



Vorex™

Business Management Solution

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Evaluation Quick Start Guide

Thank you for evaluating Vorex. 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 Vorex Implementation.

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# Adding an Employee into HR folder

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

The screenshot shows the Vorex 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 options like Admin Dashboard, My Company, Business Process, HR, Departments, Job Titles, Skill Categories, and Employees. The main content area displays the 'Employees' list 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'. The table below shows 6 records found.

	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 in the Vorex Admin interface. The form has a header with 'Home / Employees / New Employee' and buttons for 'Save (S)', 'Save and Add New', and 'Cancel (C)'. The form contains the following fields:

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

3. Click the **Save** button.  
Vorex 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)

Home / Employees / Edit Employee: Mary Jones

Save (S) Save and Add New Cancel (C) Delete (D) Refresh (R)

Personal Details Contact Info Wages Shifts Associated Clients Associated Queues **Employee Roles**

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.

	Account Name	Account Type	Account Manager	Created By	Active
	Berkshire Bank	Client	Mary Jones	Mary Jones	Yes
	Hamilton County Court House	Client	Mary Jones	Mary Jones	Yes
	Harris Law Firm	Client	Mary Jones	Mary Jones	Yes
	Kaseya	Client	Global Admin	Global Admin	Yes

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

3. Click the **Save** button.

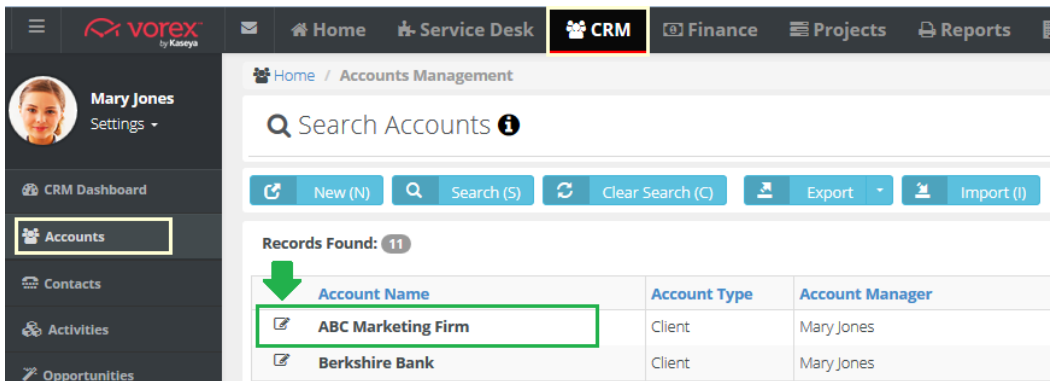
**Note:** You can add the address information at any time, but for Quick Start purposes, you have enough information now to use this account in testing.

## Adding a Contact in the CRM Module

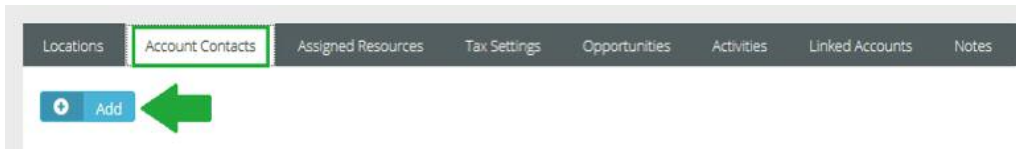
Now that we created an Account, let's add a contact to this Client record. Why?

- 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 Vorex 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 \*

Ticket Details Custom Fields

**Customer Info**

Client:\*  
ABC Marketing Firm

Location:\*  
Main

Contact:  
Sam Parker

Contact Phone:  
413-654-0987

Contact Email:  
sparker@abcmarket.com

Source:\*  
Phone

**Ticket Properties**

Ticket Type:\*  
Incident

Issue Type:  
Router

Sub-Issue Type:

Service Contract:

SLA:

Work Type:  
Labor Hours

From Template:

Title:\*  
Sam Called in with problem with Router

Priority:\*  
Medium

Status:\*  
New

TTR:  
None

Details:\*

Sam called in today, cannot connect to office internet from meeting room and has a presentation tomorrow

Primary Assignee:\*  
Mary Jones

Open Date:\*  
3/11/2016 3:46 PM

Queue:\*  
Level One Support

Due Date:  
3/13/2016 11:00 AM

Secondary Assignee(s):

Affected Hardware Asset:

Affected Software Asset:

Select or Drag and Drop File(s):  
Select

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

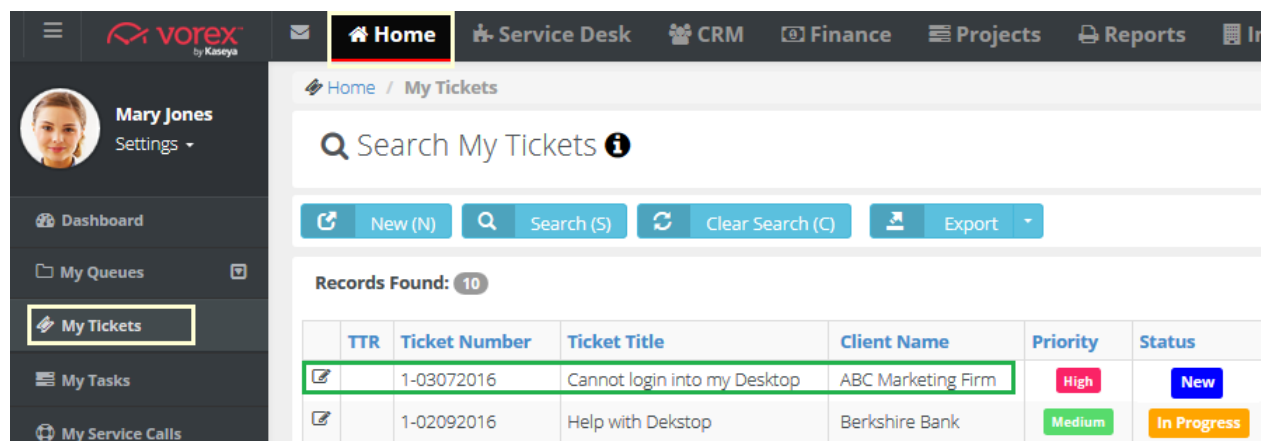
# Accessing Tickets and Entering Time and Notes

