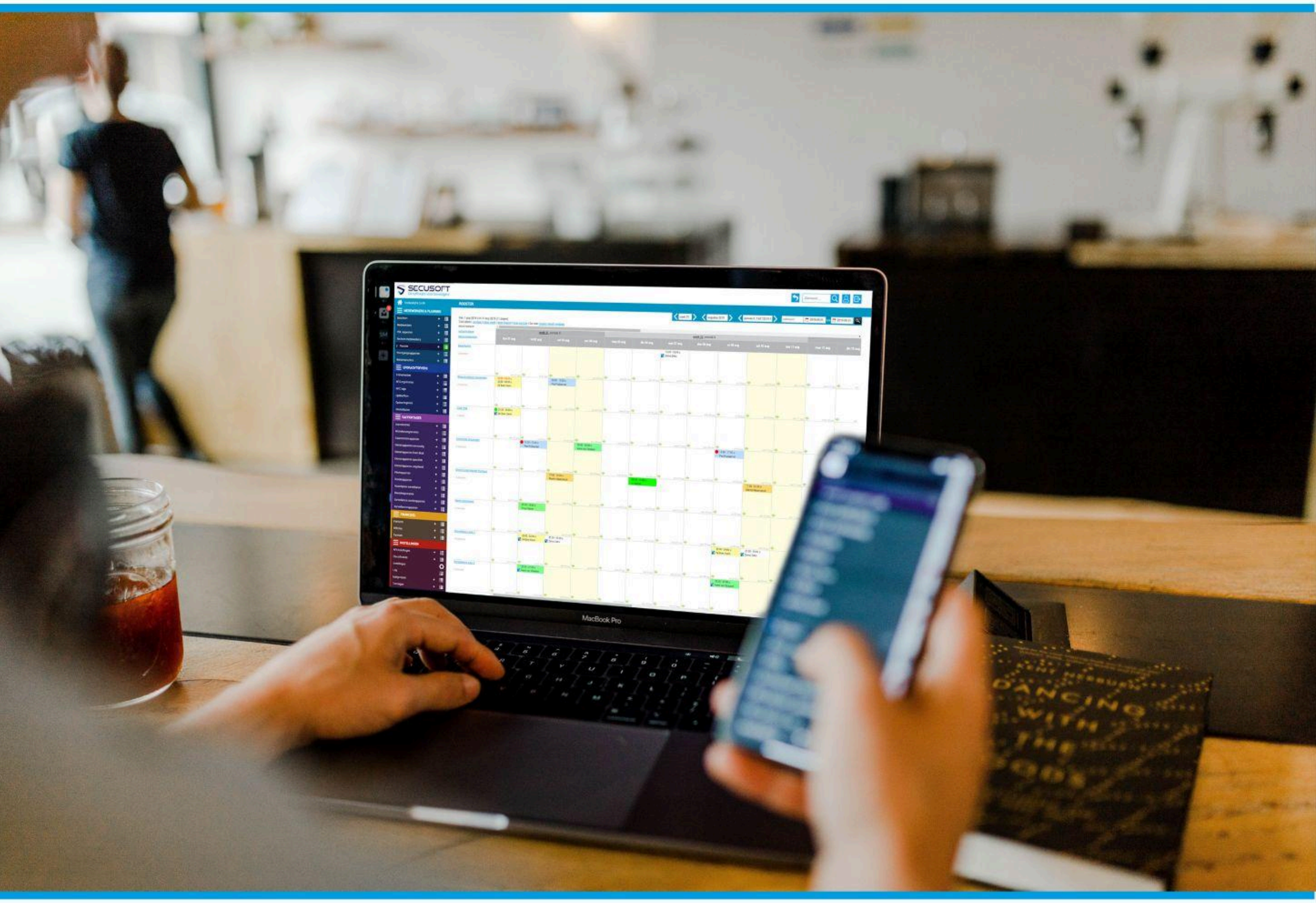
QUICK START
Management Manual



SECUSOFT
Software for security guards

In this manual we will walk you through the start-up step by step, so that you can get started right away.

