

# Kaseya BMS

## Business Management Solution

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### Evaluation Quick Start Guide



Thank you for evaluating BMS by Kaseya. As part of the trial process, we have included this Quick Start Guide – designed to help you navigate through the most common activities in the solution. Feel free to review and use these instructions to assist you in the trial of your BMS Implementation.

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# Adding an Employee into HR folder

1. Go to **Admin Module** → **HR** → **Employees** → **New**

The screenshot shows the BMS Admin interface. The top navigation bar includes Home, Service Desk, CRM, Finance, Projects, Reports, Inventory, HR, and Admin. The left sidebar shows the user profile for Mary Jones and a menu with Admin Dashboard, My Company, Business Process, HR, Departments, Job Titles, Skill Categories, and Employees. The main content area shows the 'Employees' page with a search bar containing 'Employees' and a green arrow pointing to it. Below the search bar are buttons for 'New (N)', 'Search (S)', 'Clear Search (C)', and 'Export'. A table titled 'Records Found: 6' lists employee details.

|  | User Name  | Employee ID | First Name | Last Name | Email Address              | Job Title       | Department         | Active |
|--|------------|-------------|------------|-----------|----------------------------|-----------------|--------------------|--------|
|  | kfeathers  | 4           | Kirk       | Feathers  | kirk.feathers@kaseya.com   | Project Lead    | Project Management | Yes    |
|  | Mary_Jones | 100         | Mary       | Jones     | mjones@reliablemsp.com     | Administrator   | Administration     | Yes    |
|  | JMarkham   | 2           | John       | Markham   | jmarkham@reliablemsp.com   | Project Manager | Support Services   | Yes    |
|  | tnicholson | 6           | Tm         | Nicholson | tnicholson@reliablemsp.com | Project Lead    | Project Management | Yes    |
|  | msmith     | 3           | Mark       | Smith     | msmith@reliablemsp.com     | Project Lead    | Support Services   | Yes    |
|  | dtwine     | 5           | Donti      | Twine     | dtwine@reliablemsp.com     | Project Manager | Project Management | Yes    |

2. Fill in, and select from drop-down menus, information in all required fields indicated by \*

The screenshot shows the 'New Employee' form. At the top, there are navigation links for Home, Employees, and New Employee, and buttons for 'Save (S)', 'Save and Add New', and 'Cancel (C)'. The form contains several fields with asterisks indicating they are required:

- User Name: \* (Text input: JBlake)
- First Name: \* (Text input: Joe)
- Last Name: \* (Text input: Blake)
- Emp ID: \* (Text input: 7)
- Email Address: \* (Text input: jblake@reliablemsp.com)
- Job Title: \* ⓘ (Dropdown menu: Project Manager)
- Department: \* ⓘ (Dropdown menu: Project Management)
- Manager: \* (Dropdown menu: Mary Jones)
- Employment Type: \* (Dropdown menu: Full Time)
- Employee Roles: \* ⓘ (Dropdown menu: Project Manager)
- Security Roles: \* (Dropdown menu: Project Manager)
- Location: \* (Dropdown menu: New York Office)

3. Click the **Save** button.  
BMS will automatically send an email with login credentials to the new user.

## Adding Roles to an Employee Record

1. Go to **Admin** → **HR Folder** → **Employees** (Open an Employee Record)

The screenshot shows the 'Edit Employee: Mary Jones' page in the Kaseya BMS interface. The 'Employee Roles' tab is selected. The table below lists the roles and their status:

| ROLE NAME              | HAS ROLE                            | DEFAULT                          |
|------------------------|-------------------------------------|----------------------------------|
| Administration         | <input type="checkbox"/>            | <input type="radio"/>            |
| Sr Level Technician    | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> |
| Jr Level Technician    | <input type="checkbox"/>            | <input type="radio"/>            |
| Database Administrator | <input checked="" type="checkbox"/> | <input type="radio"/>            |
| Consultant             | <input checked="" type="checkbox"/> | <input type="radio"/>            |
| Project Manager        | <input checked="" type="checkbox"/> | <input type="radio"/>            |
| DBA                    | <input type="checkbox"/>            | <input type="radio"/>            |

2. Add the Role(s) this employee has.
3. Set the Default Role. (*This role will appear when the employee enters time on Ticket or Task*)

**Note:** You can change role rate if you need to charge another client a different rate for Time and Material work. You create a NEW Time and Material Contract in the Finance Module. No need to create too many roles

## Creating an Account in the CRM Module

In order to create contracts and open support tickets and manage projects for our customers you need to enter those customers into the CRM Module.

1. Go to **CRM** → **Accounts** Click on the **New** button.

The screenshot shows the CRM interface with the 'Accounts' section selected in the sidebar. A green arrow points to the 'New (N)' button. Below the buttons, a table displays a list of accounts.

|  | Account Name                | Account Type | Account Manager | Created By   | Active           |
|--|-----------------------------|--------------|-----------------|--------------|------------------|
|  | Berkshire Bank              | Client       | Mary Jones      | Mary Jones   | <span>Yes</span> |
|  | Hamilton County Court House | Client       | Mary Jones      | Mary Jones   | <span>Yes</span> |
|  | Harris Law Firm             | Client       | Mary Jones      | Mary Jones   | <span>Yes</span> |
|  | Kaseya                      | Client       | Global Admin    | Global Admin | <span>Yes</span> |

2. Fill in, and select from drop-down menus, information in all required fields indicated by \*

The screenshot shows the 'New Account' form with the following fields and values:

- Account Name: ABC Marketing Firm
- Account Type: Client
- Business Type: General
- Website: www.abcmarketingfirm.com
- Acquired Date: 10/1/2014
- Credit Limit: \$0
- Default Currency: US Dollar
- Net Days: 0
- Account Manager: Mary Jones
- Description: The Tri-States premier marketing firm specializing in . . .

3. Click the **Save** button.

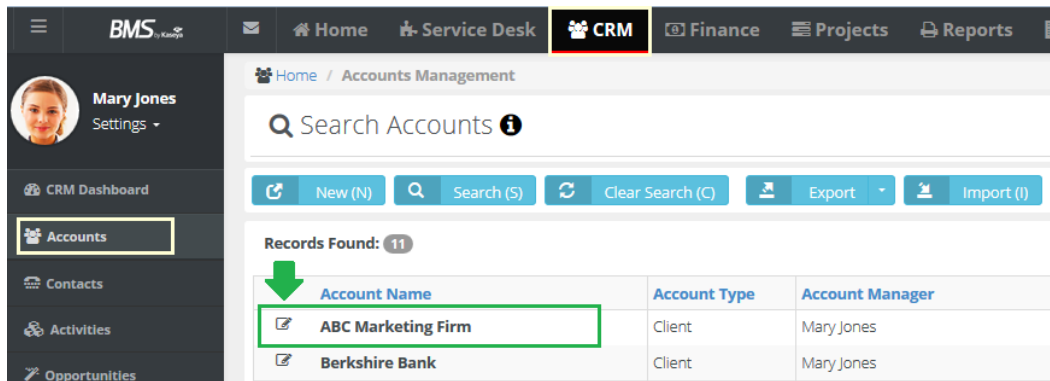
**Note:** You can add the address information at any time, but for Quick Start purposes, you have enough information now to use this account in testing.

## Adding a Contact in the CRM Module

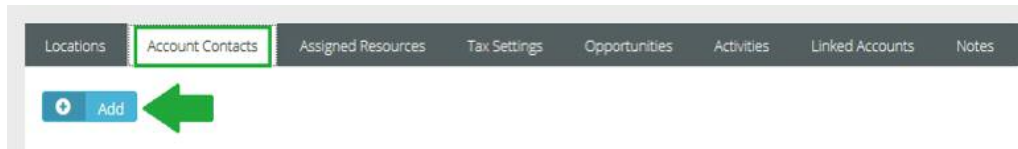
Now that we created an Account, let's add a contact to this Client record. Why?

- You open Tickets for contacts when they call looking for support
- Contacts send emails to support@yourcompany.com
- Email notifications are auto sent to contacts (example – close a ticket)
- Quotes and Invoices are sent to Contacts

1. Go to **CRM** → **Accounts** Open the Account you just created (example here is ABC Marketing)



2. Look at the lower section of **Account** and click **Account Contacts** and click on the **Add** button.



3. Fill in, and select from drop-down menus, information in all required fields indicated by \*

**Company Contact**

Account Contact    Custom Fields

First Name: \*     Middle Name:     Last Name: \*

Location Name:     Job Title:

Phone Type:     Phone: \*     Status:  Active  InActive

Email Type:     Email: \*     Point of Contact:  YES  NO

Has Client Portal Access:  YES  NO    Receive Invoices:  YES  NO

4. Click the **Save** button.

# Creating a New Ticket in the Service Desk Module

Tickets are used to capture a Customer issue and assign to the appropriate employee(s) to work and resolve that issue.