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

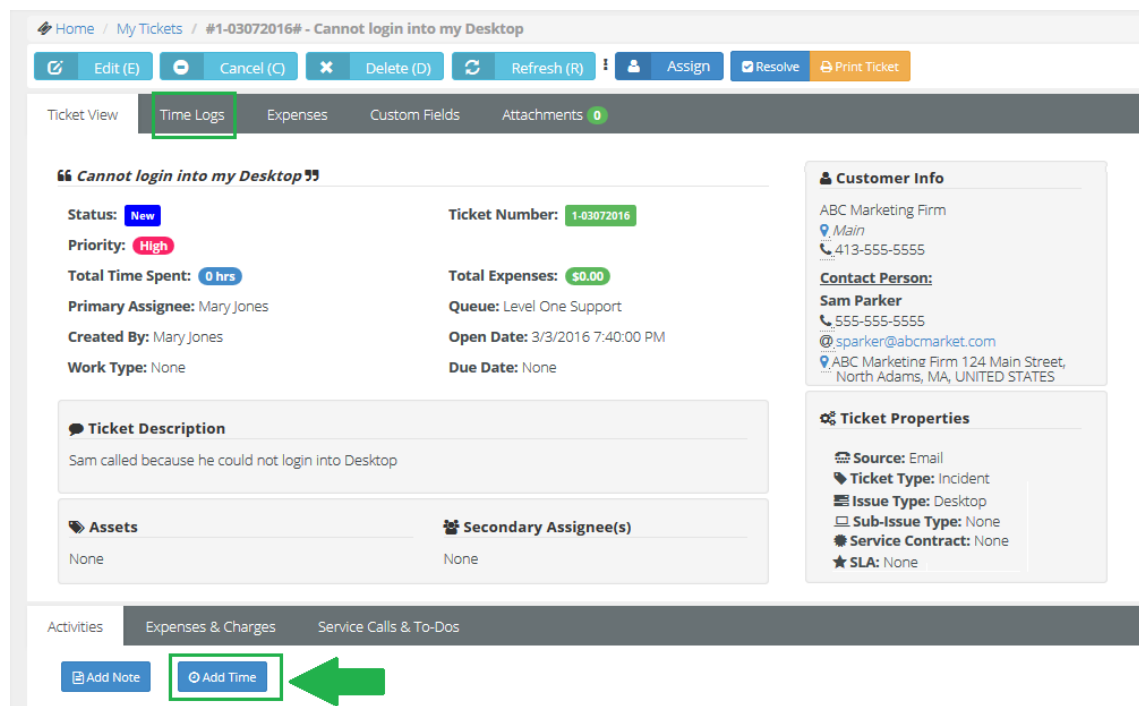
- Service Desk Dashboard (Status / Priority / Assignee / Queue / Issue Type)
- Tickets Folder
- Recurring Master Tickets
- Service Calls

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 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:

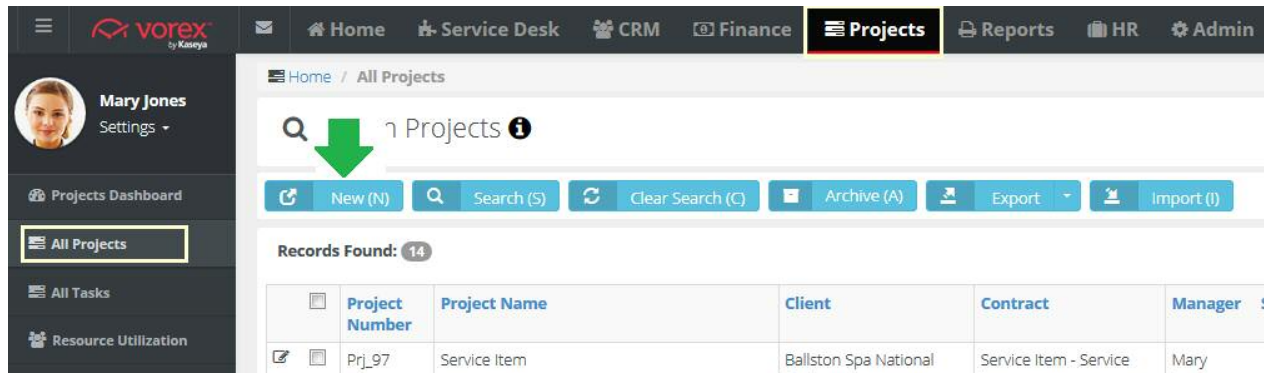
- Time will now be captured on the Ticket
- The employee's Time sheet will be updated.
- You can review the Labor Entry in the Finance Module to create an Invoice.