SUPPORT: +31 85 1300760 support@secusoft.com

Management Guidance | SECUSOFT

When you first log in to Secusoft, the amount of options can be overwhelming! You may no longer see the forest for the trees. In this manual we will walk you through the start-up step by step, so that you can start immediately.

What needs to be done now, and what can be done later?

You will find that as you become more familiar with the system, you will use and appreciate more modules, because our software is fully adapted to the needs of private security companies.
But that will come later, now first: get started!

To start with, it is important that you have the basic settings correct. These are discussed in this **Quick Start Guide for Management**, and we tell you where you can find the basic settings. We also provide answers to common questions you may encounter when working with Secusoft for the first time.

Are you wondering what all the icons mean? At the end of this manual you will see the meaning of each icon.

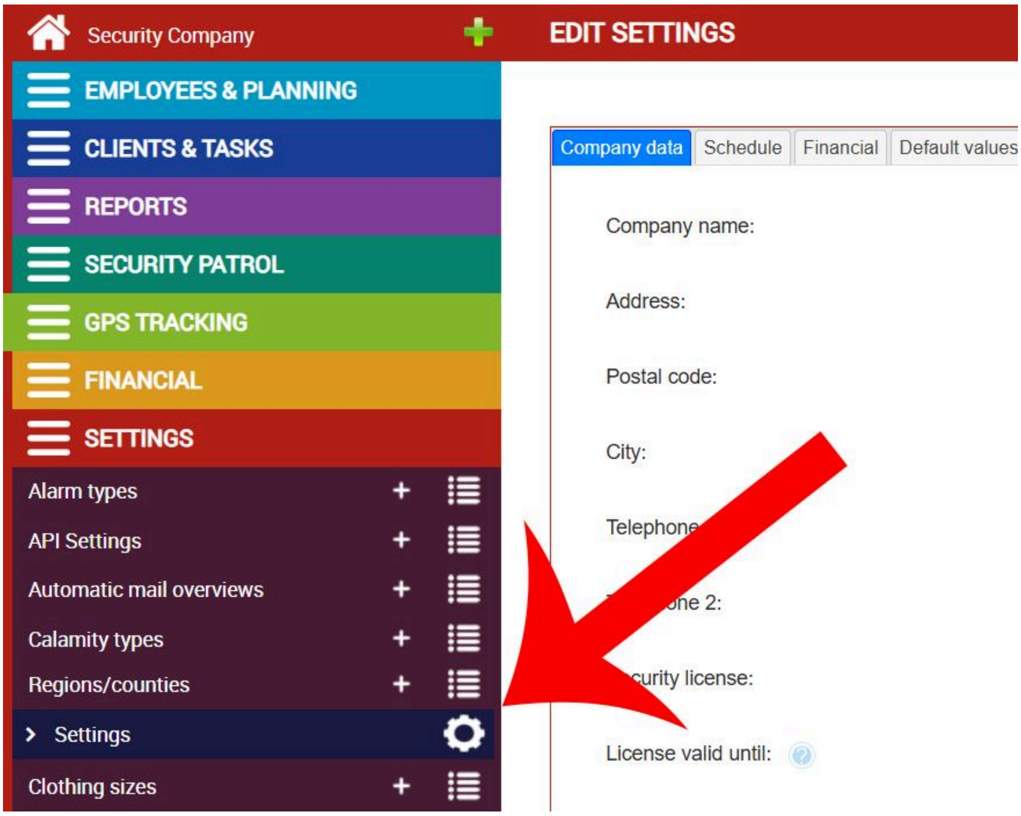
Start

You have an account on Secusoft and you are logged in.
From now on everything starts with the colored menu (dashboard) on the left. Don't see this menu?
Then your dashboard is still 'folded'. Click on the 3 lines at the top left and the menu will unfold.

