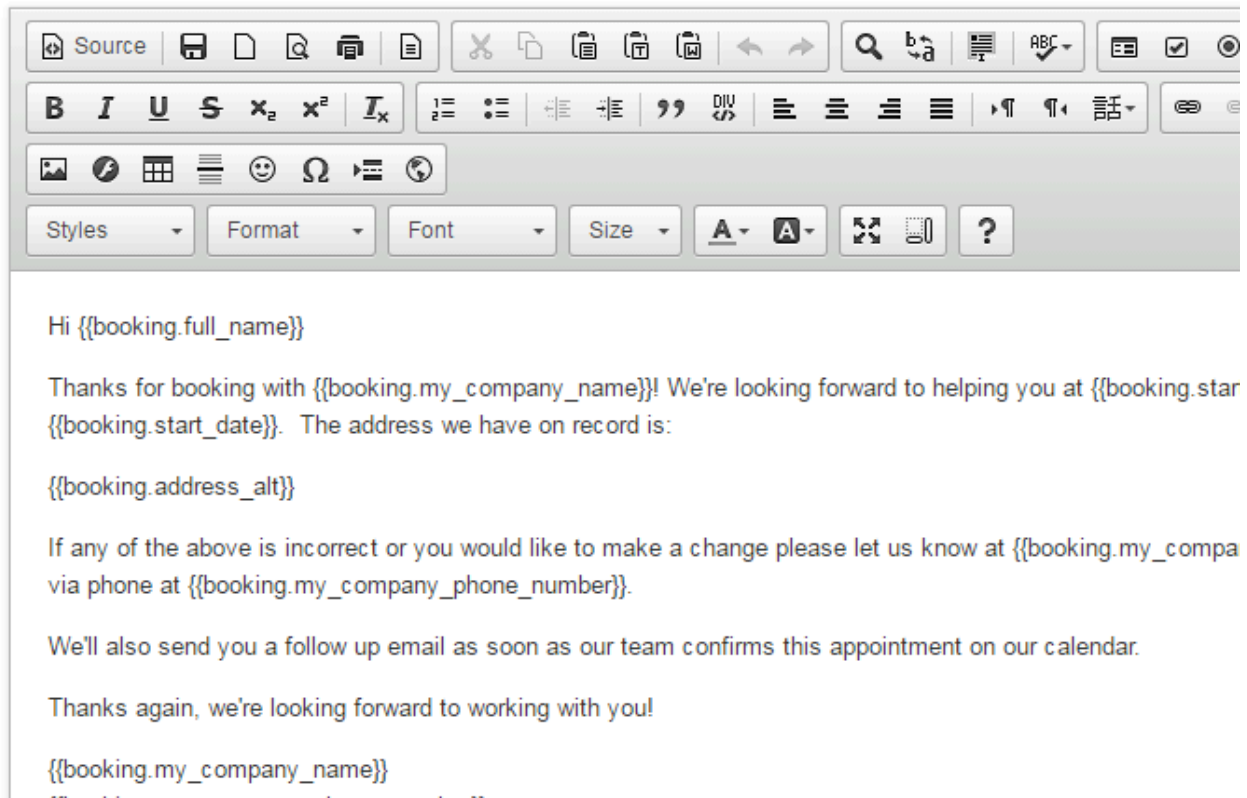
Booking Confirmation

4. Make the necessary edits in the Subject and Body sections as you like. Make use of wildcards to assign what information is included. ([Click here to find out what wildcards are](#))

Subject

Thanks for booking with {{{booking.my_company_name}}}!

Body



Hi {{{booking.full_name}}}

Thanks for booking with {{{booking.my_company_name}}}! We're looking forward to helping you at {{{booking.start_date}}}. The address we have on record is:

{{{booking.address_alt}}}

If any of the above is incorrect or you would like to make a change please let us know at {{{booking.my_compa}}

via phone at {{{booking.my_company_phone_number}}}.

We'll also send you a follow up email as soon as our team confirms this appointment on our calendar.

Thanks again, we're looking forward to working with you!

{{{booking.my_company_name}}}

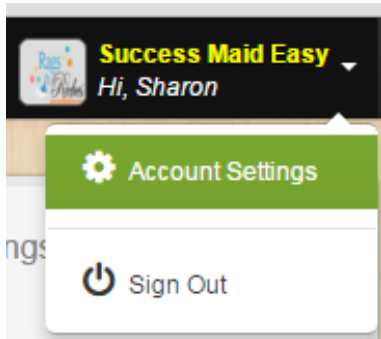
5. Click on Preview to see the changes you've made and lastly click on Save Changes.

Preview

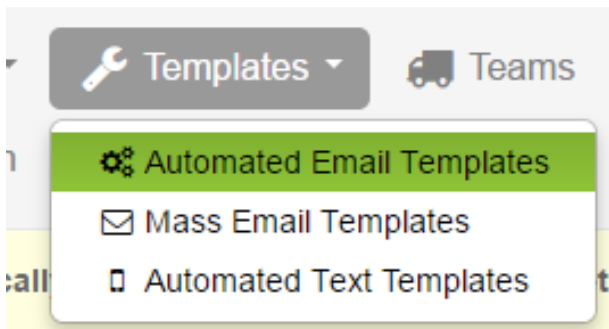
Save Changes

How to Edit Appointment Reminder

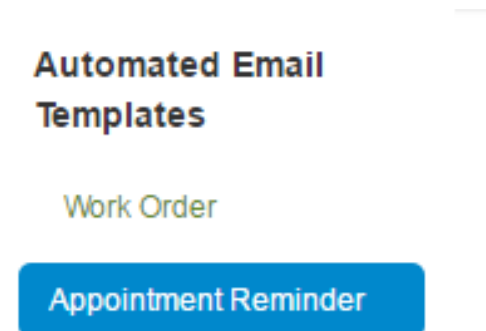
1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Appointment Reminder



4. Make the necessary edits in the Subject and Body sections as you like. Make use of wildcards to assign what information is included. ([Click here to find out what wildcards are](#))

Subject

Reminder ...

Body

Hi {{appointment.contact_name}},

You're receiving this email as a quick reminder that you have an upcoming appointment with us:

{{appointment.start_time}} on {{appointment.start_date_in_words}}

{{appointment.address}}

Thanks again for choosing us, we're looking forward to leaving you a sparkling home.

{{appointment.company_name}}

{{appointment.company_phone_number}}

www.SuccessMaidEasy.com

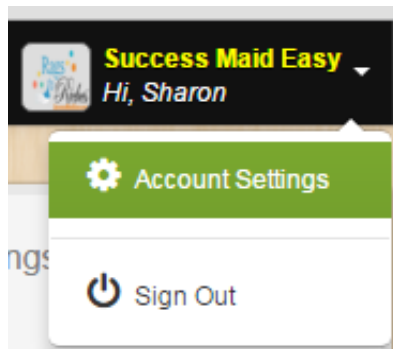
5. Click on Preview to see the changes you've made and lastly click on Save Changes.

Preview

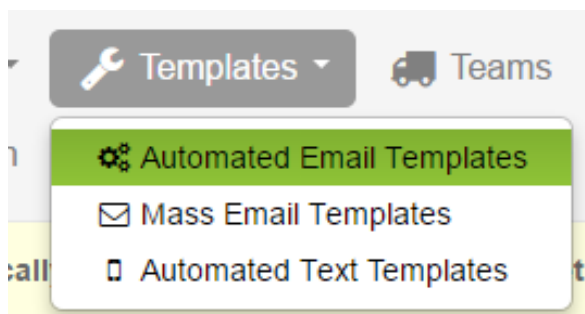
Save Changes

How to Edit Work Order

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Work Order

Automated Email Templates



4. Make the necessary edits in the Subject and Body sections as you like. Make use of wildcards to assign what information is included in your work orders ([Click here to find out what wildcards are](#)). Click Preview to check on the changes you made. Lastly click Save Changes.

Subject

{{(appointment.company_name)}} Work order for appointment on {{(appointment.start_date_in_words)}} {{(appointment.start_time)}} - {{(appointment.end_time)}}

Edit subject as you want

Body

Source | [Icons] | [Icons] | [Icons] | [Icons] | [Icons] | [Icons]

B I U S x² xⁿ T_x | [Icons] | [Icons] | [Icons] | [Icons] | [Icons] | [Icons] | [Icons] | [Icons] | [Icons]

Styles ▾ Format ▾ Font ▾ Size ▾ A- A+ [Icons] ?

{{(appointment.logo)}}
Customer Data Sheet **Edit here**

Customer's Name {{(appointment.contact_name)}} _____
Address {{(appointment.address)}} _____

{{(appointment.start_date)}} {{(appointment.start_time)}}

Phone Numbers {{(appointment.customer_contact_phone_numbers)}} _____ _____ <i>(*Please asterisk preferred phone)</i>	Emails {{(appointment.customer_contact_emails)}} _____ _____
---	--

How would you prefer to be contacted for holiday rescheduling changes, windows of time, etc? {{(appointment.hashed_customer_items.preferred_contact_method)}} _____

Possible other names on Checks Received (Needed for Accurate Posting of Checks) {{(appointment.hashed_customer_items.possible_other_names_on_checks_received)}} _____

of bathrooms {{(appointment.hashed_customer_items.bedrooms)}} _____ # of bedrooms {{(appointment.hashed_customer_items.bathrooms)}} _____

of stories {{(appointment.hashed_customer_items.stories)}} _____

More than 50% carpeted {{(appointment.hashed_customer_items.more_than_half_carpeted)}} _____

Access to Home (Gate Code, Alarm Code and Location, Location of Hidden Key, Other Entering Instructions) _
{{(appointment.hashed_customer_items.access_to_home)}} _____

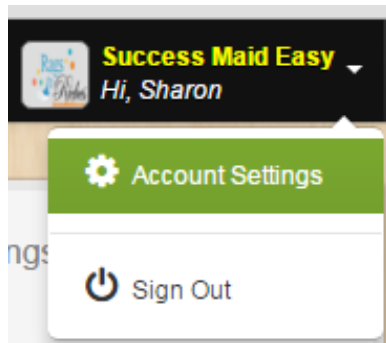
Animal Names, Types, and Special Instructions {{(appointment.hashed_customer_items.animal_names_and_instructions)}} _____

☐ Send daily schedule to employees the night before?