The BMS solution allows you to create service tickets in a number of ways:

- Alerts from an RMM like VSA → create tickets
- Emails sent to Support@yourcompany.com → create tickets
- Client Portal Submissions → create tickets
- Clicking the NEW ticket if you take a support call

Let's create a Ticket based on taking a call from a customer

**1.** Go to **Service Desk** → **Tickets** → **New**

You can also click the Blue New Ticket button along the top 

**2.** Fill in, and select from drop-down menus, information in all required fields indicated by \*

The screenshot shows the 'New Ticket' form in the Service Desk module. The form is organized into several sections:

- Customer Info:** Includes fields for Client (\*), Location (\*), Contact, Contact Phone, Contact Email, Source (\*), and Ticket Properties (Ticket Type (\*), Issue Type, Sub-Issue Type, Service Contract, SLA, Work Type).
- Main Ticket Details:** Includes From Template, Title (\*), Priority (\*), Status (\*), Details (\*), Primary Assignee (\*), Queue (\*), Secondary Assignee(s), Open Date (\*), Due Date, Affected Hardware Asset, and Affected Software Asset.
- File Upload:** A section for 'Select or Drag and Drop File(s)' with a 'Select' button.

Red boxes in the image highlight the required fields: Client, Location, Source, Ticket Type, Title, Priority, Status, Details, Primary Assignee, Queue, Open Date, and Due Date.

**3.** Click the **Save** button.

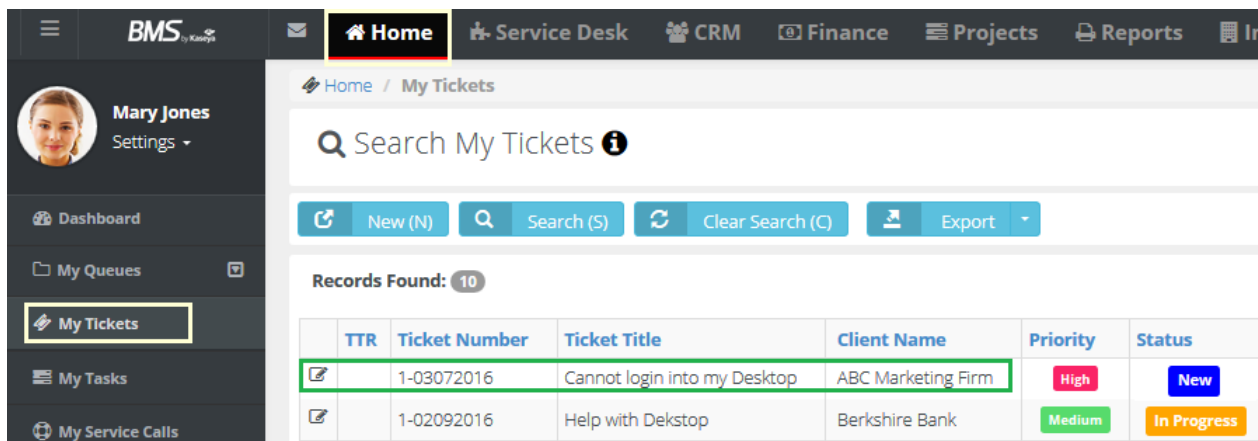
# Accessing Tickets and Entering Time and Notes

When Tickets are created in the BMS, a Service Desk Manager will see and have access to ALL tickets in the Service Desk Module via:

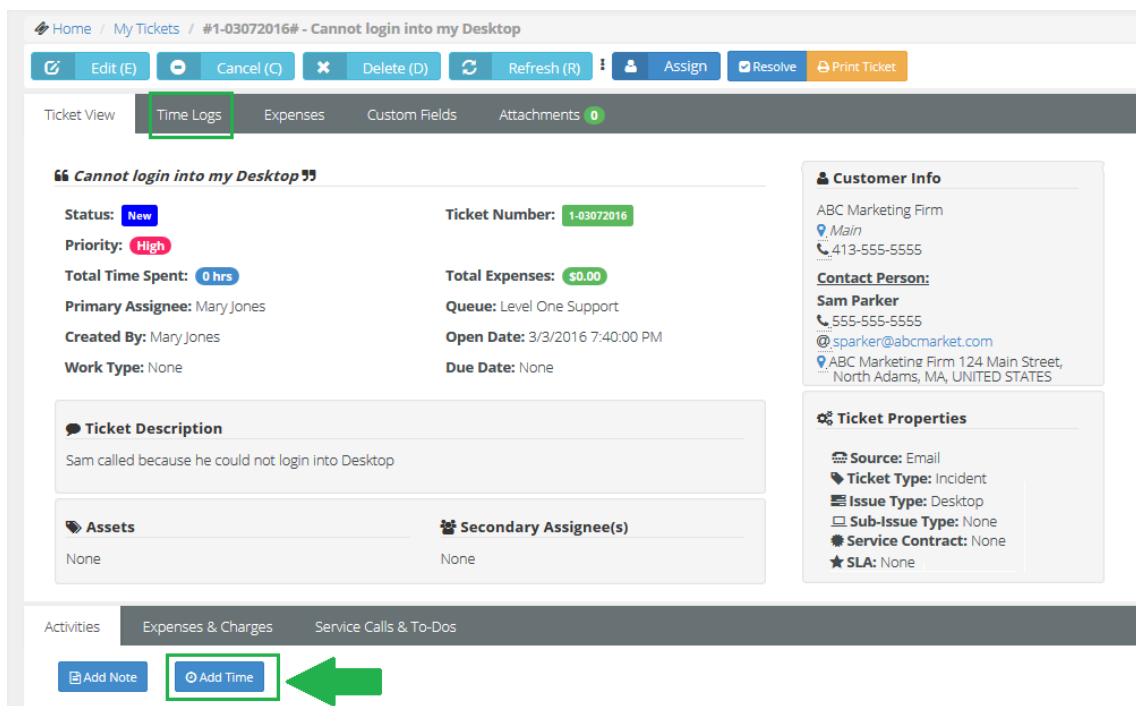
- Service Desk Dashboard (Status / Priority / Assignee / Queue / Issue Type)
- Tickets Folder
- Recurring Master Tickets
- Service Calls

Your employees will find tickets assigned to them in their Home Module.

1. Go to **Home** → **My Tickets** Click on Ticket Number or Pencil Icon 



2. When Ticket is open, look to bottom and click on the **Add Time** button  
(Or Click on the *Time Logs Tab* and click Add Time)





3. After you click on the **Add Time** button the following screen will appear.  
Fill in, and select from drop-down menus, information in all required fields indicated by \*

**Note:** **General Notes** are public facing. **Internal Notes** are seen by employees and not clients.

Add/Edit

⊙ Add / Edit Ticket Time Log

Time Details Notifications

Date Started:\* 3/13/2016 Start Time:\* 03:55 PM End Time:\* 04:55 PM Time Spent (hrs):\* 1.00

Role:\* Sr. Technician Work Types:\* Labor Hours

Status: Completed

**General Notes:**  
This is what I did to help Sam log back into his desktop  
These notes will show on Invoices and Reports

**Internal Notes:**  
Internal Notes will only show for internal Employees  
Client will NOT see these notes

Save (S) Cancel (C)

4. Click the **Save** button.

This Time entry has updated many forms including:

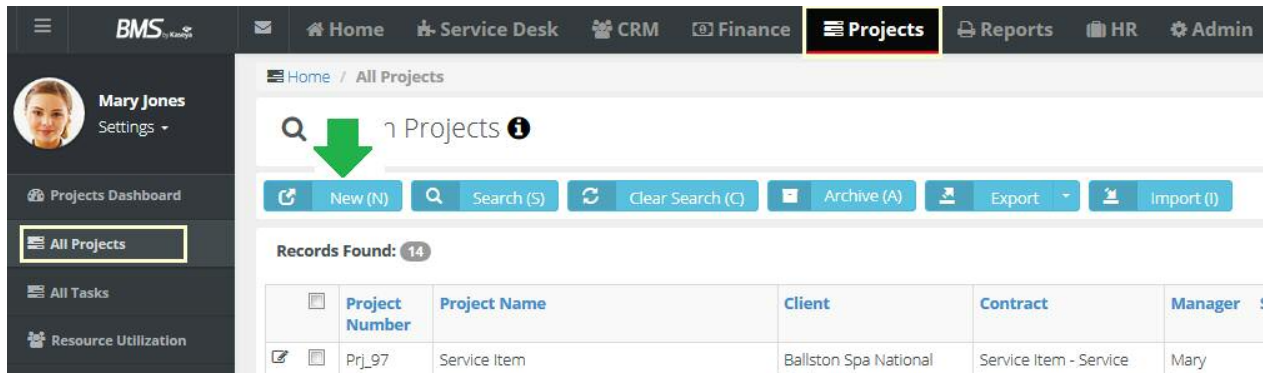
- Time will now be captured on the Ticket
- The employee's Time sheet will be updated.
- You can review the Labor Entry in the Finance Module to create an Invoice.