1. Settings

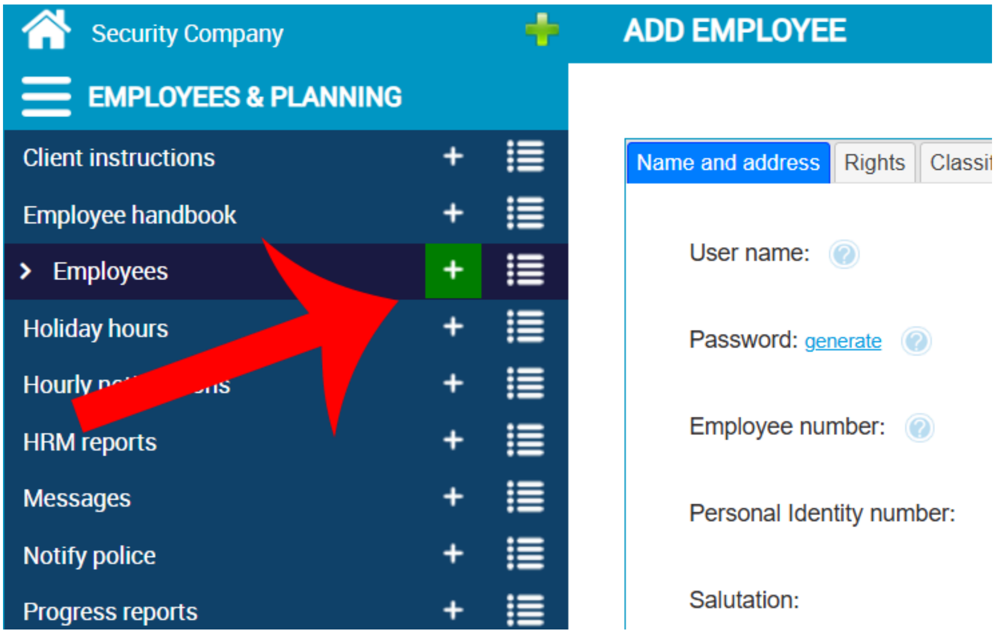
You will first enter your company details in the system. To do this, go to the red part of the menu (left) and click on the **gear next to 'Settings'**. Here you check your own company details such as contact details, Chamber of Commerce number, IBAN, etc., and supplement them where necessary.

Don't forget to save after completing!
You can save by clicking on the button at the bottom right: Save.



2. Add employees

You will then add all employees of your security company. You do this by clicking on the **plus sign next to 'Employees'** on the left in the light blue section under 'Employees and Planning'. This way you add each employee separately.

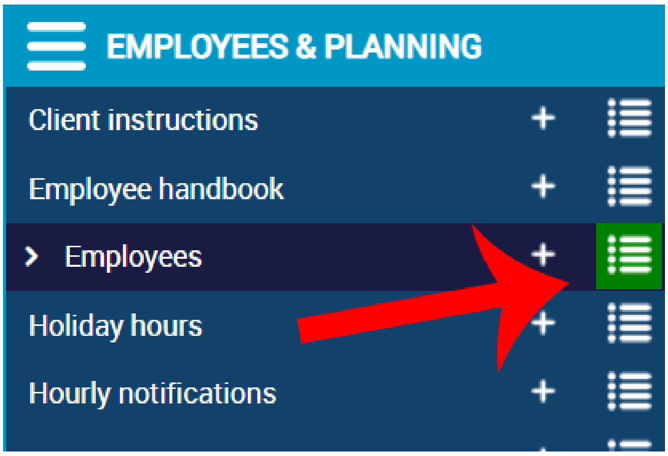


Enter for each employee:

- **name**
- **username** (e.g. initial + last name (asteele))
- **email address**
- **the type of employment contract** ❗ *IMPORTANT!*

Leave the **password** blank. The employee can create this himself with the activation email that he or she will later receive from you. You can add additional information about each employee, such as clothing sizes or the expiration date of the security pass, later if desired.

