
MANAGE YOUR
CLEANING BUSINESS
WITH EASE
WHEREVER YOU ARE

Manual prepared by:

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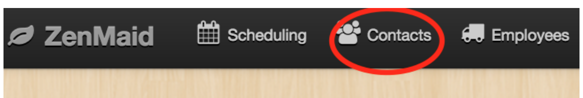
How to Import your Customers and Schedule into Zenmaid from Your Previous System

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.

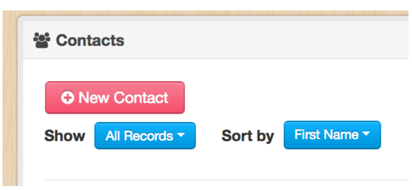
How to Manually Add New Customers in the System

To add any new customer in the system:

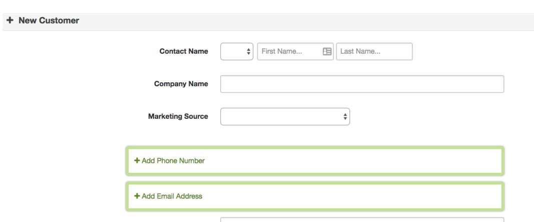
1. Click Contacts



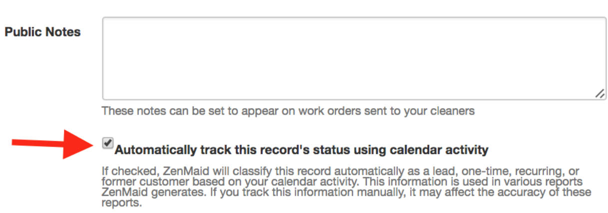
2. Click + New Contact button



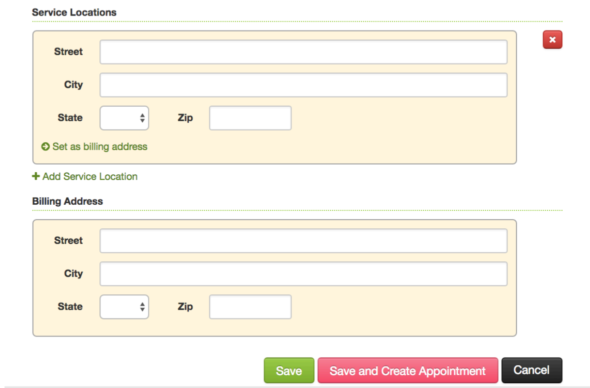
3. Fill in the details



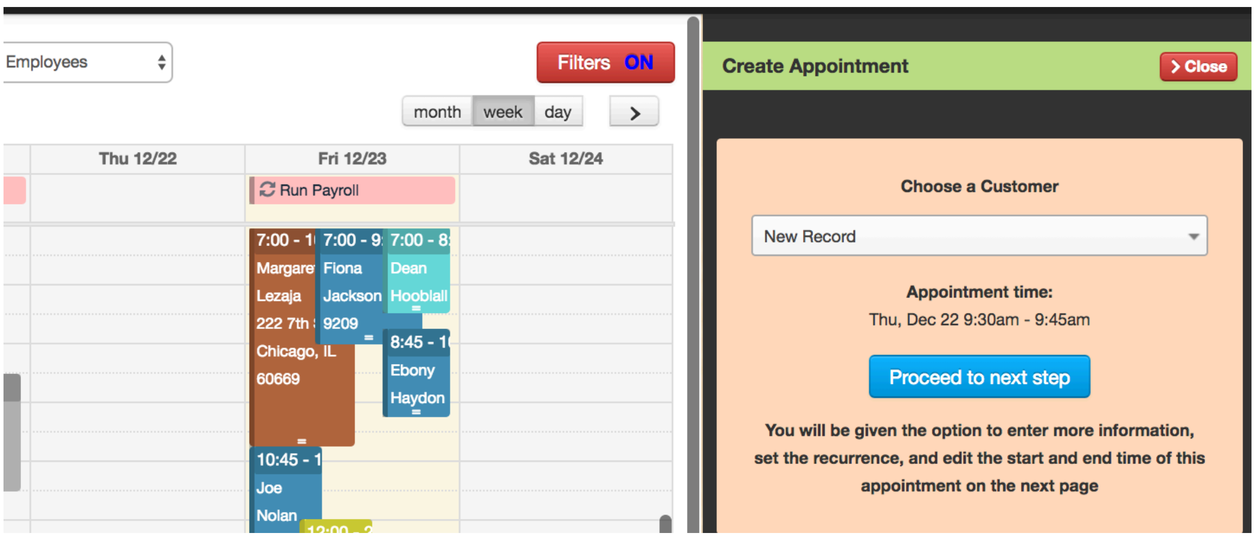
4. Tick on the box to automatically track the customer's records status (lead, one-time, recurring customer, or former customer)



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



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.

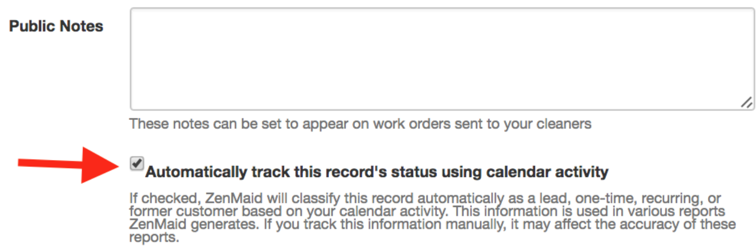


Understanding Customer Type or Status

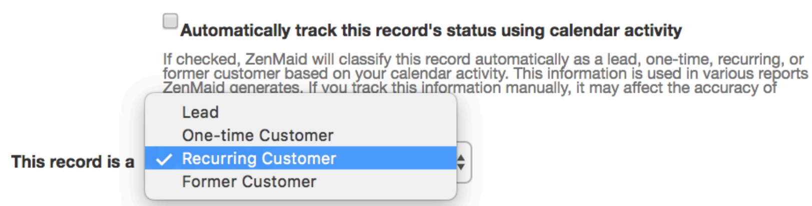
We have the following Customer Types:

- **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.



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

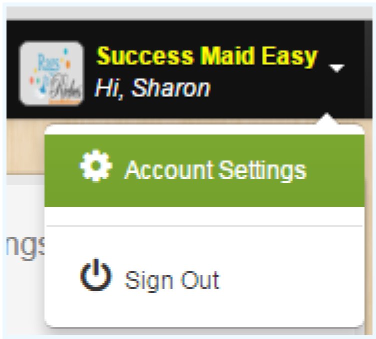


IMPORTANT NOTE:

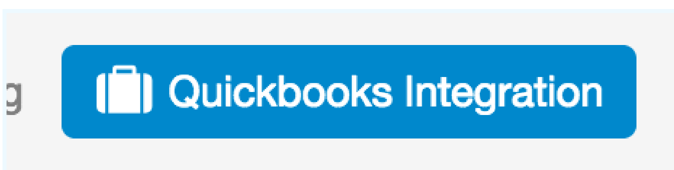
If you're manually changing your customer status to Former Customer, you'll have to inactivate the customer's all ongoing and future appointments first. Click here for [step by step instructions on how to inactivate ongoing and future appointments].

How to Integrate Quickbooks

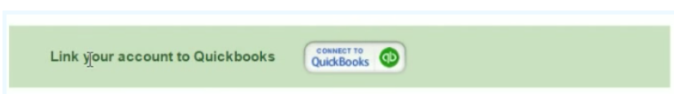
1. Click on the dropdown after your name and click Account Settings



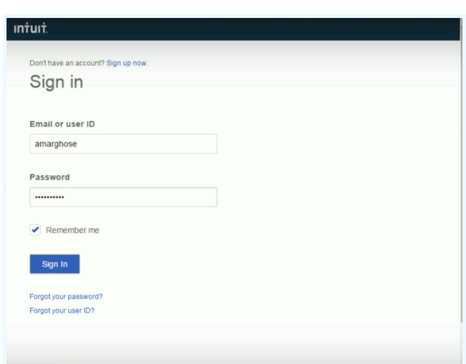
2. Click on Quickbooks Integration button



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



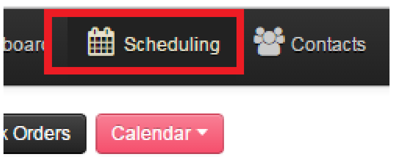
5. Go to your Contacts page and click Sync Customers with Quickbooks

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

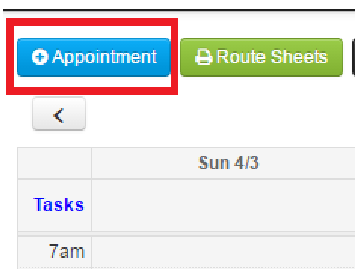
How to Create an Appointment

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

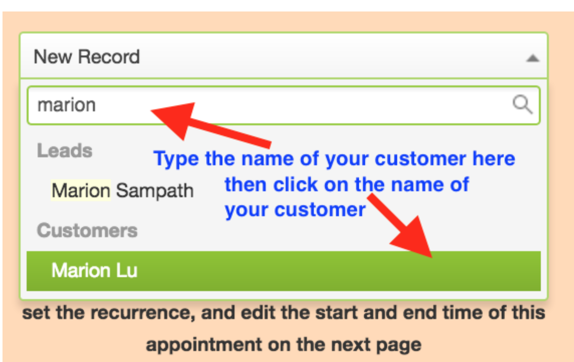
1. Click on Scheduling

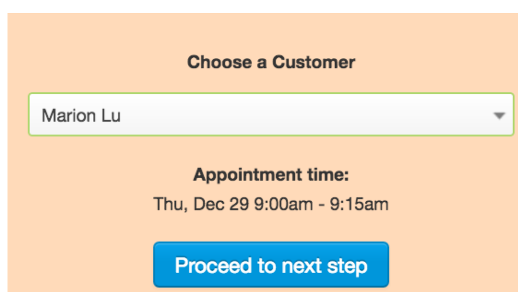


2. Click on the + Appointment button.

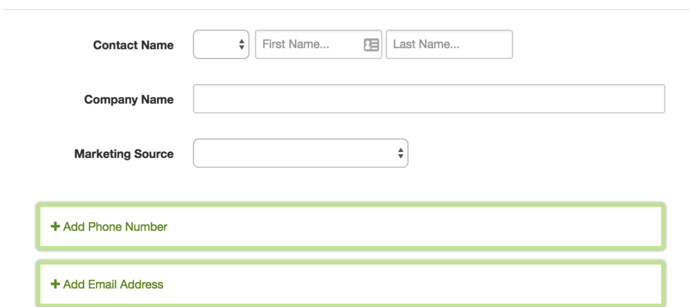


3. From the pop up sidebar (right part of the screen), type in the name of your customer on the search bar and click on it. You can also click on New Record (for new customers). Then click on Proceed to Next Step

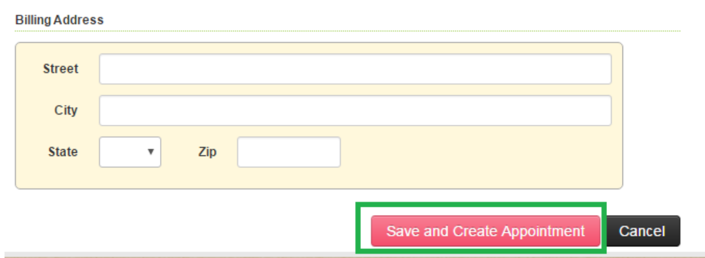




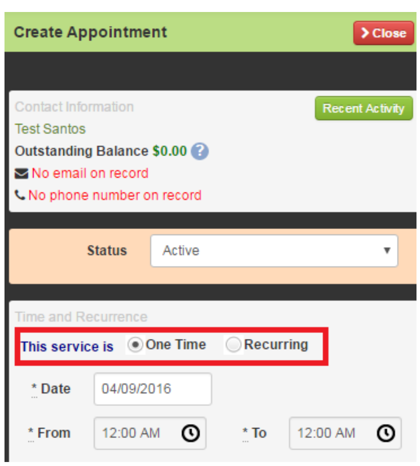
If you clicked on New Record, you will be taken to a new screen where you can enter all the customer details. It'll look like this (see below).



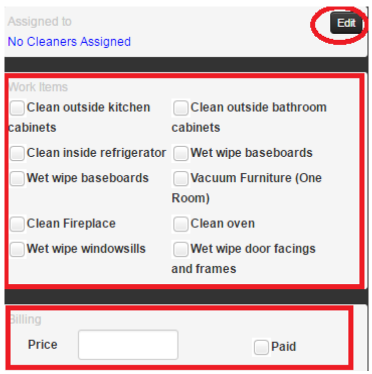
After filling in all customer details, click on Save and Create Appointment



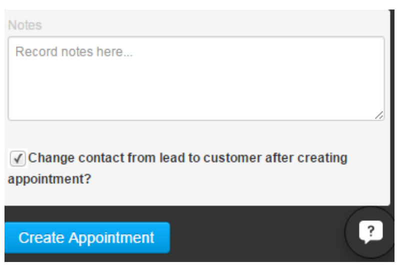
4. On the screen pop up to your right, you can start entering the appointment details (date and time, recurrence - one time or recurring, etc.)



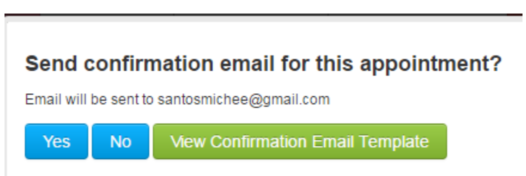
5. Click on edit to assign cleaners for the appointment. You can assign it to a team or specific cleaners. [To create teams click here](). Tick on work items as needed. Put in the price (optional)



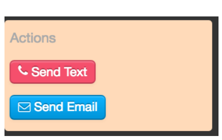
6. You can put down notes such as special instructions. Once done, click on Create Appointment

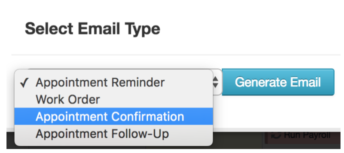


7. If there's an email address on the customer's file you will be asked if you want to send a confirmation email for this appointment. Click Yes, if you want to.



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

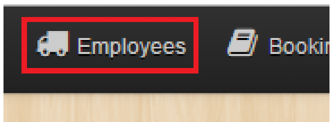




The confirmation email and other email templates as well as text templates can be edited and automated. [For instructions on how to edit templates, click here]().

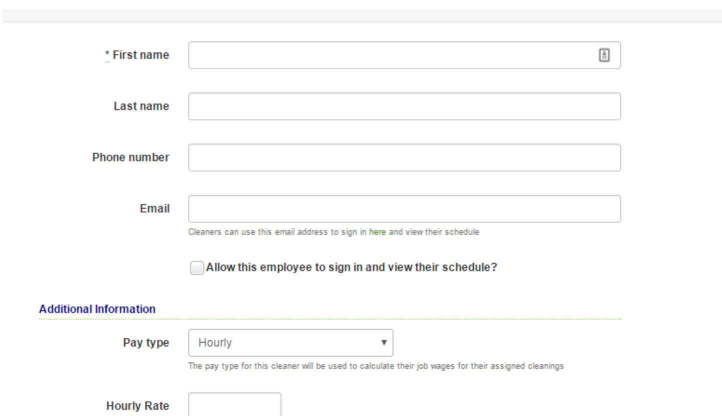
How to Create Employees

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.



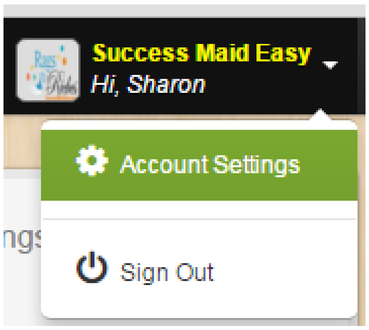
The email is necessary for your employee to receive work orders via email, view their schedule and also to clock in and out on every job. Here's how you can give your employees access to the clock in and out feature of zenmaid. The clock in and out information they enter is connected to Zenmaid's payroll.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

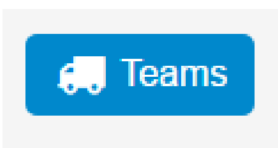
How to Create Teams

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](#).

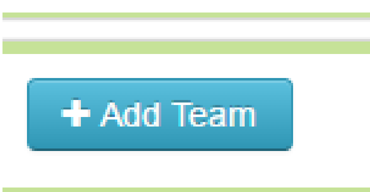
1.Click on the dropdown after your name and click Account Settings



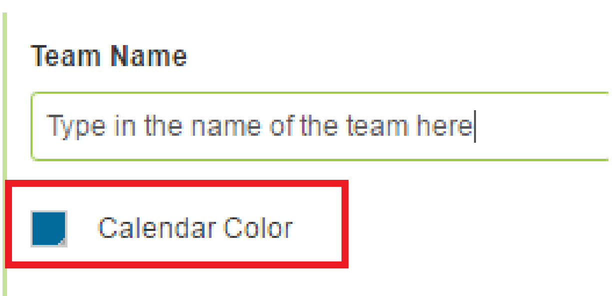
2. Click on Teams



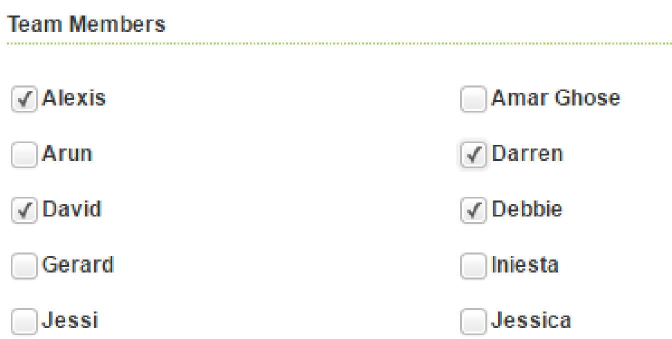
3. Click on + Add Team



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

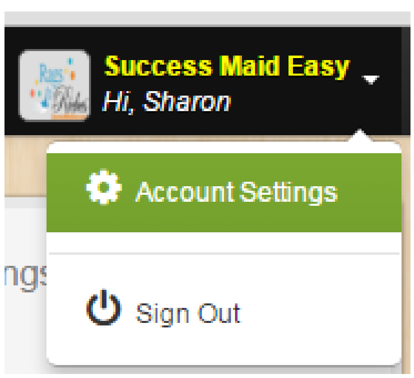


5. Assign team members by ticking on the box before the employee name then click Save Changes.

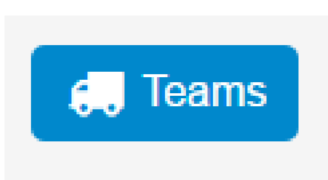


How to Add a Member to Teams

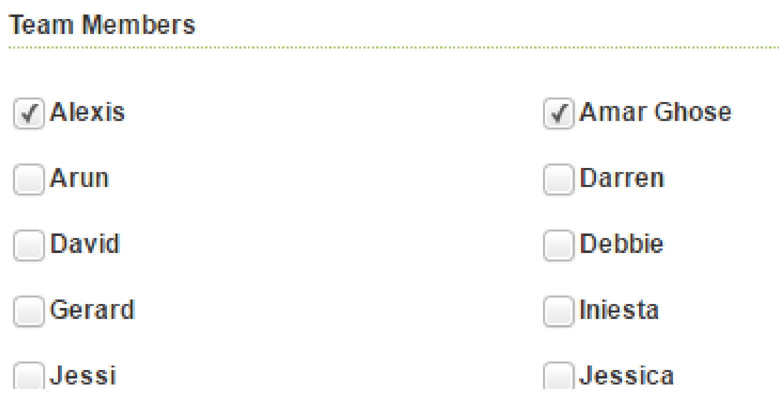
1.Click on the dropdown after your name and click Account Settings



2. Click on Teams



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

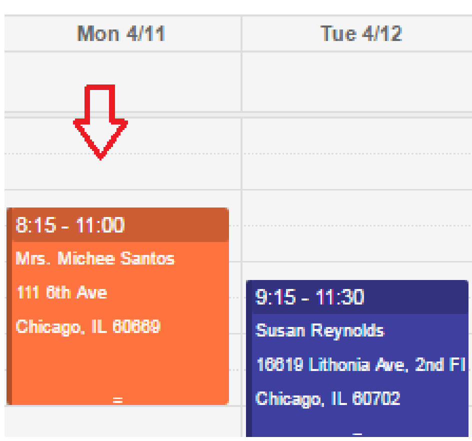


How to Assign Cleaners/Teams for an Appointment

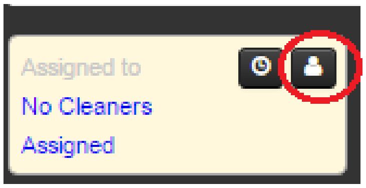
You can assign cleaners or teams for each cleaning appointment.

1. Click on Scheduling

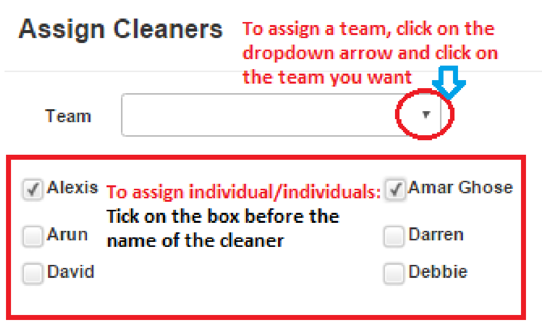
2. On your calendar, click on the appointment



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.



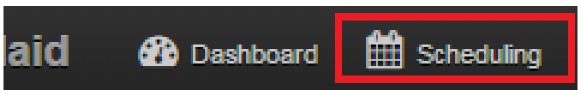
5. If it's a recurring service and you want to assign the appointment to the same team or cleaner/cleaners you've chosen, tick on the box otherwise leave it unticked. Then click on Assign Cleaners.