# Creating a Project in the Projects Module

Projects in the BMS can be created in a number of ways:

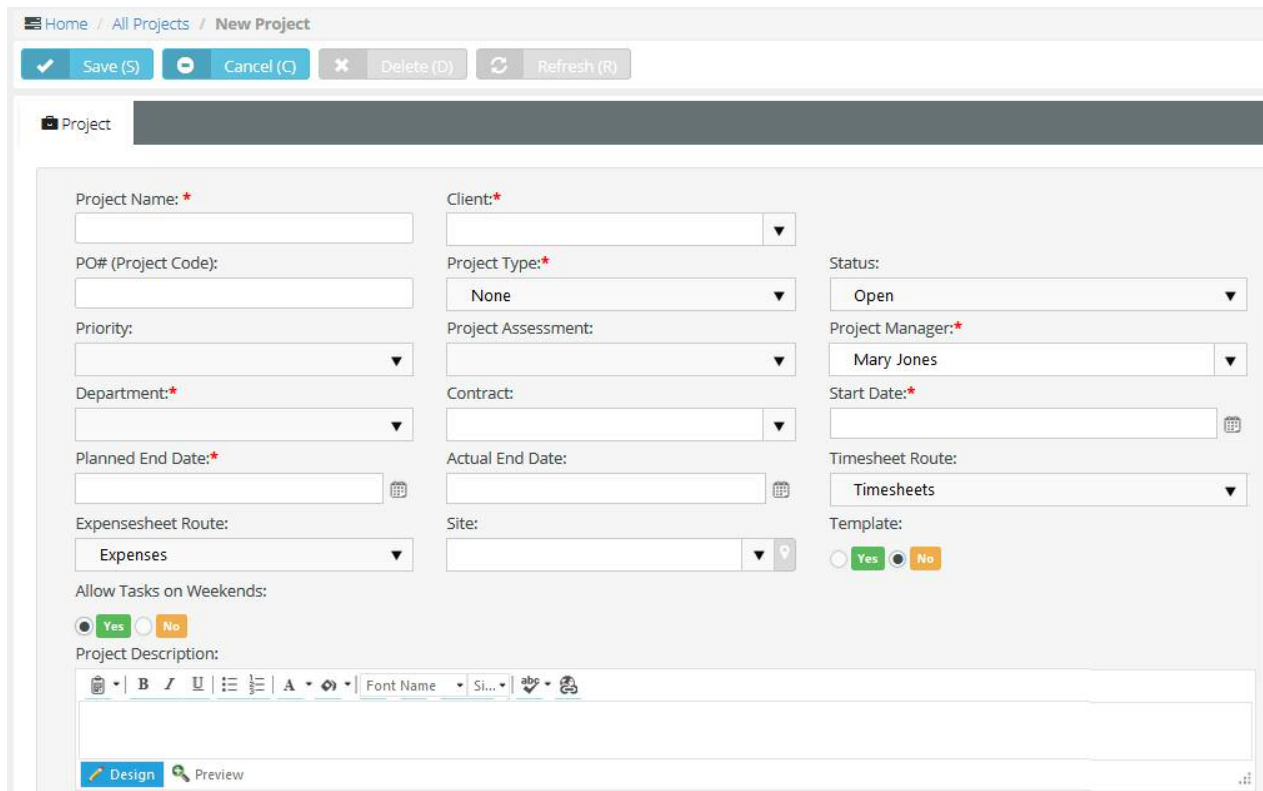
- Create the Project from scratch – adding Tasks and Employees
- Copy an existing Project
- Cloning a Project from the Template Project folder

## 1. Go to **Project** → **All Projects** → **New**



## 2. Click on the **New** button and select Project

You will get the following screen...



**3.** Fill in, and select from drop-down menus, information in all required fields as well as any applicable fields

**Project Name\*** Name of the project.

**Client\*** Client you are performing work for (Client form CRM).

**Project Type\*** Used to track projects – Types can be configured.

**Status** You should leave it as an OPEN status if this project is active and you want employees to enter time/expenses against it.

**Project Manager\*** Who is managing this project within your organization? Required

**Department\*** Track which Department is leading the project. Can report on Projects by Department.

**Contract** You can select a contract that will manage how time entered is billed for this project. ( Example - Fixed Price Contract)

**Start Date\*** The first day work on this project will begin. All tasks must have a start date equal or greater than the start date of the project. You can adjust this if needed.

**Planned End Date\*** The Day you are targeting to end this project.

**Actual End Date** The day you actually complete the project and set to Closed

**Timesheet Approval Route** Select which approval route flow you want submitted Timesheets to follow for this specific project. If NONE is selected, then you are telling the system to Auto-Approve all submitted Timesheets for this project only.

**Expense Approval Route** Select which approval route flow you want submitted Expense Sheets to follow for this specific project. If NONE is selected, then you are telling the system to Auto-Approve all submitted expenses for this project only.

**Project Description** A description of this project – who, what, where, when and why?

## 4. Set the Planned Budget and Planned Hours

| Financials   | Related Opportunities   | Expenses  | Charges   | Receipts <span>1</span> <span>i</span>                               | Custom Fields   | Attachments <span>1</span>  |   |
|--|---|---|---|--|---|---|---|
| <b>Planned Budget:*</b><br><input type="text" value="\$5,000.00"/>   | <b>Planned Hours:*</b><br><input type="text" value="80.00"/>    | <b>PO Amount:</b><br><input type="text" value="\$0.00"/>      | <b>Cost Type:</b><br><input type="text" value="Client Billable"/> | <b>Used Budget Labor:</b><br><input type="text" value="\$435.36"/>   | <b>Used Hours:</b><br><input type="text" value="20.00"/>        | <b>Total Billing:</b><br><input type="text" value="\$2,420.00"/>      | <b>Cost Center:</b><br><input type="text"/> |
| <b>Used Budget Expense:</b><br><input type="text" value="\$200.00"/> | <b>Remaining Hours:</b><br><input type="text" value="60.00"/>   | <b>Actual Billing:</b><br><input type="text" value="\$0.00"/> |   | <b>Used Budget Materials:</b><br><input type="text" value="\$0.00"/> | <b>Percentage Used:</b><br><input type="text" value="25.00 %"/> | <b>Remaining Unbilled:</b><br><input type="text" value="\$2,420.00"/> |   |
| <b>Remaining Budget:</b><br><input type="text" value="\$4,364.64"/>  | <b>Percentage Used:</b><br><input type="text" value="12.71 %"/> |   |   |  |   |   |   |

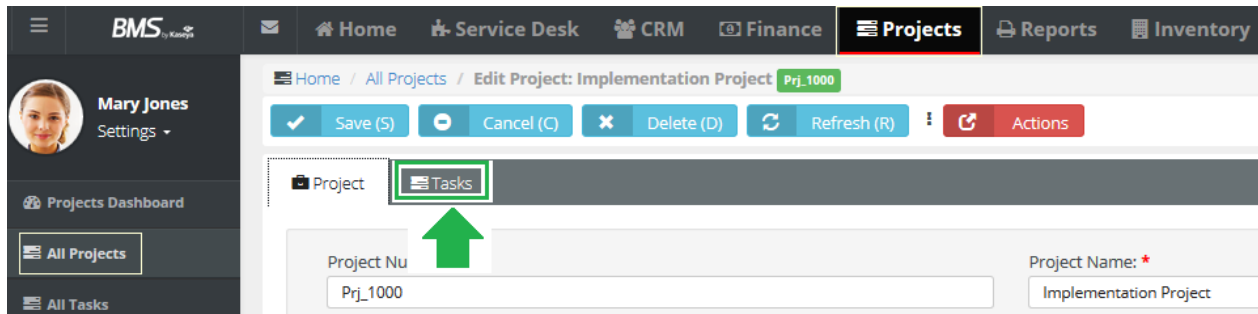
# Creating Project Tasks and Assigning to Employees

A Project without a Task(s) is only a static holder of project related information (Name, budget, manager, costs, etc.)

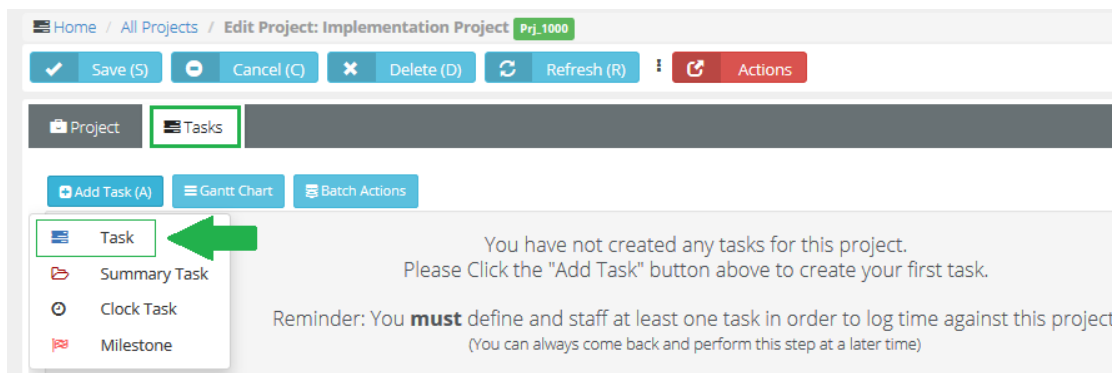
Tasks are what make a project interactive, dynamic, and make it possible to track its progress

Tasks are what employees enter time against and it updates their timesheets automatically – eliminating the need for double and triple entry