Then save.



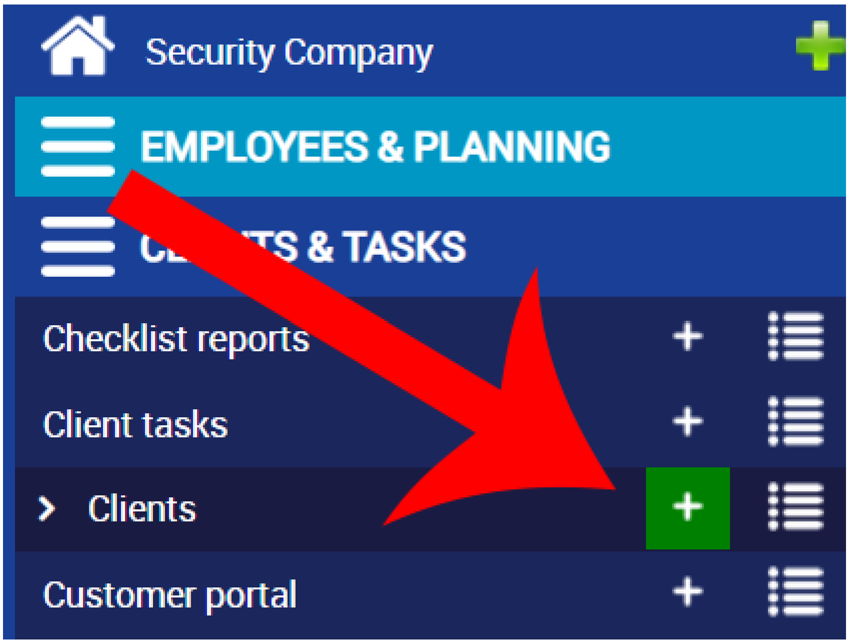
To view the entered data, click on the lines next to the plus sign. These lines take you directly to the overview of added employees.

3. Clients and Assignments

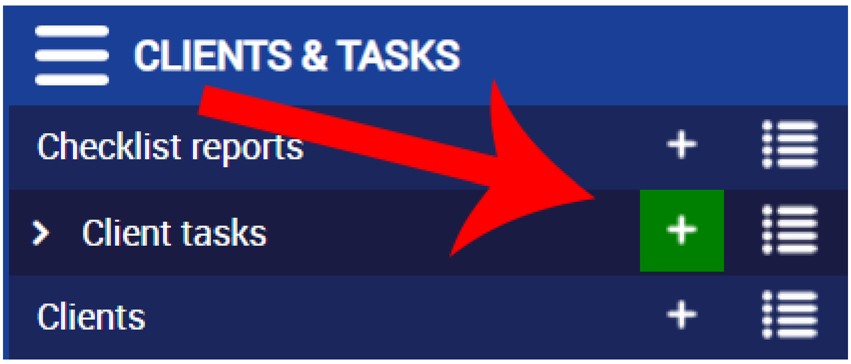
You will now add your clients, and then the client tasks.

What's the difference?
The client is the customer or hiring party that purchases your services.
The jobs or work locations that you carry out for that customer are the client tasks, also called Assignments.

Before you can add client tasks, you must have entered a client to link these assignments to. You do this via the menu (left) in the dark blue section.
Click on the plus sign next to 'Clients'.



The different jobs or work locations that you carry out for each client are the **client tasks**, which you then add as an assignment by clicking on the **plus sign next to 'Client tasks'**.