# Creating a Project in the Projects Module

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

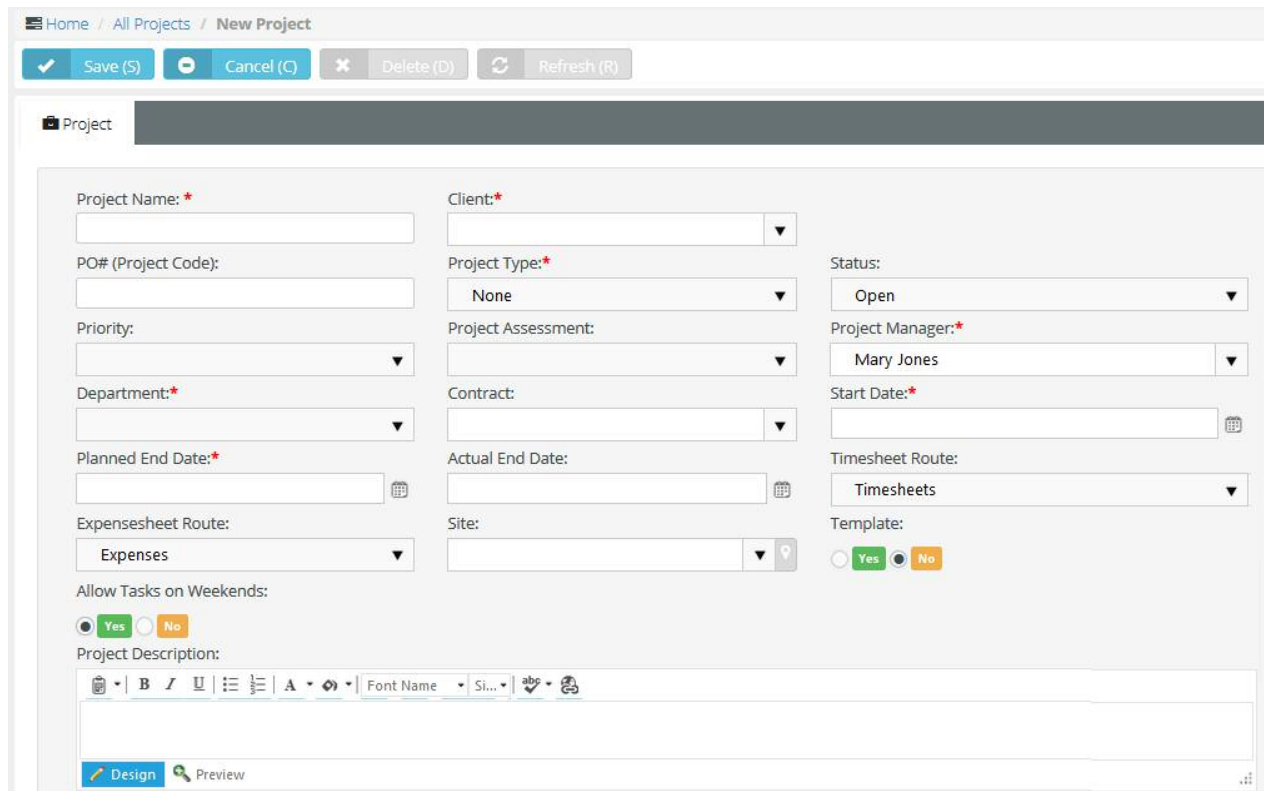
- Create the Project from scratch – adding Tasks and Employees
- Copy an existing Project
- Cloning a Project from the Template Project folder

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

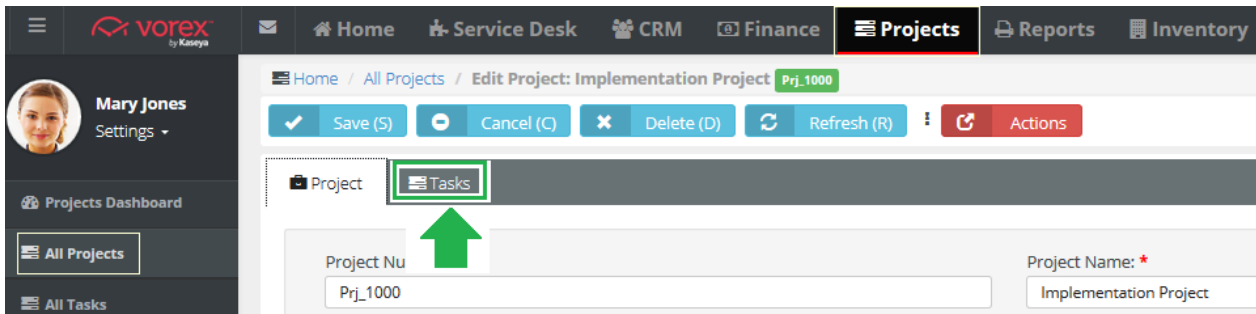
# Creating Project Tasks and Assigning to Employees

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

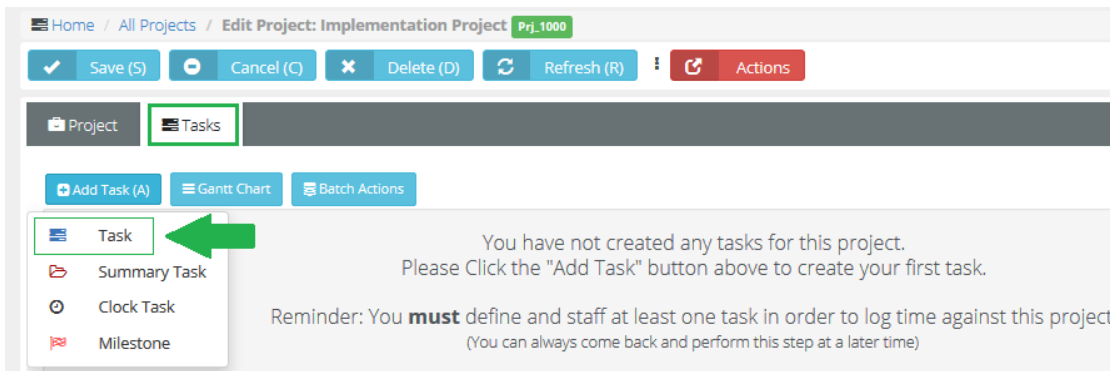
Tasks are what make a project interactive, dynamic, and make it possible to track its progress

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

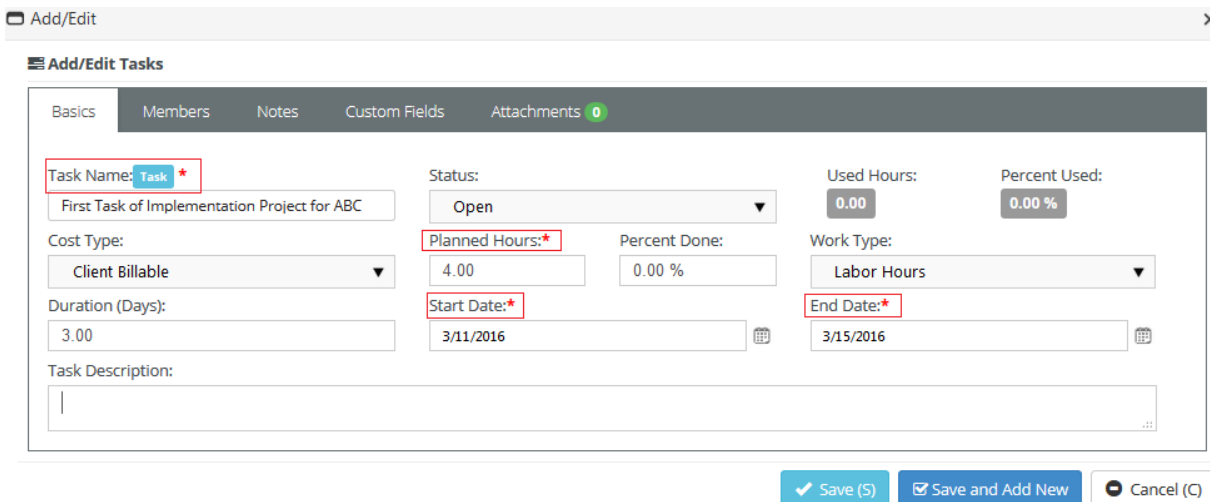
## 1. Go to **Tasks Tab** on our New Project