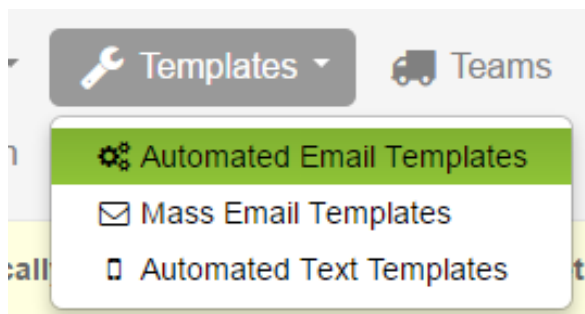
Preview **Save Changes**

How to Edit Appointment Follow Up

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Appointment Follow Up

Automated Email Templates

Work Order

Appointment Confirmation

Booking Confirmation

Come Back

Appointment Follow-Up

Subject

Quick check in

Body

Source [Icons] [Rich Text Editor Icons]

B I U S x₂ x² T_x [List Icons] [Link Icon] [Image Icon]

[Table Icon] [Smiley Icon] [Omega Icon] [More Icon] [Globe Icon]

Styles - Format - Font - Size - A- A+ [Reset Icon] [Help Icon]

Hi {{appointment.contact_name}},

Thanks again for choosing {{appointment.company_name}} to clean your home! We hope you had a great experience with us but wanted to follow up and make sure.

Please let us know if there is anything we can be doing to provide you with better service. Your feedback helps us consistently improve the quality of our business and to ensure you always receive the best experience possible.

At {{appointment.company_name}} your satisfaction is our top priority.

Thanks again, we look forward to cleaning your home again!

{{appointment.company_name}}

{{appointment.phone_number}}

www.SuccessMaidEasy.com

Like us on Facebook!

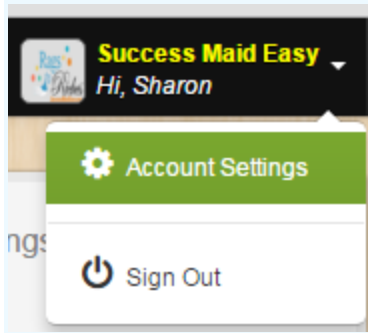
PS If you had a great experience with us please [share us on facebook](#) or [review us on Yelp!](#)

{{appointment.logo}}

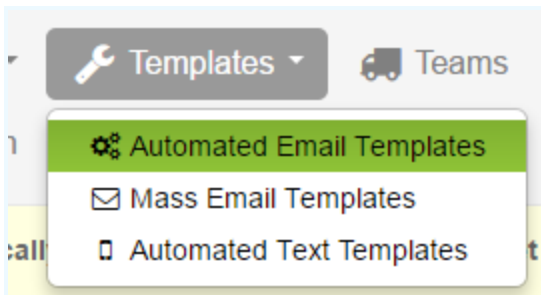
Preview **Save Changes**

How to Edit Invoice

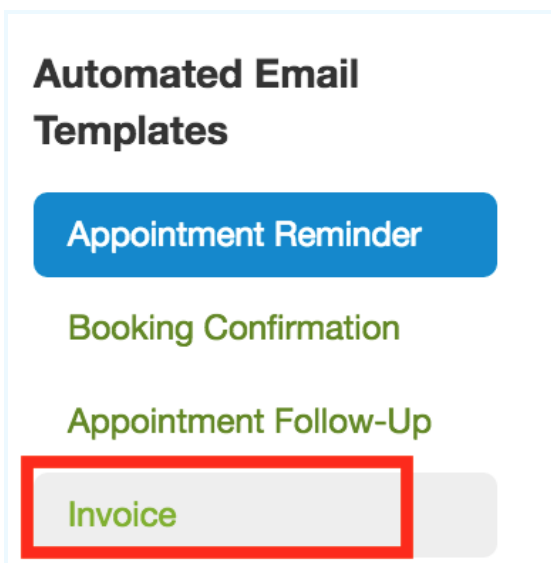
1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates

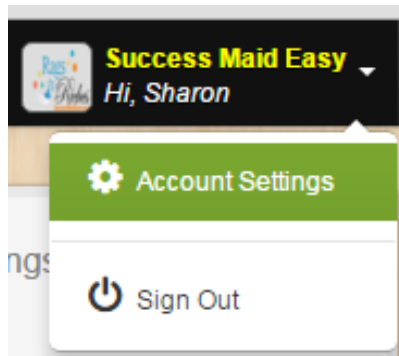


3. Click on Invoice

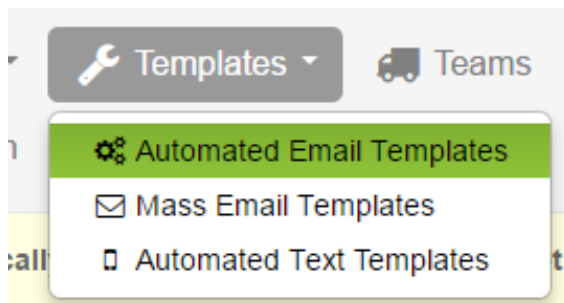


How to Edit Come Back Email

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Come Back

Automated Email Templates

Work Order

Appointment Confirmation

Booking Confirmation

Come Back

Subject

We miss you!

Body

Source

Hi {{customer.first_name}},

We noticed you hadn't needed a cleaning in over a month. {{customer.my_company_name}} prides itself on quick, quality service and we were hoping to help you again. If you'd like to book an appointment with us in the next couple weeks we'd be happy to give you a discount as a token of our appreciation for giving us the opportunity to clean your home.

Just mention this email next time you book with us and you'll get 10% off!

Hope you're doing well, we're looking forward to hearing from you!

{{customer.my_company_name}}

{{customer.my_phone_number}}

{{appointment.logo}}

Preview

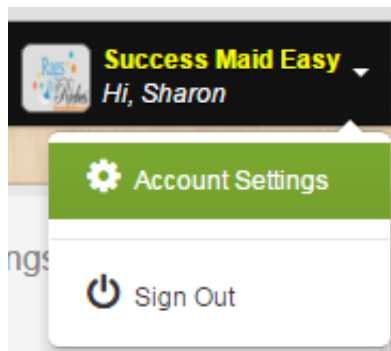
Save Changes

How to Edit Text Templates (Step by Step Instructions)

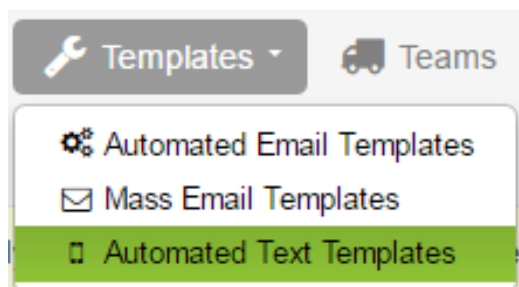
Text templates can be edited. However, keep in mind that text messages are limited to 140 characters only.

How to Edit Text Appointment Reminder

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Text Templates



3. Click Appointment Reminder

Text Templates

Appointment Reminder

Work Order

4. Edit the body section as you want. Please keep in mind the 140 characters limit. Click Save Changes

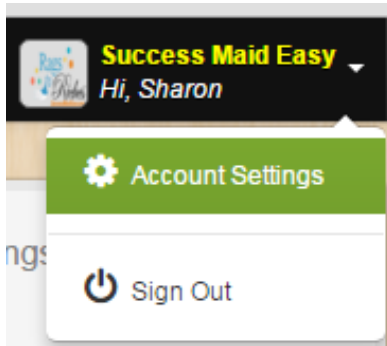
Body

You have a cleaning scheduled for {{appointment.start_time}} on {{appointment.start_date}} - {{appointment.company_name}}. Please contact us at {{appointment.company_phone_number}} to cancel or reschedule

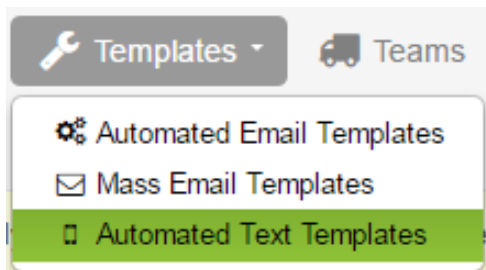
Save Changes

How to Edit Text Work Order

1. Click on the dropdown after your name and click Account Settings



2. Click on the Templates tab's dropdown and click on Automated Text Templates



3. Click Work Order

Text Templates

Appointment Reminder

Work Order

4. Edit the body section as you want. Please keep in mind the 140 characters limit. Click Save Changes

Body

{{appointment.contact_name}} - {{appointment.start_date}}, {{appointment.start_time}} - {{appointment.end_time}}. {{appointment.address}}

Save Changes

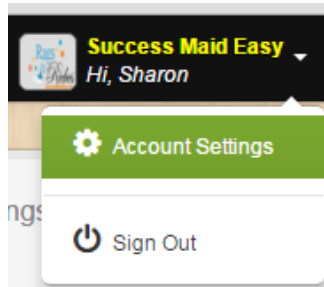
Manual prepared by:



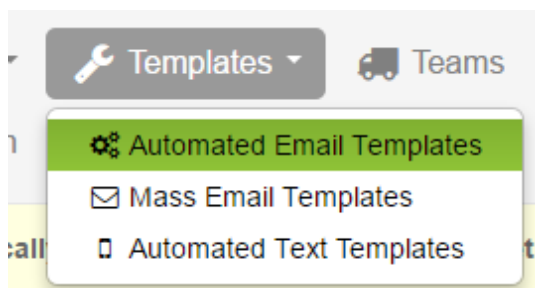
Last updated 10/19/2016

How to Automate Sending of Email Templates

1. Click on the dropdown after your name and click Account Settings



2. From the Templates tab, click on Automated Email Templates



3. Choose the template you want to send automatically.

Automated Email Templates

Work Order

Appointment
Confirmation

Booking Confirmation

Come Back

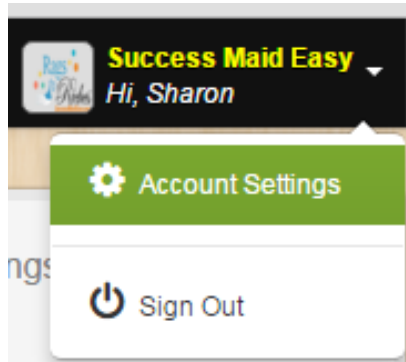
Appointment Follow-Up

Appointment Reminder

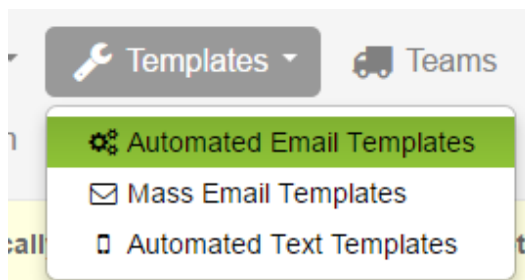
4. Choose when the automated email gets sent out and click Save Changes

How to Automate Sending of Appointment Reminders via Email

1. Click on the dropdown after your name and click Account Settings



2. From the Templates tab, click on Automated Email Templates



3. Click on Appointment Reminder.

Automated Email Templates

Work Order

Appointment
Confirmation

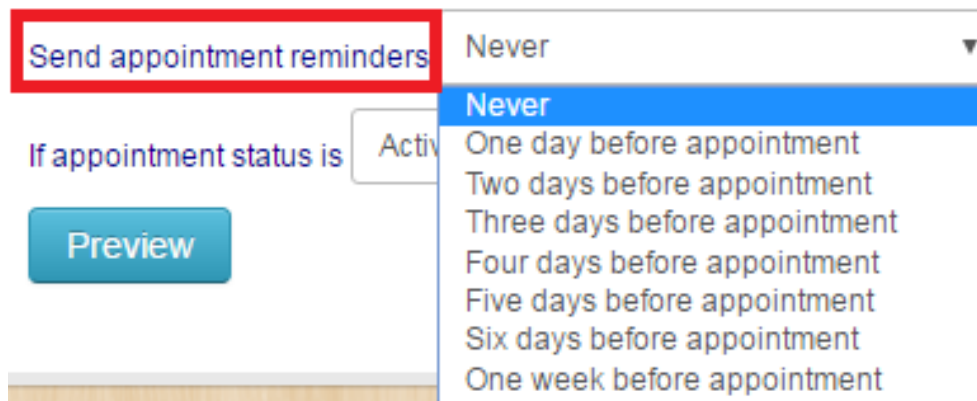
Booking Confirmation

Come Back

Appointment Follow-Up

Appointment Reminder

4. Make the necessary changes in the Body section if any. Scroll down until you see “Send appointment reminders”. Click on the dropdown and choose the time you want to send it from the options available. Then click on Save Changes

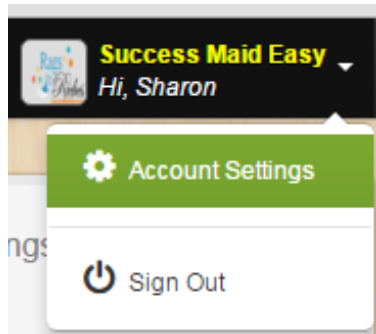


The screenshot shows the 'Appointment Reminder' template configuration page. A red box highlights the 'Send appointment reminders' dropdown menu, which is currently set to 'Never'. The dropdown menu is open, showing the following options: 'Never', 'One day before appointment', 'Two days before appointment', 'Three days before appointment', 'Four days before appointment', 'Five days before appointment', 'Six days before appointment', and 'One week before appointment'. To the left of the dropdown, there is a label 'If appointment status is' followed by a dropdown menu showing 'Active'. Below the label, there is a 'Preview' button.

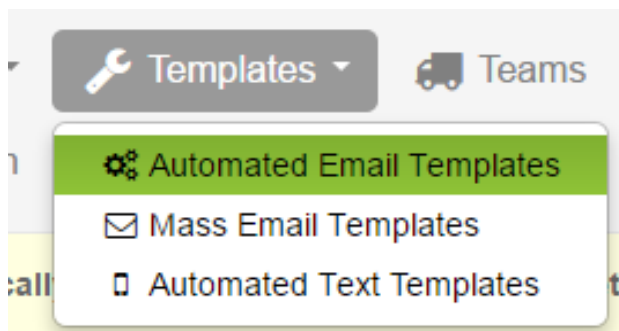
How to Automate Sending of Work Orders via Email:

You can email daily schedules to your employees the night before each appointment.

1. Click on the dropdown after your name and click Account Settings



2. From the Templates tab, click on Automated Email Templates



3. Click on Work Order.

Automated Email Templates

Work Order

Appointment
Confirmation

4. Make the necessary changes in the Body section if any. Below the Body section, scroll down until you see “Send daily schedule to employees the night before?”. Tick on the box before it and then Click on Save Changes

☒ Send daily schedule to employees the night before?

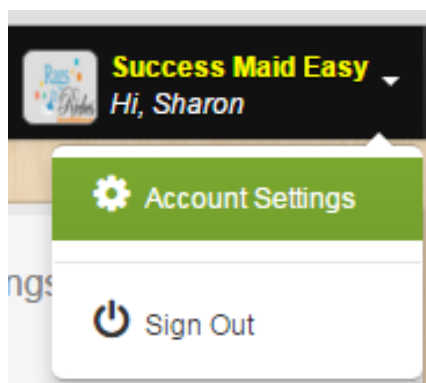
[Preview](#)

[Save Changes](#)

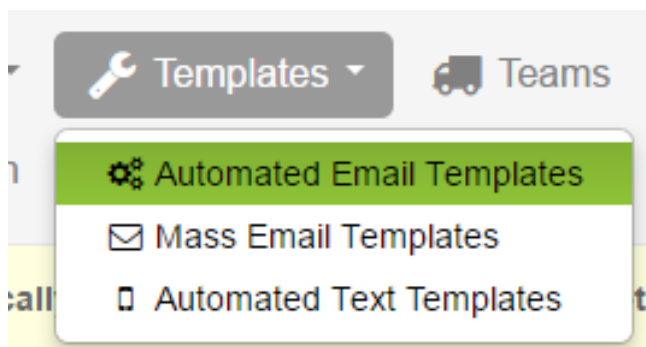
How to Automate Sending of Appointment Follow Up via Email

After completing a scheduled cleaning, you can email an appointment follow up to your customers to get their feedback.

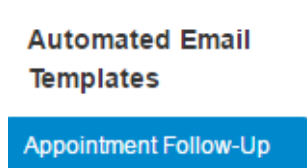
1. Click on the dropdown after your name and click Account Settings



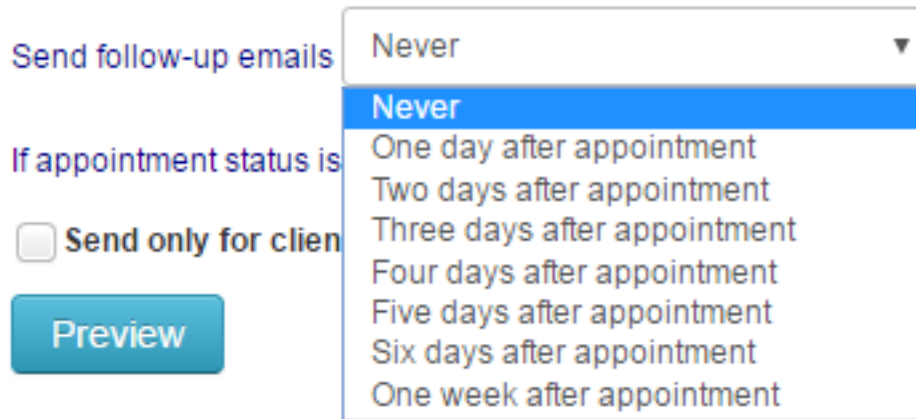
2. From the Templates tab, click on Automated Email Templates



3. Click on Appointment Follow Up

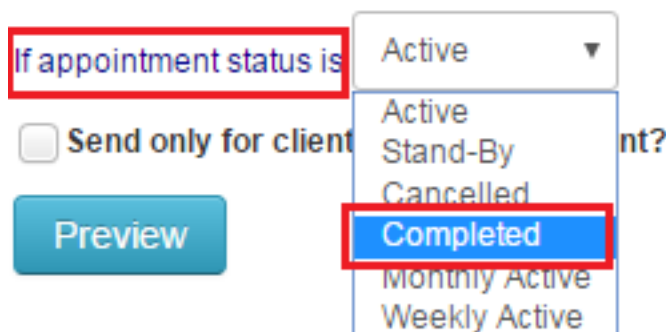


4. You can make edits in the Body section as you like. Scroll down until you see “Send follow up emails”. Click on the dropdown and choose the time when you want appointment follow ups get sent.



The screenshot shows a form section with the label "Send follow-up emails" next to a dropdown menu. The dropdown is open, showing a list of options: "Never", "One day after appointment", "Two days after appointment", "Three days after appointment", "Four days after appointment", "Five days after appointment", "Six days after appointment", and "One week after appointment". The "Never" option is currently selected and highlighted in blue. Below the dropdown, there is a checkbox labeled "Send only for client" which is currently unchecked, and a blue "Preview" button.

5. On the appointment status, click Completed from the dropdown menu.



The screenshot shows a form section with the label "If appointment status is" next to a dropdown menu. The dropdown is open, showing a list of options: "Active", "Stand-By", "Cancelled", "Completed", "Monthly Active", and "Weekly Active". The "Completed" option is currently selected and highlighted in blue. To the left of the dropdown, there is a checkbox labeled "Send only for client" which is currently unchecked, and a blue "Preview" button.