How to Edit One-Time Appointments

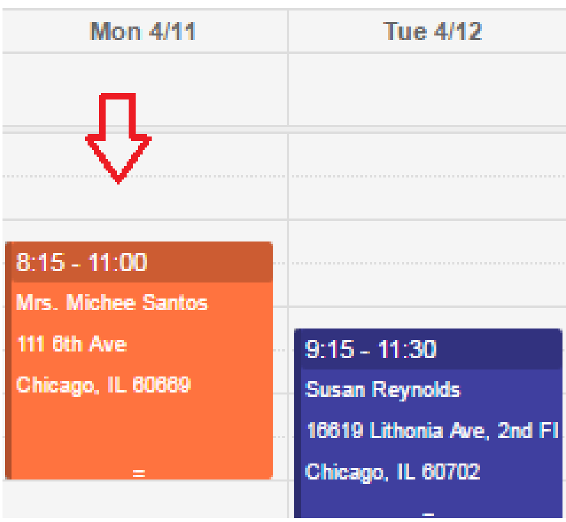
If you need to edit the date and or time of the appointment:

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

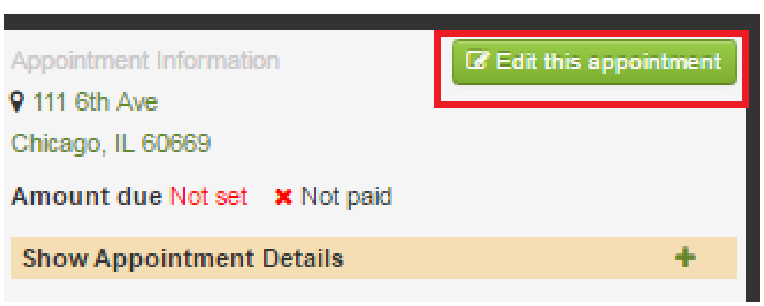
1. Click on Scheduling



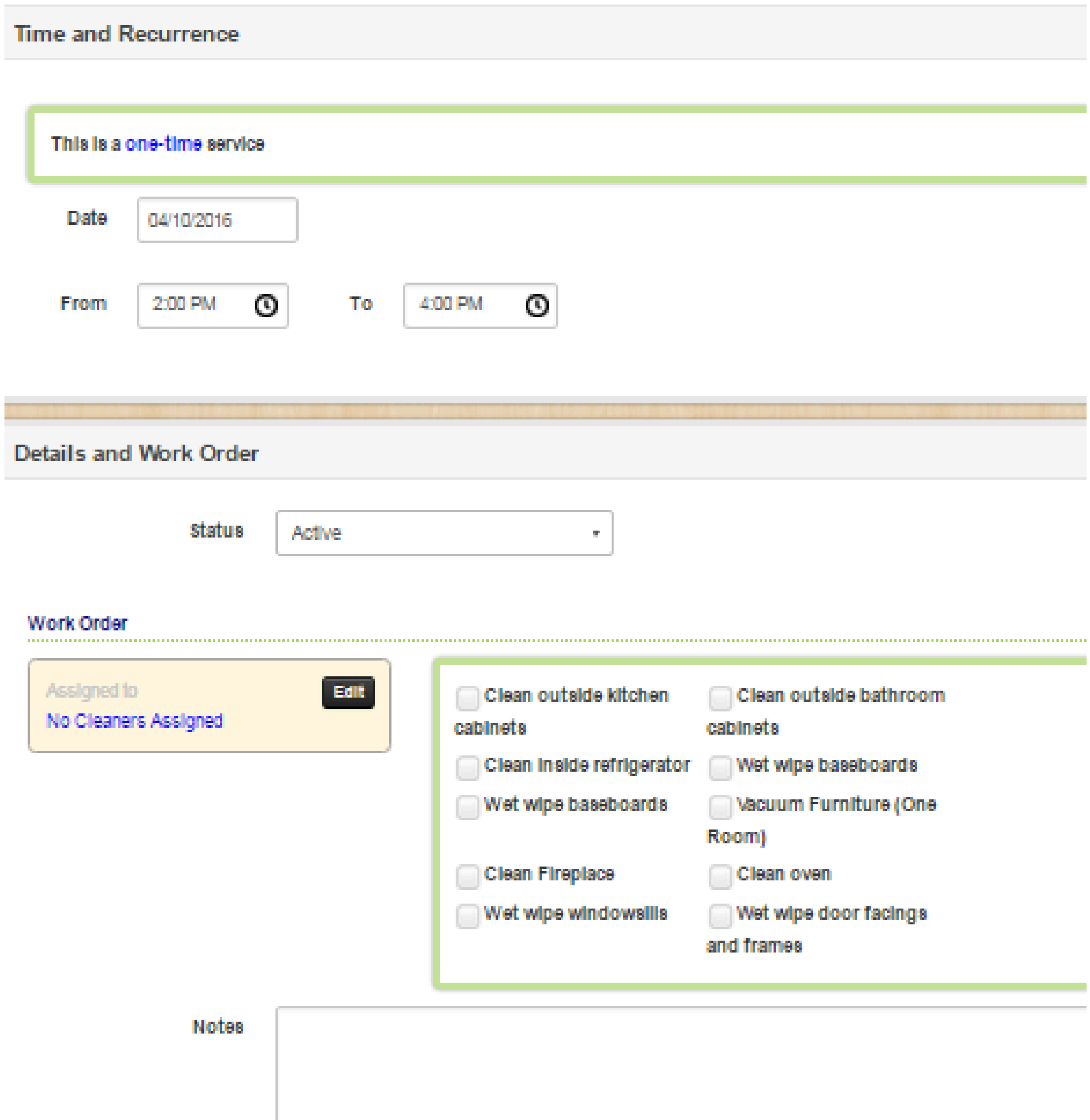
2. On your calendar, click on the appointment



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.

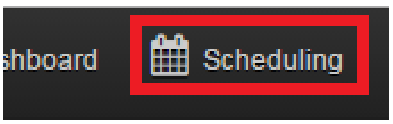


5. Lastly Click Save Changes

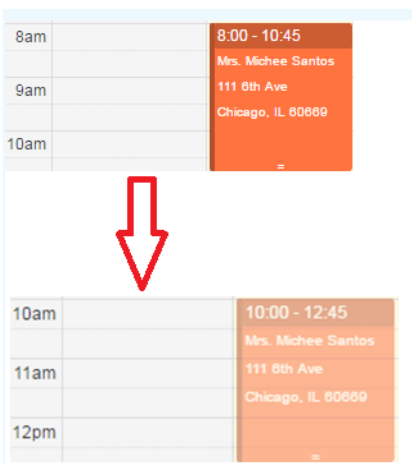
How to Edit Recurring Appointments

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

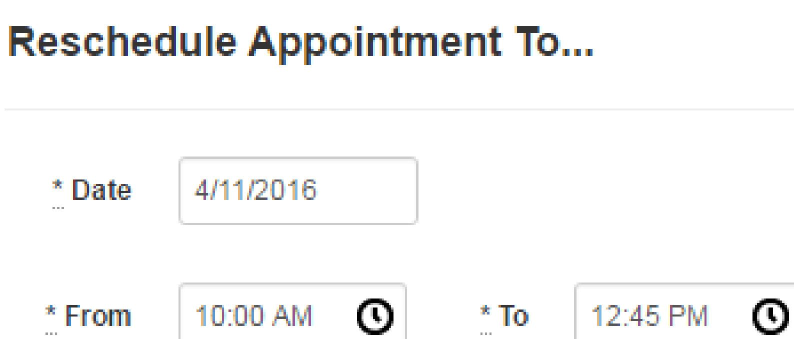
1. Click on Scheduling



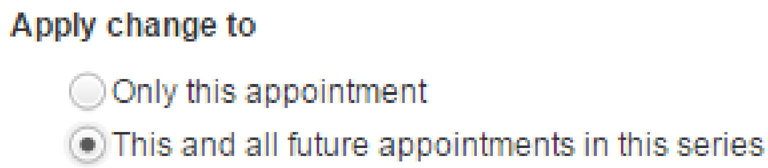
2. From your calendar click and hold simultaneously on the appointment and drag it down.



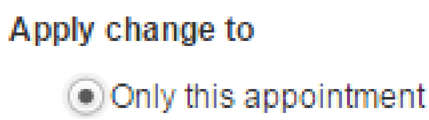
3. A pop up will appear where you can edit the date and time of the appointment



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



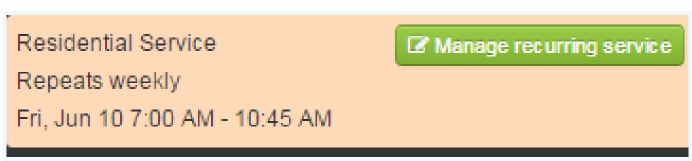
5. If it’s just for this specific appointment, then tick on only this appointment.



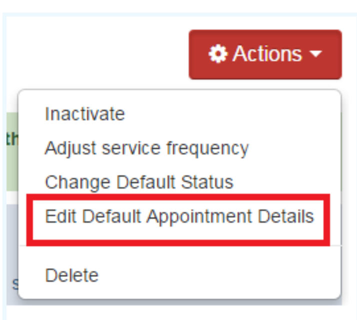
6. Lastly, click Save

How to Edit the Address of a Recurring Appointment

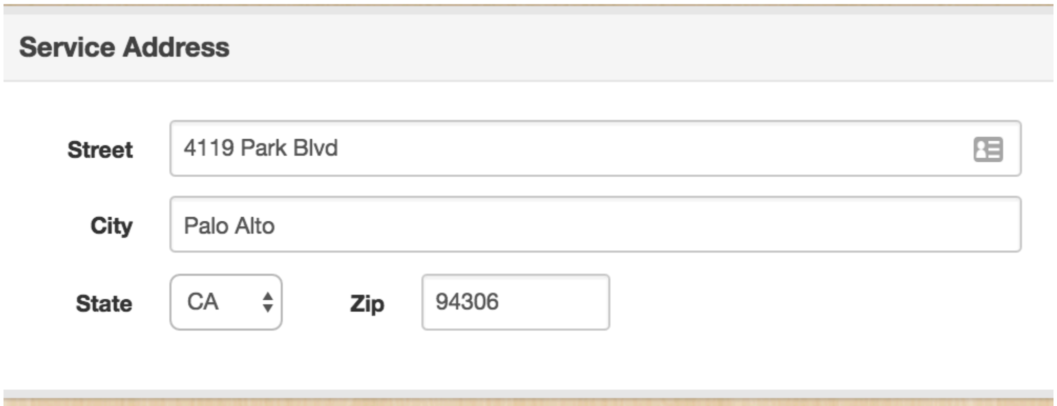
1. Click on the appointment and from the sidebar pop up click on Manage Recurring Service



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

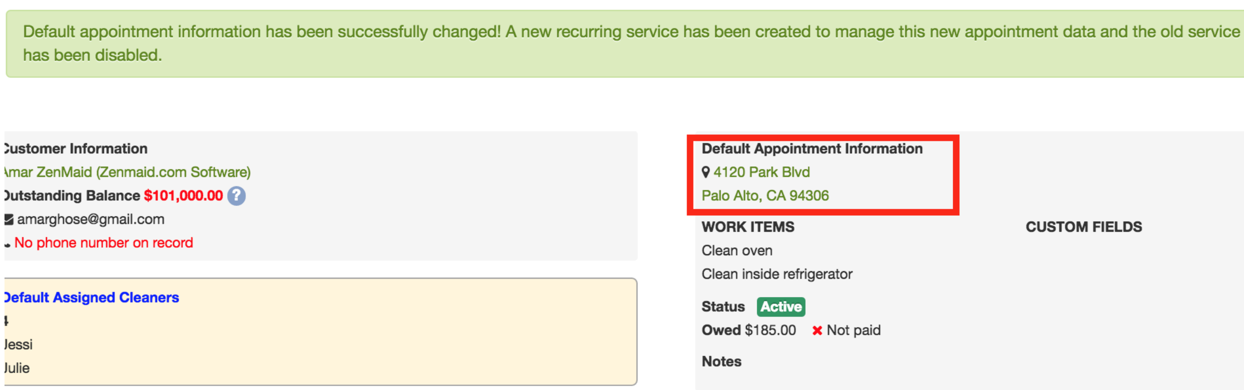


3.Top right of your screen, you'll see Service Address. Put in the new address here.



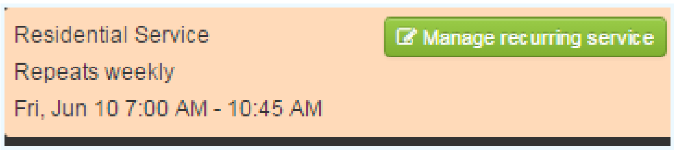
4. Scroll down and click on Save Changes

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

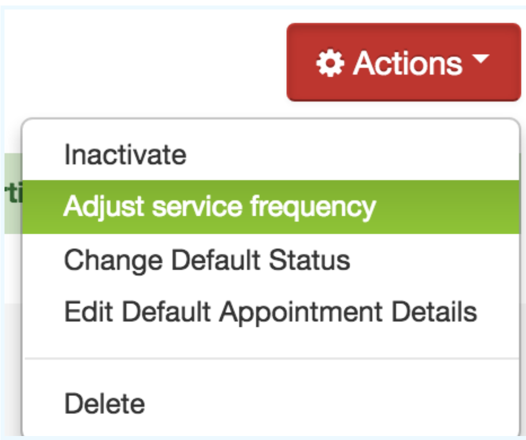


How to Edit the Frequency of a Recurring Service

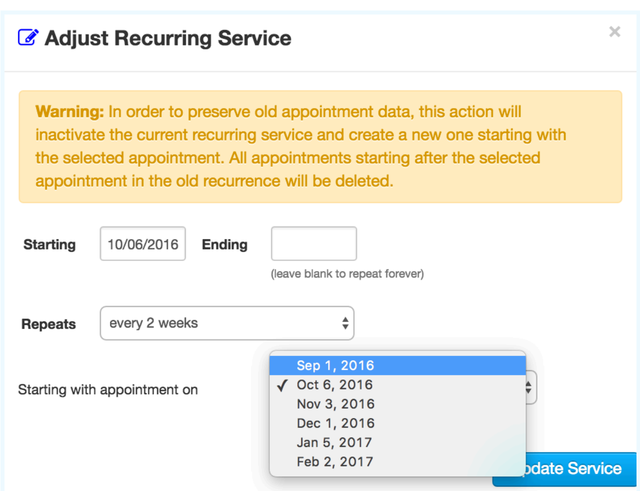
1. Click on the appointment and from the sidebar pop up click on Manage Recurring Service



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



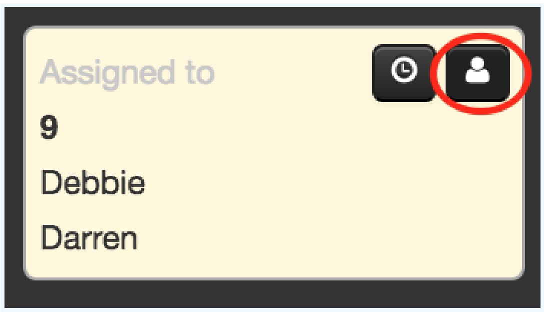
3. From the pop up, choose the new frequency under "Repeats" and for "Starting with appointment on" click on the dropdown arrow as to when this change will take effect. Once you've chosen a date from the dropdown arrow, you can also type in the same date for the box that says "Starting"



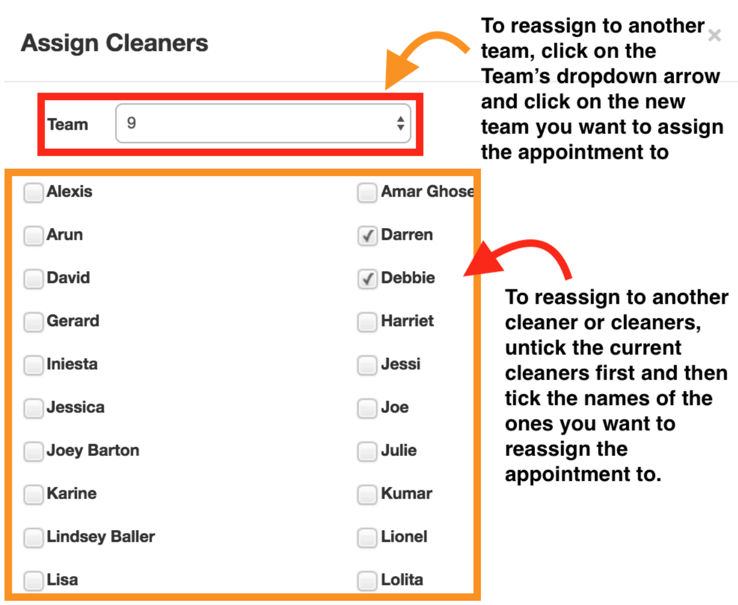
4. Lastly, click on Update Service

How to Reassign a Recurring Appointment

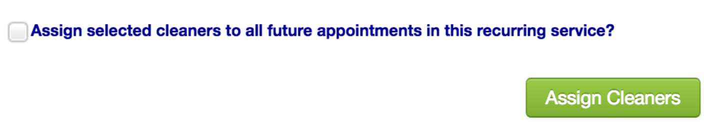
1. Click on the appointment and from the sidebar pop up click on the person icon



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

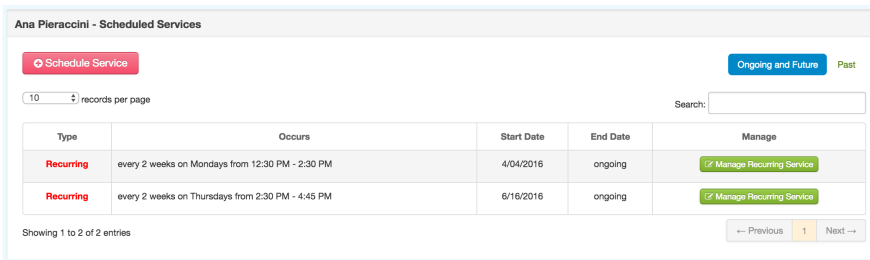


3. Scroll down and if you want the entire series of appointments assigned to the new cleaners, tick on the box for "Assign selected cleaners to all future appointments in this recurring service" otherwise leave it untick. Lastly, click Assign Cleaners.

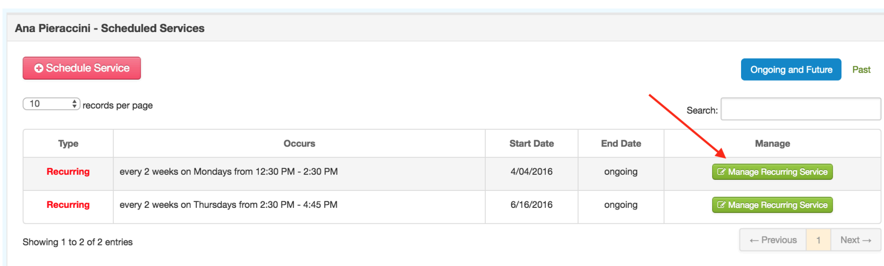


How to Inactivate Appointments

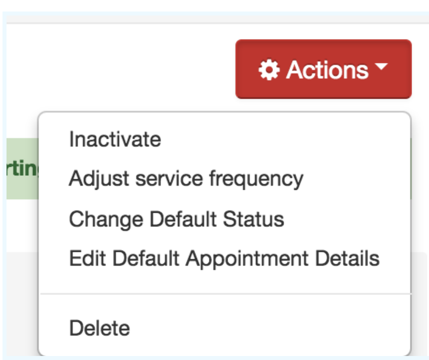
1. Go to the contacts page, click on the name of the customer and click on Edit. Scroll all the way down until you see the Scheduled Services of your customer.



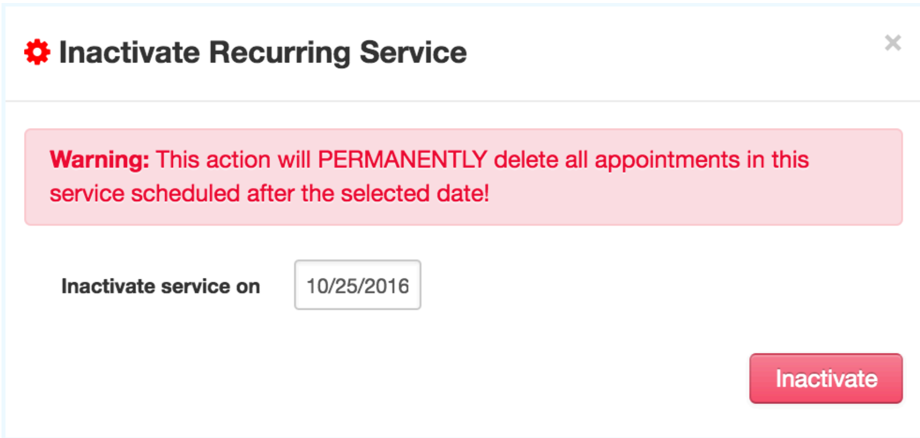
2. Click on Manage Recurring Service or Manage Appointment



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



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

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

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

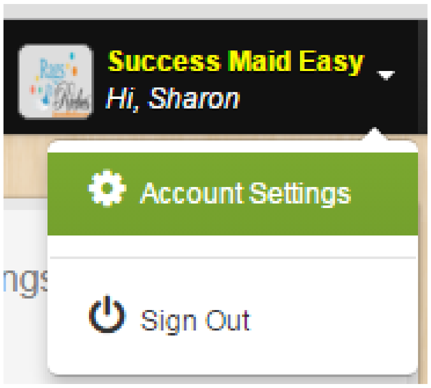
You can send these text templates manually or automatically. You can edit what you'd like to appear in these templates and if you automate, you can choose the time they get sent out. To edit text templates, click here.