## 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 with the 'Members' tab 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 with a task on the project schedule. The task is 'First Task of Implementation Project for ABC' with a duration of 3 days, planned hours of 4.00, and assigned to Mary Jones.

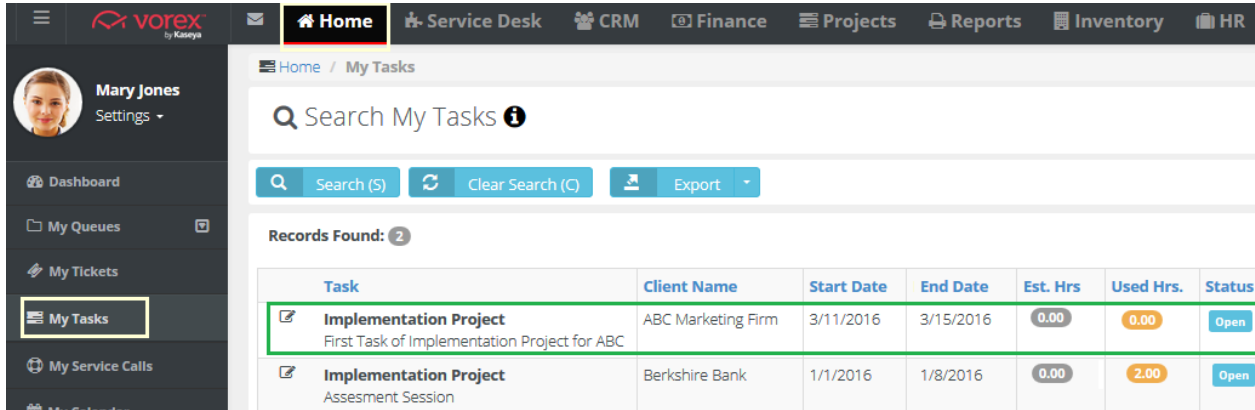
Task Name	Duration	Start Date	End Date	Planned Hrs	Status	Member(s)	Used Hrs	% Used	% Done
1 First Task of Implementation Project for ABC	3 d	03/11/2016	03/15/2016	4.00	Open	Mary Jones	0.00	0.00%	0.00%



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

## Entering Time and Notes on Project Tasks

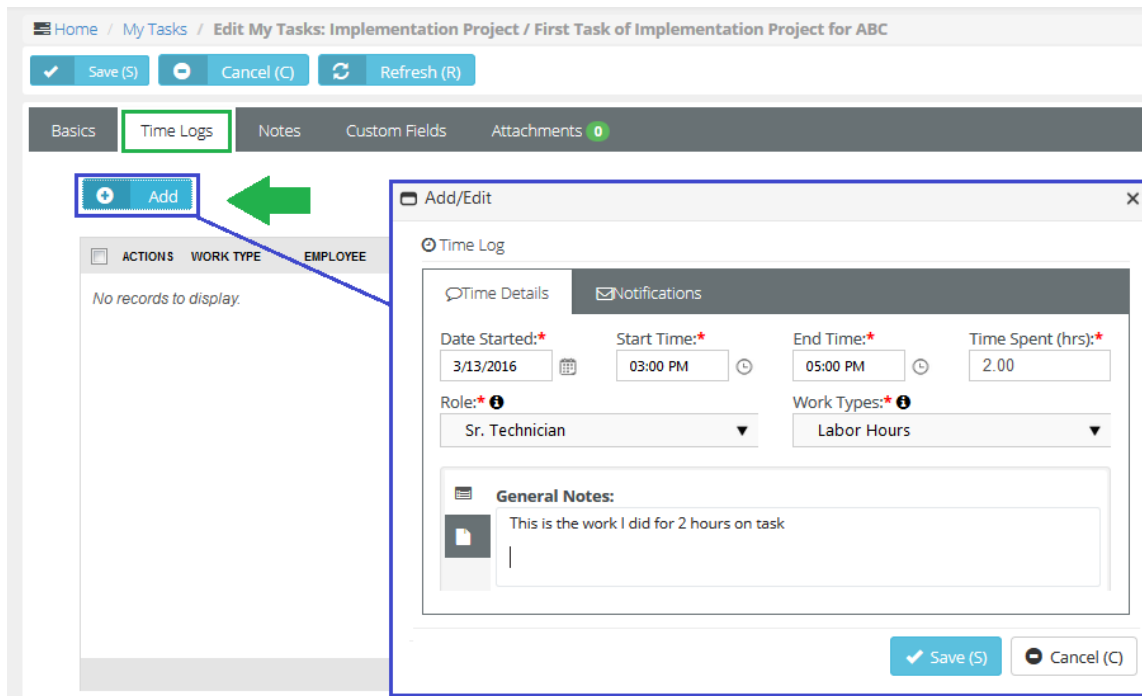
In the Vorex, your employees can track time worked on any Project Task they are assigned to. Time entries here, just like tickets, can be used to generate line items on an invoice.