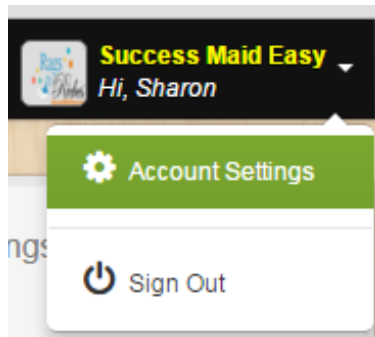
6. You have the option to send appointment follow up for only the first appointment of your client. Tick on the box if that's what you want otherwise leave it unticked. Lastly, click on Save Changes



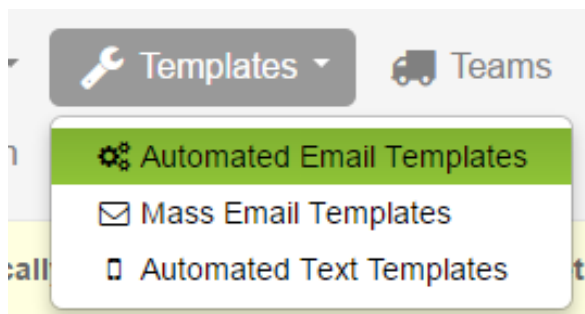
The screenshot shows a single checkbox with the label "Send only for client's first appointment?". The checkbox is currently unchecked.

How to Automate Sending of Come Back Email

1. Click on the dropdown after your name and click Account Settings



2. From the Templates tab, click on Automated Email Templates



3. Click on Come Back

Automated Email Templates

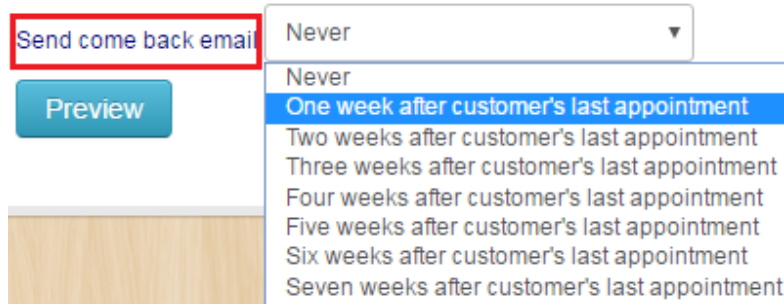
Work Order

Appointment
Confirmation

Booking Confirmation

Come Back

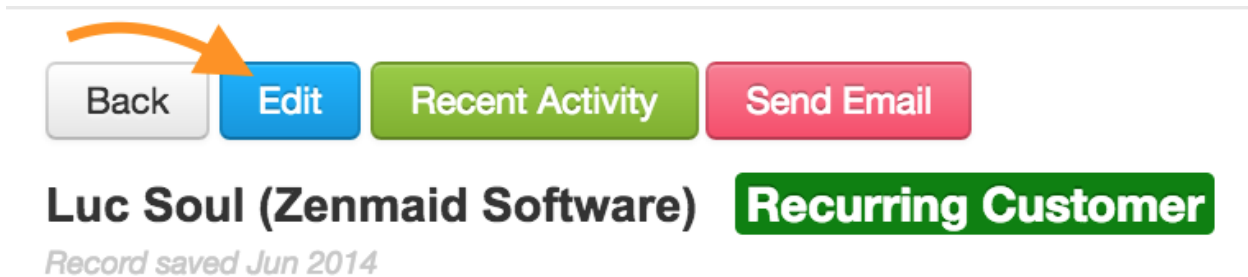
4. In the Body section, you can make edits as needed. Scroll down until you see “Send comeback email”. From the dropdown menu, choose when you want the comeback email sent out. Lastly click on Save Changes.



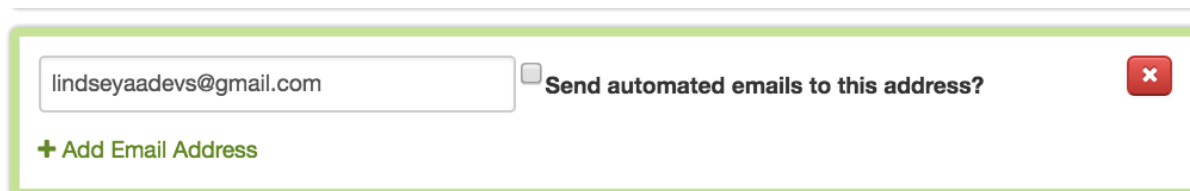
The screenshot shows a web interface with a red box highlighting the text "Send come back email". To the right of this text is a dropdown menu currently set to "Never". The dropdown menu is open, showing a list of options: "Never", "One week after customer's last appointment" (which is highlighted in blue), "Two weeks after customer's last appointment", "Three weeks after customer's last appointment", "Four weeks after customer's last appointment", "Five weeks after customer's last appointment", "Six weeks after customer's last appointment", and "Seven weeks after customer's last appointment". Below the dropdown menu is a blue button labeled "Preview".

How to Stop Sending Automated Emails For Certain Customers

From the Contacts page, click on the name of your customer then click Edit



Untick the part that asks "Send automated emails to this address?"

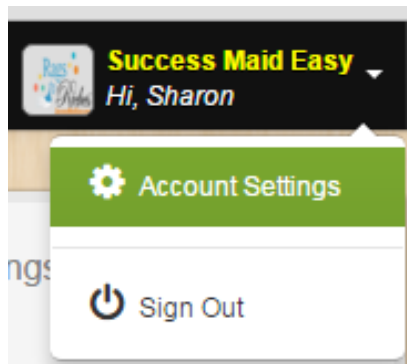


Scroll down and click Save Changes

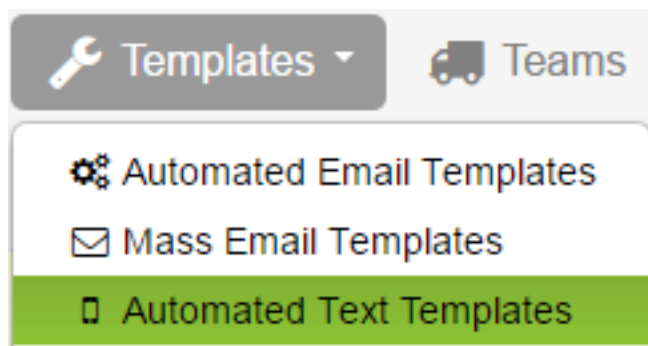


How to Automate Sending of Text Messages

1. Click on the dropdown after your name and click Account Settings



2. From the Templates tab, click on Automated Text Templates



3. Choose the template you want to send automatically.

Text Templates

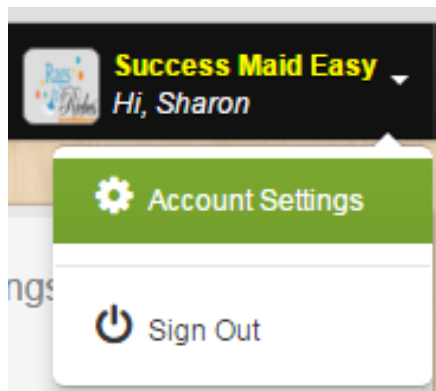


Work Order

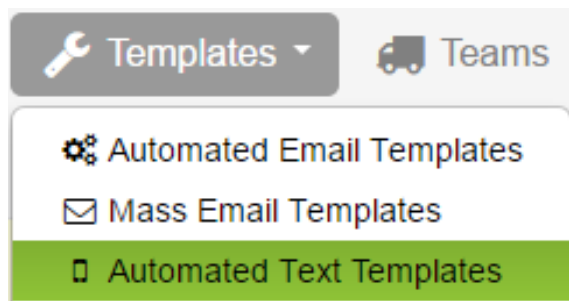
4. Choose when the automated text message gets sent out and click Save Changes

How to Automate Sending of Text Appointment Reminders

1. Click on the dropdown after your name and click Account Settings



2. From the Templates tab, click on Automated Text Templates



3. Click on Appointment Reminder .

Text Templates



4. Right below the Body section, choose when you want the appointment reminder text message gets sent out. Choose Active for the Status and click Save Changes.

Body

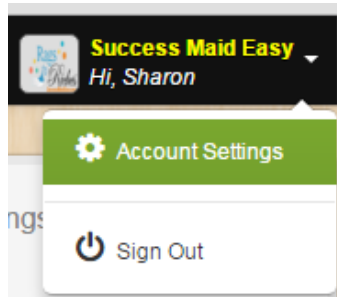
You have a cleaning scheduled for {{appointment.date}} at {{appointment.time}}. Please call {{appointment.company_phone}} for more information.

Send appointment reminders Never

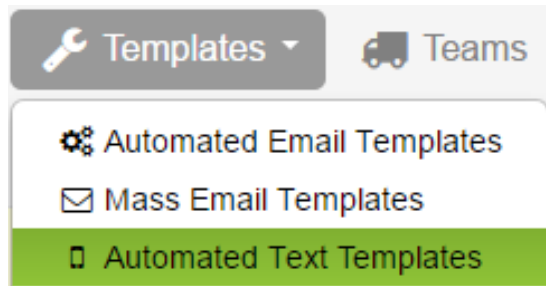
If appointment status is Active

How to Automate Sending of Text Work Orders

1. Click on the dropdown after your name and click Account Settings



2. From the Templates tab, click on Automated Text Templates



3. Click Work Order

Text Templates

Appointment Reminder

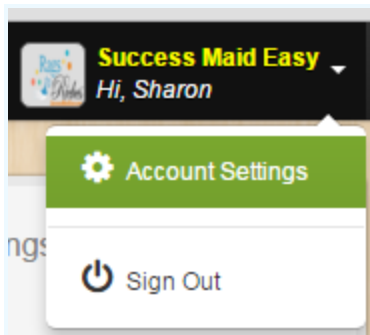


4. Under the Body section tick on the box to text daily schedules to employees the day before and click Save Changes.

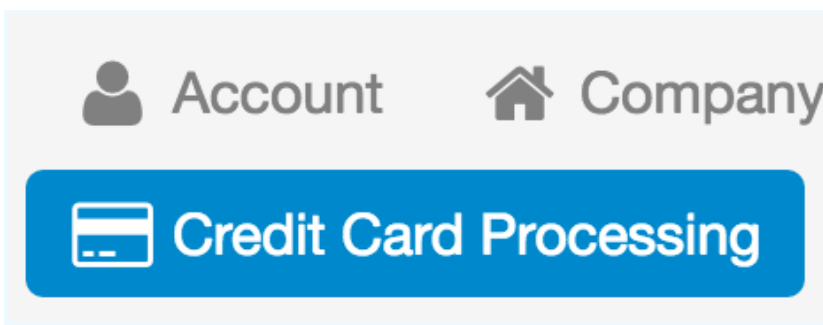
☒ Text daily schedules to employees the day before (in the afternoon)?