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

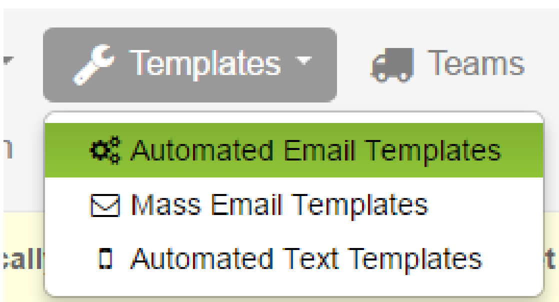
IMPORTANT NOTE: Please remember that text messages are limited to 140 characters only.

How to Edit Email and Text Templates Overview

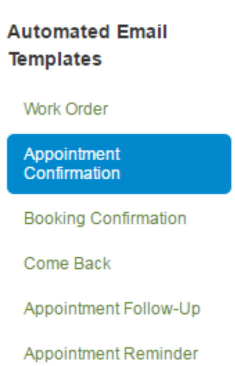
1. Click on the dropdown after your name and click Account Settings



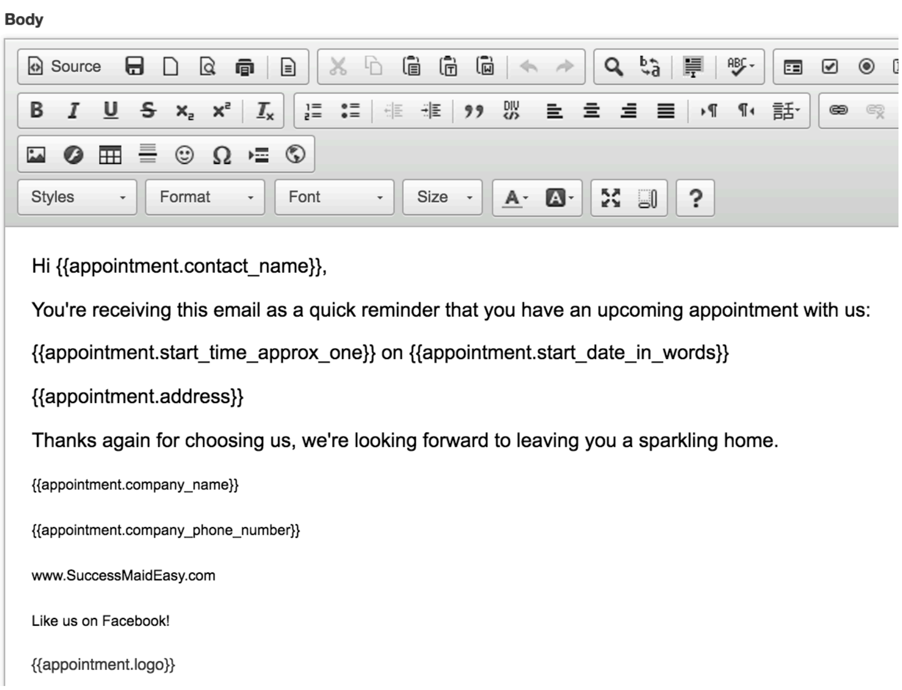
2. Click on the Templates tab's dropdown and click on Automated Email Templates or Automated Text Templates



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



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

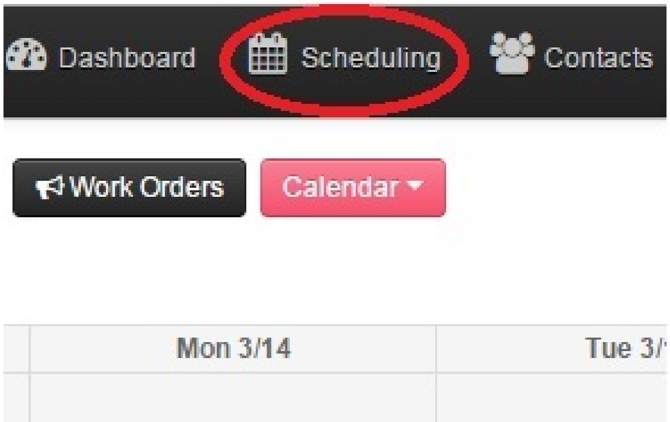
IMPORTANT NOTE: Those in curly brackets (e.g. {{appointment.start_time}}) are called wildcards. They tell the system where to put the corresponding information for each appointment. Currently, the system supports the following wildcards:

- {{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)

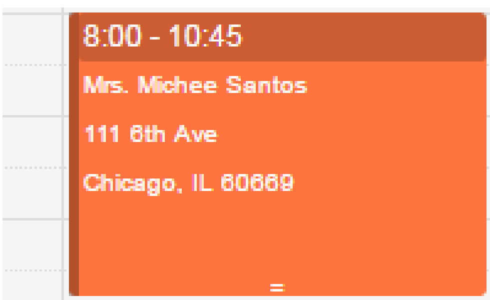
You can send an email to amar@zenmaid.com if the information you want to add is not a supported wildcard.

How to Email Invoice to Customers

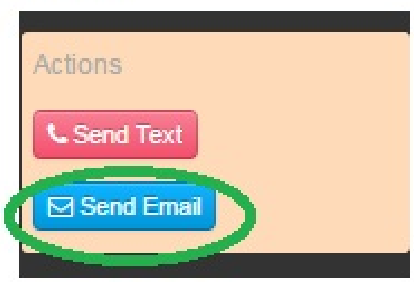
1. Click on Scheduling



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.

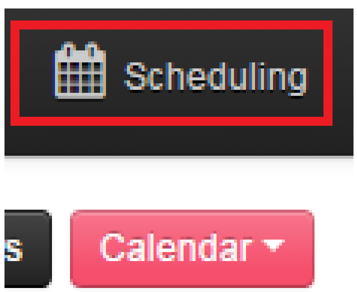
How to Send/Resend Appointment Confirmation

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.

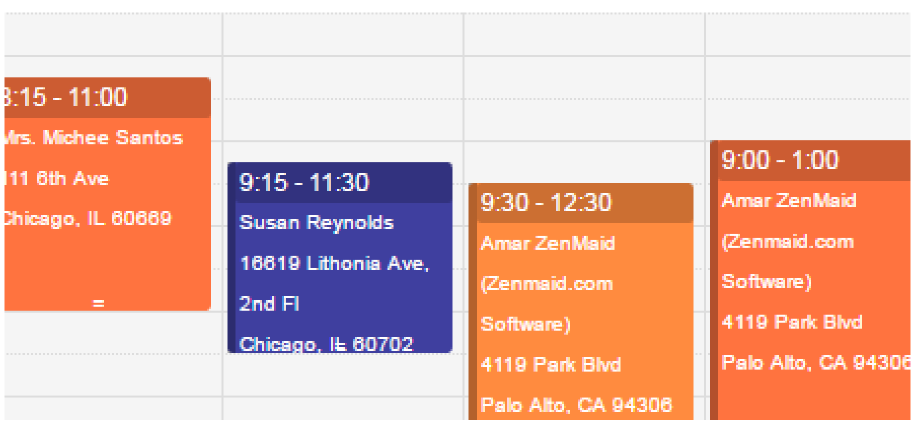
If your customer has made changes to a scheduled appointment, you'll have to manually send a new appointment confirmation with the changes made.

To resend appointment confirmation:

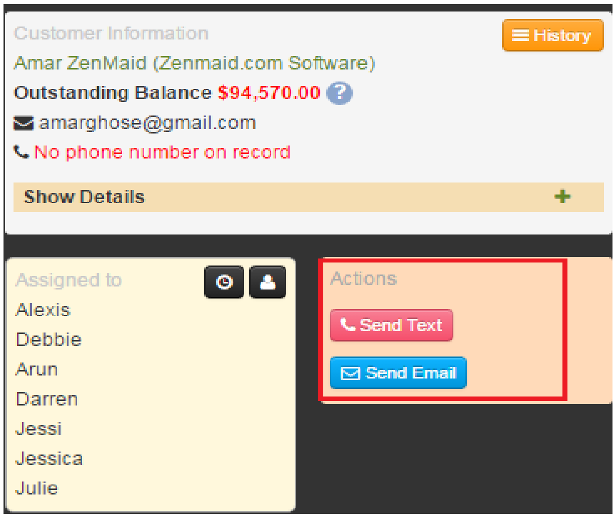
1. Click on the Scheduling tab.



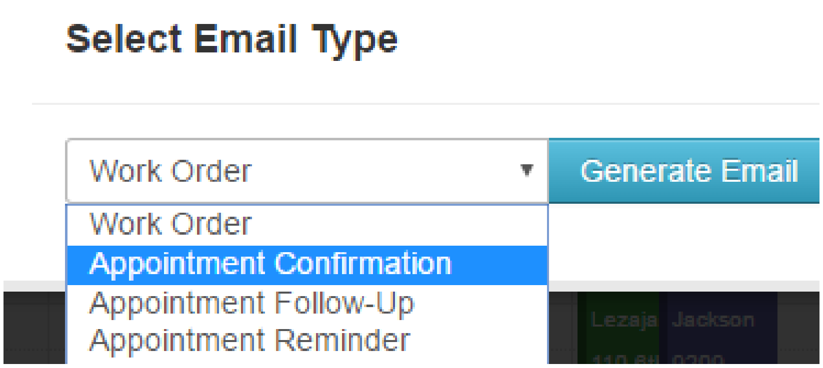
2. Click on the appointment



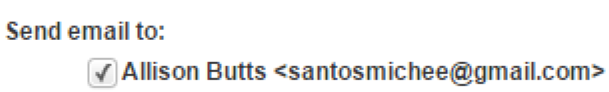
3. On the right side of your screen, a pop up will appear. Under Actions, click on Send Email



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



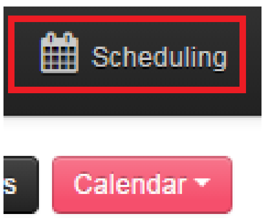
5. On the next page, you'll have the chance to edit the confirmation email and put in the changes made. Make sure that the Send to box is ticked then hit Send Email



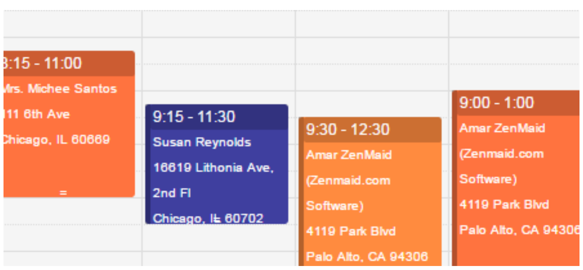
How to Send Work Orders

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.

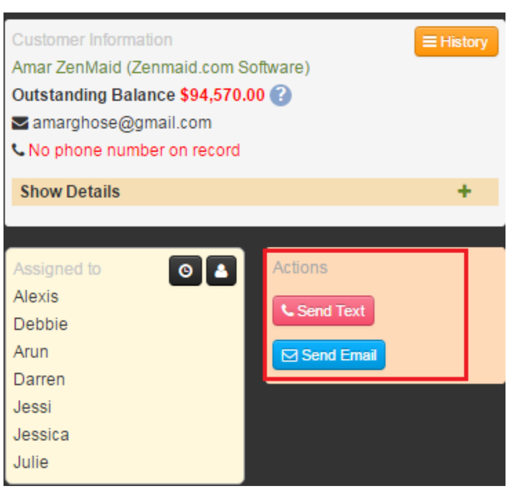
1. Click on the Scheduling tab.



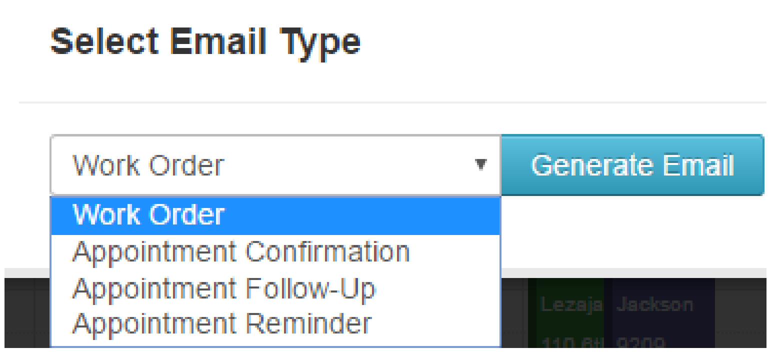
2. Click on the appointment



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



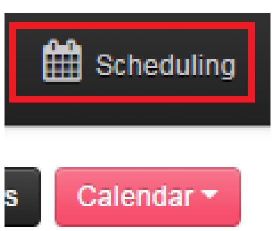
4. Choose Work Order from the dropdown choices and click on Generate Email or Generate Text



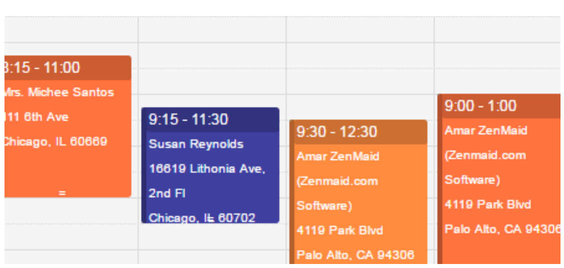
How to Send Appointment Reminders

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

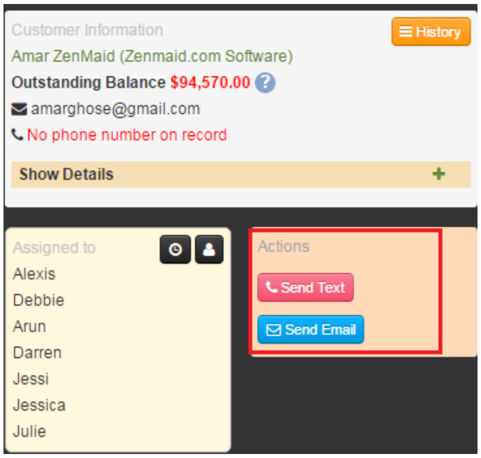
1. Click on the Scheduling tab.



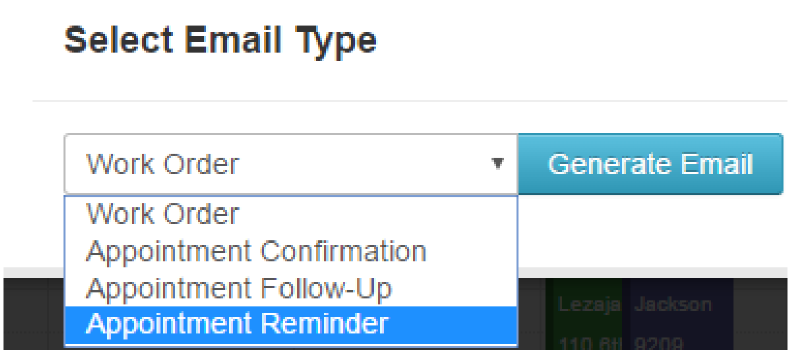
2. Click on the appointment



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



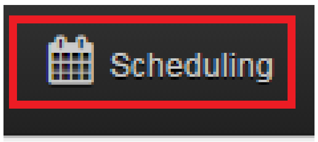
4. Choose Appointment Reminder from the dropdown choices and click on Generate Email or Generate Text



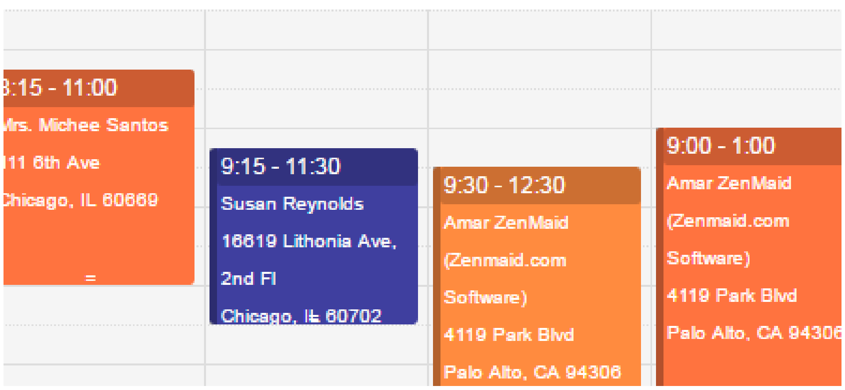
How to Send Appointment Follow Ups

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

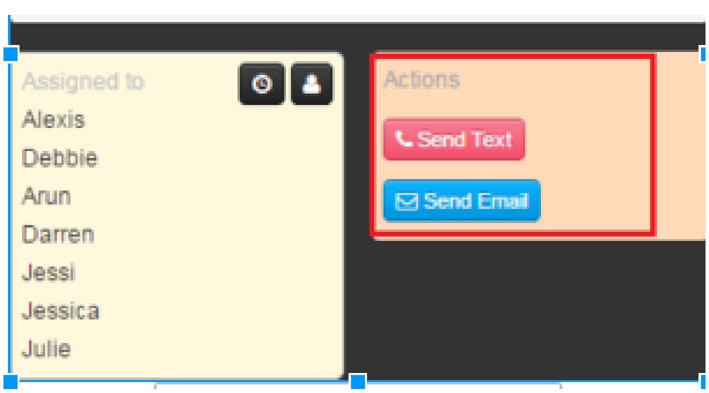
1. Click on the Scheduling tab.



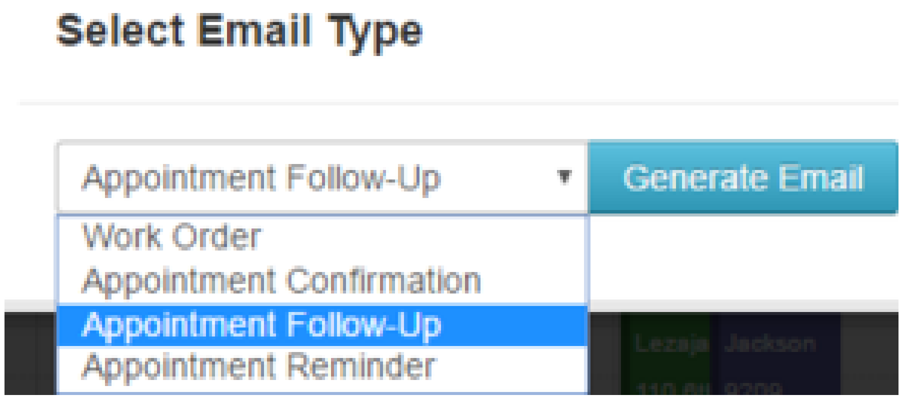
2. Click on the appointment



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

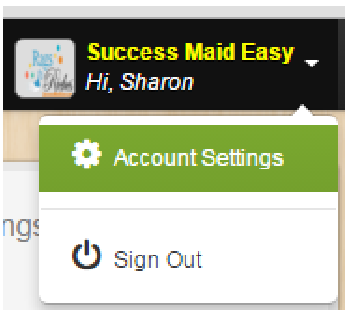


How to Edit Email Templates (Step by Step Instructions)

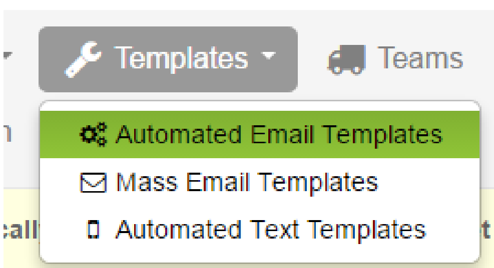
You can edit the email templates in Zenmaid to suit your needs.

