

Katalyst Office Management WorkflowMax Cheat Sheet



Get WorkflowMax setup correctly

- Save yourself, and your team, a whole lot of frustration and time and get WorkflowMax setup correctly, right from the start.
 - WorkflowMax provide plenty of free [videos](#) and [self-paced courses](#). If you are going to DIY the setup, then this is a good place to start. If you DIY the setup and your Work in Progress doesn't make sense, then you need help.
 - We offer [setup and support services](#), we can review your setup and fill in any gaps or help with any issues you are having, or we can provide you with a custom quote to take care of the setup process for you.

Use the Dashboard tab - all day long

- Use the Dashboard tab, a lot. Your Dashboard calendar shows lead activities at the top and then job related activities - such as scheduled tasks, milestones and job start and end dates.
- Your today box shows solid blue when you can go home... if you're the boss of course ;-), everyone else needs to find more work!

Use WorkflowMax to remember - This one is for all my fellow box tickers!

- Use Milestones to remember important items – Purple on your Dashboard
 - They are dated and are job related and appear on your Dashboard and will show as overdue if you don't complete them in time. You can't assign them to individuals, so put the responsible person's name in front when typing in a milestone.
 - You can create a custom report to keep an eye on Milestones across all staff.
- Use To Do's on Tasks for regular steps to complete a task. For box tickers, keep in mind we probably don't want to tell people 'how to suck eggs'. Not everyone likes boxes, so do you really need it?
 - They are task related and appear in your task manager (Jobs, Tasks).
 - For the Task Manager to work, you really need to be scheduling tasks and allocating them correctly too.

Keep your WIP clean! (...as in work in progress...)

- Keep your eye on the Work in Progress – go to Business, Work in Progress. If it doesn't make any sense at all, then contact us to book in a session to walk you through it.
 - This is vital for maintenance and ongoing reporting
 - Clean out any jobs showing a status of completed
 - Clean out any non-chargeable jobs
- Check this monthly once billing is completed, before customer statements are sent out, to ensure all billing is done that can be.
- We have a [WorkflowMax and Xero Month-end Process](#) if you want to ensure the numbers are right.

A Client is not a human being.

- A client is the entity we are billing – be it a company or individual – they are not humans

- A contact is a human – they are the ones that walk around with a cell phone. Their cell phone number is held on the contact record, not the client record, likewise with email addresses.
- Use custom contact fields and a custom report to create Christmas present lists, or use a client and contact custom report to create a list for exporting to [MailChimp](#) for your newsletters.

Global Search



- If you have entered contacts correctly, you can search for them and WorkflowMax will show you their email and phone numbers. Very handy for your team.
- Search for jobs – number in full, or name, suppliers, quotes... have a play.

Use custom fields to expand WorkflowMax

- Use Custom Fields to enhance reporting and function, but create a report to back them up if it is important data.
- Job custom fields make an awesome work order, job bag, or installer info sheet using the job brief custom template.

Upgrade to Premium to better manage staff

- Upgrade to Premium version for an around \$50+GST per month, to get productivity KPI graphs for staff to manage themselves, plus other things.

If you have any questions at all, please don't hesitate to contact your Katalyst WorkflowMax Certified Advisor on +64 9 269 5466.