How to Integrate Stripe with Zenmaid:

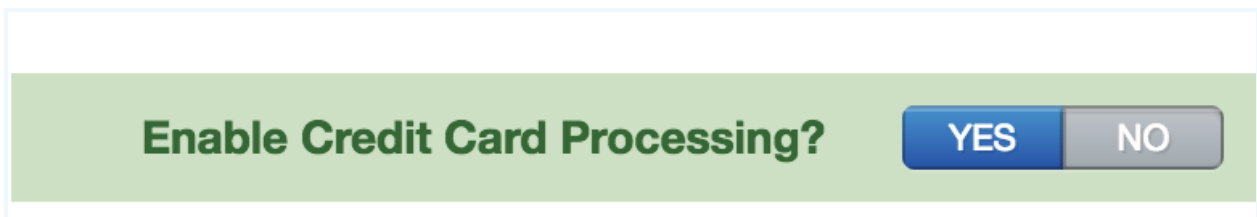
1. Click on the dropdown after your name and click Account Settings



2. Click on Credit Card Processing



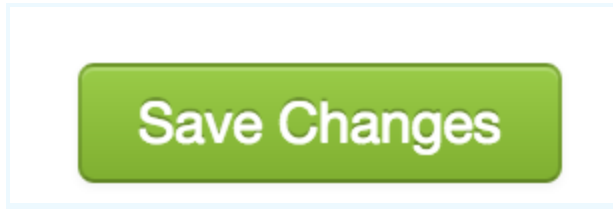
3. Click on the Yes button for Enable Credit Card Processing



4. Enter your Stripe secret API key

A screenshot of the ZenMaid user interface showing a form. The form has a label 'Stripe API Secret Key' and a text input field. There is a small icon in the bottom right corner of the input field.

5. Lastly click Save Changes



You should then be able to see the option to add credit card in your customer's records from the Contact page

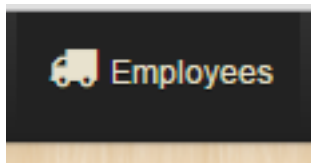


How to Run Payroll

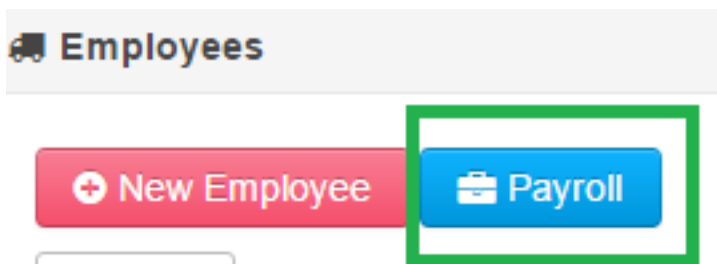
First make sure that you've added all your employees and set up their pay rate. [To learn how to add employees, click here.](#) You choose/edit how you compensate your employees (hourly, revenue share, fixed flat rate, or variable flat rate) when you create them (in the employees tab at the top of your screen)

To Run Payroll

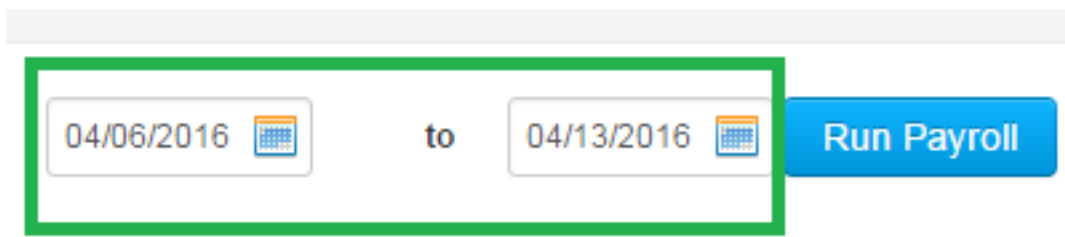
1. Click on the Employees tab at the top of your screen



2. Click on Payroll



3. Set the dates and then click on Run Payroll



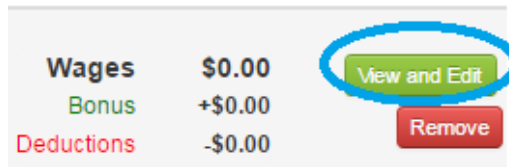
How to Calculate Variable Fixed Rate

To calculate a variable fixed rate pay:

1. Run payroll first



2. Look for the right employee name and click on View and Edit for his or her wages



3. Click on the pen and notebook icon (see below)



4. A pop up will appear where you can enter your employee's wage (and extras if any). Then click on Save Job Pay

Edit Appointment Wage



Wage	\$0.00
+ Extras	\$0.00
<hr/>	
Total	\$0.00

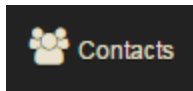
Save Job Pay

How to Handle Day Offs and Holiday or Vacation Leaves (2-Part Process)

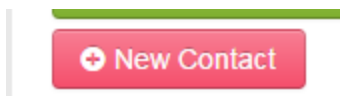
Part 1: Create a Fake Job

The first part is to create a “fake job”. You need to Create a new customer named Not Available or something along this line. To do this:

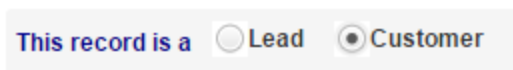
1. Click Contact



2. Click on + New Contact



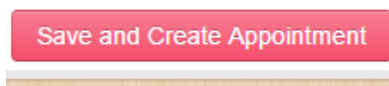
3. Tick on Customer



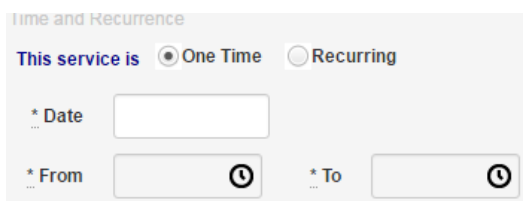
4. Name it Not Available



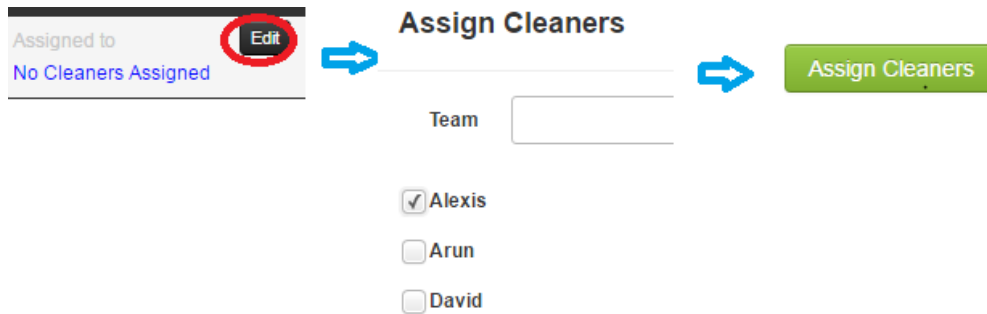
5. Click on Save and Create Appointment



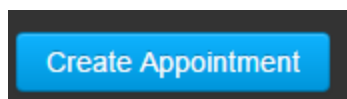
6. Schedule the appointment on the day or days a specific cleaner is off. Tick on Recurring if your employee is off during certain days or a certain day for every week or month. If it's just a one-time day off such as sick leave, etc. then click on one time.



7. Assign the cleaner for this appointment by clicking on Edit and from the pop up ticking on the name of the cleaner then click on Assign Cleaners



8. Lastly, click on Create Appointment

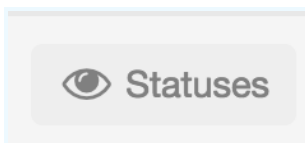


Another method is to create a new appointment from your calendar and clicking on New Record for your customer. On the next page, you'll have the chance to create the record for Not Available and then proceed with scheduling the appointment and assigning it to the cleaner on his or her off day. [For step by step instructions on how to create an appointment. click here](#)

Part 2: Create a Status for the “Fake Job”

The second part is to create a Status for the “fake jobs” so they won't be included in the Payroll

1. From Account Settings, click on Statuses



2. Click on + Add Status




3. Then give the new status a name like Off Work.



- UNTICK the box that asks include in payroll.



- UNTICK the box that asks put in work order box.
- TICK the box that says show by default in calendar and
- TICK the box that asks Use to calculate scheduling conflicts should be ticked.

Name

Off Work

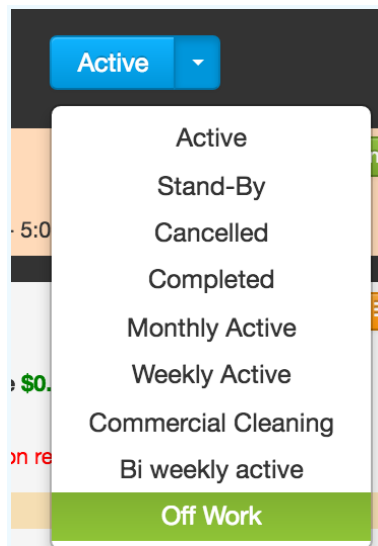
 Calendar Color

☒ Show by default in calendar? 
☐ Put in work order? 