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
 Implementation Project First Task of Implementation Project for ABC	ABC Marketing Firm	3/11/2016	3/15/2016	0.00	0.00	Open
 Implementation Project 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



Home / My Tasks / Edit My Tasks: Implementation Project / First Task of Implementation Project for ABC

Save (S) Cancel (C) Refresh (R)

Basics **Time Logs** Notes Custom Fields Attachments 0

**Add**

Time Log

Time Details Notifications

Date Started:\* 3/13/2016 Start Time:\* 03:00 PM End Time:\* 05:00 PM Time Spent (hrs):\* 2.00

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

General Notes:  
This is the work I did for 2 hours on task

Save (S) Cancel (C)

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

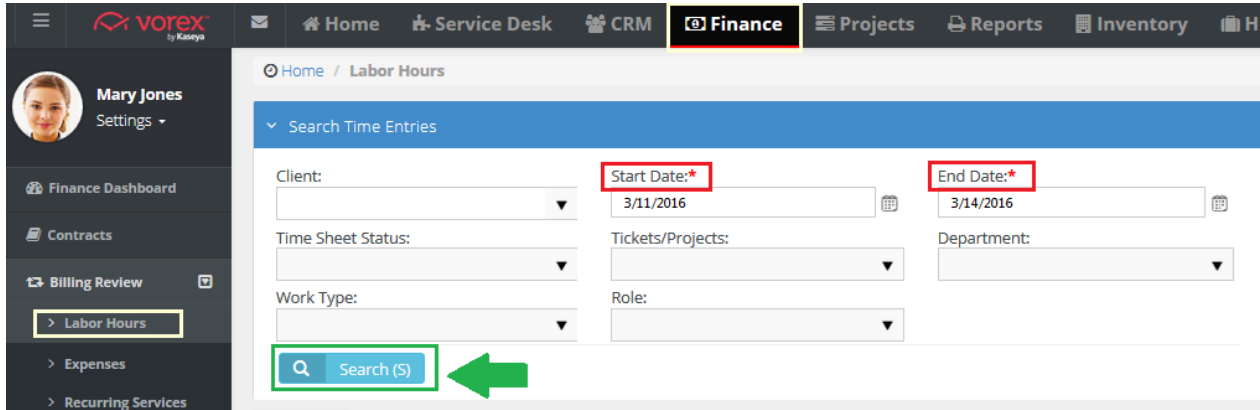
4. Click the **Save** button.

- 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.

Home / Labor Hours

Search Time Entries

Results

Post (P)

2 items in 1 pages

<input checked="" type="checkbox"/>	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 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 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



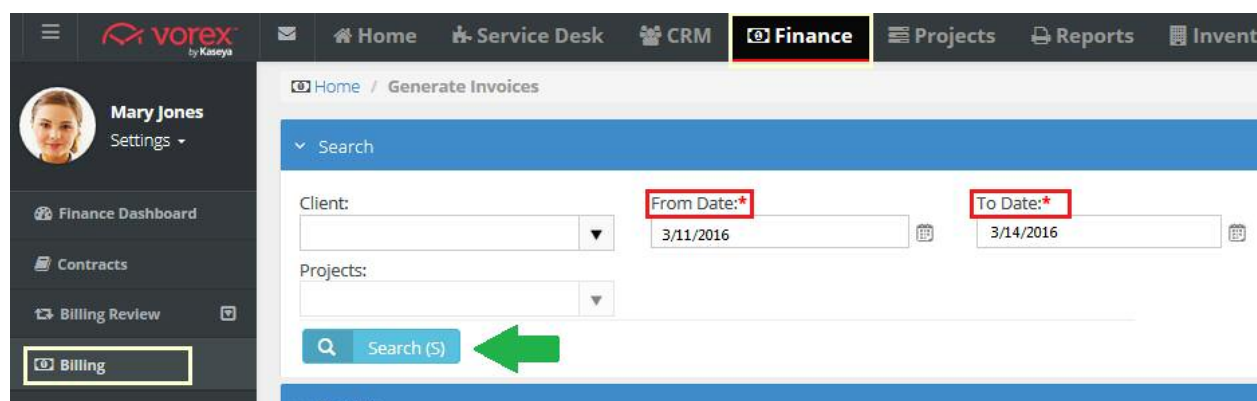
## Billing Process

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:

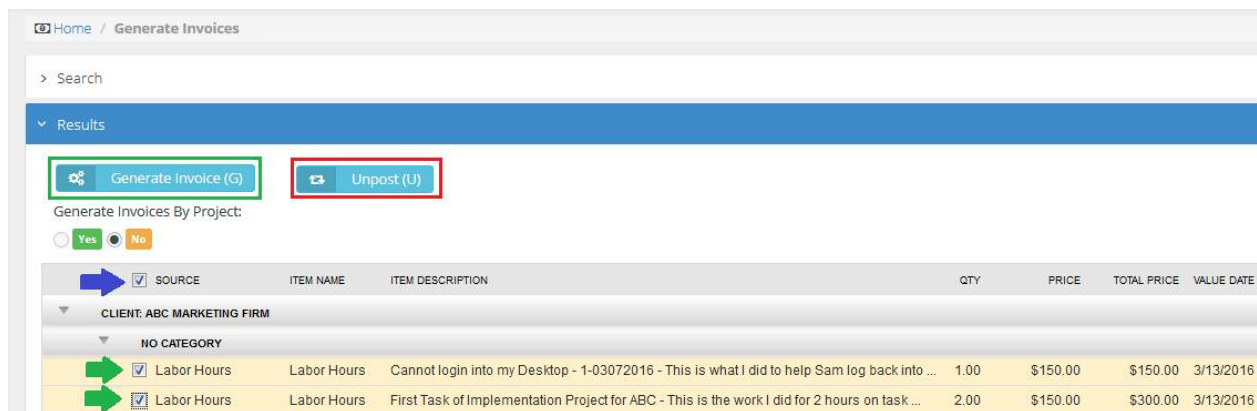
- Expenses added to a ticket or project
- Recurring Service Contracts
- Fixed Price Contract Milestones (ex – Deposit or Final Project Payment)
- Retainer Hour Contracts (some call them Block Hours)