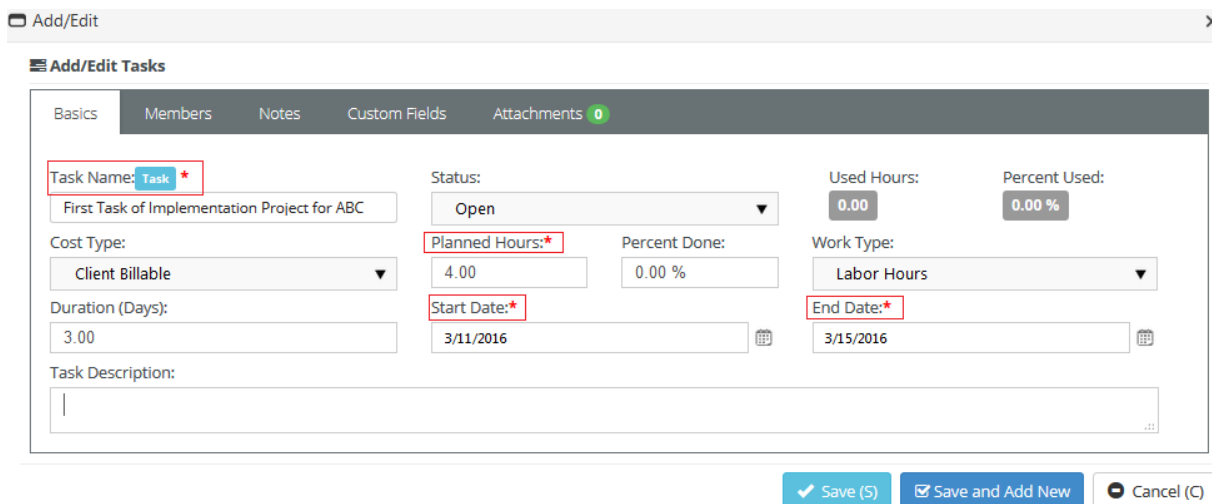
## 1. Go to **Tasks Tab** on our New Project



## 2. Click the **Add Task** button and then select the **Task** tab



## 3. Fill in, and select from drop-down menus, information as indicated on the following page.



**Task Name\*** Name of the task.

**Status\*** Set to Open.

**Cost Type\*** Set to Client Billable

**Planned Hours** How long should it take to complete? - Can be “0” hours

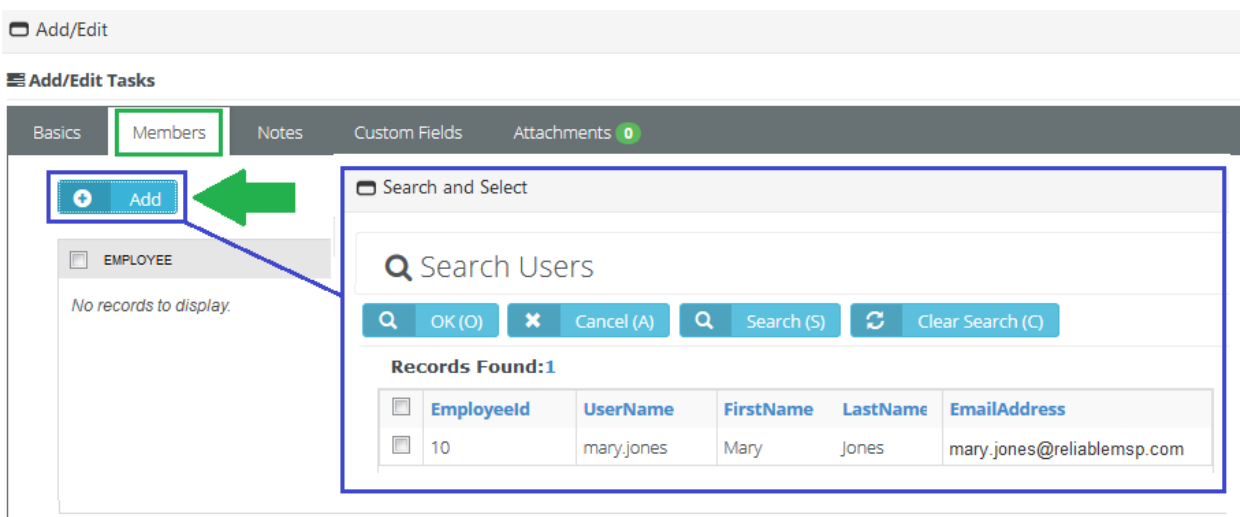
**Work Type** Set to Labor Hours

**Start Date\*** and **End Date\***

4. Click the **Save** button.

## Adding Employee(s) to the Task

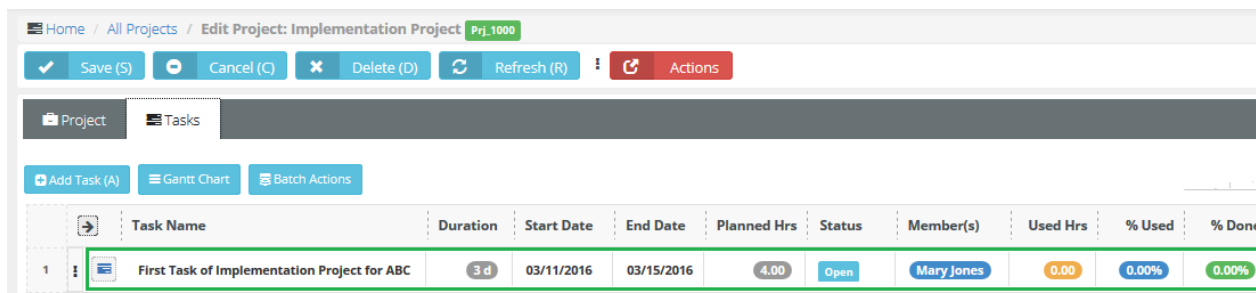
1. Go to the **Members** tab on the Task and Tasks Tab on our New Project



The screenshot shows the 'Add/Edit Tasks' interface. The 'Members' tab is selected. A green arrow points to the 'Add' button. A search box for 'Search Users' is visible, showing one record for 'Mary Jones'.

| EmployeeId | UserName   | FirstName | LastName | EmailAddress               |
|------------|------------|-----------|----------|----------------------------|
| 10         | mary.jones | Mary      | Jones    | mary.jones@reliablemsp.com |

The Project Manager will see Task on Project Schedule



The screenshot shows the Project Manager interface. The 'Tasks' tab is selected. A task is listed in the table below.

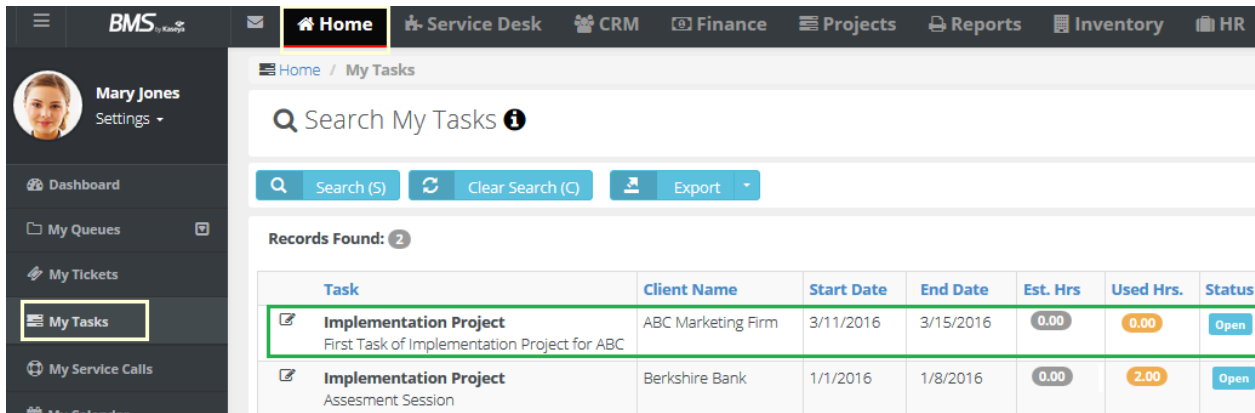
| Task Name                                    | Duration | Start Date | End Date   | Planned Hrs | Status | Member(s)  | Used Hrs | % Used | % Done |
|--|----------|------------|------------|-------------|--------|------------|----------|--------|--------|
| First Task of Implementation Project for ABC | 3 d      | 03/11/2016 | 03/15/2016 | 4.00        | Open   | Mary Jones | 0.00     | 0.00%  | 0.00%  |



Your employees will find tasks assigned to them in their Home Module

## Entering Time and Notes on Project Tasks

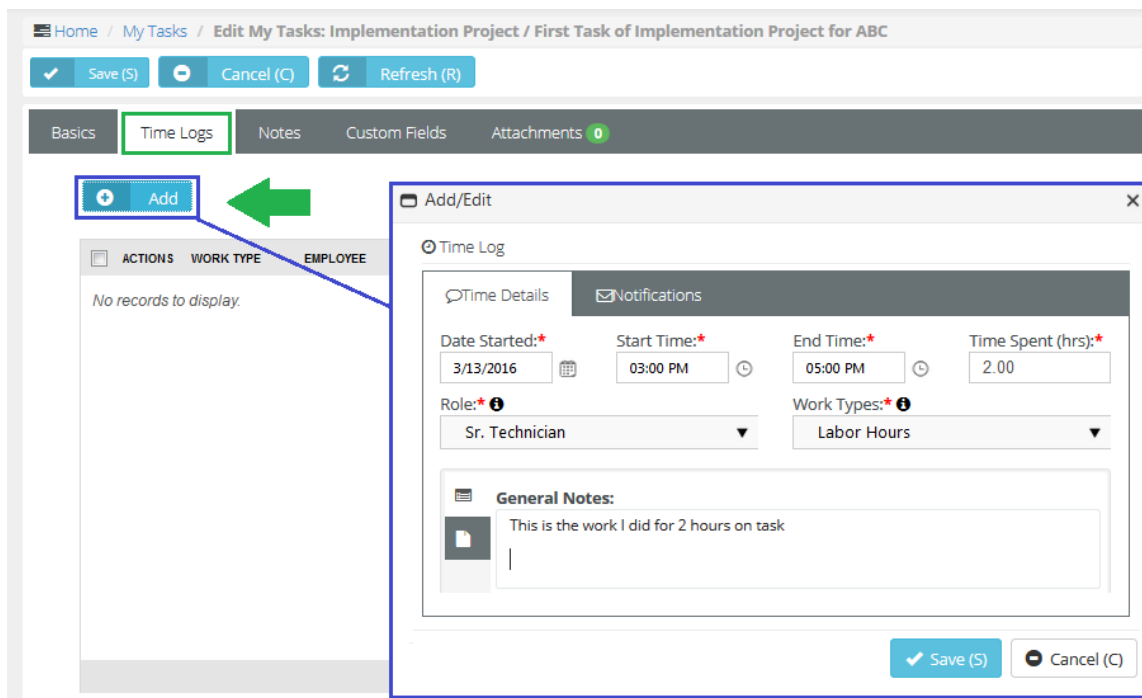
In the BMS, your employees can track time worked on any Project Task they are assigned to. Time entries here, just like tickets, can be used to generate line items on an invoice.