How to Edit Appointment Confirmation

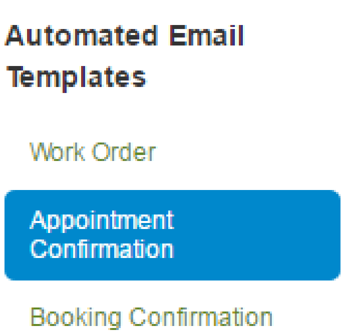
1. Click on the dropdown after your name and click Account Settings



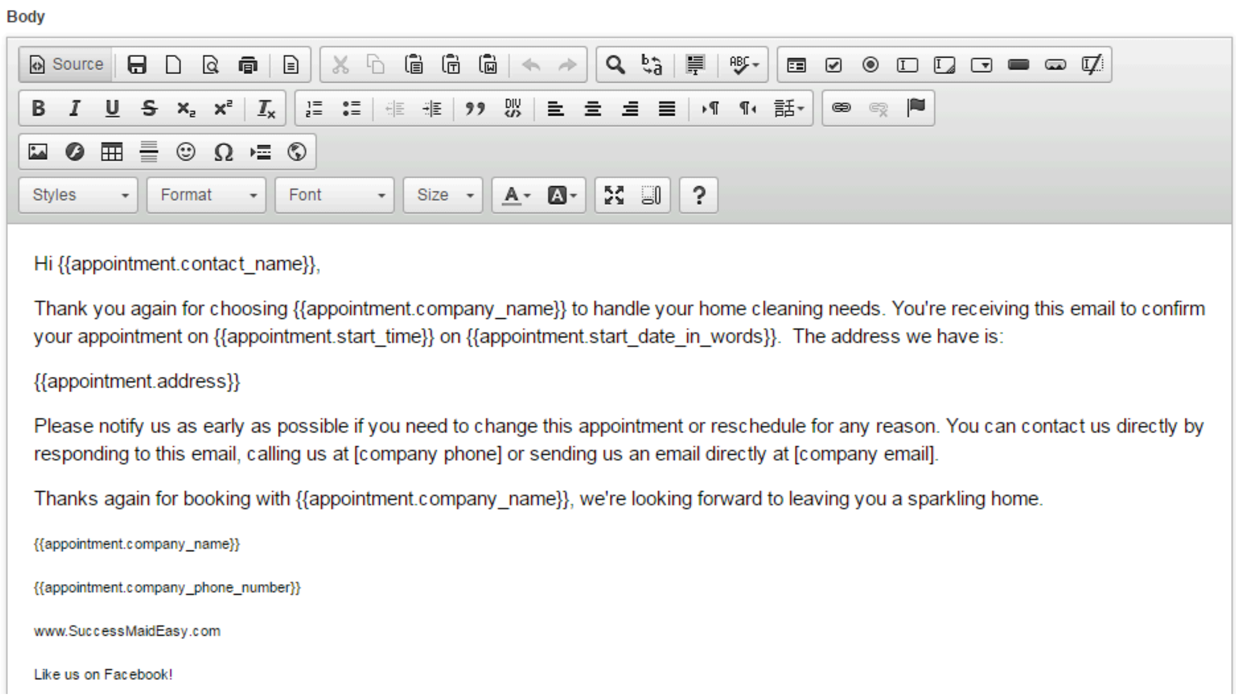
2. Click on the Templates tab's dropdown and click on Automated Email Templates



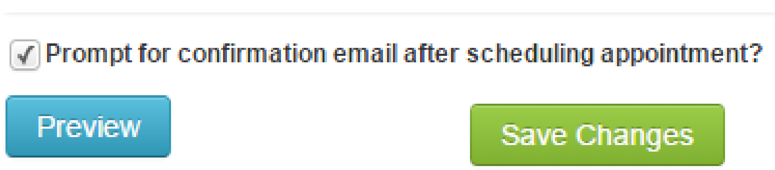
3. Click on Appointment Confirmation



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)

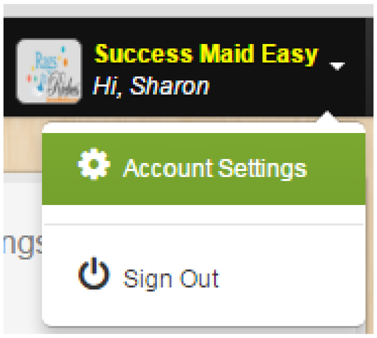


5. Make sure that the box Prompt for confirmation email after scheduling appointment is ticked. Click Preview to see the changes you made and lastly click Save Changes

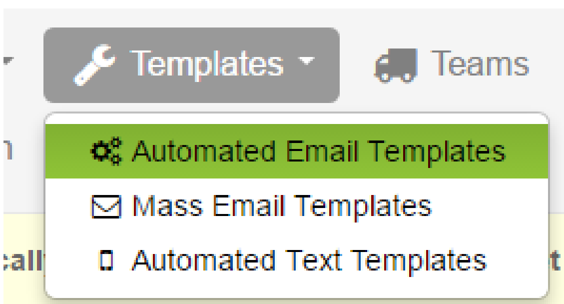


How to Edit Booking Confirmation

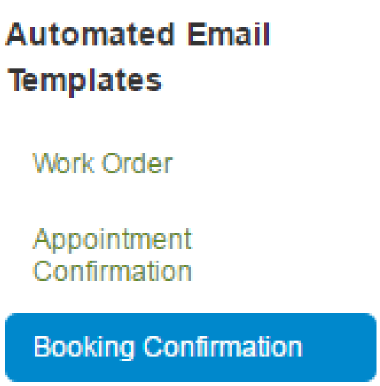
1. Click on the dropdown after your name and click Account Settings



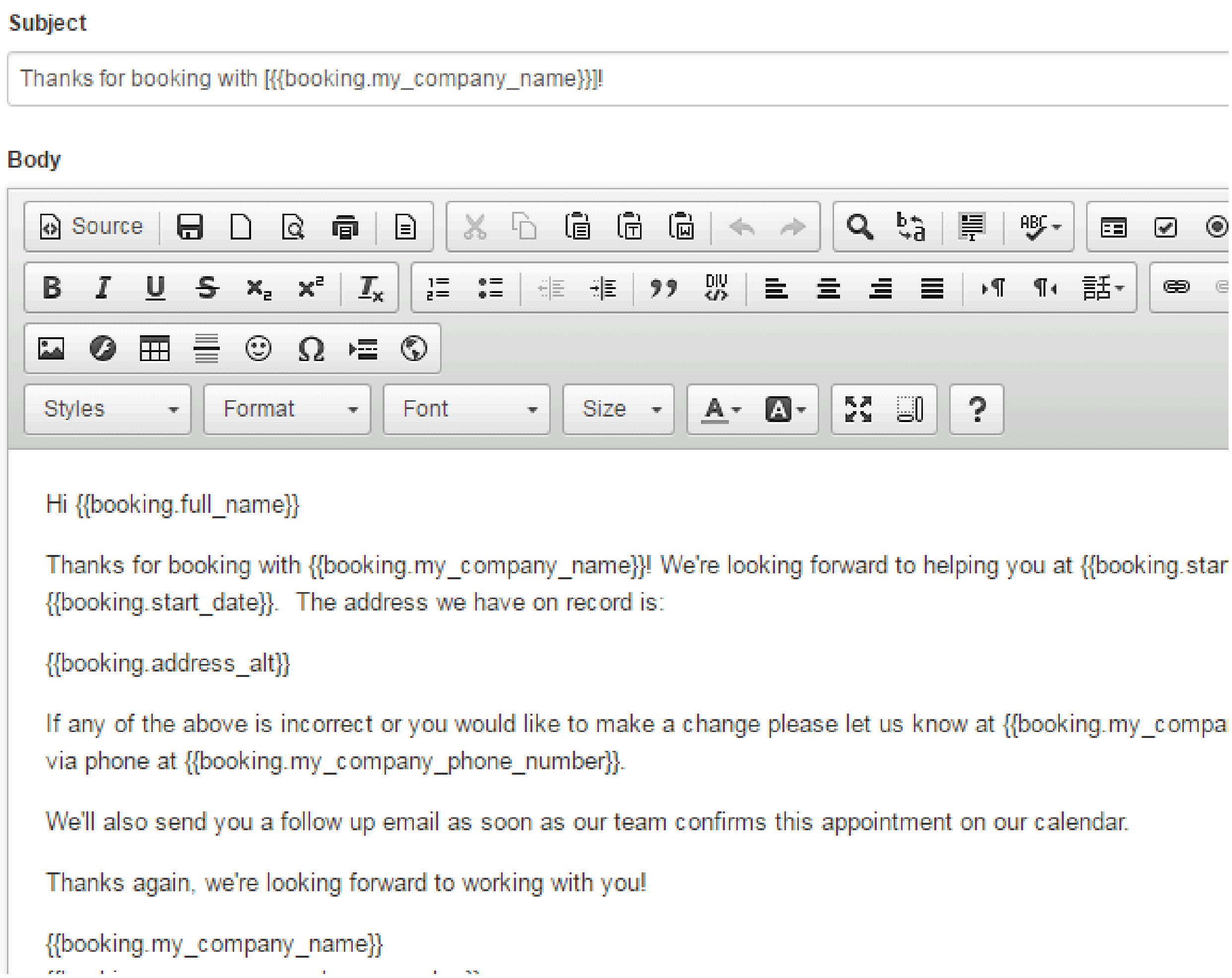
2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Booking Confirmation



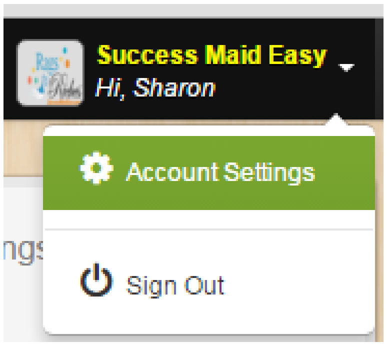
4. Make the necessary edits in the Subject and Body sections as you like. Make use of wildcards to assign what information is included. (Click here to find out what wildcards are)



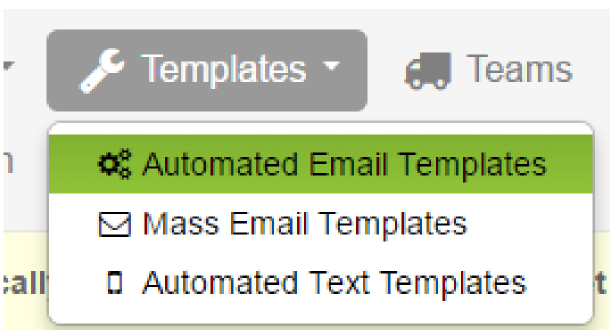
5. Click on Preview to see the changes you've made and lastly click on Save Changes.

How to Edit Appointment Reminder

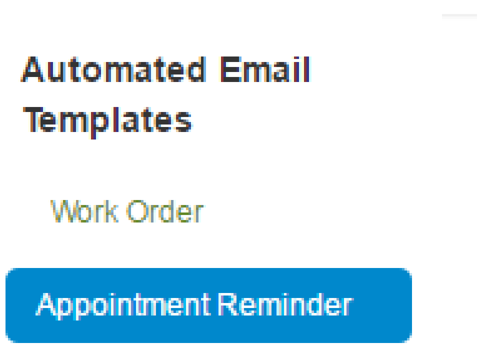
1. Click on the dropdown after your name and click Account Settings



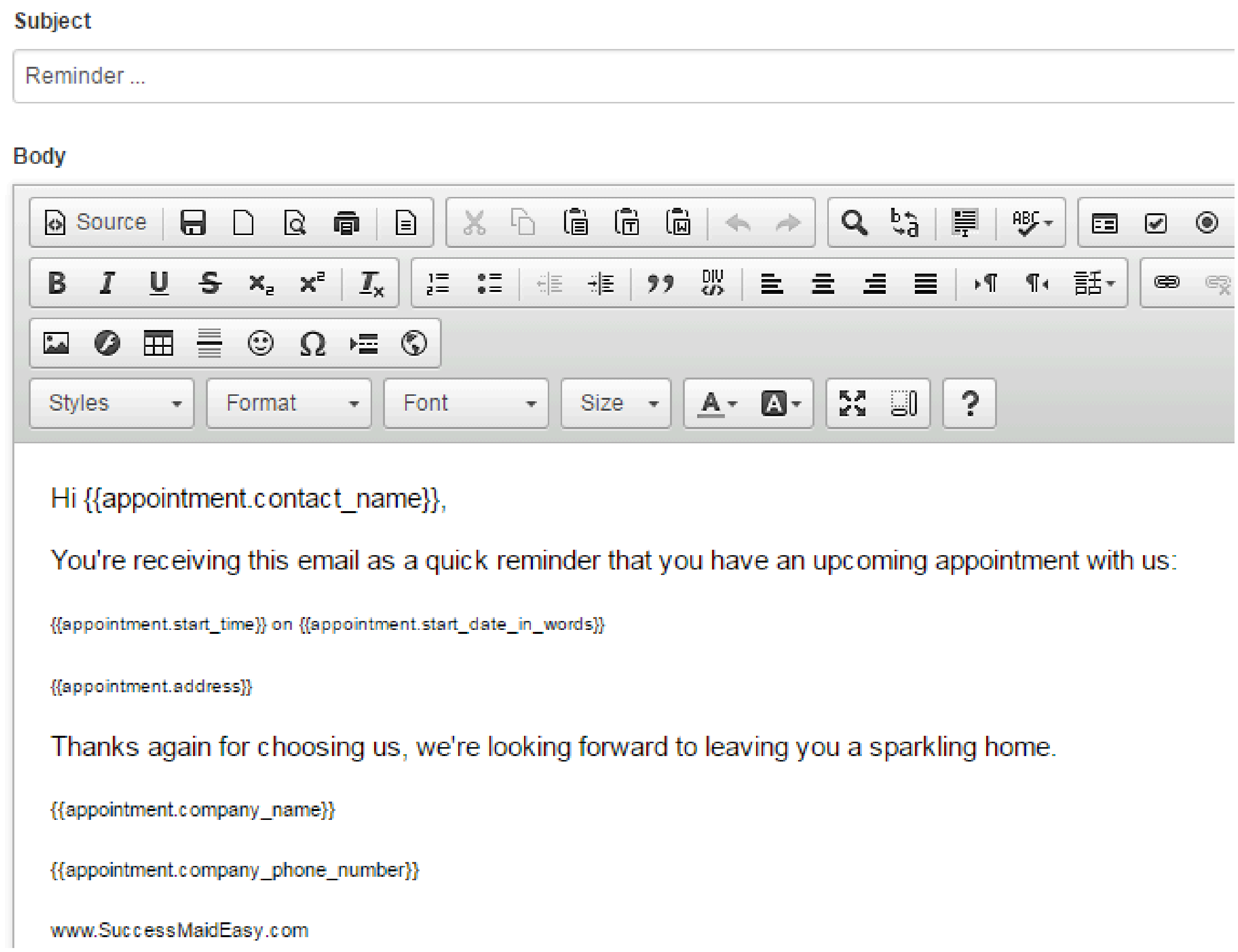
2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Appointment Reminder



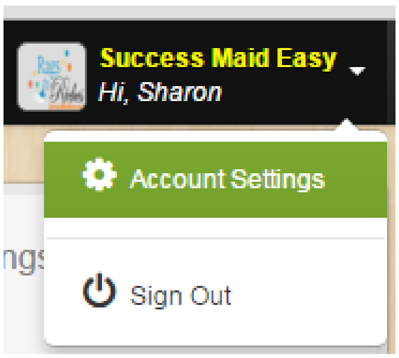
4. Make the necessary edits in the Subject and Body sections as you like. Make use of wildcards to assign what information is included. [(Click here to find out what wildcards are)]



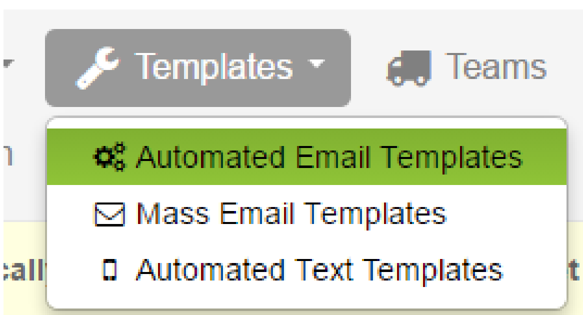
5. Click on Preview to see the changes you've made and lastly click on Save Changes.

How to Edit Work Order

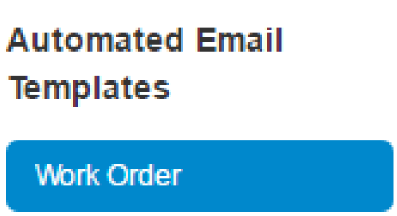
1. Click on the dropdown after your name and click Account Settings



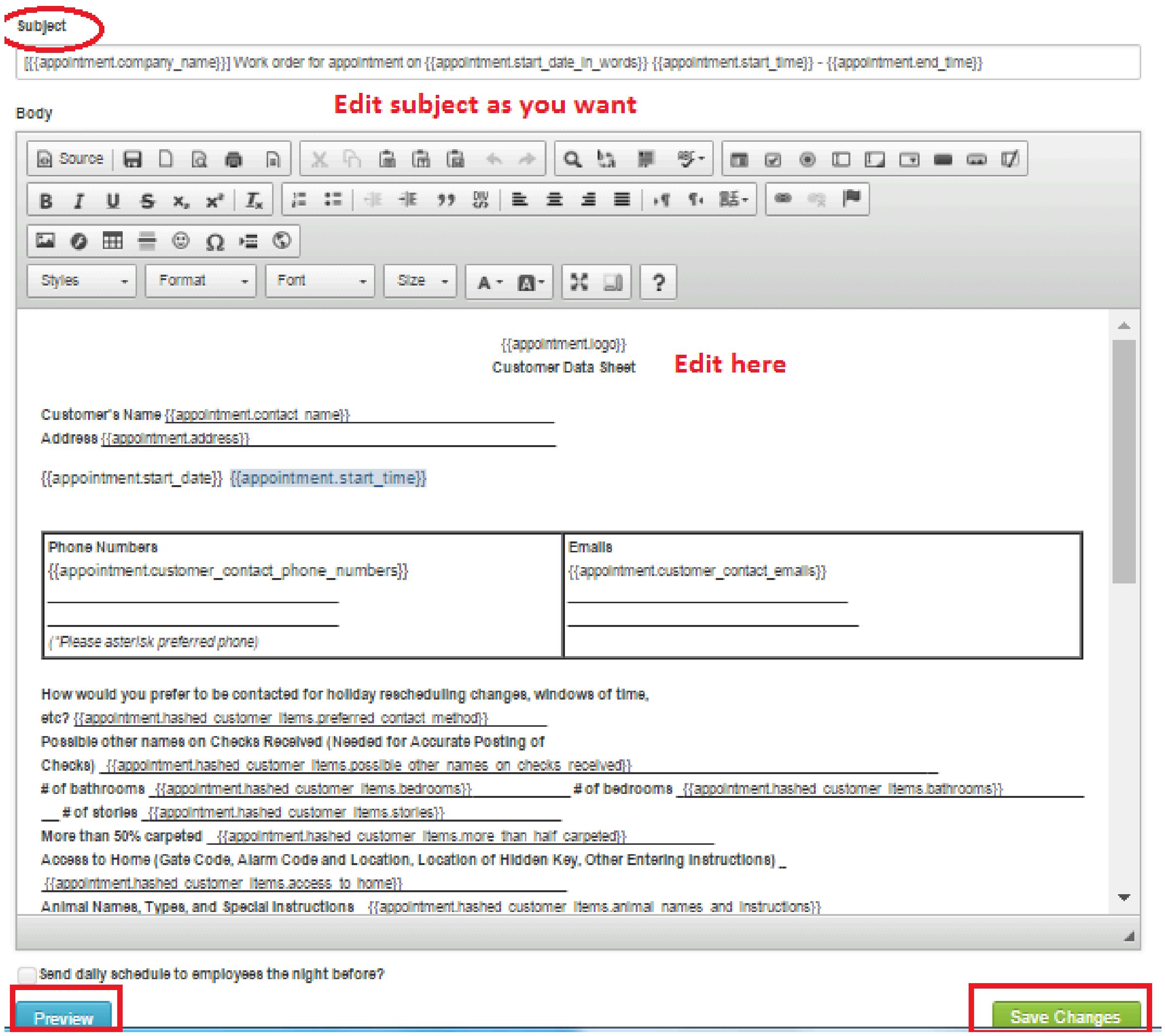
2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Work Order

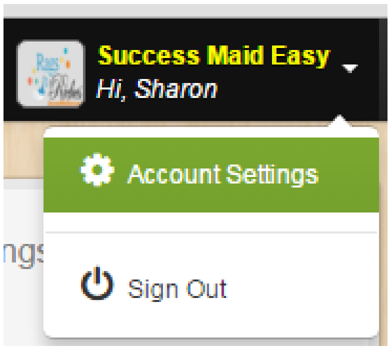


4. Make the necessary edits in the Subject and Body sections as you like. Make use of wildcards to assign what information is included in your work orders (Click here to find out what wildcards are). Click Preview to check on the changes you made. Lastly click Save Changes.

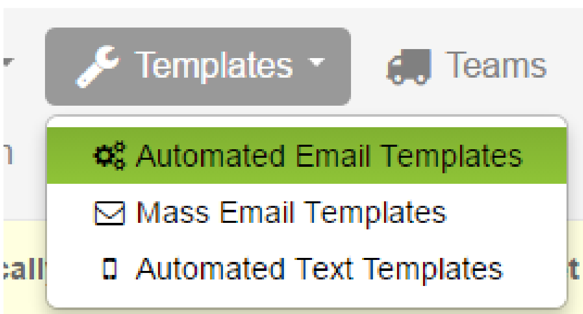


How to Edit Appointment Follow Up

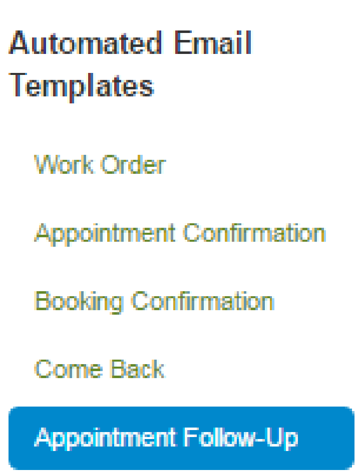
1. Click on the dropdown after your name and click Account Settings



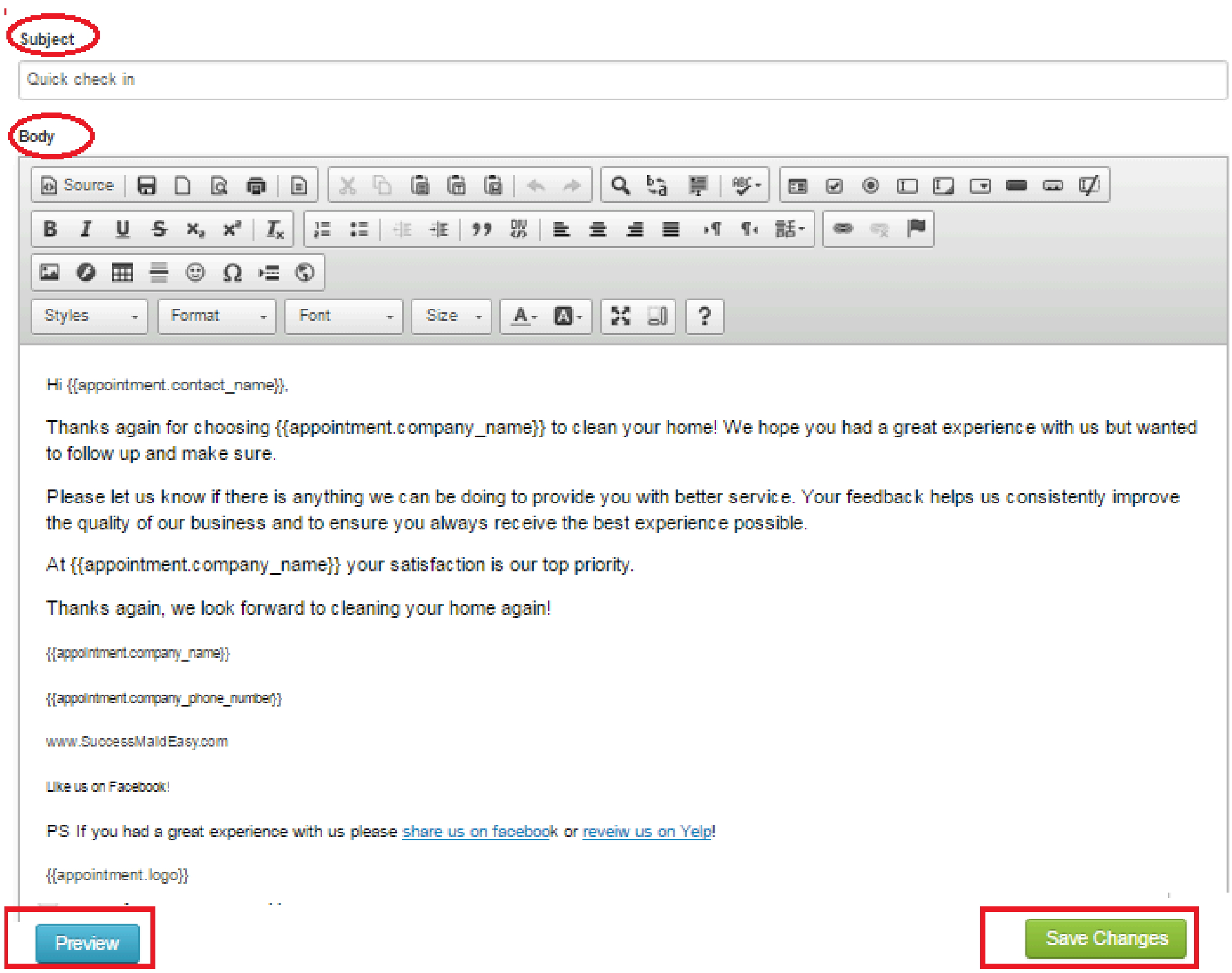
2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Appointment Follow Up

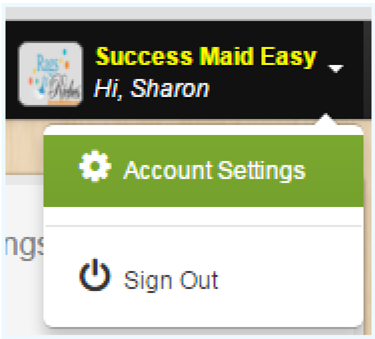


4. Make the necessary edits in the Subject and Body sections as you like. Make use of wildcards to assign what information is included in your work orders (Click here to find out what wildcards are). Click Preview to check on the changes you made. Lastly click Save Changes.