☒ Use to calculate scheduling conflicts? 
☐ Include in payroll? 
☐ Include in revenue

4. Then click on Save Changes

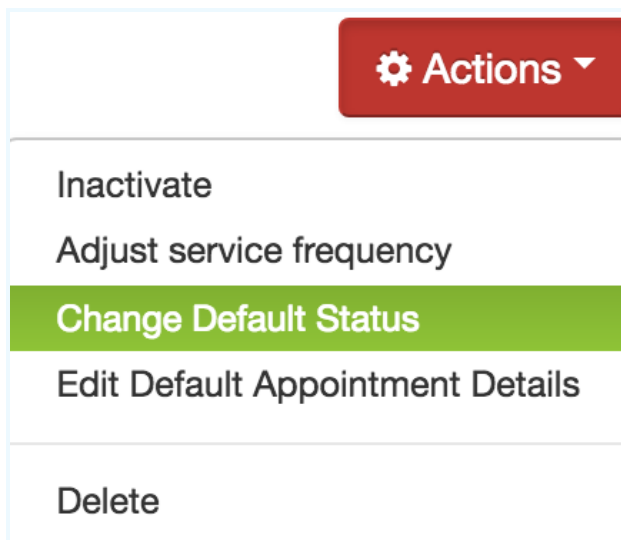
5. Go back to your calendar, click on the “fake job” and on the sidebar pop up, change the status from Active to the new status Off Work. And do the same every time you create a fake job.



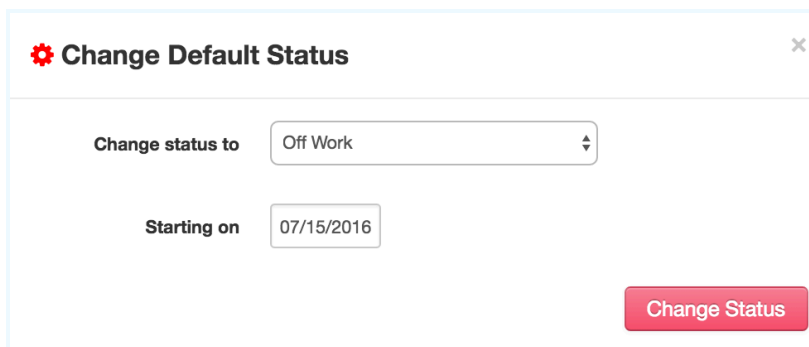
Editing the Status of Recurring “Fake Jobs”

1. If the fake job, you created is a recurring one, click on the appointment and click on Manage Recurring Service.

2. On the next page, click on the Actions dropdown arrow and click on Change Default Status



3. From the pop up, change status to Off work and click on Change Status



4. You should get a confirmation of the status change you made

Status for recurring service was successfully adjusted!

How to Create Tasks

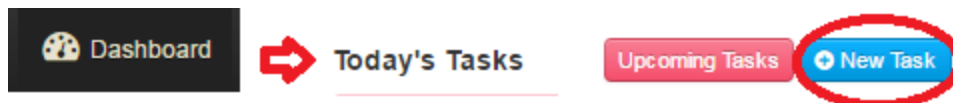
1. From your calendar, there is a row for tasks at the very top. Click on it



2. On the sidebar pop up right of your screen, write down the name of the task, notes if any and when it's due. If it's a recurring task click on set repeat and choose from the recurrence options. You also have the option to customize recurrence.

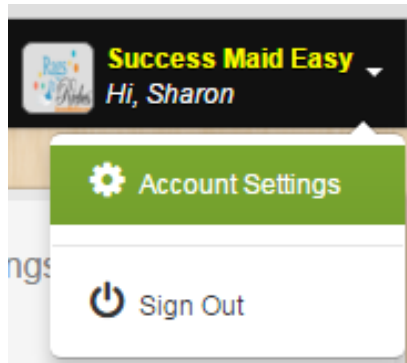
A screenshot of the 'New Task' sidebar form. The form has a green header with the text 'New Task' and a red 'Close' button. Below the header, there are four main sections: 'Task' with a text input field, 'Note' with a larger text area, 'Due' with a date input field showing '04/10/2016', and 'Set to repeat?' with a green oval button. At the bottom right, there are two buttons: a green 'Create' button and a grey 'Cancel' button. The 'Task' field, 'Note' field, 'Due' field, 'Set to repeat?' button, and 'Create' button are all circled in red.

Another method is by clicking on Dashboard. Scroll down until you see Today's Tasks. Then click on + New Task



How to Create and Customize Appointment Statuses

1. Click on the dropdown after your name and click Account Settings



2. Click on Statuses





3. Click on Add Status






4. Give the new status a name and tick on the options you want for the status as you like and choose it's calendar color

Name

Calendar Color

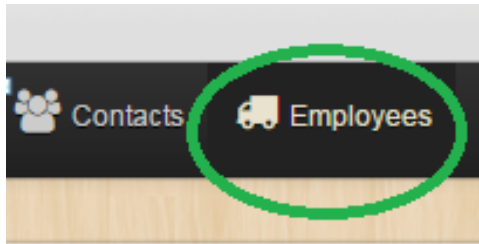
☒ Show by default in calendar?  ☒ Put in work order? 

☒ Use to calculate scheduling conflicts?  ☒ Include in payroll?  ☐ Include in revenue reports? 

5. Lastly, click on Save Changes

How to Give Your Employees Log in to their Schedules

1. Click on Employees tab



2. Search for the employee you want to give access and click Edit

[New Employee](#) [Payroll](#) Filter: Active

10 records per page Search:

Name	Email	Phone number	Link
Alexis			Edit
Amar Ghose	amarghose@gmail.com	650-704-3503	Edit
Arun	amar@zenmaid.com	650-704-3503	Edit
Damen	damen@zenmaid.com		Edit
David			Edit

3. Check the box "Allow this employee to sign in and view their schedule"

* First name

Last name

Phone number

Email

Cleaners can use this email address to sign in [here](#) and view their schedule

☒ Allow this employee to sign in and view their schedule?

4. Create a password for your employee



5. Scroll down and click Save Changes



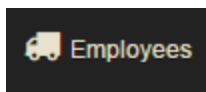
How Employees Can Clock in and Out of Zenmaid

How to Give Your Employees Access to the Clock in & Out Feature

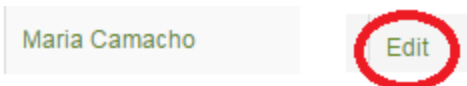
Your employees can now clock in and out of Zenmaid. Here's a step by step instruction on how to give your employees access to this new feature.

For Employees Already Added in the System

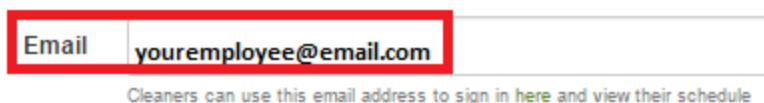
1. Click on Employees



2. Click Edit beside the name of the employee. You can also click on the employee name and on the next page click the Edit button at the top. Either way, you'll be taken to the page where you can edit your employee's information.



3. On the next page, type in your employee's email address if there isn't one yet



Cleaners can use this email address to sign in [here](#) and view their schedule

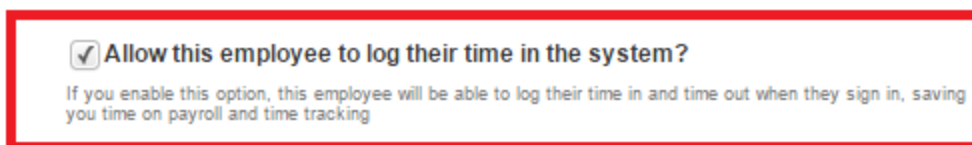
4. Tick on the box "Allow this employee to sign in and view their schedule" if it's not yet ticked.



☐ Is this employee an office manager?

Office managers can create, view, and edit customers, appointments, and employees

5. Next, tick on the box "Allow this employee to log their time in the system"



If you enable this option, this employee will be able to log their time in and time out when they sign in, saving you time on payroll and time tracking

6. Create a password for your employee and type it in the Password box and then reenter the same password on the provided text box below to confirm.

Password
(leave blank if you don't want to change it)

Password confirmation

If there's an existing one and you want to change it, click on Change Password. Otherwise, leave it as is.

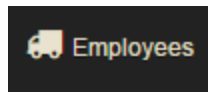
Password **Change Password**

7. Lastly click on Save Changes

Save Changes

For New Employees or Those You Are Just Adding in the System

1. Click on Employees



2. Click + New Employee

+ New Employee

3. Add in the details of your employee. Make sure that your employee has an email address.

* First name

Last name

Phone number

Email
Cleaners can use this email address to sign in [here](#) and view their schedule

4. Tick on the box "Allow this employee to sign in and view their schedule"

☒ **Allow this employee to sign in and view their schedule?**

☐ **Is this employee an office manager?**

Office managers can create, view, and edit customers, appointments, and employees

5. Next, tick on the box “Allow this employee to log their time in the system”

☒ **Allow this employee to log their time in the system?**
If you enable this option, this employee will be able to log their time in and time out when they sign in, saving you time on payroll and time tracking

6. Create a password for your employee and type it in the Password box and then reenter the same password on the provided text box below to confirm.

Password

create a password for your employee

(leave blank if you don't want to change it)

Password confirmation


retype the same password here

7. Lastly, click on Create Employee

Create Employee

How to Clock in and Out of Zenmaid

1. Go to the sign in page https://app.zenmaid.com/sign_in
2. Enter your log in details



SIGN IN

✉

...

🔑

...