For example: you add IKEA head office as **'Client'** and if you provide services to different branches, you add each branch/work location separately as ‘**Client tasks**’.
Example for Assignments:

- IKEA location Amsterdam
- IKEA location Rotterdam
- IKEA location The Hague

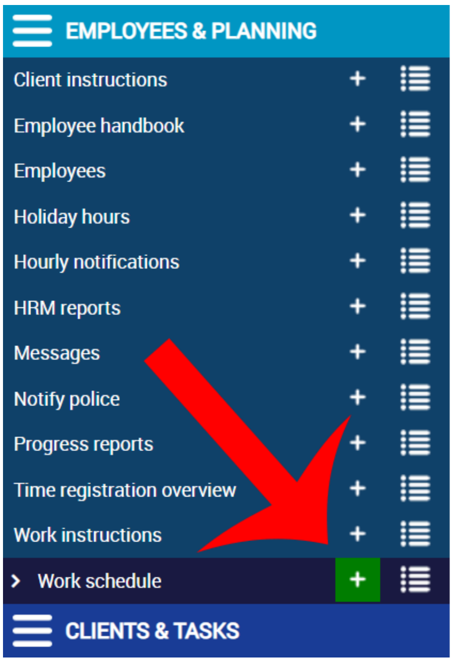
You must link each client task to a client. You will later see that you can list all completed tasks per client in one overview.

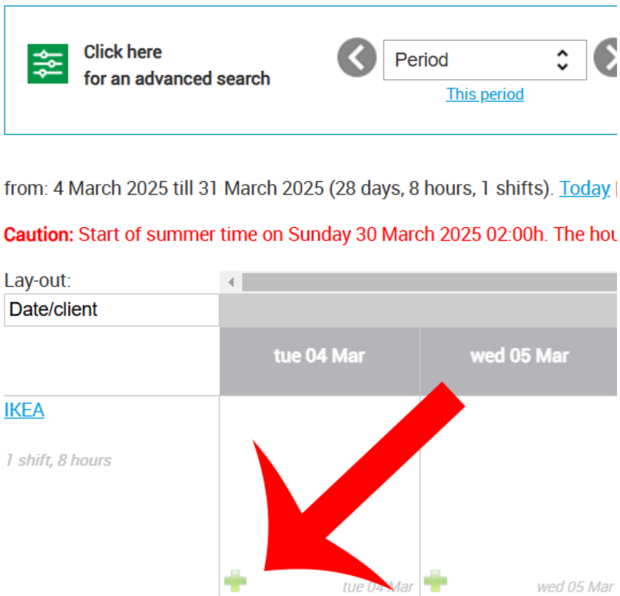
You make it easy for yourself by entering a number of default values for each assignment. Such as start and end time, type of work and breaks. This will already be shown when you add a shift for this assignment (in the next step).

4. Your first work schedule

- **Add shifts**
- **Scheduling employees**
- **Make a schedule**

Now you are ready to schedule shifts. You do this by clicking on the **plus sign next to 'Schedule'** under Employees and Planning (light blue), or from the work schedule by clicking on the green plus sign.