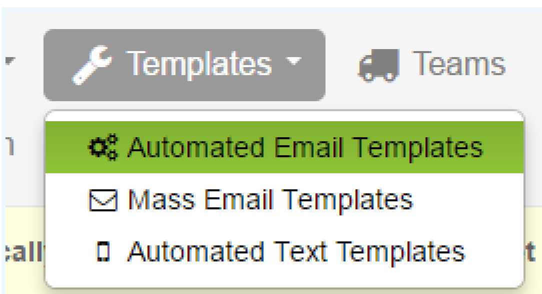


How to Edit Invoice

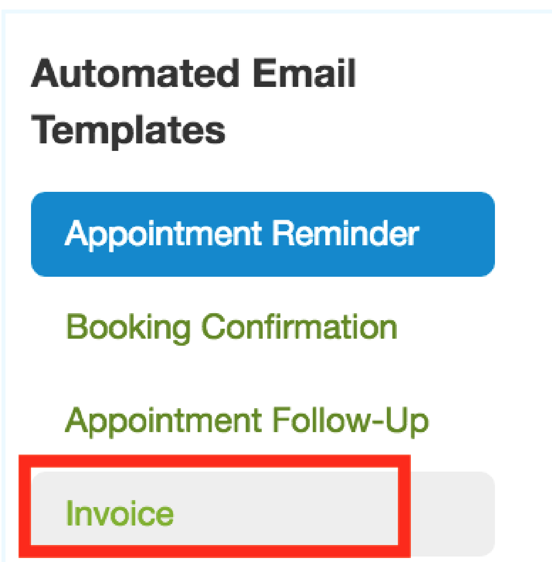
1. Click on the dropdown after your name and click Account Settings



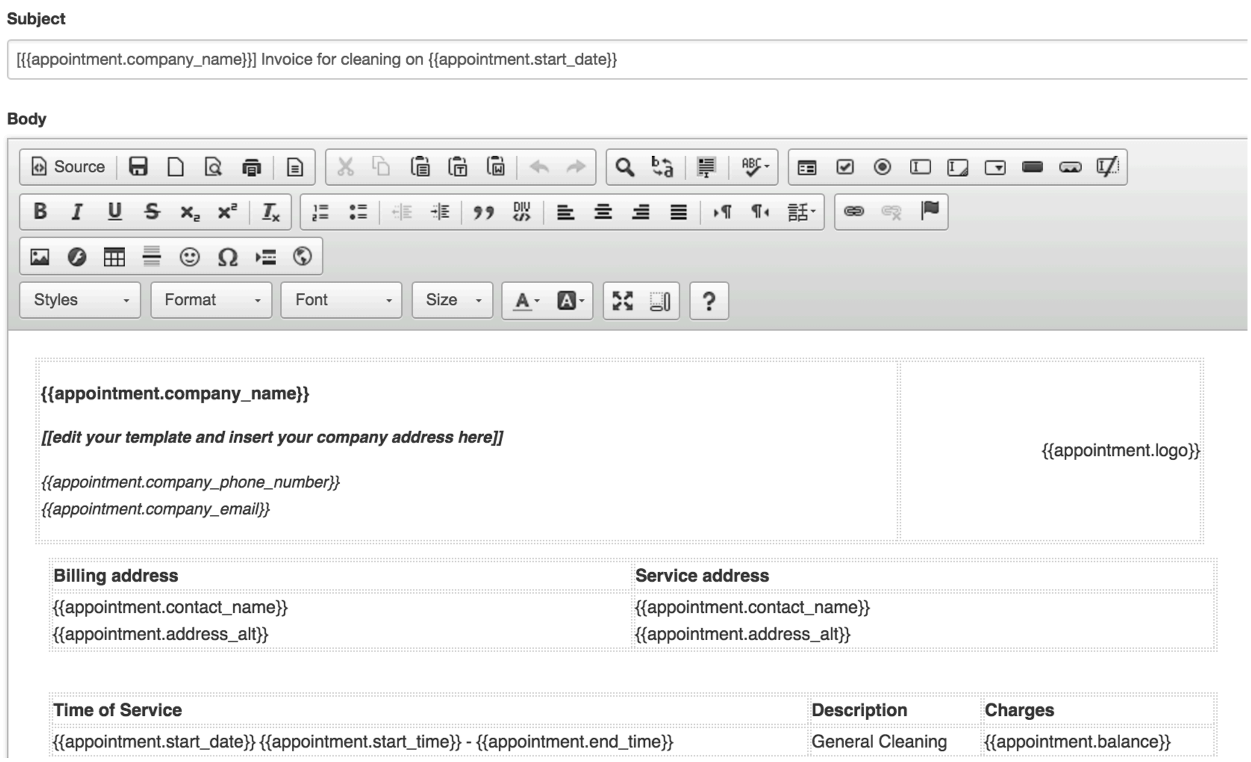
2. Click on the Templates tab's dropdown and click on Automated Email Templates



3. Click on Invoice



4. You'll have the chance to edit the invoice under the Body Section

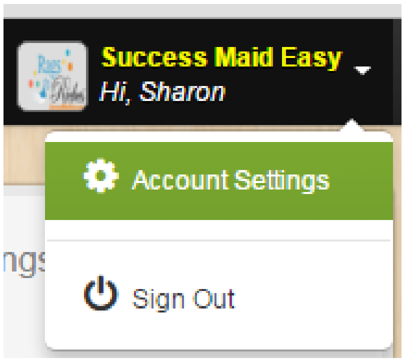


5. Click on Preview to see how your invoice template looks like

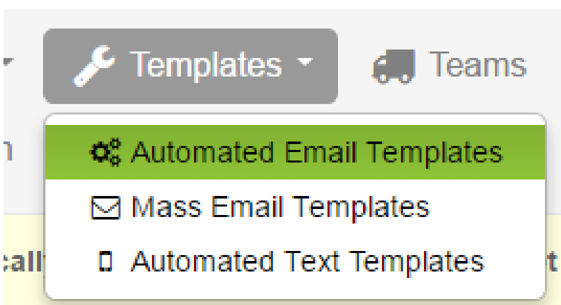
6. Don't forget to click on Save Changes.

How to Edit Come Back Email

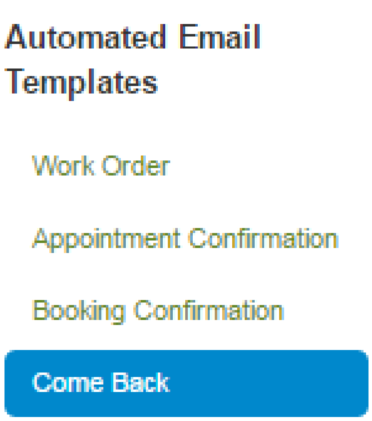
1. Click on the dropdown after your name and click Account Settings



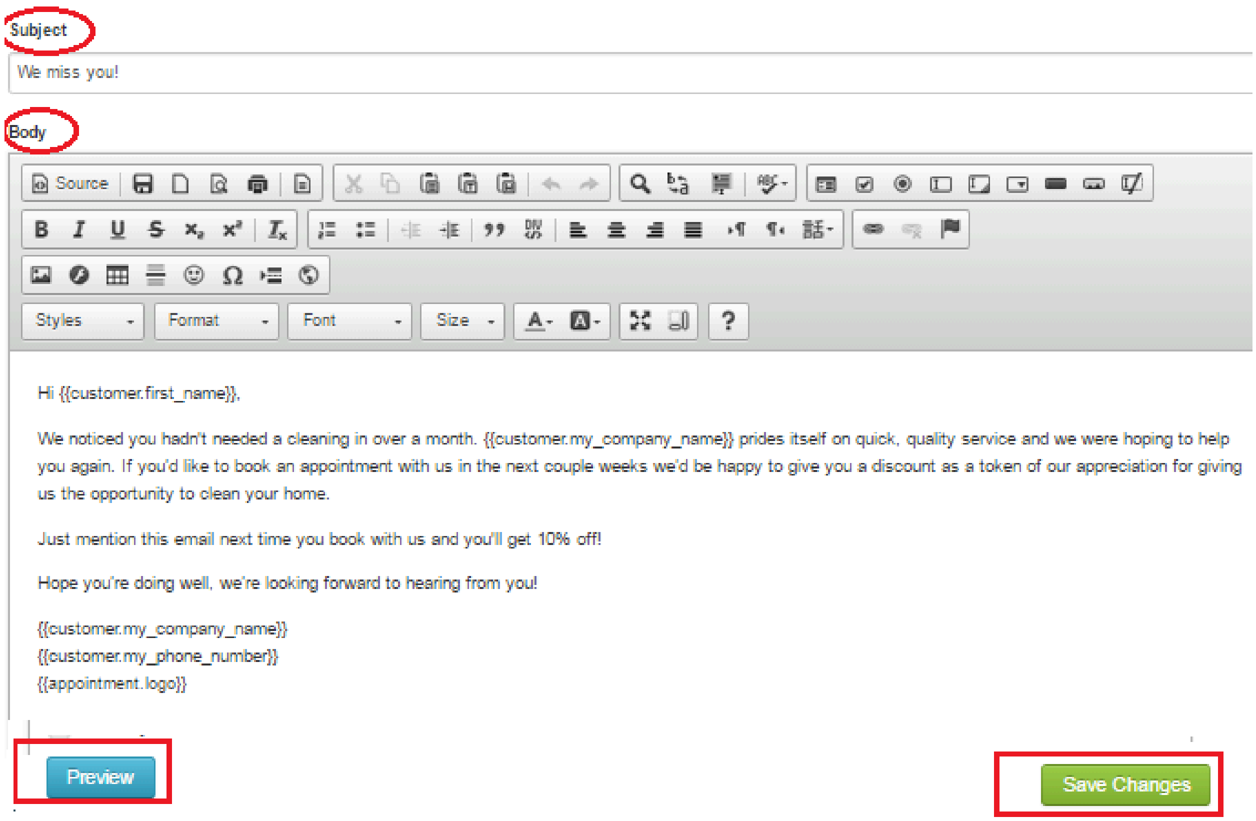
2. Click on the Templates tab’s dropdown and click on Automated Email Templates



3. Click on Come Back



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.

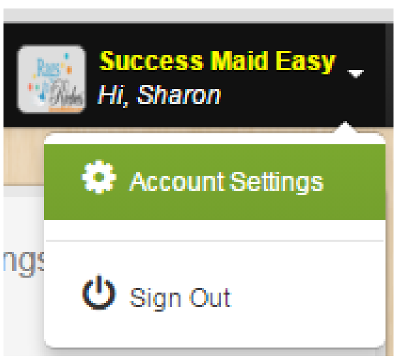


How to Edit Text Templates (Step by Step Instructions)

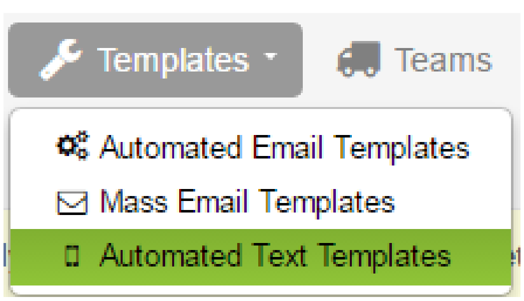
Text templates can be edited. However, keep in mind that text messages are limited to 140 characters only.

How to Edit Text Appointment Reminder

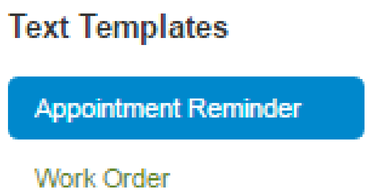
1. Click on the dropdown after your name and click Account Settings



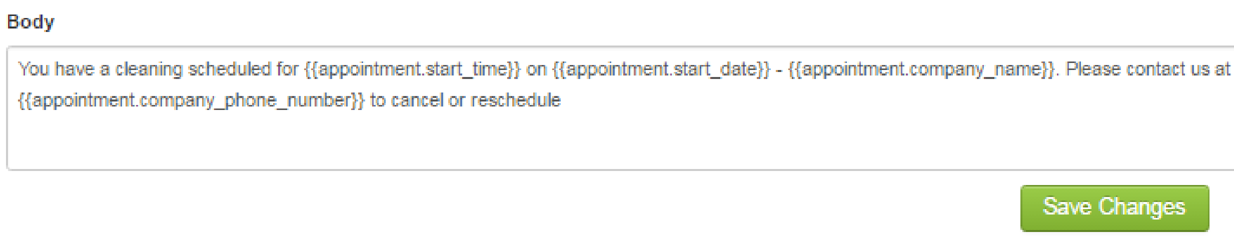
2. Click on the Templates tab's dropdown and click on Automated Text Templates



3. Click Appointment Reminder

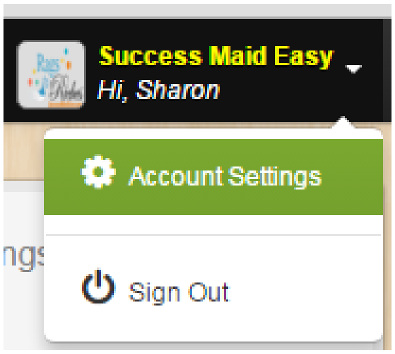


4. Edit the body section as you want. Please keep in mind the 140 characters limit.Click Save Changes

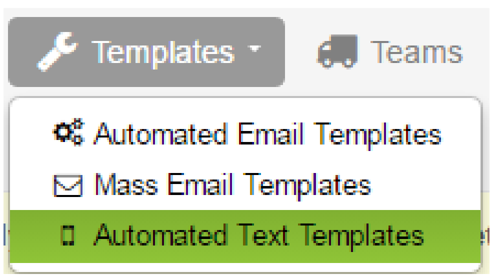


How to Edit Text Work Order

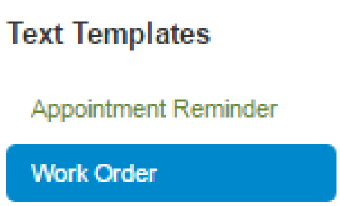
1. Click on the dropdown after your name and click Account Settings



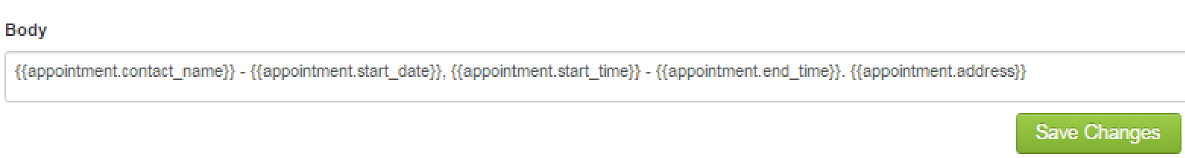
2. Click on the Templates tab's dropdown and click on Automated Text Templates



3. Click Work Order

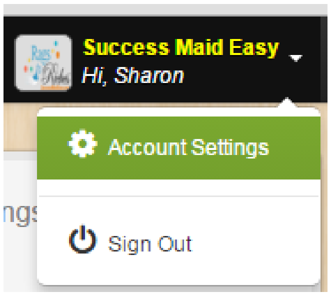


4. Edit the body section as you want. Please keep in mind the 140 characters limit.Click Save Changes

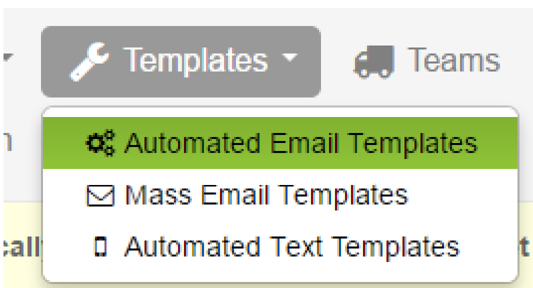


How to Automate Sending of Email Templates

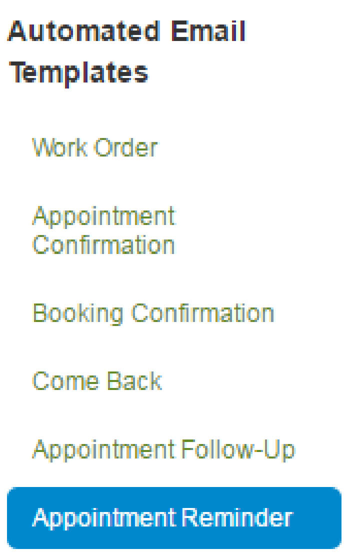
1.Click on the dropdown after your name and click Account Settings



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



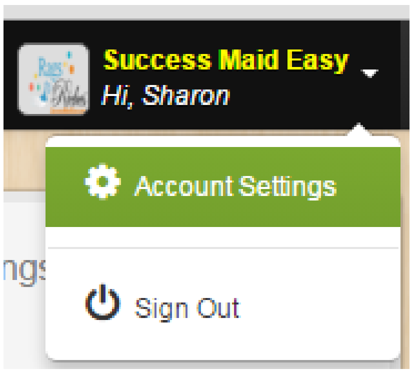
3. Choose the template you want to send automatically.