### 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

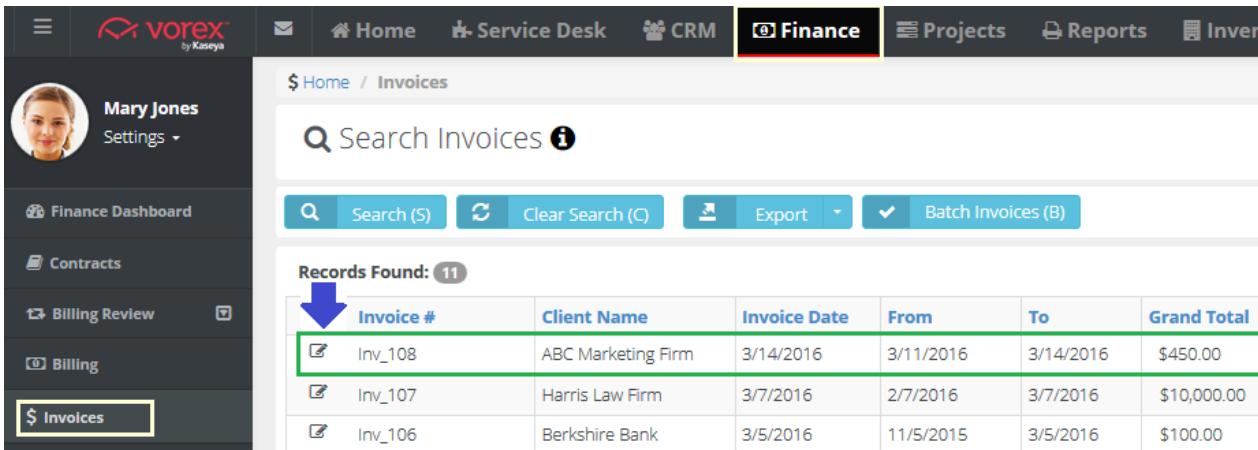
All the items that have been Reviewed and Approved and Generated are now sitting in the Invoice Folder with the Status of NEW

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:

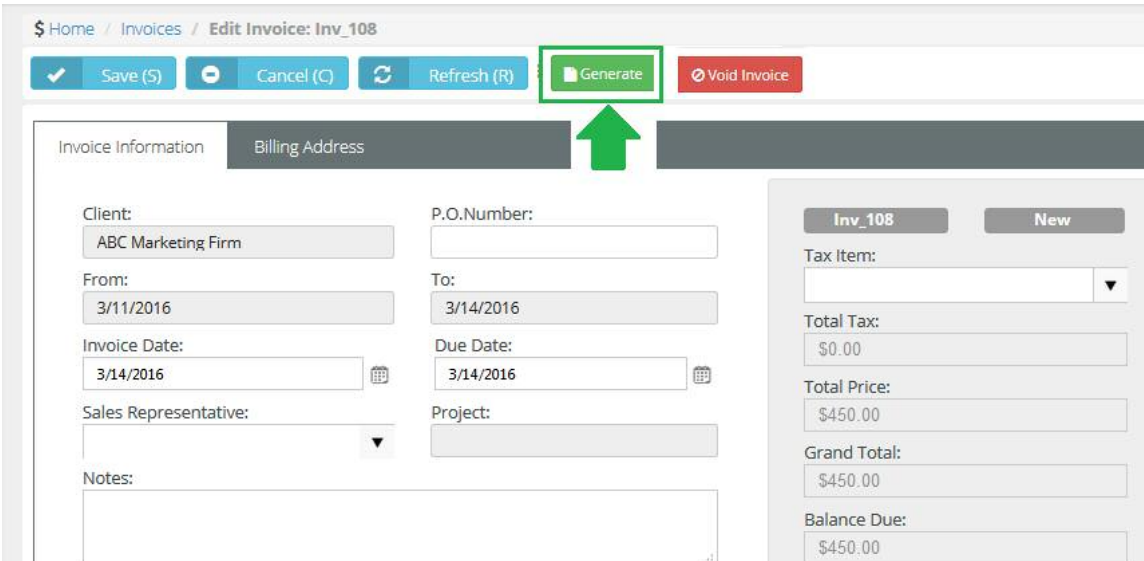
- Add additional information to Line items or a Note on Invoice
- Adjust Quantity or Unit Price
- Apply a Discount – a dollar or percentage amount
- Attach Receipts (that flowed through system to final invoice)
- Add any additional attachments

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.



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

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

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).

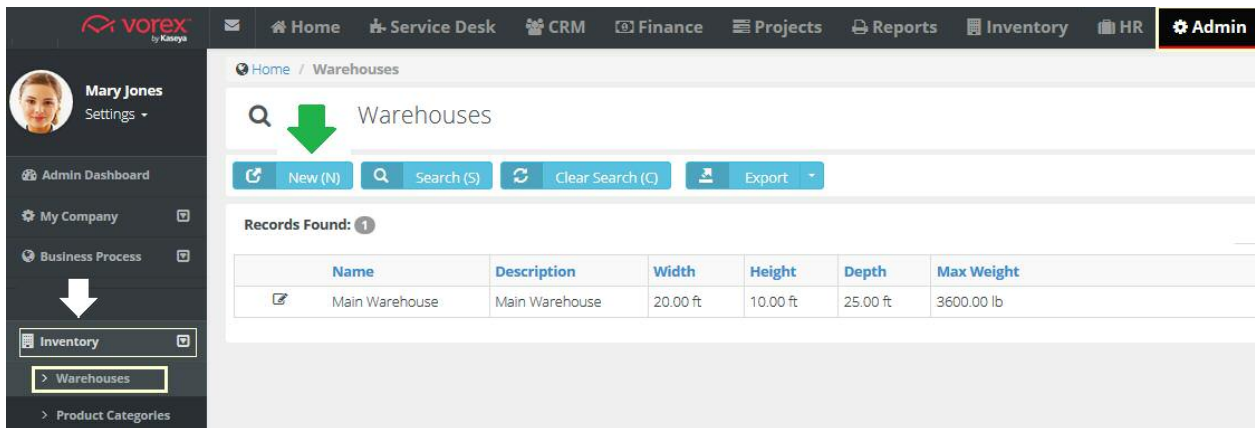
# Inventory, Warehouse Locations and Product Categories

Vorex comes with an Inventory Module that helps you:

