**Higher-Level Admin Procedures**

1. Memorize Sales Receipt.

For those who have clients with repeating payments like rental properties, monthly subscriptions, payment plans, etc…

Procedure:

* Open Create Sales Receipts
* Choose the Customer, enter the date, choose the item, quantity, price, tax if applied, deposit to Account, etc.
* Go to Edit / Memorize Sales Receipt
* Check Automate Transaction Entry, choose How Often, Next Date, Number Remaining, other if applied
* Save (OK)
1. Create a Job with ToDo Reminder.

For those who have clients with different projects running by period and needs the 30-day reminder for renewal

Procedure:

* Go to Customer Center
* Click on customers name to highlight
* Go to New Customers & Jobs and pick Add Job in Submenu
* Enter the Job Name
* Go to the Job Info and enter the following information: Status - In progress; Start Date - purchase date; Projected End Date - Start Date + 1 year; Job description – You Name; Job Type – Choose from the list or create the new one.
* Save (OK)
* Go to Customer:Job -> Notes -> New ToDo and enter the following information: Type – choose one; With - Customer name; Due - 1 month before job end date; Details - Customer Name Job Name 30-day notice; Status – Active
* Save (OK)

**Highly-detailed Procedures for Lower-Level Clerical**

**Using FileZilla**

FileZilla moves files from your local computer to a web site and back. The technical term you might see is FTP. File Transfer Protocol.

You can download files using your browser, but when you need to upload files, you need to use FileZilla.

We’ll use Filezilla for the following:

1. All web site updates.
2. Moving audios and transcripts to the AA web site and for Ning forum access.
3. Moving Freeconferencecalling.com recordings for coaching client access.
4. Moving Black and White Q&A call recordings to the AA site.
5. Moving Sandi’s SoundForge recordings to the web sites.
6. Receiving very large files from Matt my artist.

The basics

FileZilla has two window panes, one on the left and one on the right. The one on the left shows the files on your computer. The one on the right shows the files on the web site that is connected to the Internet. The top shows the folders, while the bottom shows the files in the folder that is highlighted.

Since our goal is to transfer files between 2 locations, the first thing we need to do is understand which locations are involved.

Step 1. Open Filezilla. Maximize the window.

1. The first time you use Filezilla, customize it to avoid errors.
	1. Click View. If QuickConnect has a checkmark by it, click it. We will never use QuickConnect.

Step 2: Determine what locations are relevant for your task.

1. Where are the files on your computer that you need to move? Point the left side to those files.
2. For example, on my computer, I would highlight Documents or click the + sign to expand it. Then I would click Clients, then Clients K-Z, then xx, then xx web site until I saw the .htm files.
3. What is the site you need to update? Point the right side to it. If you don’t see it, add a new site.
	1. Click File > Site Manager.
	2. Highlight the correct Site and click Connect. At the top below the menu bar/command bar and above the location panes, you will see the commands. “Directory listing successful” means you can continue. For anything else, ask Sandi.
	3. Change to the correct folder/directory.
		1. For InMotion accounts, it will be Public\_html, then possibly the domain name.
		2. For FutureQuest accounts, it will be www, then possibly the folder name.

Step 3. Double-check your locations using the Local site and Remote site bars and making sure the correct folders and path are displaying.

Step 3: Transfer your files.

1. If you are uploading (updating a website), right-click on a file on the left side and choose “upload”.
2. If you are downloading (saving web pages to your computer), right-click on a file on the left side and choose, “download.”

Step 4: Check your work in a browser.

1. If you were uploading pages, go to the web page to make sure your changes show up.
2. If you were downloading pages, you can open CoffeeCup to see them.

Setting up a new site:

If the site you need to move your files to is not set up, you need to set it up:

1. Click file > site manager.
2. If your site is not listed, click the New Site button. Type in the domain name then client name. For example, “xx xx.”
3. You’ll need 3 pieces of info:
	1. Type in the Host name (this will be provided always)
	2. Change the logon type from anonymous to normal
	3. Type in the User (this will be provided always)
	4. Type in the Password (this will be provided always)
4. Make some notes in the comments section if you want to:
	1. Especially if there are multiple sites. For example, with xx, you will also have xx within the xx account. So a good note might be:

“Includes xx. To get there, change to the /www/xx/ folder.”

* 1. For brainways, multiple sites are included: fillyouraccountingpractice.com, myclientstools.com, accountantsaccelerator.com, thewealthyaccountant.com, and many more. BrainWays is just the base site.
1. Click Connect or OK.

Once you set up a site, you don’t have to do it again unless something changes.

**Filezilla: Uploading Articles**

Find Correct Folder for client on the PC. There should be a folder for each client in the folders under the title “client”

There are 2 hosts available:

1 inmotionhosting: In this everything will be loaded through public\_html

Or

2 futurequest: Click on the + sign and find the folder “www”

After clicking on the correct folder, make sure the name in the title of Remote Site (on left side) matches the folder in which you are working.

In “Local Site” find the folder for xx (example) under “my documents” click + “Clients” + “xx”

The matching name should be in the tab above in Local Site

Under the “Filename” tab, click twice on the “last modified” to sort by date and find the correct article/file (the most recent)

Select the article to be loaded as well as the “articles” file

Right click on the correct file and click “Download” for both files

OPEN: Coffeecup – click “Open Existing Files”

Find the correct folder and open both articles at the same time by highlighting, holding down “ctrl” and dragging down until they are both highlighted in blue.

Right click and “Save As…”Rename to “articles” plus “-‘title of article’”.htm

**BEFORE CONTINUING**: Always double-check to make sure the title isn’t duplicated, so as not to overwrite an existing article.

Open the Word Document that has the new article and copy and paste the entire article from title to the bottom of the page.

Go back to Coffeecup, in the coded section, find the editing icon at the top of the page, click and then click on the Toggle Word Wrap option in the drop-down menu.

Delete existing article and replace with new article

In the coding, find the previous articles Title/Date/Category, delete the old and replace with the new Category/Date/Title

To ensure the proper format, at the beginning of each Paragraph break, insert <p> all the way to bottom of the article

Go back to Word Document and look over again, this time for any italicized/bold words or phrases

**To italicize**: go back to the html view and highlight word/phrase to be changed and click “format” scroll down and click “Emphasis”

**To bold:** go back to the html view and highlight word/phrase to be changed and click “format” scroll down and click “Strong”

Go to the “articles” page (bottom left) click in

Copy and Paste the most recent article that belongs in the same category, copy and paste

In the top article delete the old info and replace with new Category/Date/Title

Preview Work

Go back to Filezilla

Refresh filezilla, right click on article title, click “upload”

Repeat for both article files

On the generic “articles” file, it will ask if it’s OK to overwrite, click “OK”, if it asks on the new article title, re-check title again to make sure it isn’t duplicated.

Open website, refresh and make sure the article link is on the “article” page, click link and ensure that the format is correct.

**Repeat Same Process** for “xx” website by clicking the + in the remote site tab on “www” and select “xx”

Again, make sure that in the Remote Site title tab, the name changes to “xx”