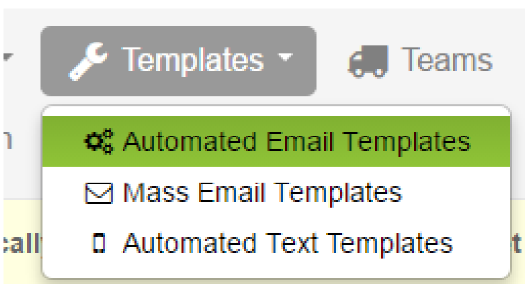
4. Choose when the automated email gets sent out and click Save Changes

How to Automate Sending of Appointment Reminders via Email

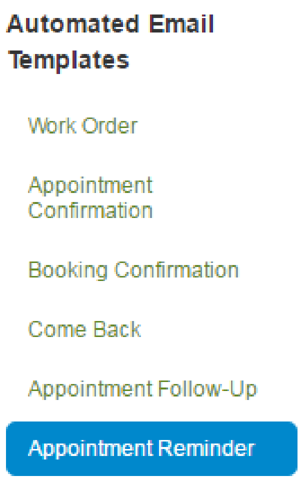
1.Click on the dropdown after your name and click Account Settings



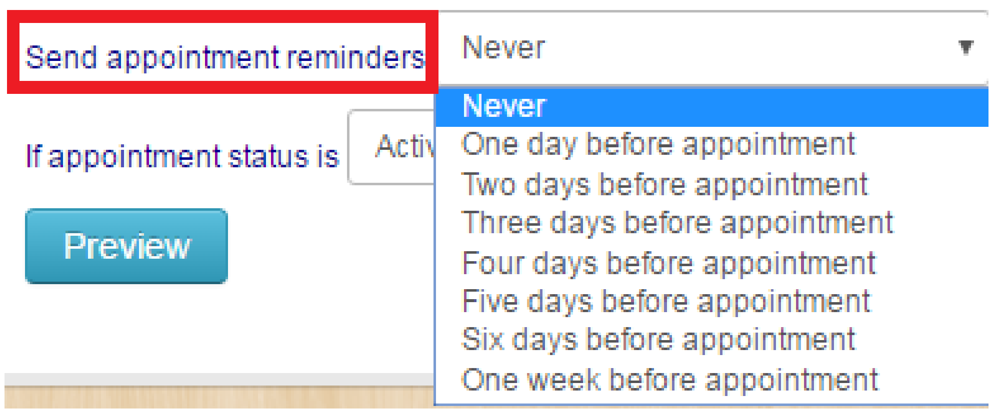
2. From the Templates tab, click on Automated Email Templates



3. Click on Appointment Reminder.



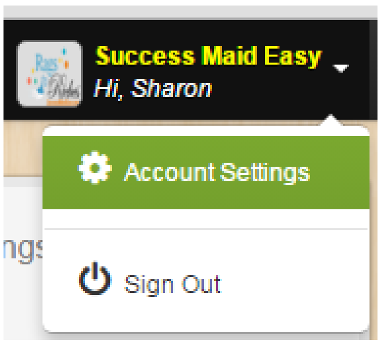
4.Make the necessary changes in the Body section if any. Scroll down until you see “Send appointment reminders”. Click on the dropdown and choose the time you want to send it from the options available. Then click on Save Changes



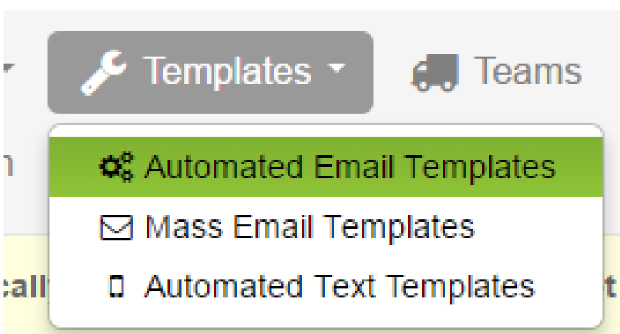
How to Automate Sending of Work Orders via Email:

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

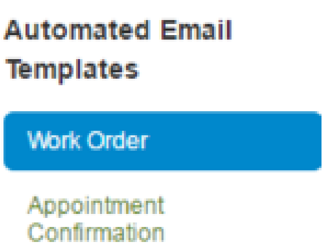
1.Click on the dropdown after your name and click Account Settings



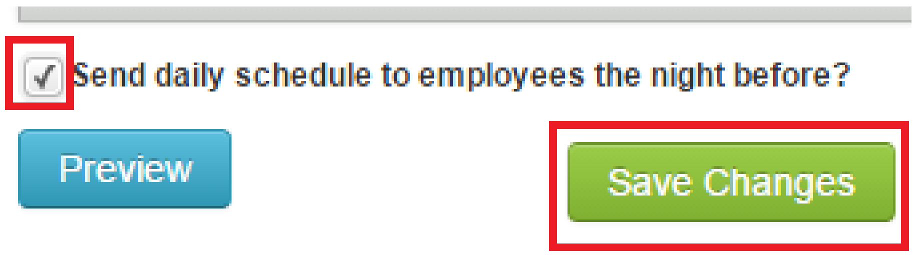
2. From the Templates tab, click on Automated Email Templates



3. Click on Work Order.



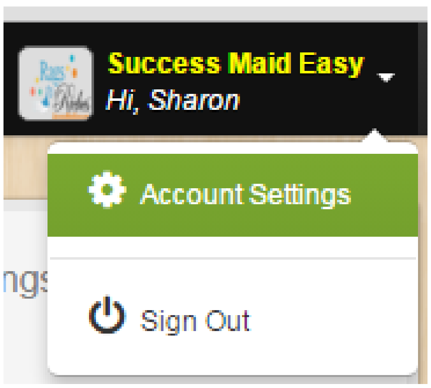
4. Make the necessary changes in the Body section if any.Below the Body section, scroll down until you see “Send daily schedule to employees the night before?”. Tick on the box before it and then Click on Save Changes



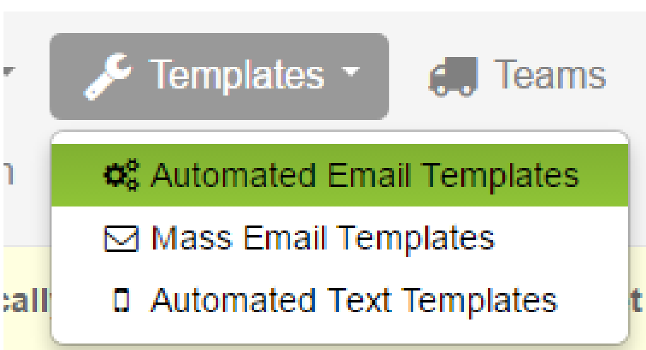
How to Automate Sending of Appointment Follow Up via Email

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

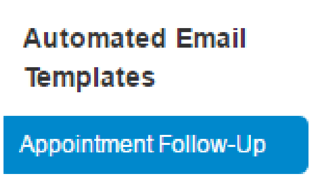
1.Click on the dropdown after your name and click Account Settings



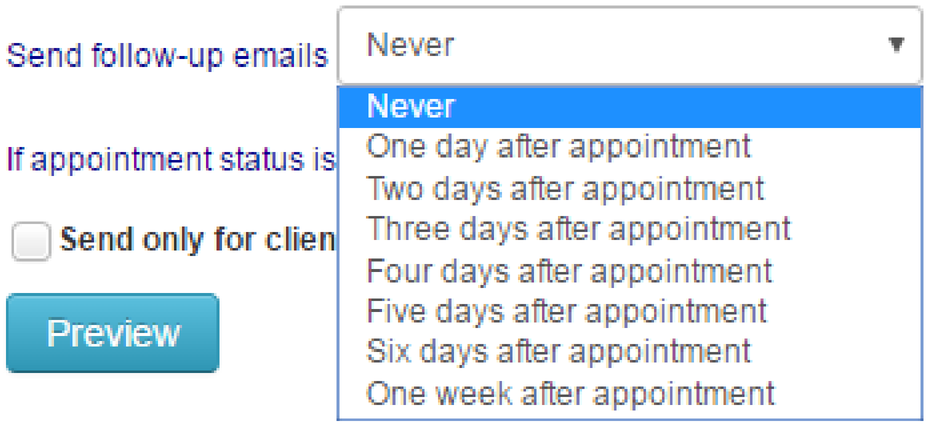
2. From the Templates tab, click on Automated Email Templates



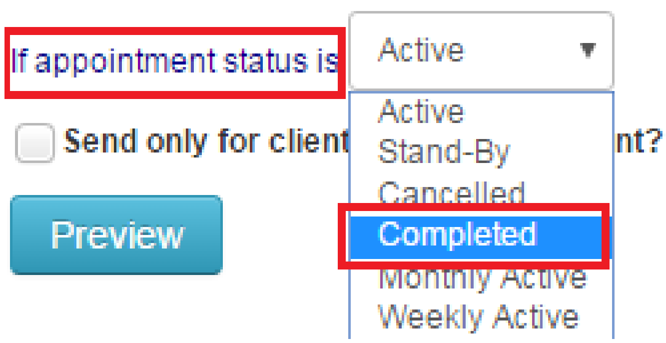
3. Click on Appointment Follow Up



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.



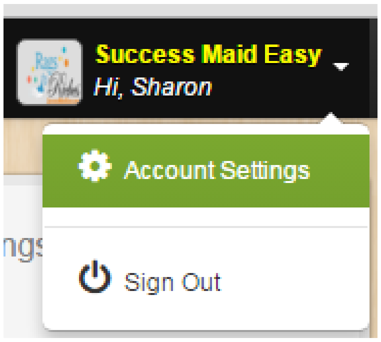
5. On the appointment status, click Completed from the dropdown menu.



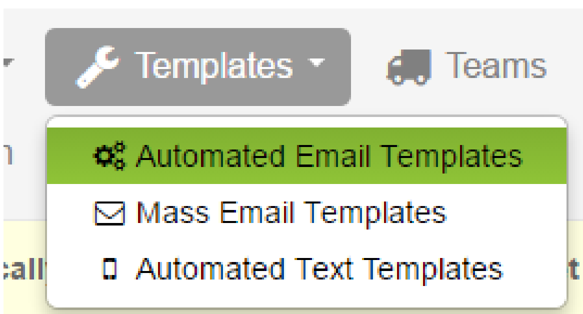
6. You have the option to send appointment follow up for only the first appointment of your client. Tick on the box if that’s what you want otherwise leave it unticked. Lastly, click on Save Changes

How to Automate Sending of Come Back Email

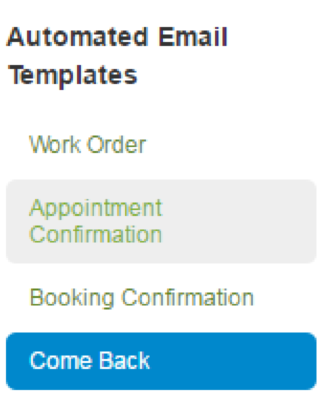
1.Click on the dropdown after your name and click Account Settings



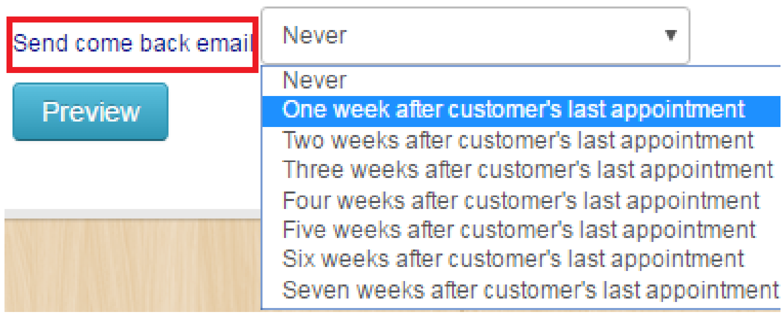
2. From the Templates tab, click on Automated Email Templates



3. Click on Come Back

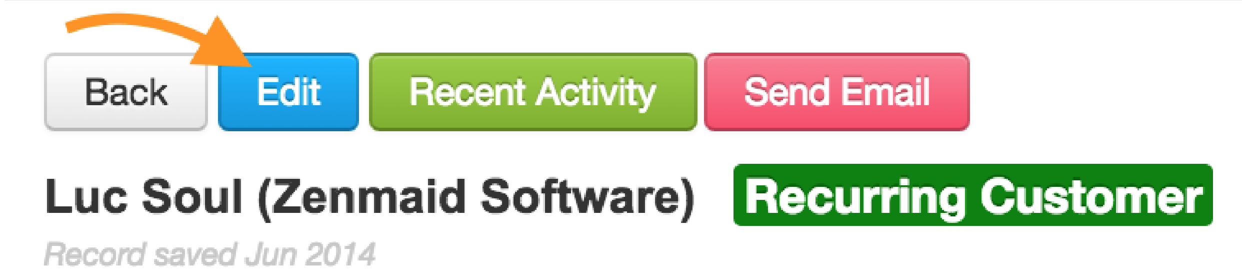


4. In the Body section, you can make edits as needed. Scroll down until you see “Send comeback email”. From the dropdown menu, choose when you want the comeback email sent out. Lastly click on Save Changes.

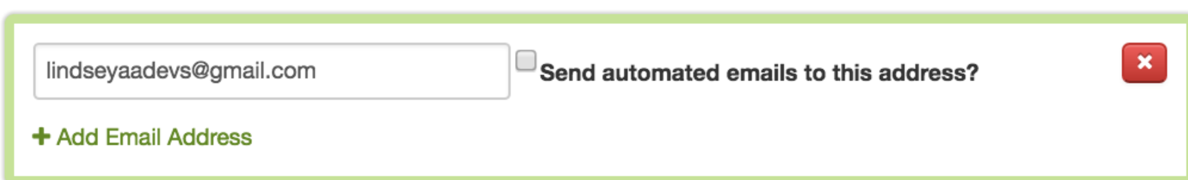


How to Stop Sending Automated Emails For Certain Customers

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



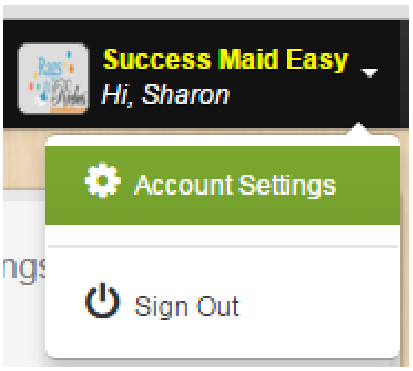
Untick the part that asks "Send automated emails to this address?"



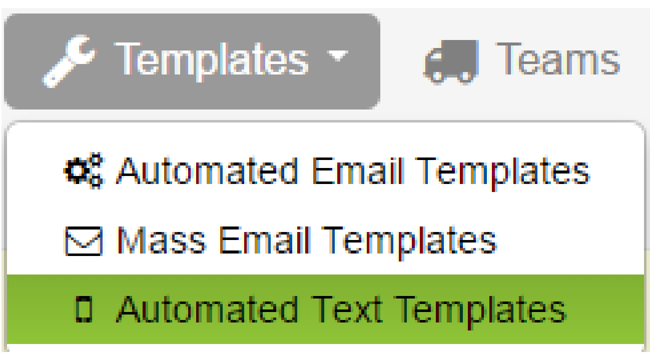
Scroll down and click Save Changes

How to Automate Sending of Text Messages

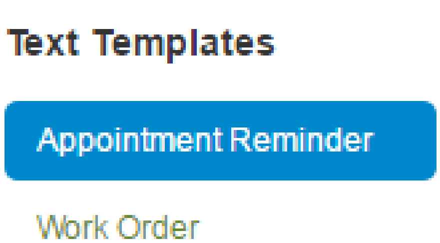
1.Click on the dropdown after your name and click Account Settings



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



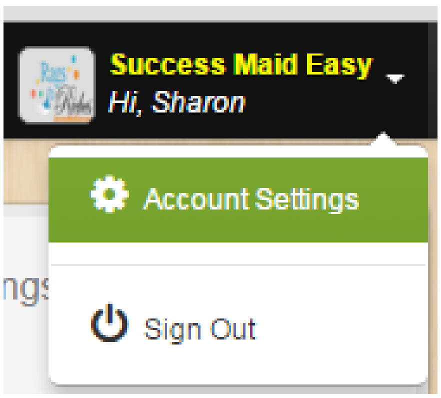
3. Choose the template you want to send automatically.



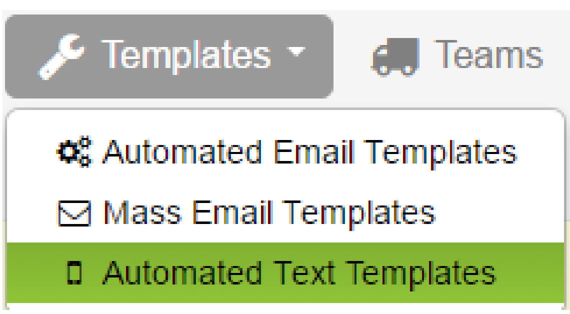
4. Choose when the automated text message gets sent out and click Save Changes

How to Automate Sending of Text Appointment Reminders

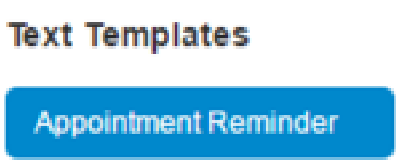
1.Click on the dropdown after your name and click Account Settings



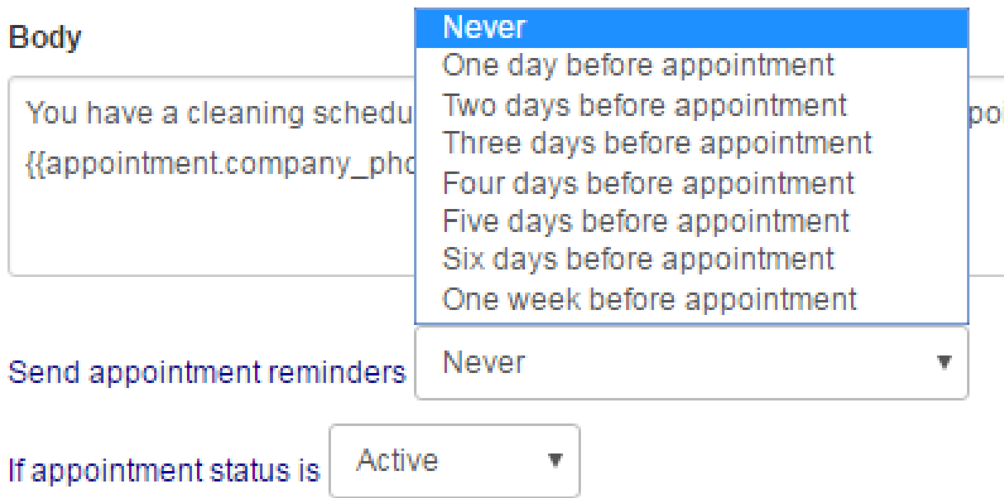
2. From the Templates tab, click on Automated Text Templates



3. Click on Appointment Reminder .

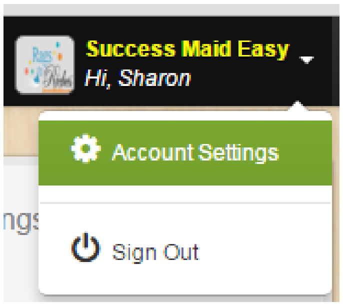


4. Right below the Body section, choose when you want the appointment reminder text message gets sent out. Choose Active for the Status and click Save Changes.

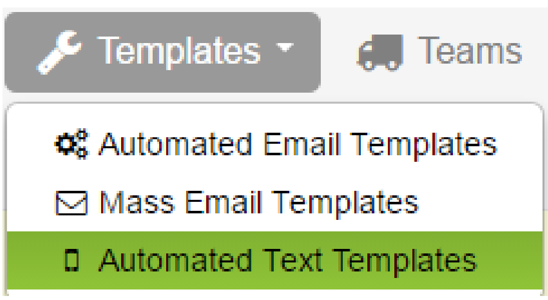


How to Automate Sending of Text Work Orders

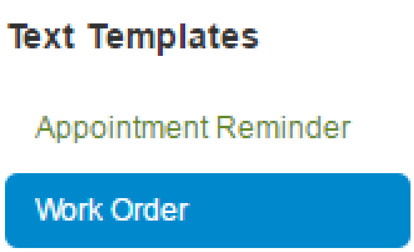
1.Click on the dropdown after your name and click Account Settings



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



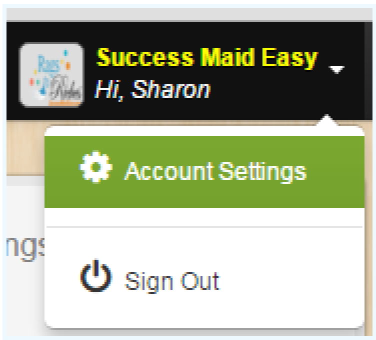
3. Click Work Order



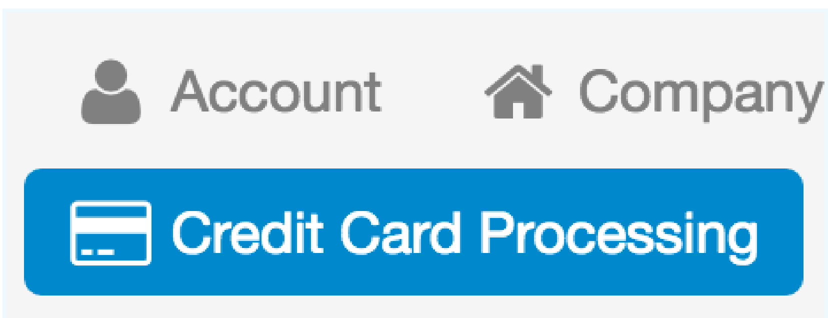
4. Under the Body section tick on the box to text daily schedules to employees the day before and click Save Changes.