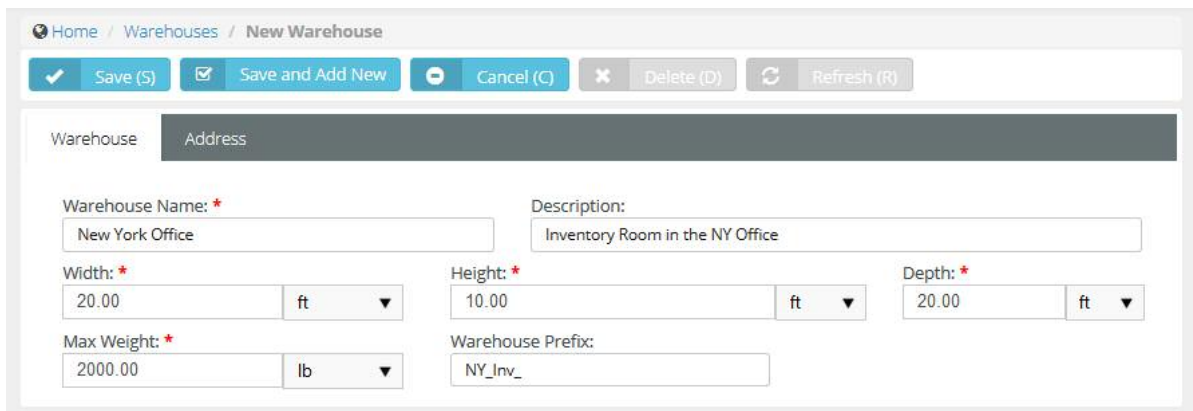
- Store Inventory in Multiple locations
- Maintain Products Lists so you can:
  - Manage the Inventory Process (maintain levels of Inventory, Generate Purchase Orders and Replenish Stock)
  - Use as Products Catalog so you can create Quotes in the CRM

## Create Warehouse Locations

1. Go to [Admin](#) → [Inventory](#) → [Warehouse](#)



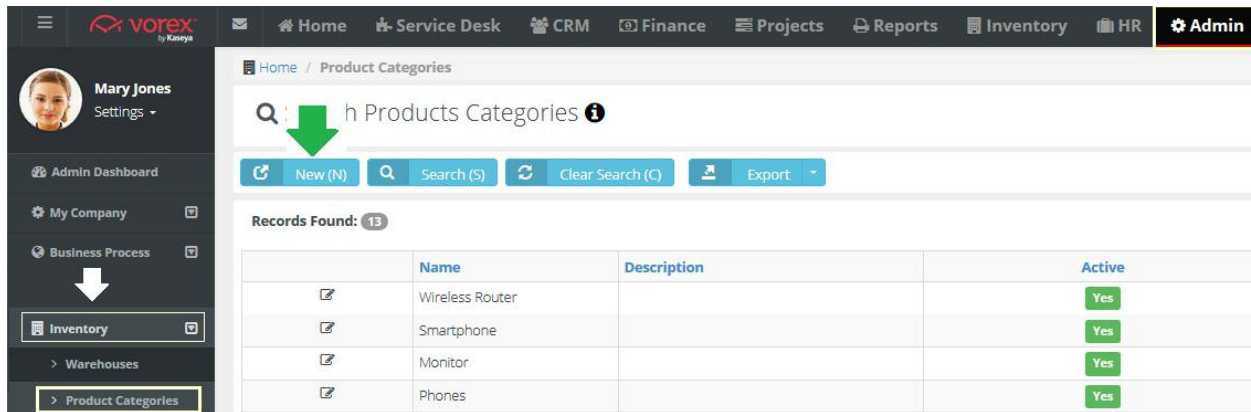
2. Fill in, and select from drop-down menus, information in all required fields and make sure to include the address of the warehouse.



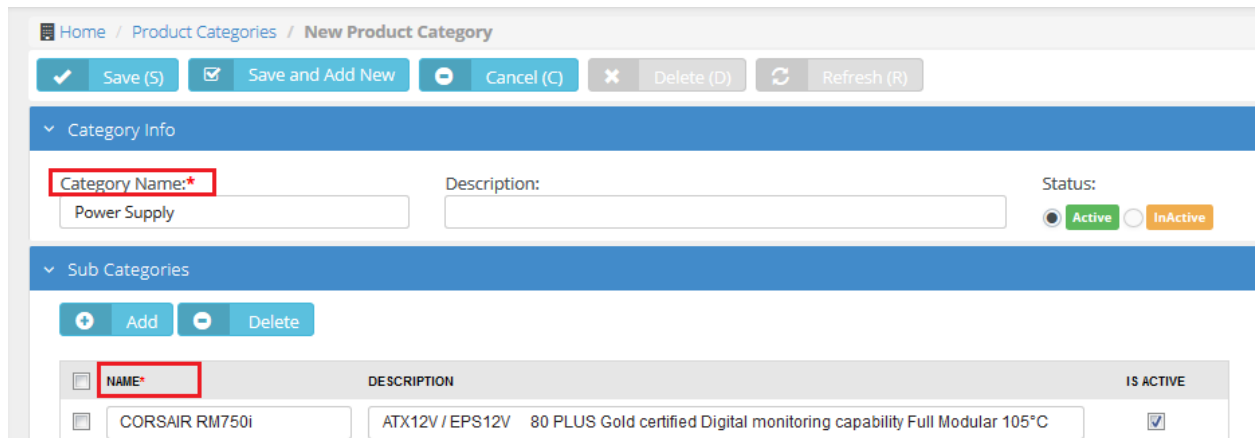
3. Click the [Save](#) button.

# 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.

Home / Product Availability

Search Available Products

Search (S) Clear Search (C) Export

Records Found: 8

	Product #	Product Name	UPC	Warehouse	In Stock	Committed	QTY Available
<input type="checkbox"/>	03172016	Power Supply	11111118281	New York Office	0.00	0.00	0.00
<input type="checkbox"/>	03172016	Power Supply	11111118281	Main Warehouse	0.00	0.00	0.00
<input type="checkbox"/>	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**

Home / Product Quotations

Search Product Quotation

New (N) Search (S) Clear Search (C) Export

Records Found: 2

	Product #	Product Name	UPC	Warehouse	In Stock	Committed
<input checked="" type="checkbox"/>	03172016	Power Supply	11111118281	New York Office	0.00	0.00
<input type="checkbox"/>	03172016	Power Supply	11111118281	Main Warehouse	0.00	0.00

Inventory Items Items Change

Add

ITEM ITEM DESCRIPTION

No records to display.

