Sync It

Quickstart Guide for Managers

Creating a company

1. Download Sync It from the app store and open it
2. Click Create a Company
3. Fill out all the block and click submit – if successful you will be taken to the Users Settings page

User Settings page

1. Update your personal information.
2. Enable notifications by clicking the box, select all three (for now)
3. Click update
4. Create new users
    a. If you create a user from the mobile app, the new user should download the app before clicking the link to set a password
    b. If you create a user from the web app, the new user can update their password on the web app from any browser
    c. The only fields that are required are last name and email address. Phone number is only used for the phone directory. Driver's license information is only used if you need it; for example, to coordinate with your insurance company.
    d. Most users should not have the Admin or Supervisor team selected. The overall permissions are below
        i. Admin – manage users, company settings, payroll
        ii. Supervisor – create and manage checklists, certifications, equipment and projects

Company settings page (click the Sync It icon or access from the menu)

1. General Settings
    a. Add a company icon
    b. Set the receipt email – Your accounting software should have an email to send receipts. In Quickbooks the email is under the Receipts page
2. Payroll Settings
    a. Use these settings to manage payroll certifications and make payroll a breeze.
    b. Set payroll - this defaults to a payroll period of every week with the week running from Sunday through Saturday. Every other week, monthly and bi-

monthly are also available. These setting will not affect timecards, just the payroll certifications.

3. Notification timing
    a. Payroll notification delay– Users can receive a payroll notification if their timecard certifications do not match their timecards for the pay perios. Payroll periods end at midnight, the delay is the number of hours after the period ends when the notification will go out. You may use a negative number to send the notification before the pay period ends. The time and day for the next notification is displayed for reference.
    b. Service notifications – You may receive a notification for overdue services. The notifications go out once per day at the time selected. Service notifications only go out once, on the day they become overdue.
4. Equipment types
    a. You may create equipment types if desired. Equipment types are used only for sorting lists of equipment. If you don't have many pieces of equipment to track, creating equipment types is probably not necessary. You may add, change or delete equipment types at anytime.
5. Subscription status
    a. See the status of your subscription and purchase subscriptions

Equipment (available on the bottom tab)

1. Click Tools, then New Equipment
2. Add equipment as desired
3. You may modify any of the fields later
4. Currently, you can only add Registration and Insurance documents from the web app
5. Select the notifications block if you want a notification when a service goes overdue. You only get one notification at the time the service goes overdue, so you don't get overloaded with notifications.
6. Add services
    a. You typically want to track services by miles/hours or days, not both. However, you may select both for services if needed and Sync It will track both intervals.
    b. You may add a service record that is not tied to a scheduled service. Click the plus next to Service History

Checklists (Available on the bottom tab)

1. Click the title to bring up the submenu, select Modify Checklists

2. Add checklists as desired
3. Add Tasks to checklist
    a. Click the pencil to change the name of the task or link equipment or services
    b. Linking equipment to a task will open an equipment block for the checklist completer to update the mile/hours or view other data
    c. Linking service to a task will open a service block for the checklist completer to update the service and create a service report
    d. Use the hamburger button to select and switch the task order
4. Add users to checklist
    a. Any of the selected users can complete the checklist
5. Assign a frequency
    a. As needed checklists will always show in the "Checklists due" drop down but will never show overdue
    b. Checklists can also be set with a frequency to complete and will show due after that number of days. The Reset due date button will set the checklist as overdue. Setting any new frequency will also set the checklist as overdue.

Certifications (available from the menu tab)

1. Click the title and select Modify Certifications
2. Click the Certifications text
3. Add certifications as desired
4. Add tasks and users, similar to Checklists
5. Click the pencil on a task to add a description or file (add file is currently only available on the web app)
6. Group Certifications together in a Certification Group
    a. For example, you could have a Group called Mow Crew Tech and assign the certifications: mower, trimmer, blower to the group. When a user has those three certifications completed and verified they will be identified as a Mow Crew Tech
7. When you are done creating certifications, click the title and select Manage Certification
8. Certifications are a 2-part process to show qualified. The user "completes" the certification and a supervisor "verifies" the certification. When a user's certification is verified, they will show qualified.
9. The Manage Certification section has 2 parts
    a. Verify Certifications – You can verify certifications that users have completed
    b. Pull a list of Users that have a certification or certification group verified
    c. Pull a list of certifications that a specific user has verified

Sync It

Project (available on the menu)

1. Creating projects is currently on available on the web app
2. Add a project
3. Add contact info and notes for the crew
4. Add tasks to track. The crew will report the number of labor hours they spend on each task each day. You can pull reports that add the total hours for each task over the course of the project or individual daily reports
5. Add users to the project

Timecards and payroll (available from the bottom tab)

1. Users create timecards when they work. They can fix the timecard and add timecards if they miss one.
2. At the completion of the pay period, each user should click the Certify timecards text, set the payroll period, check their times and "Certify" their timecard.
    a. Note, users will probably certify their timecard after the pay period is over. In that case, they will need to select "Last pay period" to pull the applicable timecards.
3. Click the title and select payroll
4. This page will show Certified times for each user and users with missing certifications. If the user's certified time doesn't match the total of their applicable timecards, the total will be red.
5. You will probably run payroll after the pay period ends. In this case, select "Last pay period".
6. The applicable pay period is displayed
7. You should be able to just type these times into your payroll software. If there are issues, you can click the user under the certified times or missing certifications block to show the timecards for that user.

Receipts (available on the bottom tab)

1. Simply capture a receipt and the receipt will be emailed to the email selected in Company Settings. You will get a green popup letting you know the receipt was uploaded correctly. Occasionally the phone camera will glitch and not upload the receipt. If that happens, you can take a picture of the receipt and upload it from the gallery.

Messaging (available on the bottom tab)

1. This works similar to other messaging apps. If the user has Messaging Notifications selected under their user settings, they will receive notifications for new message