☐ Remember Me

Sign In

[Forgot your password?](#)

5:00 - 8:00
Allison Butts

Assigned to
Maria Camacho

Edit time in and out

Maria Camacho

In

5:00 PM

Out

8:00 PM

Save

Cancel

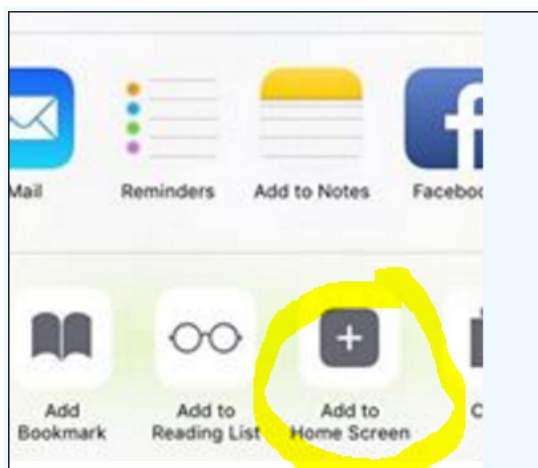
How to Create a Shortcut for Zenmaid Login on Your Mobile Devices

For iPhone users

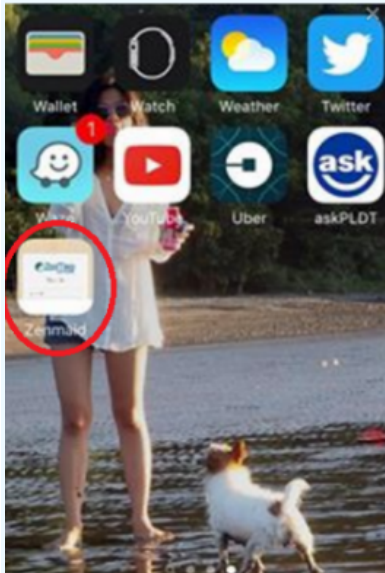
1. Open Safari and go to zenmaid.com and click on log in
2. Click the Bookmark icon



3. On the next page, click on Add to Homescreen



The zenmaid will now be on your homescreen. Just click on it and it'll open to the log in page

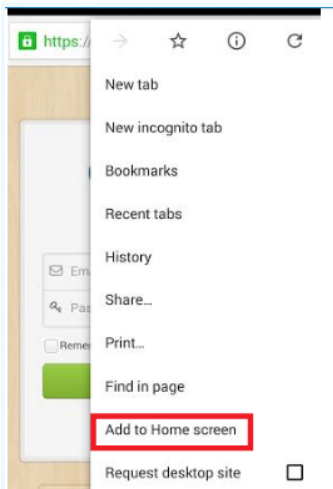


For Android Users

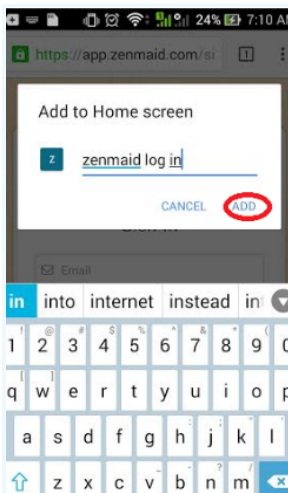
1. Open Google Chrome go to zenmaid.com and click on log in.
2. At the top right of the screen, click on the 3 dots



3. Then click on Add to Homescreen



4. On the pop up, type in the name (Zenmaid Log in) and click on Add

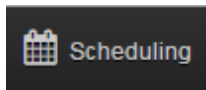


5. The zenmaid app will now be on your homescreen. Just click on it and it'll open to the log in page

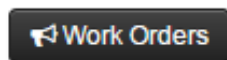


How to Print Work Orders

1. Click on Scheduling



2. Click on Work Orders



3. Tick on print work orders



I want to ☒ print work orders ☐ email work orders

4. Modify the dates

From To

(leave blank to print schedule for single day)

5. You can choose to print for employees or teams. Choose from the dropdown menu for either. Then tick on the employees or teams you want to print for

For

Employees
Teams

☒ Michee Test Santos
☒ Sharon
☒ test
☒ Test Employee

6. If you want to print just the work orders/schedules without grouping by team or employee, scroll down and tick "print schedule without grouping by team or employee"

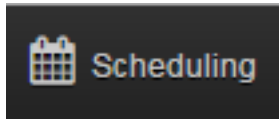
☒ Print schedule without grouping by team or employee

7. Lastly, click Print Work Orders

[Print Work Orders](#)

How to Print Route Sheets

1. Click on Scheduling



2. Click on Route Sheets



3. Modify the dates

From To

(leave blank to print schedule for single day)

4. You can choose to print for employees or teams. Choose from the dropdown menu for either. Then tick on the employees or teams you want to print for

For

Employees
Teams

☒ Michee Test Santos
☒ Sharon
☒ test
☒ Test Employee

5. If you want to print just the route sheets without grouping by team or employee, scroll down and tick "print schedule without grouping by team or employee"

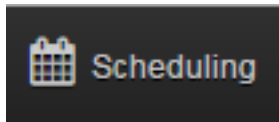
☒ **Print schedule without grouping by team or employee**

6. Click on Generate Route Sheets

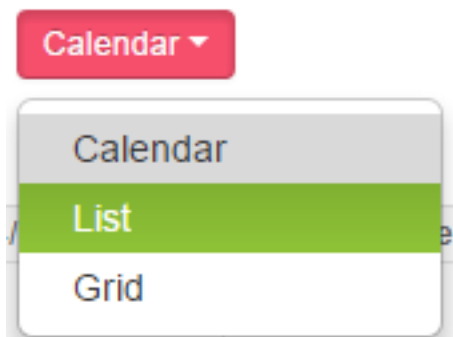
Generate Route Sheets

How to View Your Appointments for An Entire Week/Weeks or a Month

1. Click Scheduling





2. Click the Calendar dropdown and click on List



3. Modify the type of appointments you want to see



4. Modify the dates and click on Fetch Appointments

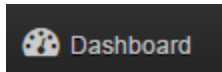
from  to  **Fetch Appointments**

5. You'll see the appointments listed as this

<input type="checkbox"/>	Amar ZenMaid (Zenmaid.com Software) Active Assigned to Alexis , Debbie , Arun , Darren , Jessi , Jessica , Julie Amount due \$1,000.00 ✖ Not paid
<input type="checkbox"/>	Fiona Jackson Active Assigned to Lisa , Neymar (5) Amount due Not set ✖ Not paid
<input type="checkbox"/>	Margaret Lezaja Active Assigned to Debbie , Darren (9) Amount due Not set ✖ Not paid
<input type="checkbox"/>	Ebony Haydon Active Assigned to Kumar , Julie (4) Amount due Not set ✖ Not paid
<input type="checkbox"/>	Joe Nolan Active Assigned to Sally , Pedro (6) Amount due Not set ✖ Not paid

How to View Appointments for the Day via Dashboard

1. Click on Dashboard



2. Modify the date to see the appointments for the day you want then click on Go to Date

Cleanings for

3. You'll see the appointments for that day listed as this (see below). Click on the dropdown to show the maximum of appointments displayed

10
▼
records per page

Search:

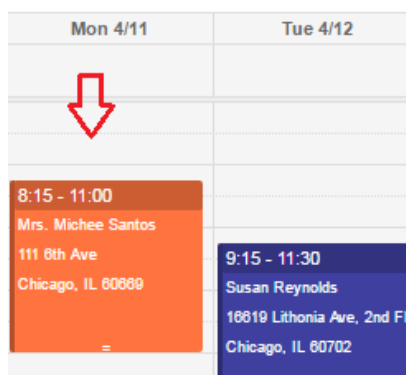
Date ▲	Time ⬆	Customer Name ⬆	Balance Owed ⬆	Paid ⬆	Status ⬆	Link
Sat, Apr 16, 2016	7:30 AM	Mrs. Michee Santos		No	Active	Edit
Sat, Apr 16, 2016	9:30 AM	Steven Delice	\$76.00	No	Active	Edit
Sat, Apr 16, 2016	11:00 AM	Allison Butts		No	Active	Edit

Updating Outstanding Balance

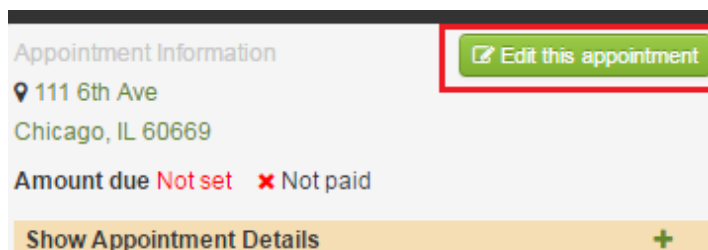
The system updates balances everyday at midnight and any changes made on the appointments are reflected in the customer's balance the following day.