How to Integrate Stripe with Zenmaid:

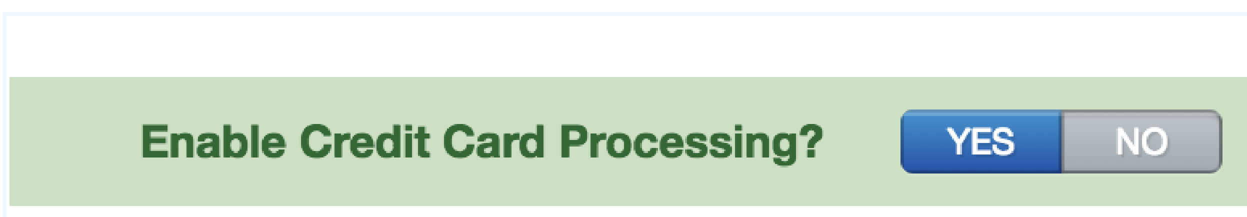
1. Click on the dropdown after your name and click Account Settings



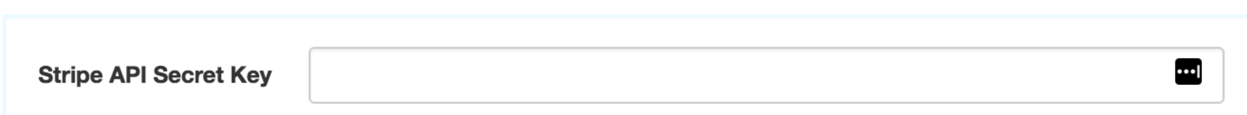
2. Click on Credit Card Processing



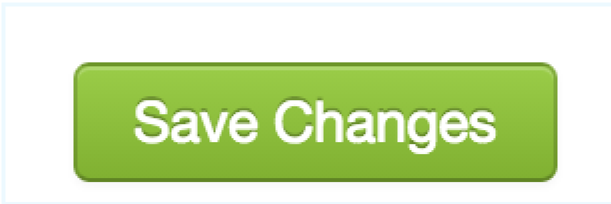
3. Click on the Yes button for Enable Credit Card Processing



4. Enter your Stripe secret API key



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

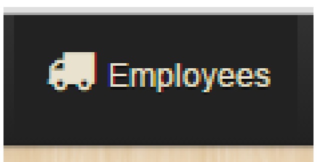

ZENMAID PAYROLL
YOU'LL
LOVE IT

How to Run Payroll

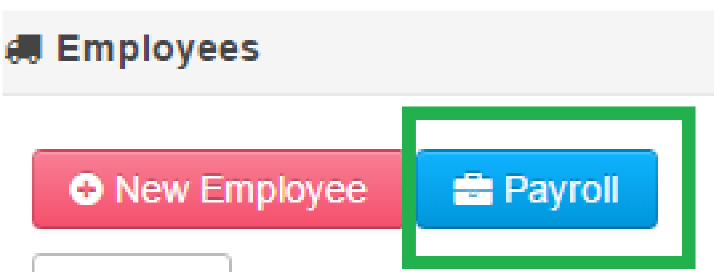
First make sure that you've added all your employees and set up their pay rate. To learn how to add employees, click here. You choose/edit how you compensate your employees (hourly, revenue share, fixed flat rate, or variable flat rate) when you create them (in the employees tab at the top of your screen)

To Run Payroll

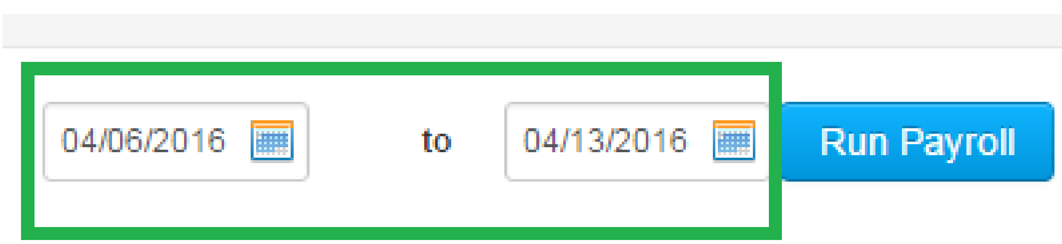
1. Click on the Employees tab at the top of your screen



2. Click on Payroll



3. Set the dates and then click on Run Payroll

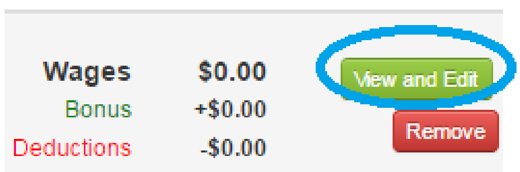


How to Calculate Variable Fixed Rate

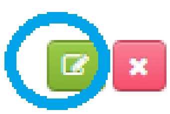
To calculate a variable fixed rate pay:

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)



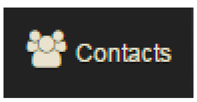
4. A pop up will appear where you can enter your employee's wage (and extras if any). Then click on Save Job Pay

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

Part 1: Create a Fake Job

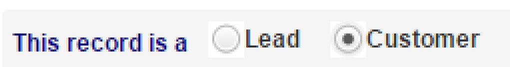
The first part is to create a “fake job”. You need to Create a new customer named Not Available or something along this line. To do this:

1. Click Contact



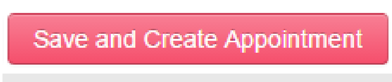
2. Click on + New Contact

3. Tick on Customer

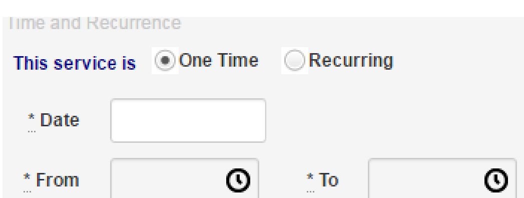


4. Name it Not Available

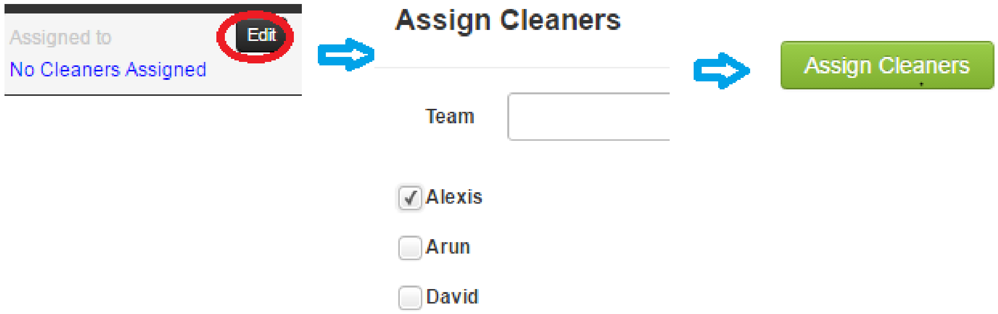
5. Click on Save and Create Appointment



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



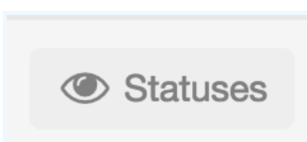
8. Lastly, click on Create Appointment

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

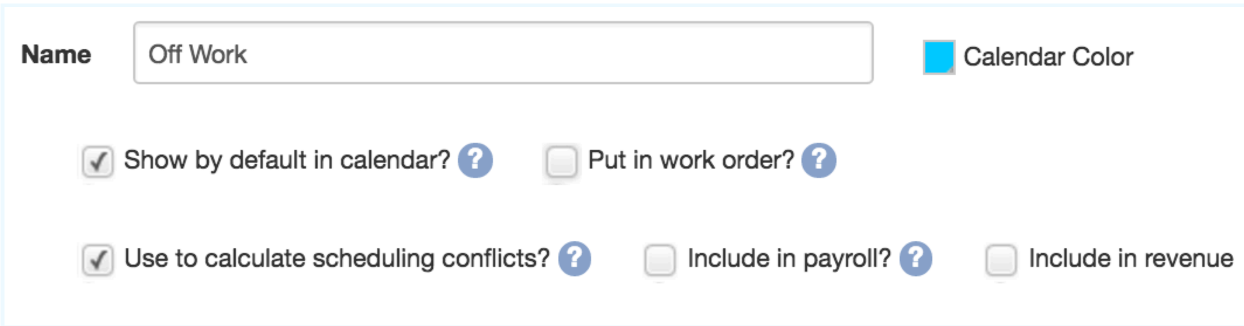


2. Click on + Add Status

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

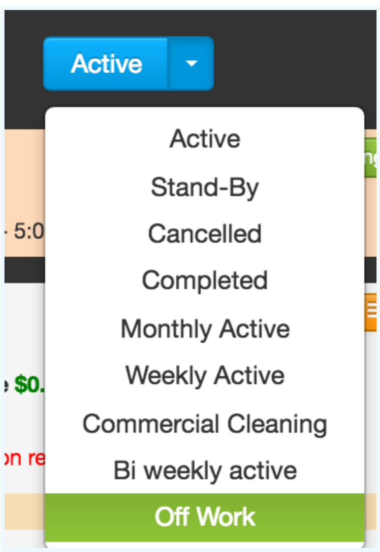
- UNTICK the box that asks include in payroll.

- 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.



4. Then click on Save Changes

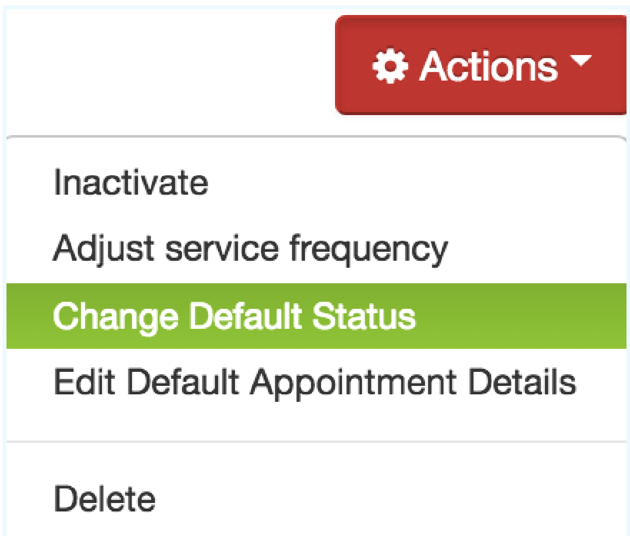
5. Go back to your calendar, click on the “fake job” and on the sidebar pop up, change the status from Active to the new status Off Work. And do the same every time you create a fake job.



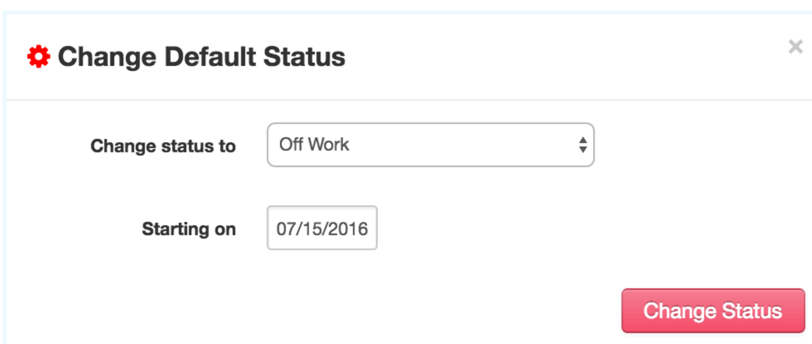
Editing the Status of Recurring "Fake Jobs"

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



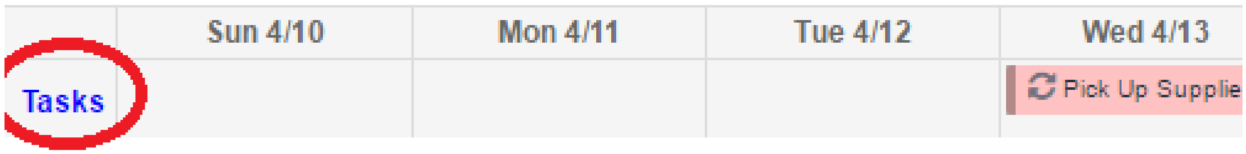
3. From the pop up, change status to Off work and click on Change Status



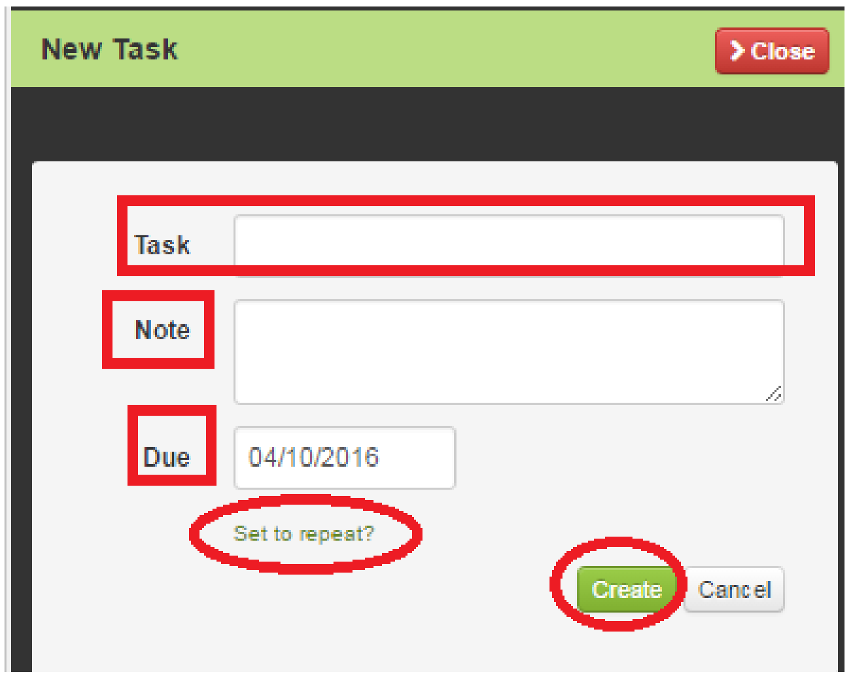
4. You should get a confirmation of the status change you made

How to Create Tasks

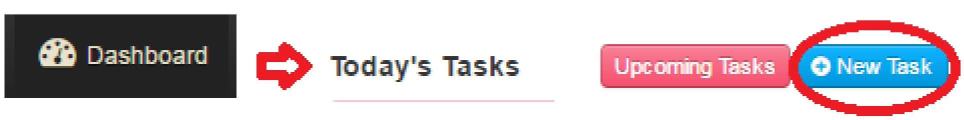
1. From your calendar, there is a row for tasks at the very top. Click on it



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.

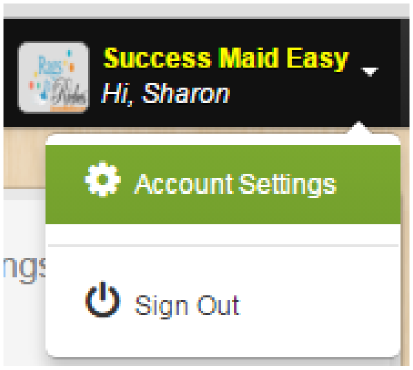


Another method is by clicking on Dashboard. Scroll down until you see Today’s Tasks. Then click on + New Task

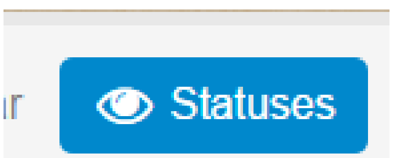


How to Create and Customize Appointment Statuses

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

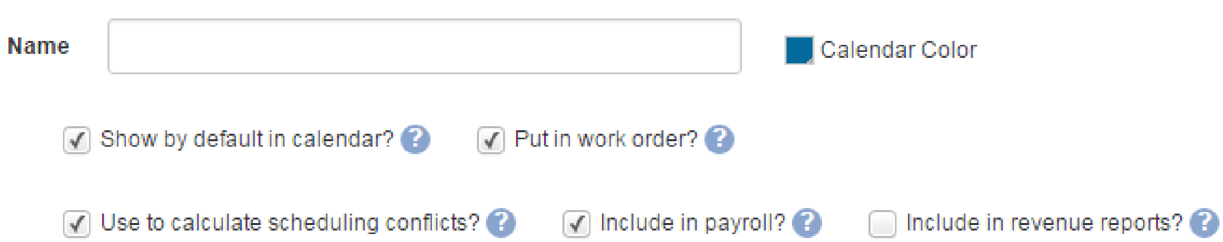


2. Click on Statuses



3. Click on Add Status

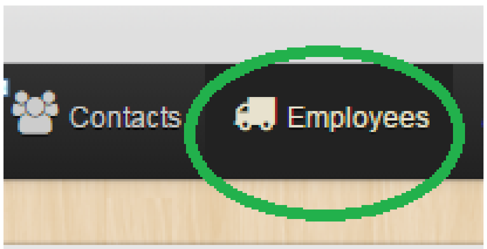
4. Give the new status a name and tick on the options you want for the status as you like and choose it's calendar color



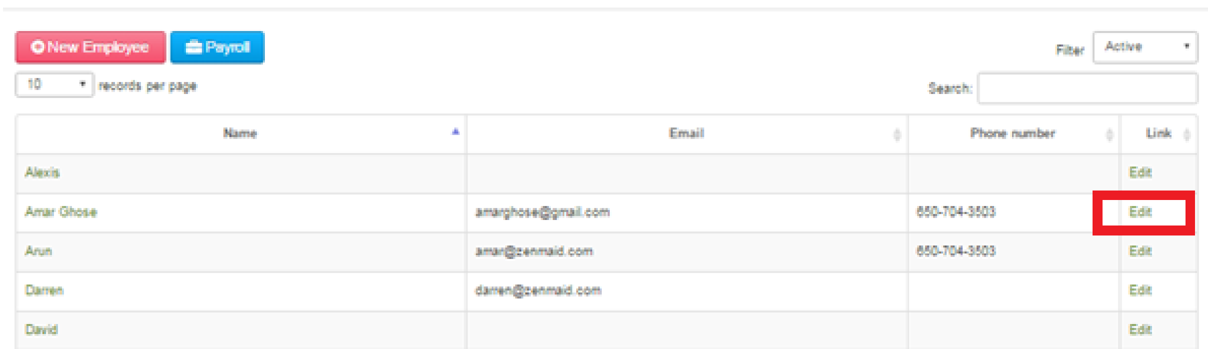
5. Lastly, click on Save Changes

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



3. Check the box “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

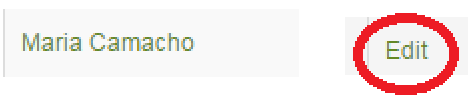
How to Give Your Employees Access to the Clock in & Out Feature

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

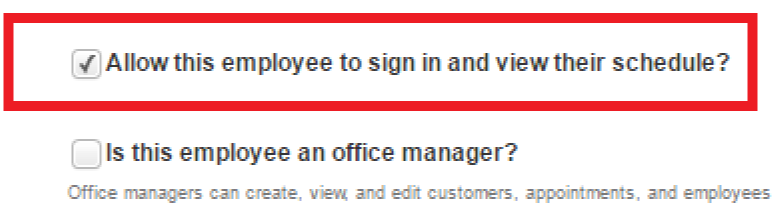
1. Click on Employees

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.



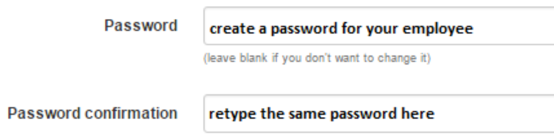
3. On the next page, type in your employee's email address if there isn't one yet

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



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

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.



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

7. Lastly click on Save Changes

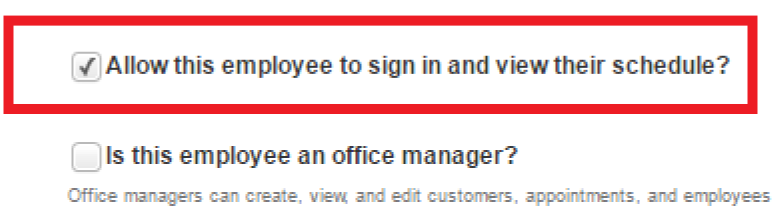
For New Employees or Those You Are Just Adding in the System

1. Click on Employees

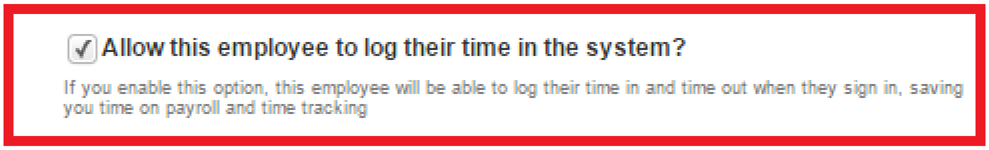
2. Click + New Employee

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

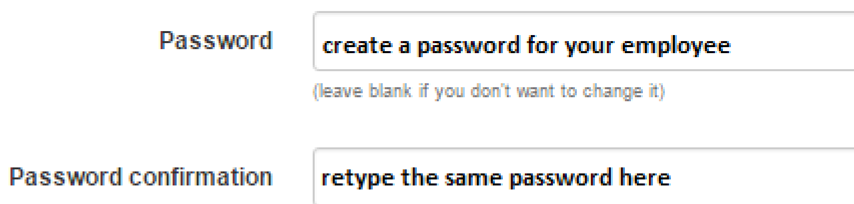
4. Tick on the box "Allow this employee to sign in and view their schedule"



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



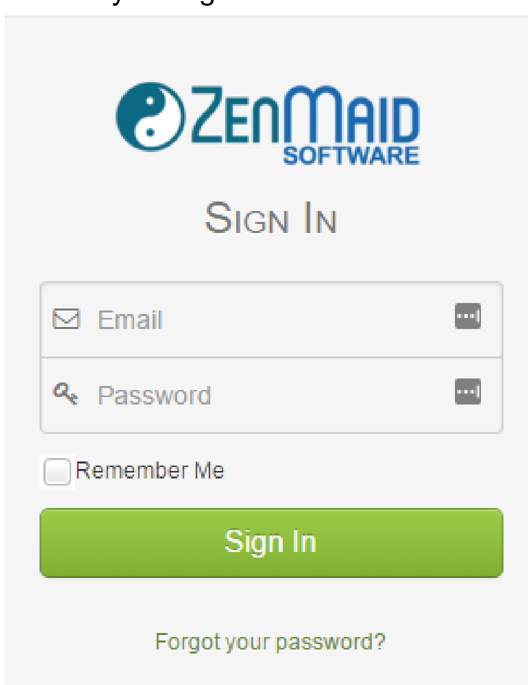
6. Create a password for your employee and type it in the Password box and then reenter the same password on the provided text box below to confirm.