1. Go to **Home** → **My Tasks** and click on Task Name or Pencil Icon 



| Task  | Client Name        | Start Date | End Date  | Est. Hrs | Used Hrs. | Status |
|---|--------------------|------------|-----------|----------|-----------|--------|
|  <b>Implementation Project</b><br>First Task of Implementation Project for ABC | ABC Marketing Firm | 3/11/2016  | 3/15/2016 | 0.00     | 0.00      | Open   |
|  <b>Implementation Project</b><br>Assesment Session                            | Berkshire Bank     | 1/1/2016   | 1/8/2016  | 0.00     | 2.00      | Open   |

2. Select the **Time Logs** tab and then click the **Add** button



3. Fill in, and select from drop-down menus, information in all required fields. Remember that General Notes are public facing.

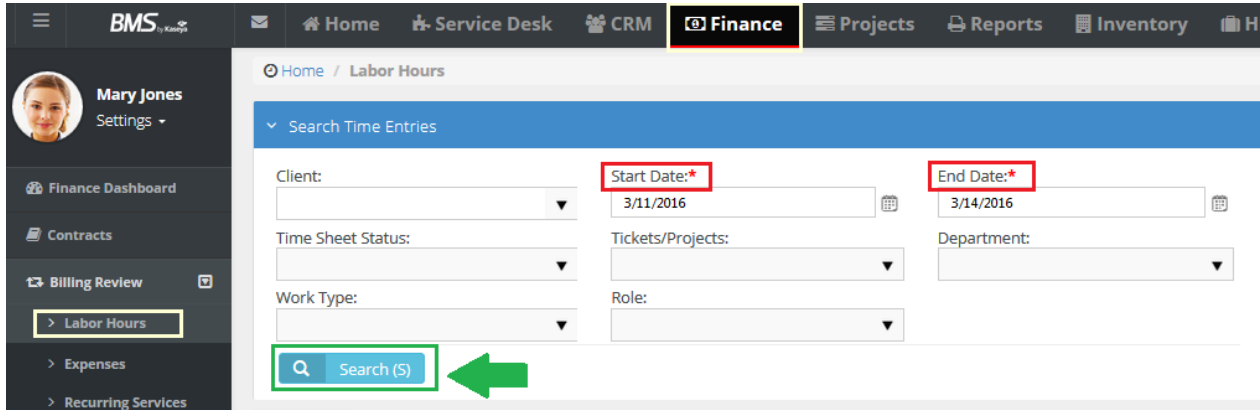
4. Click the **Save** button.

- This Time entry will now be captured on the Projects Info tab (total hours)
- The employee's Time sheet will be updated.
- You can review the Labor Entry in the Finance tab to create an Invoice

# Approve and Post Process

The Time entered on our Ticket and Task is now sitting in the Finance Folder ready to go through the Approve and Post Process

1. Go to **Finance** → **Billing Review** → **Labor Hours**



You can use the Search Grid to filter the data.

2. Click on the **Search** button and you will see the results below.

|                                     | DATE       | CLIENT NAME        | TICKET/PROJECT   | WORK TYPE   | EMPLOYEE   | NOTES                                  | OVERTIME HOURS TO BILL | OVERTIME BILLING RATE | HOURS TO BILL | BILLING RATE | TOTAL PRICE |
|-------------------------------------|------------|--------------------|--|-------------|------------|--|------------------------|-----------------------|---------------|--------------|-------------|
| <input checked="" type="checkbox"/> | 03/13/2016 | ABC Marketing Firm | 1-03072016<br>Cannot login into my Desktop               | Labor Hours | Mary Jones | This is what I did to help Sam log ... | 0.00                   | \$150.00              | 1.00          | \$150.00     | \$150.00    |
| <input checked="" type="checkbox"/> | 03/13/2016 | ABC Marketing Firm | Pjt_1000<br>First Task of Implementation Project for ABC | Labor Hours | Mary Jones | This is the work I did for 2 hours ... | 0.00                   | \$150.00              | 2.00          | \$150.00     | \$300.00    |

In this example, we see two time entries made by employees:

The first line record is time posted against a Ticket (1 hour @ \$150)

The second line record is time we posted against a Task (2 hours @ \$150)

You can adjust the Hours to Bill and Billing Rate if needed.

3. To approve and post, check the boxes next to the entry and click on the **Post** button



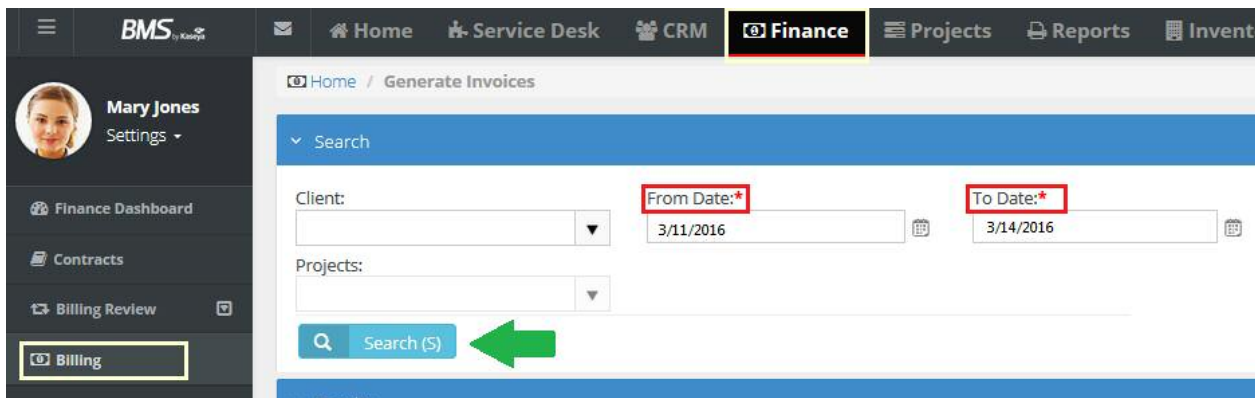
## Billing Process

After reviewing Labor Hours and approving the time entries, these items have moved into the Billing Folder

Here you can combine these Labor Hours with other items you may wish to invoice:

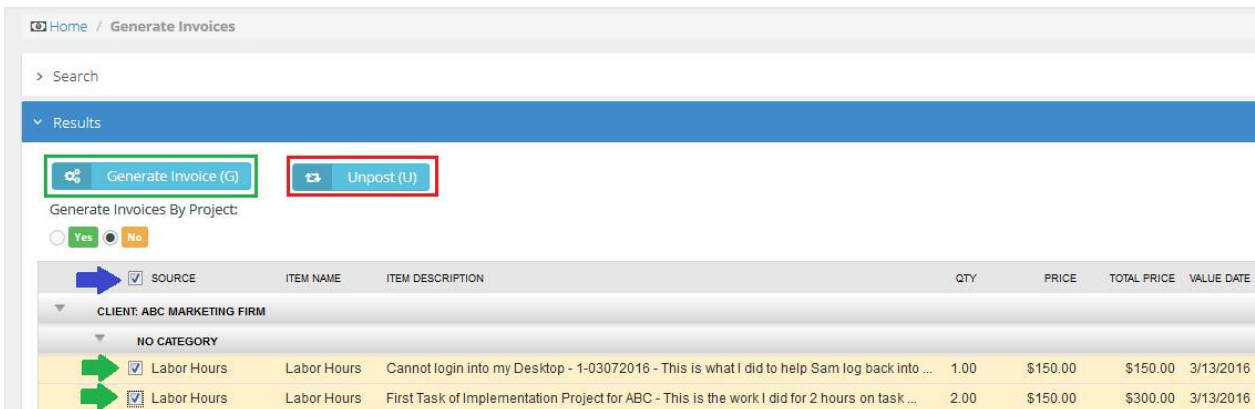
- Expenses added to a ticket or project
- Recurring Service Contracts
- Fixed Price Contract Milestones (ex – Deposit or Final Project Payment)
- Retainer Hour Contracts (some call them Block Hours)

### 1. Go to **Finance** → **Billing Review** → **Billing**



You can use the Search Grid up top to filter the data.

### 2. Click on the **Search** button and you will see the results below.



The Client is listed in the gray bar = ABC Marketing Firm

The first line record is Labor Hours posted against a Ticket (1 hour @ \$150)

The second line record is Labor Hours posted against a Task (2 hours @ \$150)

### 3. Check the boxes next to the entry to be billed and click on the **Generate Invoice** button



**Note:** You can UNPOST these records if you see an error. It will place them back in the Billing Review folder where you can make adjustments and walk through process again.