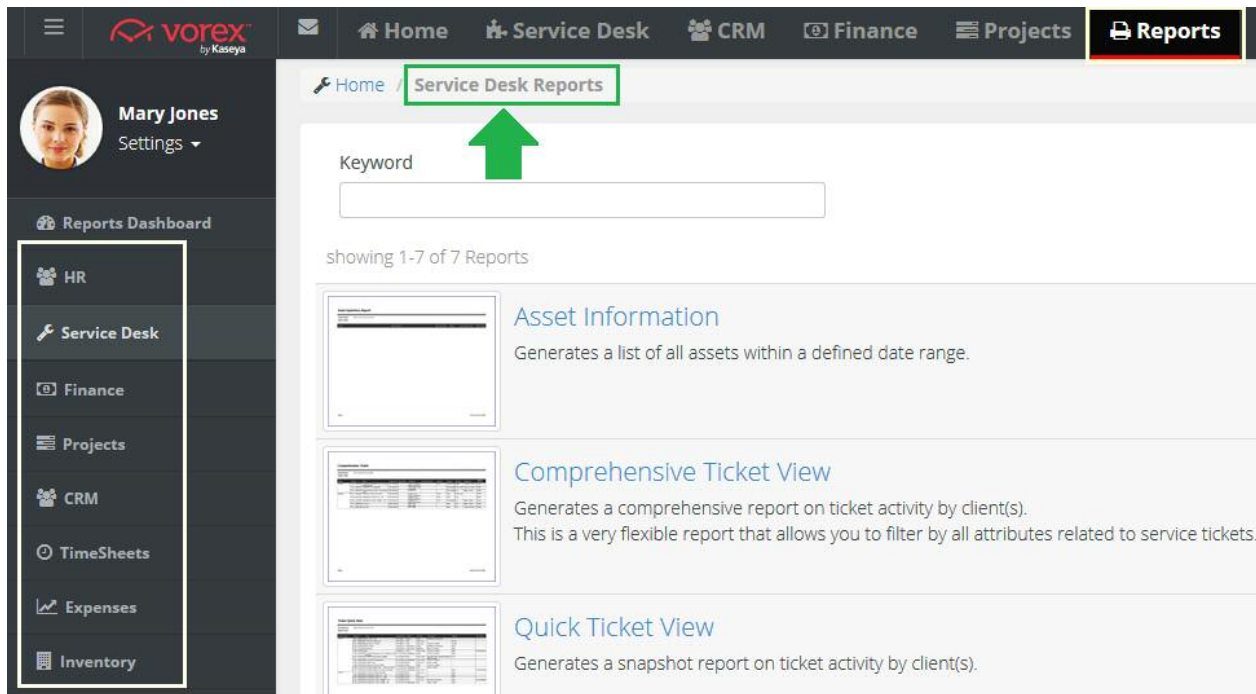
2. Click the **New** button.
3. Fill in information in all required fields.
4. Click the **Add** button under Inventory Items and select the Product you wish to quote.
5. Click the **Save** button and send quote to prospect.

# Creating Reports

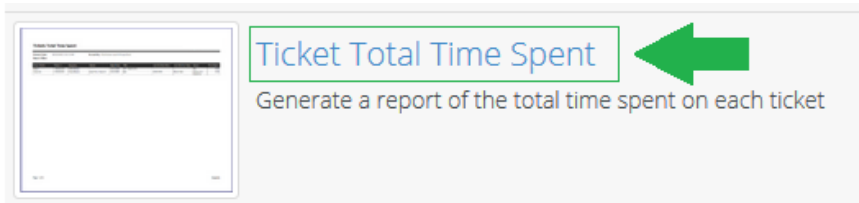
Vorex comes with Reports for each Module

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

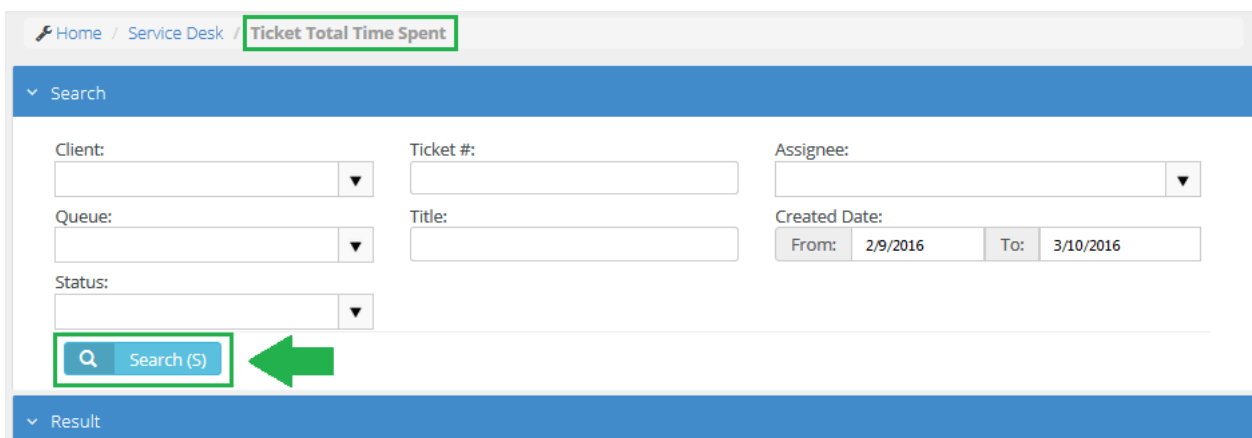
Click on the Module you want to create a report for. (Service Desk is selected in this example)



**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 log into my Desktop	In Progress	0.00
Berkshire Bank	1-02092016	Mary Jones		2/9/2016	Help with Desktop	In Progress	3.00
Berkshire Bank	1-02252016		Client Portal Created Tickets	2/25/2016	I need Help with my Laptop	New	0.00

### 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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