How to Reflect Unpaid Balance on Appointments

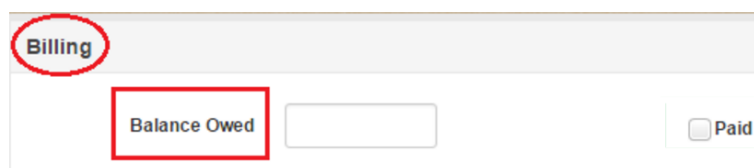
1. Click on the appointment



2. On the sidebar pop up (right of your screen), click Edit this Appointment



3. On the next page, scroll down until you see Billing and then enter the amount owed.



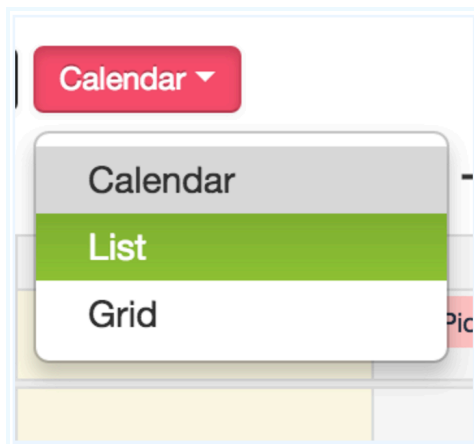
4. Click Save Changes



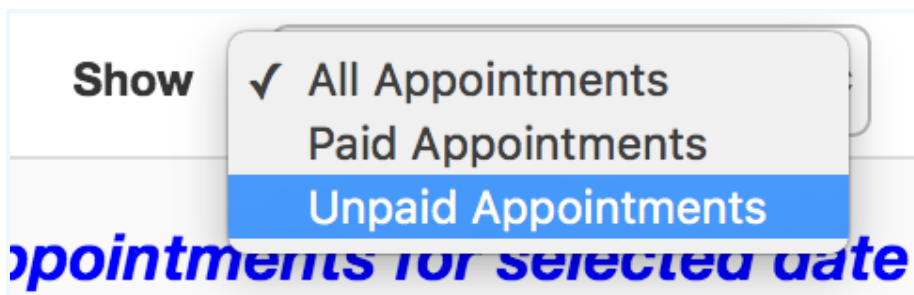
2 Ways to Clear Balances or Mark Them as Paid

How to Mark Unpaid Appointments in Bulk

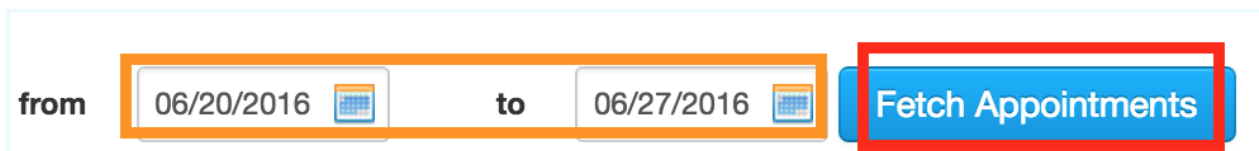
1. Click on the dropdown arrow beside Calendar and click on List



2. For "Show", click on the dropdown arrow and choose Unpaid Appointments

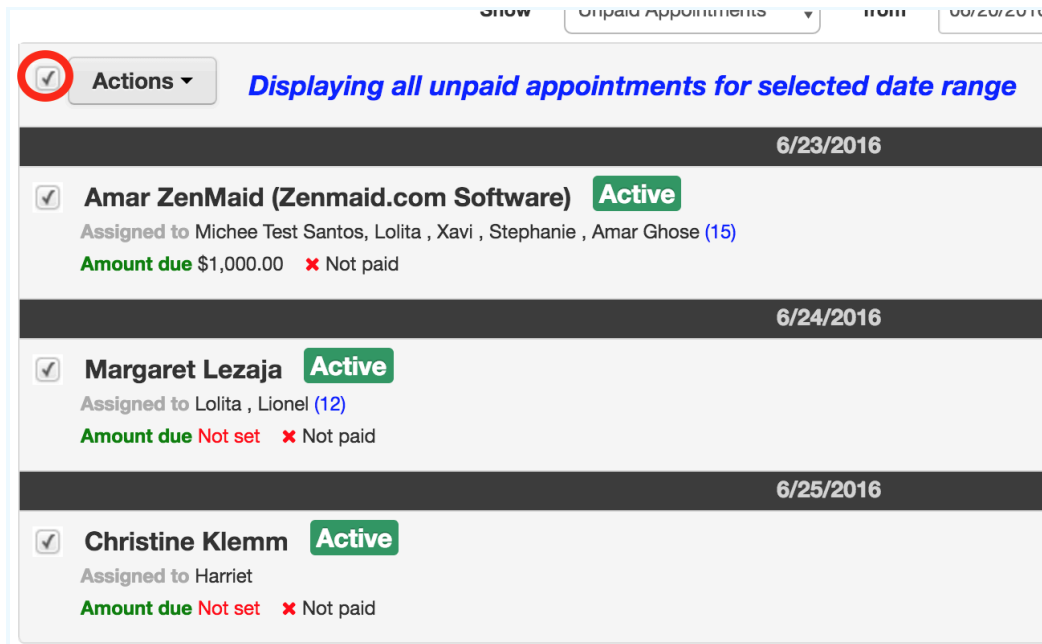


3. Modify the dates by clicking on the from and to calendars then click on Fetch Appointments



4. You'll then be given a list of all unpaid appointments within the dates you selected.

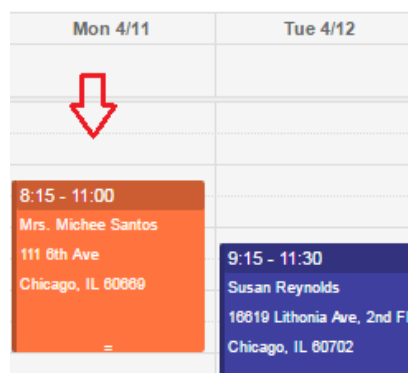
5. Tick the box beside Actions to select all unpaid appointments. If you don't want to do that, you can manually tick the appointments you want to mark as Paid



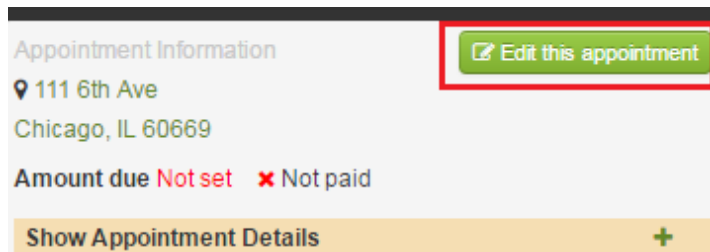
6. Click on the dropdown arrow after Actions and click on Mark as Paid. This will mark all the selected unpaid appointments as Paid.

How to Mark Appointments Paid One by One

1. Click on the appointment



2. On the sidebar pop up (right of your screen), click Edit this Appointment



Appointment Information

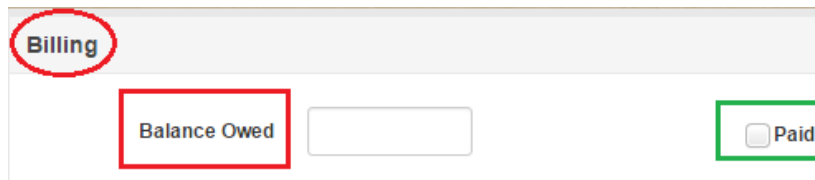
111 6th Ave
Chicago, IL 60669

Amount due Not set ✖ Not paid

Show Appointment Details +

Edit this appointment

3. On the next page, scroll down until you see Billing and tick on Paid



Billing

Balance Owed

☐ Paid

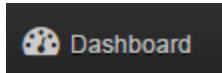
4. Click Save Changes



Save Changes

How to Fetch Revenue Reports

1. Click on Dashboard



2. Under Revenue Report, modify the dates you want the report generated for and then click Fetch Report



IMPORTANT NOTE: You'll have to manually change the dates every time you go out of the dashboard to fetch the Revenue report you want

Automated Email Templates

Appointment Reminder

Booking Confirmation

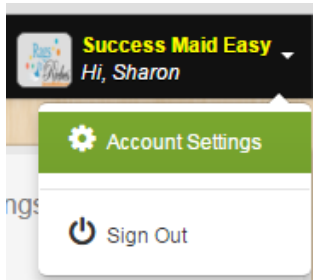
Appointment Follow-Up

Invoice

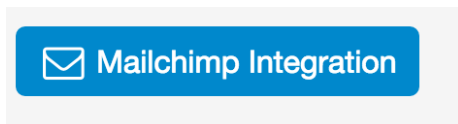
How to Connect to Mailchimp to Send Mass Emails

You can integrate zenmaid with [Mailchimp](#) and sync your contacts and then using Mailchimp, you can send out emails to your clients.

1. Click on the dropdown after your name and click Account Settings



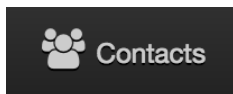
2. click on Mailchimp Integration



3. Click Connect to Mailchimp



4. Go to your Contacts page



5. Click on the sync contacts to Mailchimp button



6. On the pop up bar, choose what you want to sync (ex: just leads, just customers or both) then click Start sync

Sync contacts to mailchimp

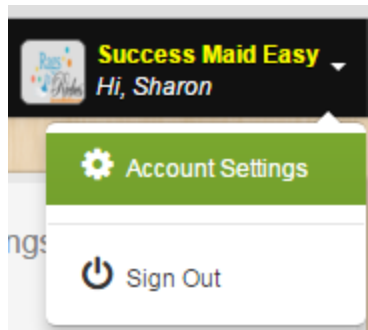
Sync	<div>✓ Leads</div> <div>Customers</div> <div>All Contacts</div>
List	<div>All Leads + All Contacts</div>

Start Sync

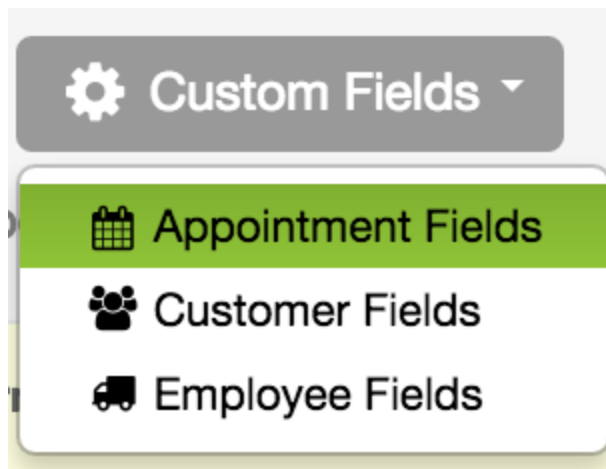
Once done, you can log in on your Mailchimp and start sending the mass email from there.

How to Add a Custom Field for Appointments

1. Click on the dropdown after your name and click Account Settings



2. Click Custom Fields then click Appointment Fields



3. Click +Custom Field



4. On the pop up, type in the name and choose the type whether it's a checkbox, dropdown or text.
Then click Create Field

Add Appointment Custom Field ×

Name

Type the name here

Type

✓ Checkbox

Dropdown

Text

☐ **Hide from employees?**
These field will be hidden from employees when they log in and on work orders.
Office admins will still be able to view and edit this field.

Create Field

Cancel