## Billing Process

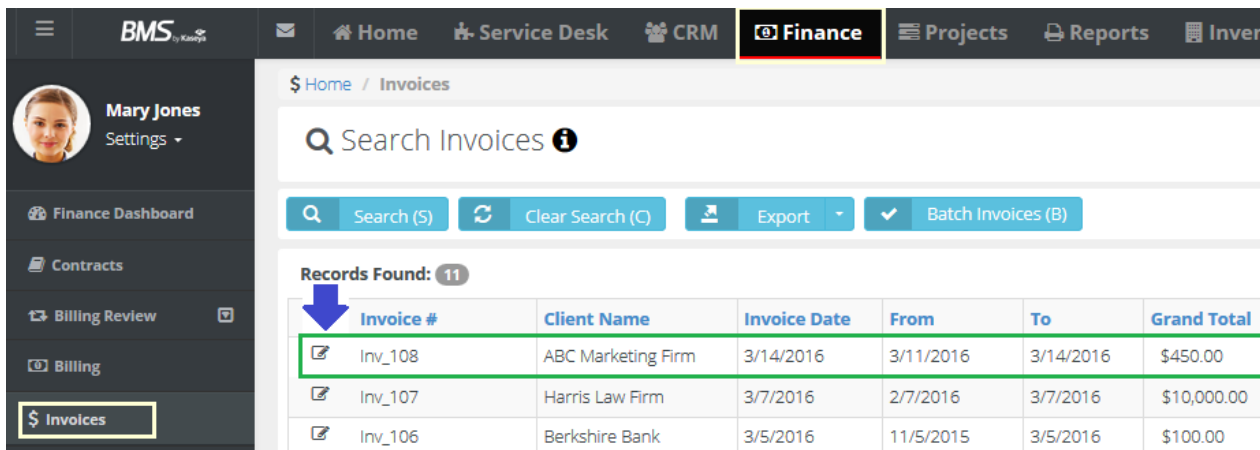
All the items that have been Reviewed and Approved and Generated are now sitting in the Invoice Folder with the Status of NEW

When we moved the items from Billing to the Invoice folder it assigned the next Invoice number in line (example Inv\_108)

You can now make adjustments before creating the final Invoice and sending to your client or transferring to QuickBooks:

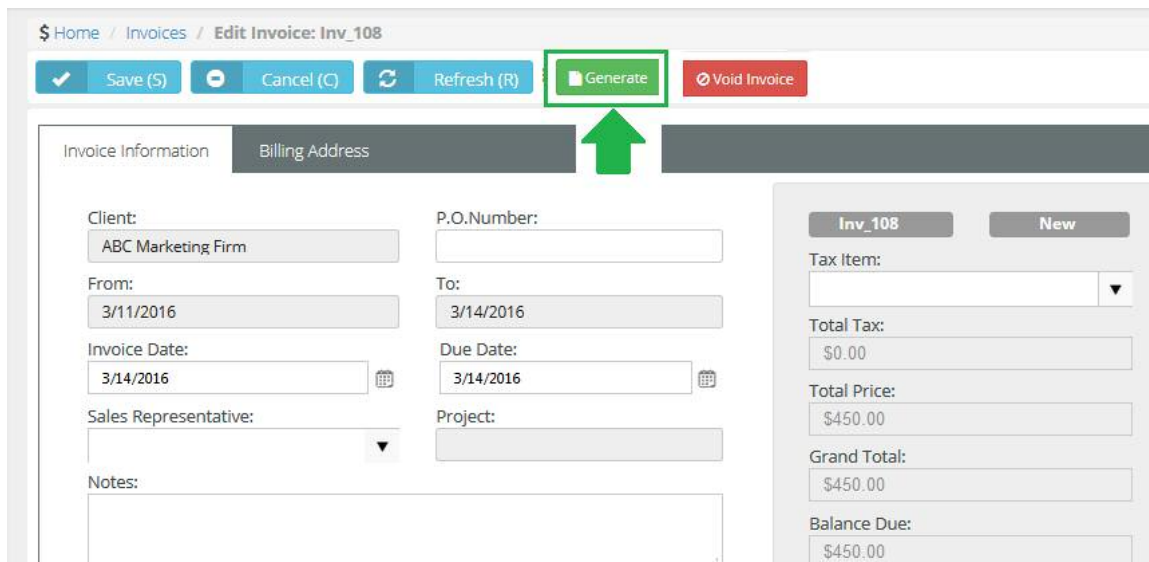
- Add additional information to Line items or a Note on Invoice
- Adjust Quantity or Unit Price
- Apply a Discount – a dollar or percentage amount
- Attach Receipts (that flowed through system to final invoice)
- Add any additional attachments

1. Go to **Finance** → **Invoices** Click on Invoice Number or 



| Invoice # | Client Name        | Invoice Date | From      | To        | Grand Total |
|-----------|--------------------|--------------|-----------|-----------|-------------|
| Inv_108   | ABC Marketing Firm | 3/14/2016    | 3/11/2016 | 3/14/2016 | \$450.00    |
| Inv_107   | Harris Law Firm    | 3/7/2016     | 2/7/2016  | 3/7/2016  | \$10,000.00 |
| Inv_106   | Berkshire Bank     | 3/5/2016     | 11/5/2015 | 3/5/2016  | \$100.00    |

2. After you open Invoice click on the green **Generate** button along the top.



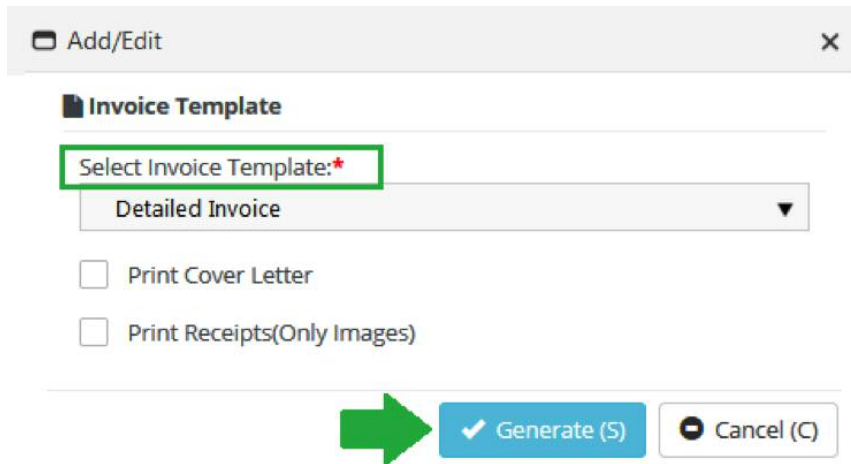
Invoice Information | Billing Address

Client: ABC Marketing Firm | P.O. Number: | From: 3/11/2016 | To: 3/14/2016 | Invoice Date: 3/14/2016 | Due Date: 3/14/2016 | Sales Representative: | Project: | Notes:

Summary:

- Inv\_108 | New
- Tax Item:
- Total Tax: \$0.00
- Total Price: \$450.00
- Grand Total: \$450.00
- Balance Due: \$450.00

3. After clicking on the green **Generate** button, you can select an invoice template. Select the template and click the **Generate** button



Add/Edit

**Invoice Template**

Select Invoice Template:\*

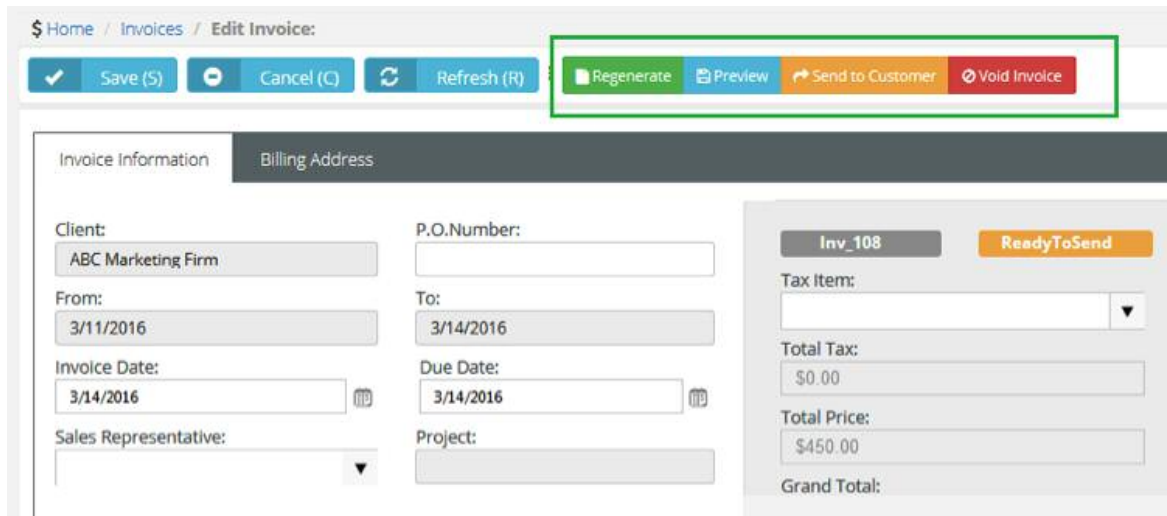
Detailed Invoice

Print Cover Letter

Print Receipts(Only Images)

Generate (S) Cancel (C)

Your Invoice buttons along the top will now include more options.