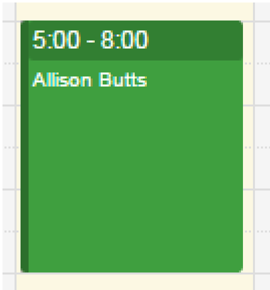
7. Lastly, click on Create Employee

How to Clock in and Out of Zenmaid

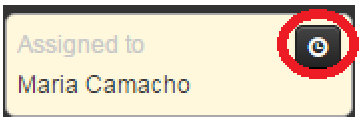
1. Go to the sign in page https://app.zenmaid.com/sign_in
2. Enter your log in details



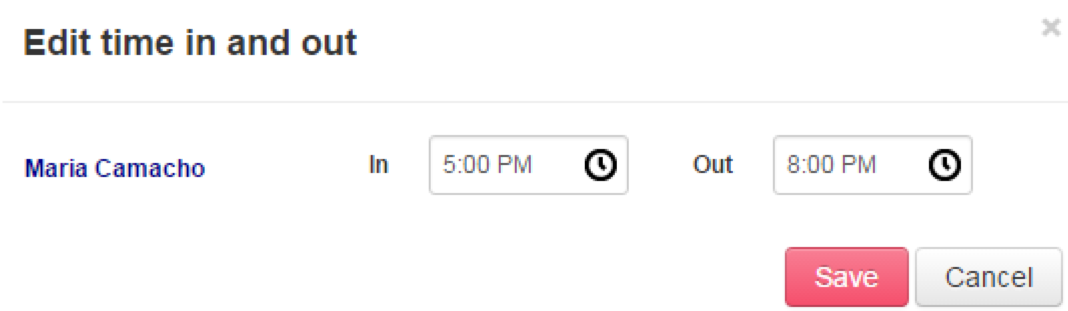
3. On the next page, click on the appointment



4. On the sidebar pop up, scroll down and click the clock icon



5. Edit your clock in and out times as necessary and then click Save.

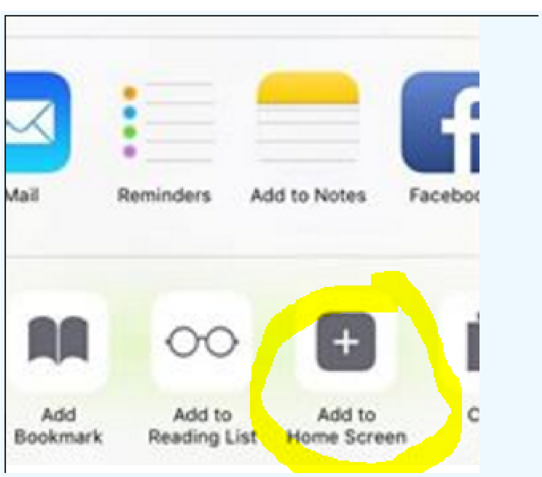


How to Create a Shortcut for Zenmaid LogIn on Your Mobile Devices

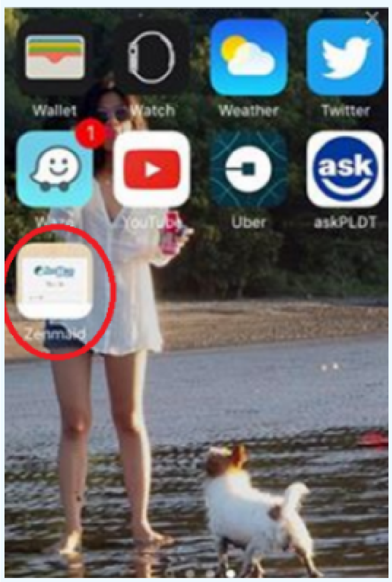
For iPhone users

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

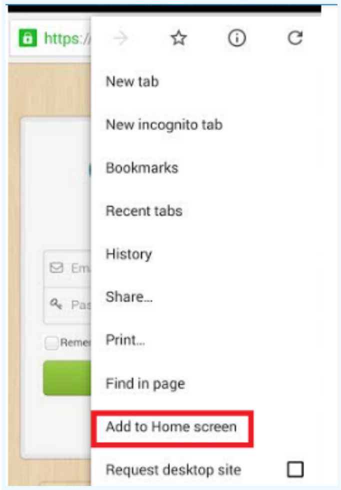


For Android Users

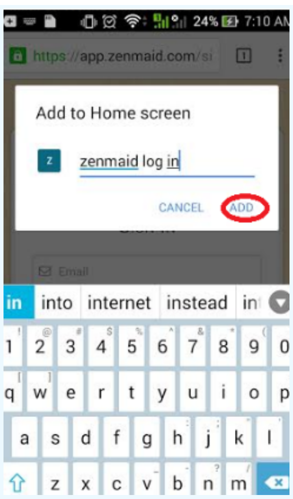
1. Open Google Chrome go to zenmaid.com and click on log in.

2. At the top right of the screen, click on the 3 dots

3. Then click on Add to Homescreen



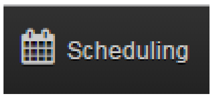
4. On the pop up, type in the name (Zenmaid Log in) and click on Add



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

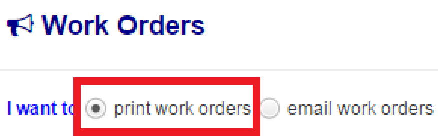
How to Print Work Orders

1. Click on Scheduling



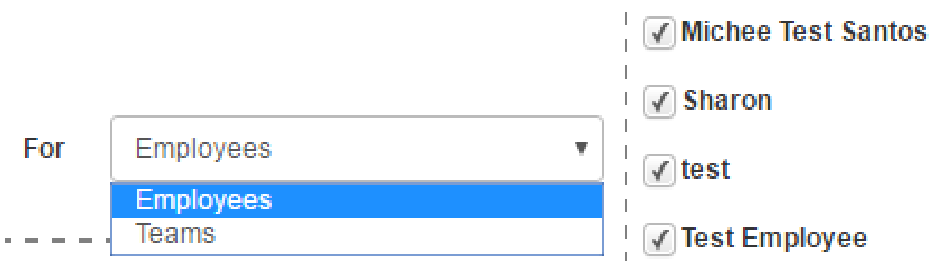
2. Click on Work Orders

3. Tick on print work orders



4. Modify the dates

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

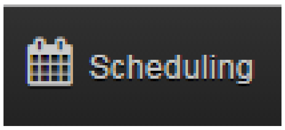


6. If you want to print just the work orders/schedules without grouping by team or employee, scroll down and tick “print schedule without grouping by team or employee”

7. Lastly, click Print Work Orders

How to Print Route Sheets

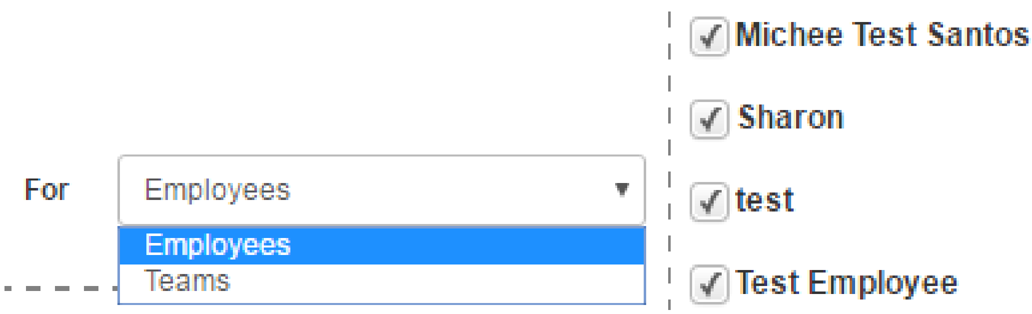
1. Click on Scheduling



2. Click on Route Sheets

3. Modify the dates

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

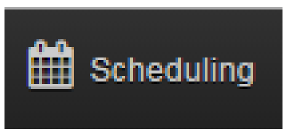


5. If you want to print just the route sheets without grouping by team or employee, scroll down and tick "print schedule without grouping by team or employee"

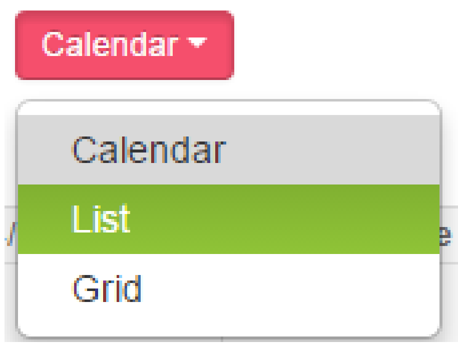
6. Click on Generate Route Sheets

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



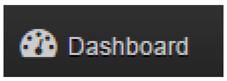
3. Modify the type of appointments you want to see

4. Modify the dates and click on Fetch Appointments

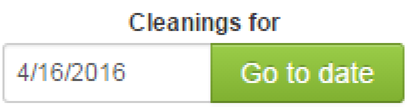
5. You'll see the appointments listed as this

How to View Appointments for the Day via Dashboard

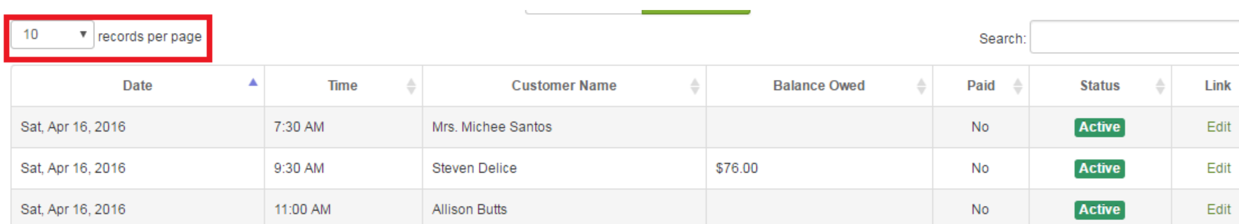
1. Click on Dashboard



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



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



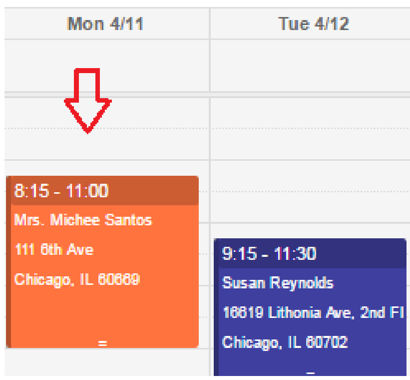
Date	Time	Customer Name	Balance Owed	Paid	Status	Link
Sat, Apr 16, 2016	7:30 AM	Mrs. Michee Santos		No	Active	Edit
Sat, Apr 16, 2016	9:30 AM	Steven Delice	$76.00	No	Active	Edit
Sat, Apr 16, 2016	11:00 AM	Allison Butts		No	Active	Edit

Updating Outstanding Balance

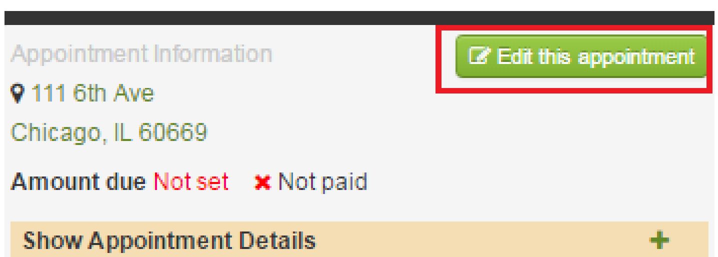
The system updates balances everyday at midnight and any changes made on the appointments are reflected in the customer's balance the following day.

How to Reflect Unpaid Balance on Appointments

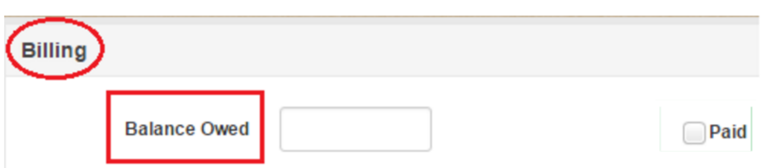
1. Click on the appointment



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.

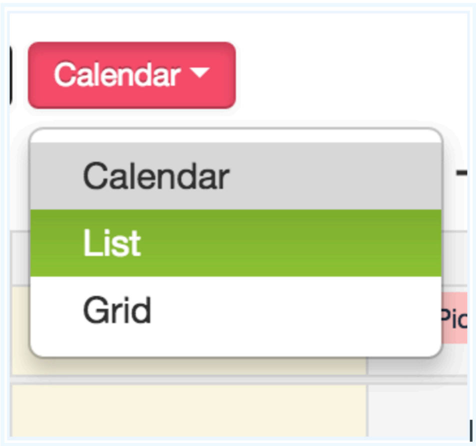


4. Click Save Changes

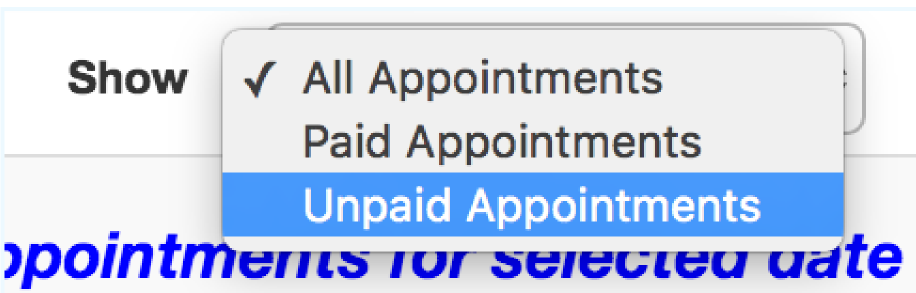
2 Ways to Clear Balances or Mark Them as Paid

How to Mark Unpaid Appointments in Bulk

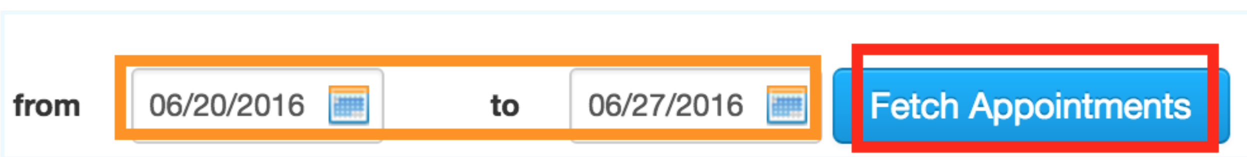
1.Click on the dropdown arrow beside Calendar and click on List



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

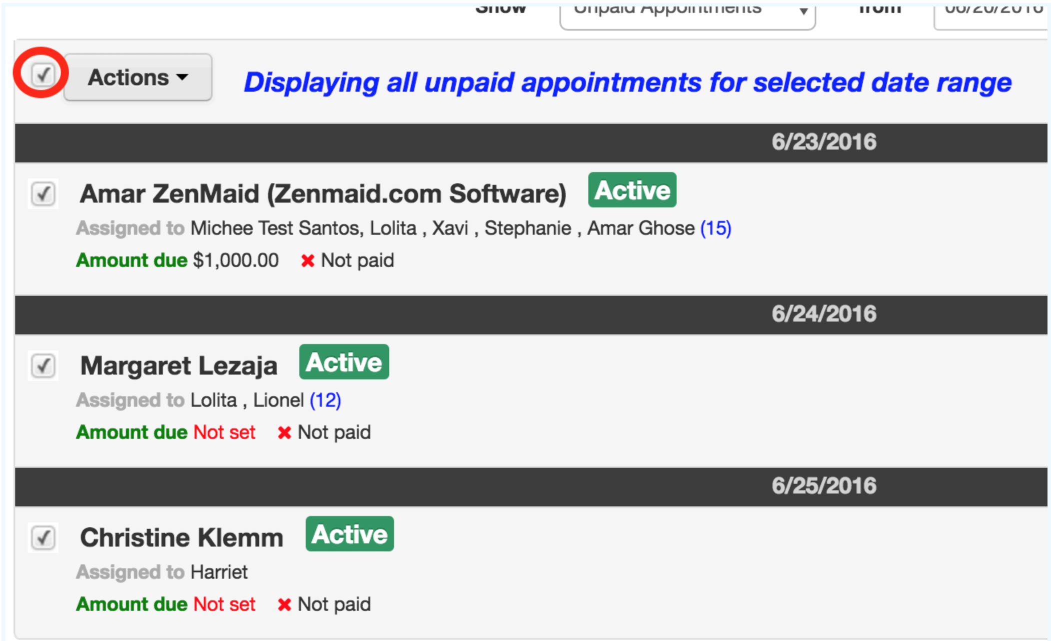


3. Modify the dates by clicking on the from and to calendars then click on Fetch Appointments



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

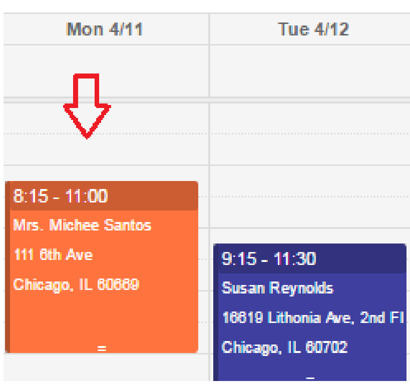
5. Tick the box beside Actions to select all unpaid appointments. If you don't want to do that, you can manually tick the appointments you want to mark as Paid



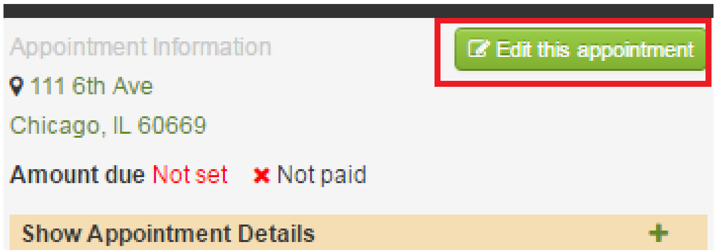
6. Click on the dropdown arrow after Actions and click on Mark as Paid. This will mark all the selected unpaid appointments as Paid.

How to Mark Appointments Paid One by One

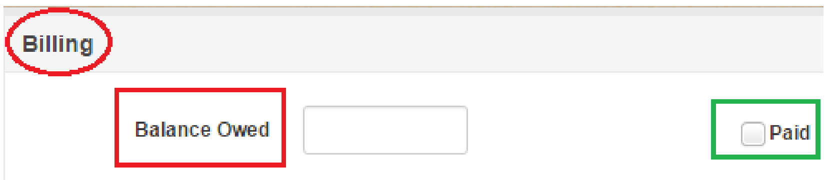
1. Click on the appointment



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



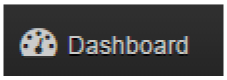
3. On the next page, scroll down until you see Billing and tick on Paid



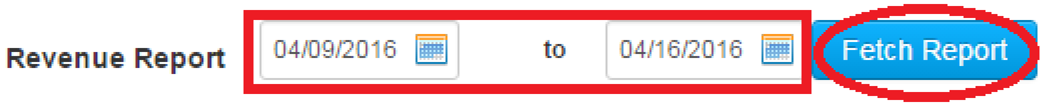
4. Click Save Changes

How to Fetch Revenue Reports

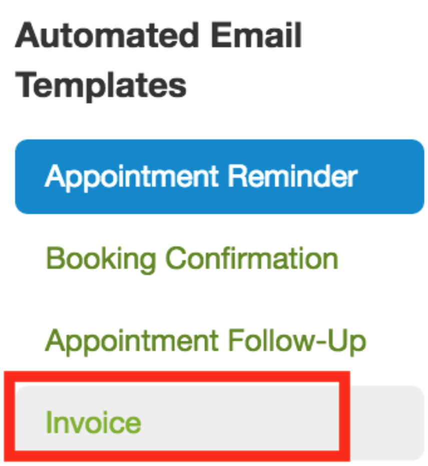
1. Click on Dashboard



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



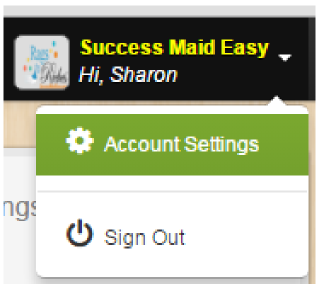
IMPORTANT NOTE: You'll have to manually change the dates every time you go out of the dashboard to fetch the Revenue report you want



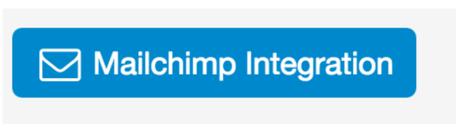
How to Connect to Mailchimp to Send Mass Emails

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

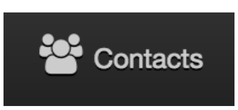


2. click on Mailchimp Integration

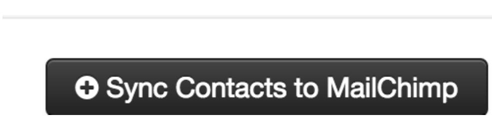


3. Click Connect to Mailchimp

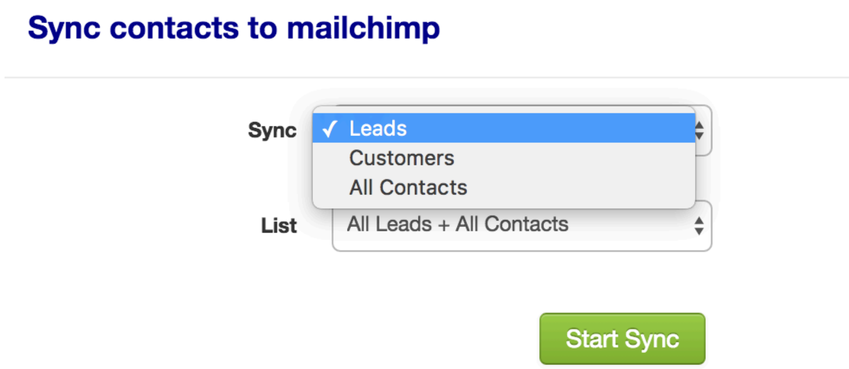
4. Go to your Contacts page



5. Click on the sync contacts to Mailchimp button



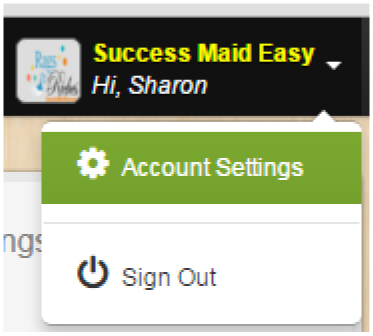
6. On the pop up bar, choose what you want to sync (ex: just leads, just customers or both) then click Start sync



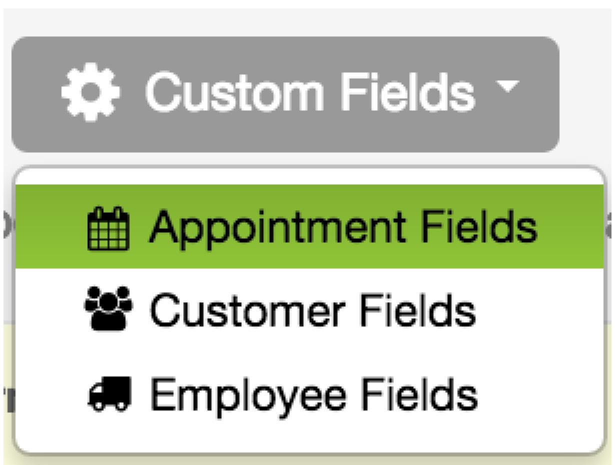
Once done, you can log in on your Mailchimp and start sending the mass email from there.

How to Add a Custom Field for Appointments

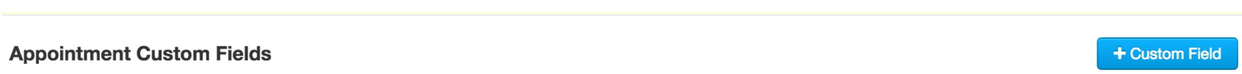
1. Click on the dropdown after your name and click Account Settings



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