\$ Home / Invoices / Edit Invoice:

Save (S) Cancel (C) Refresh (R) Regenerate Preview Send to Customer Void Invoice

Invoice Information Billing Address

Client: ABC Marketing Firm

From: 3/11/2016

Invoice Date: 3/14/2016

Sales Representative:

P.O.Number:

To: 3/14/2016

Due Date: 3/14/2016

Project:

Inv\_108 ReadyToSend

Tax Item:

Total Tax: \$0.00

Total Price: \$450.00

Grand Total:

The Status of your Invoice is now **READY TO SEND**

- You can Preview your Invoice
- You can Regenerate
- You can send to your customer
- You can Void the Invoice if necessary which places items back into Approve and Post.

**Note:** All invoices with **READY TO SEND** or **SENT** statuses are now sitting in the QuickBooks folder in the Finance Module ready to sync with QuickBooks (if configured).

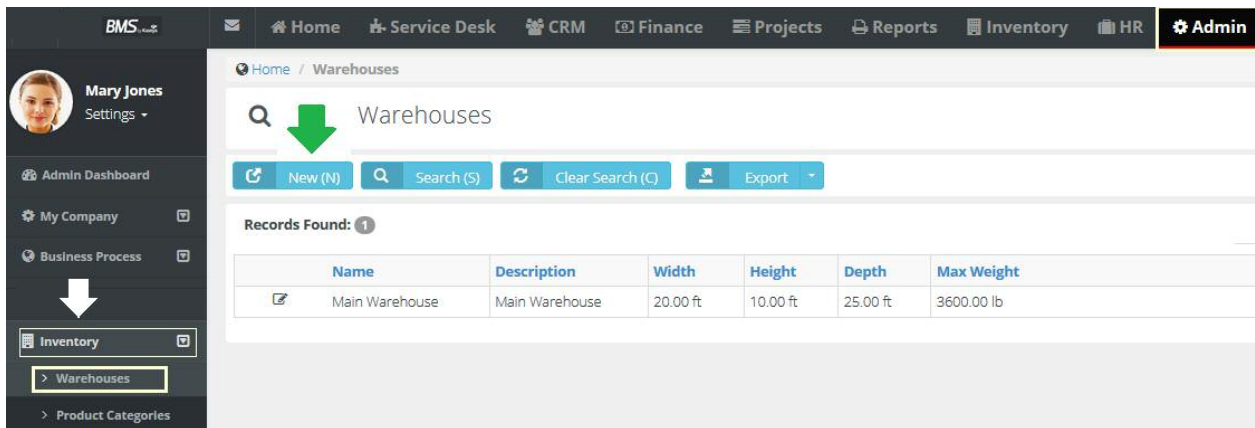
# Inventory, Warehouse Locations and Product Categories

BMS comes with an Inventory Module that helps you:

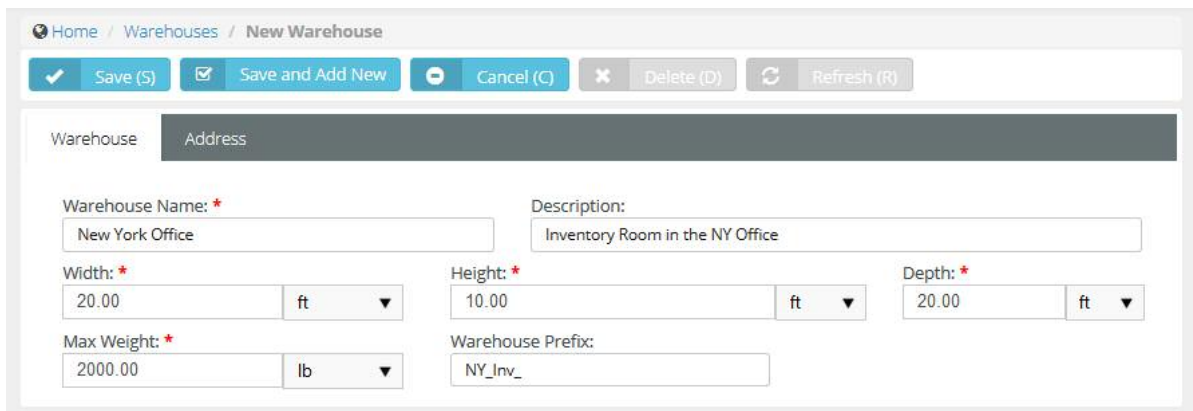
- Store Inventory in Multiple locations
- Maintain Products Lists so you can:
  - Manage the Inventory Process (maintain levels of Inventory, Generate Purchase Orders and Replenish Stock)
  - Use as Products Catalog so you can create Quotes in the CRM

## Create Warehouse Locations

1. Go to **Admin** → **Inventory** → **Warehouse**



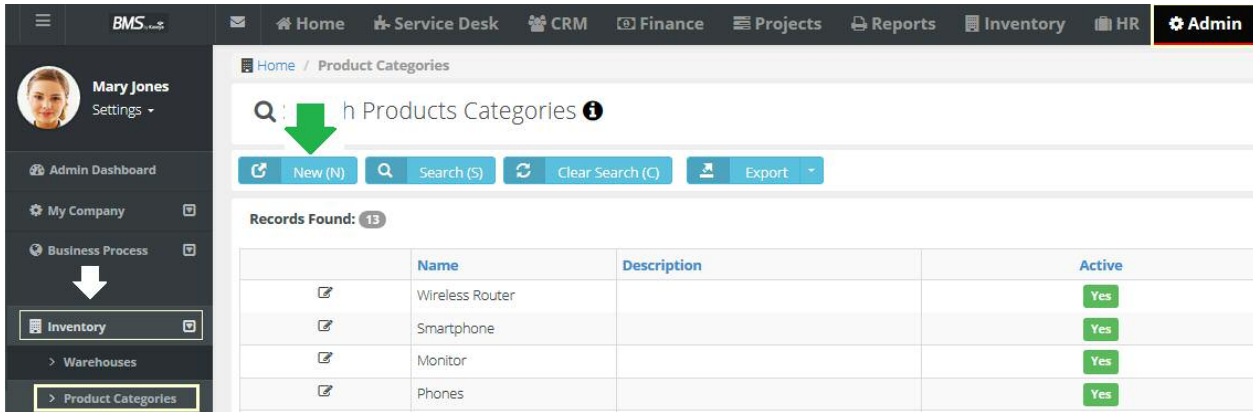
2. Fill in, and select from drop-down menus, information in all required fields and make sure to include the address of the warehouse.



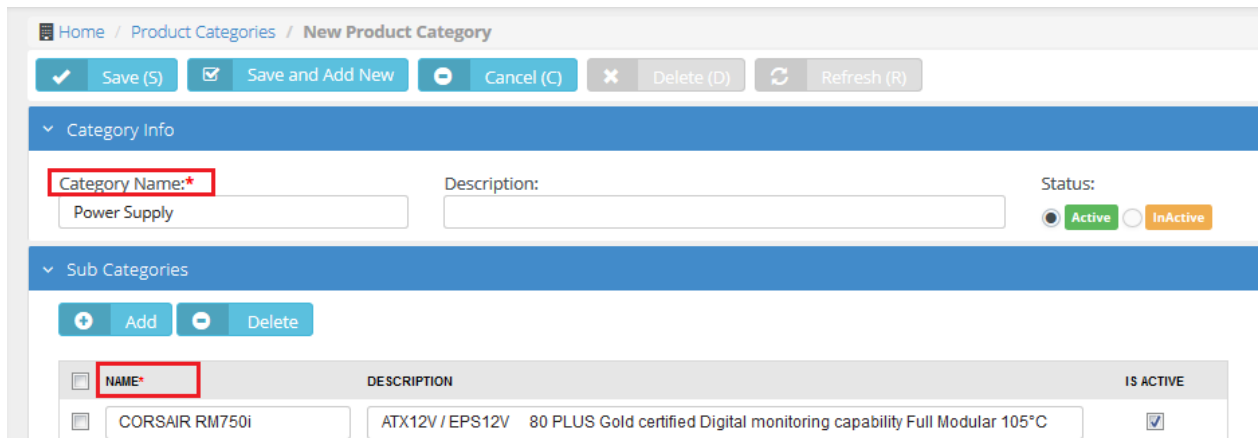
3. Click the **Save** button.

# Create Product Categories

1. Go to **Admin** → **Inventory** → **Product Categories**
2. Click the **New** button.



3. Fill in information in all required fields.



4. Click the **Save** button.

## Managing Inventory

In the Inventory Module, you will manage your Products by warehouse location

1. Go to **Inventory** → **Products** → **Product Availability**

Here you will enter product information and location.

The screenshot shows the 'Product Availability' page in the BMS system. The top navigation bar includes Home, Service Desk, CRM, Finance, Projects, Reports, and Inventory. The left sidebar shows the user profile for Mary Jones and navigation options for Inventory Dashboard, Products, and Procurement. The main content area has a search bar for 'Search Available Products' and a table of records. The table has 8 records found, with columns for Product #, Product Name, UPC, Warehouse, In Stock, Committed, and QTY Available.

| Product # | Product Name | UPC         | Warehouse       | In Stock | Committed | QTY Available |
|-----------|--------------|-------------|-----------------|----------|-----------|---------------|
| 03172016  | Power Supply | 11111118281 | New York Office | 0.00     | 0.00      | 0.00          |
| 03172016  | Power Supply | 11111118281 | Main Warehouse  | 0.00     | 0.00      | 0.00          |
| Labor     | Lanbor Hours | 11111161260 | New York Office | 0.00     | 0.00      | 0.00          |

## Creating Sales Quotes

In the CRM Module, you will use the Products created in the Inventory to generate Sales Quotes

1. Go to **CRM** → **Quotations** → **Product Quotations**

The screenshot shows the 'Product Quotations' page in the BMS system. The top navigation bar includes Home, Service Desk, CRM, Finance, Projects, Reports, Inventory, and HR. The left sidebar shows the user profile for Mary Jones and navigation options for CRM Dashboard, Accounts, Contacts, Activities, Opportunities, and Quotations. The main content area has a search bar for 'Search Product Quotation' and a table of records. The table has 2 records found, with columns for Product #, Product Name, UPC, Warehouse, In Stock, and Committed. A green box highlights the 'Add' button in the 'Inventory Items' section, and a green arrow points from it to the first record in the table.

| Product # | Product Name | UPC         | Warehouse       | In Stock | Committed |
|-----------|--------------|-------------|-----------------|----------|-----------|
| 03172016  | Power Supply | 11111118281 | New York Office | 0.00     | 0.00      |
| 03172016  | Power Supply | 11111118281 | Main Warehouse  | 0.00     | 0.00      |

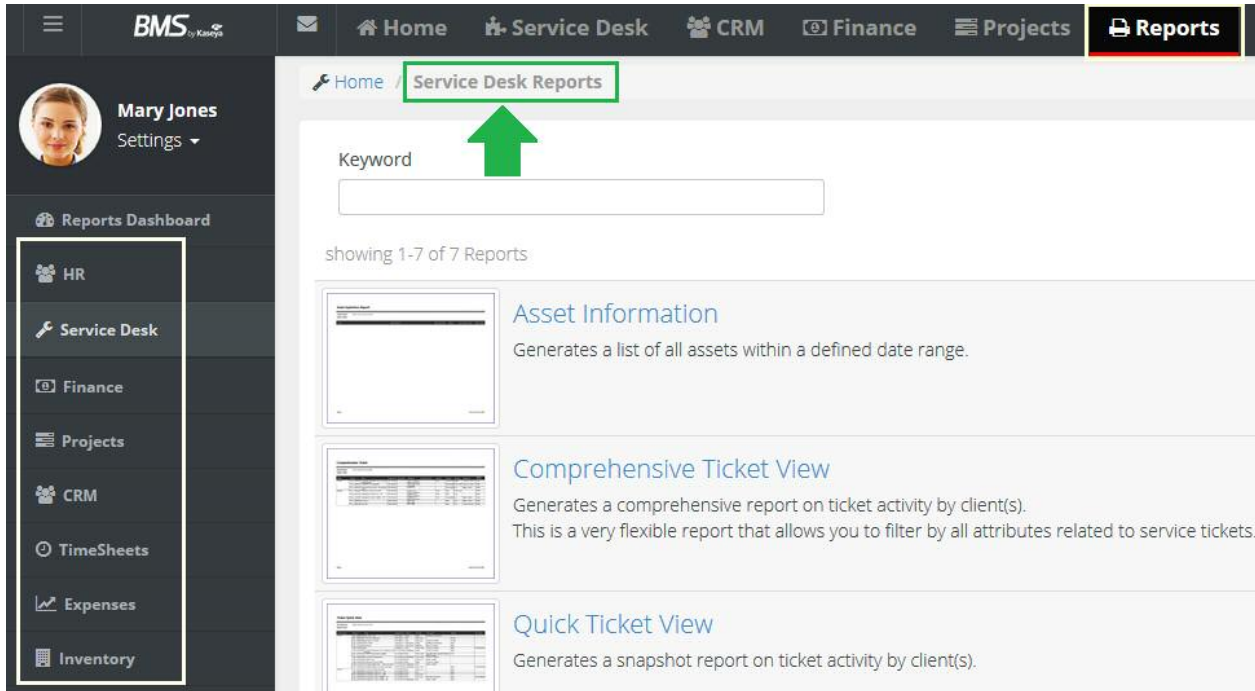
2. Click the **New** button.
3. Fill in information in all required fields.
4. Click the **Add** button under Inventory Items and select the Product you wish to quote.
5. Click the **Save** button and send quote to prospect.

## Creating Reports

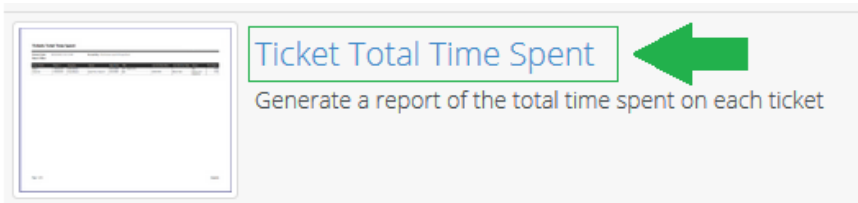
BMS comes with Reports for each Module

### 1. Go to **Reports** → **Reports Dashboard**

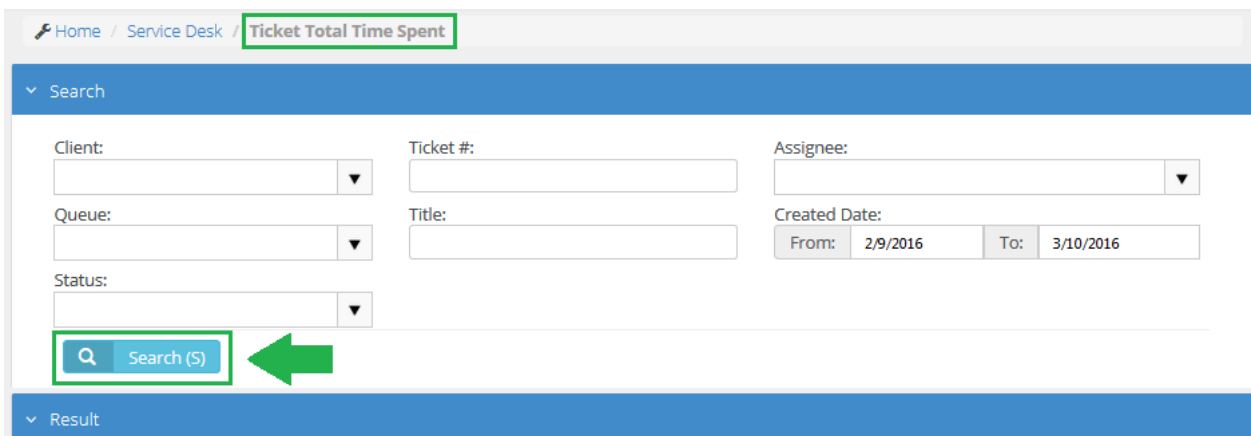
Click on the Module you want to create a report for. (Service Desk is selected in this example)



### 2. Click on the Name of the Report you want to generate.



### 3. Then use the Search Grid to produce desired output and Click on **Search**



You will see your Report under the Results banner.

## 4. Choose to print or export the report in a variety of formats

**Tickets Total Time Spent**

Printed Date: 3/10/2016 2:29:43 AM      Printed By: Mary Jones  
 Report Filter: Created Date: From: 2/9/2016 To: 3/10/2016

| Client Name        | Ticket #   | Assignee   | Queue                            | Open Date | Title                        | Status      | Time Spent |
|--------------------|------------|------------|----------------------------------|-----------|------------------------------|-------------|------------|
| ABC Marketing Firm | 1-03072016 | Mary Jones | Level One Support                | 3/3/2016  | Cannot logon into my Desktop | In Progress | 0.00       |
| Berkshire Bank     | 1-02092016 | Mary Jones |                                  | 2/9/2016  | Help with Dekstop            | In Progress | 3.00       |
| Berkshire Bank     | 1-02252016 |            | Client Portal<br>Created Tickets | 2/25/2016 | I need Help with my Laptop   | New         | 0.00       |

## Further Resources

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Kaseya has a wealth of resources available to help you maximize your investment in the Kaseya platform, including:

The online 'Kaseya Learning Center' includes a vast selection of Computer Based Training on all the Kaseya modules:

<http://university.kaseya.com>

The 'Knowledge Base' is a repository for our Kaseya processes and troubleshooting recommendations:

<https://helpdesk.kaseya.com/home>

We have a vibrant community within 'Forums' where ideas are exchanged on how to get more from the Kaseya platform:

<http://community.kaseya.com/xspf/default.aspx>

A large selection of Kaseya documentation can be found in the 'Resources' section of the Kaseya Community:

<http://community.kaseya.com/resources/m/docandguides/default.aspx>

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### ABOUT KASEYA

Kaseya® is the leading provider of complete IT management solutions for Managed Service Providers and small to mid-sized businesses. Kaseya allows organizations to efficiently manage and secure IT in order to drive IT service and business success. Offered as both an industry-leading cloud solution and on-premise software, Kaseya solutions empower businesses to command all of IT centrally, manage remote and distributed environments with ease, and automate across IT management functions. Kaseya solutions currently manage over 10 million endpoints worldwide and are in use by customers in a wide variety of industries, including retail, manufacturing, healthcare, education, government, media, technology, finance, and more. Kaseya, headquartered in Dublin, Ireland is privately held with a presence in over 20 countries. To learn more, please visit [www.kaseya.com](http://www.kaseya.com)

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