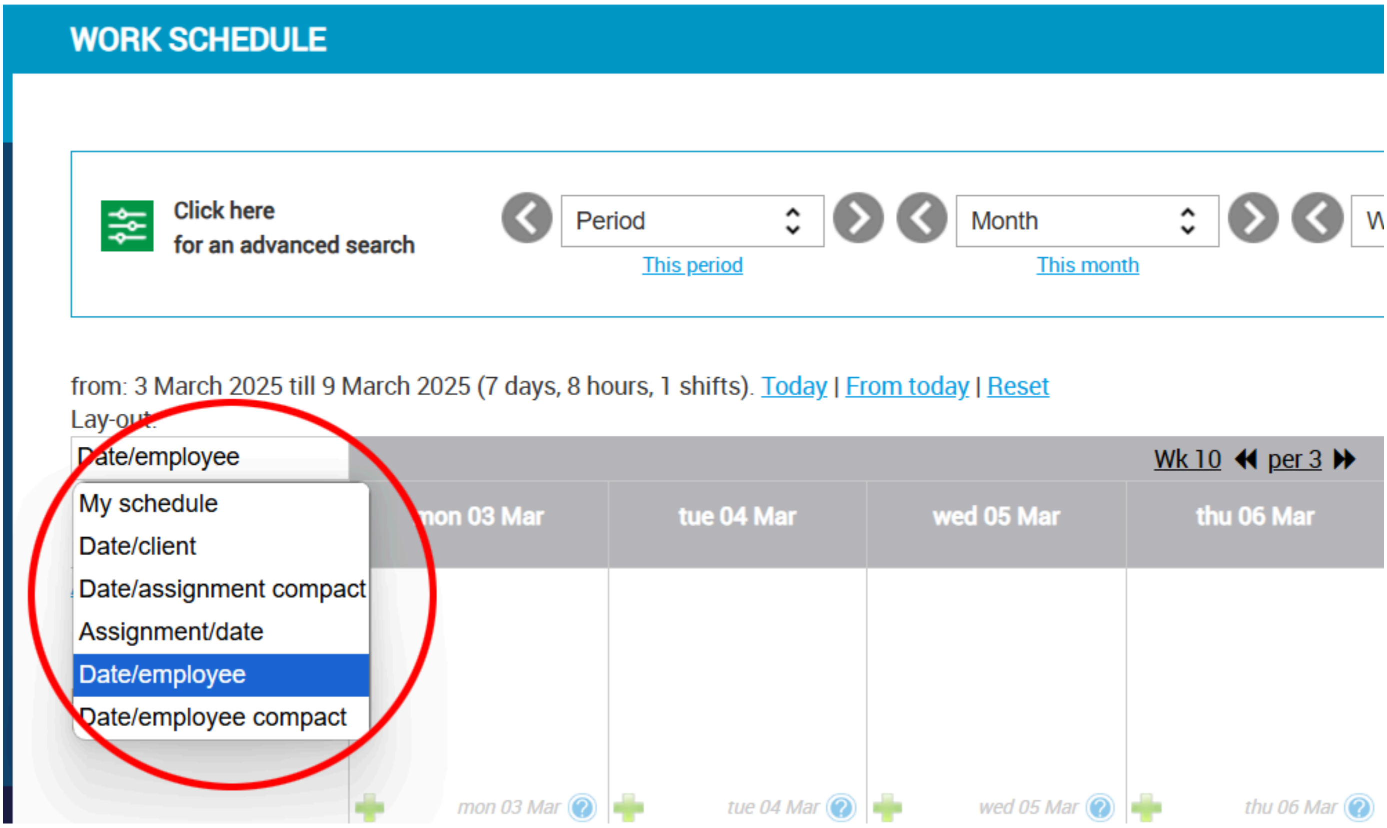
If you have already entered the default values per assignment (see previous step), these will now be selected. That saves time!

And because you have already saved the type of employment contract for each employee in step 2, any surcharges are calculated automatically.

You will see that the distance from the employee address to the work location is also shown via Google Maps.

5. Schedule lay-out

Switch layout and adjust preferences
You can adjust the view of the schedule to your own preference. By default this is set to date horizontally, assignment vertically (left). If you prefer to see the date on the left, click on “assignment/date”.
Do you find it clearer to have the employees shown vertically? Then click on “date/employee”.



Set default layout
Once you have made a choice for the display of the schedule of your choice, you can set this as the default when displaying the schedule. Change your settings to do this. Click on the blue figure at the top right. Then select the layout of your choice under “Default schedule layout” and press save (bottom right).

You can also indicate here which period you want to be shown in the schedule, for example this week, this month or this period (4 weeks).

6. Change account information

Do you want to change information in your account, such as your password? You can do this by clicking on the blue figure at the top right. You can also add your scanned signature here, after which it will be shown by default under quotes and agreements that you create in Secusoft.

7. Log-out

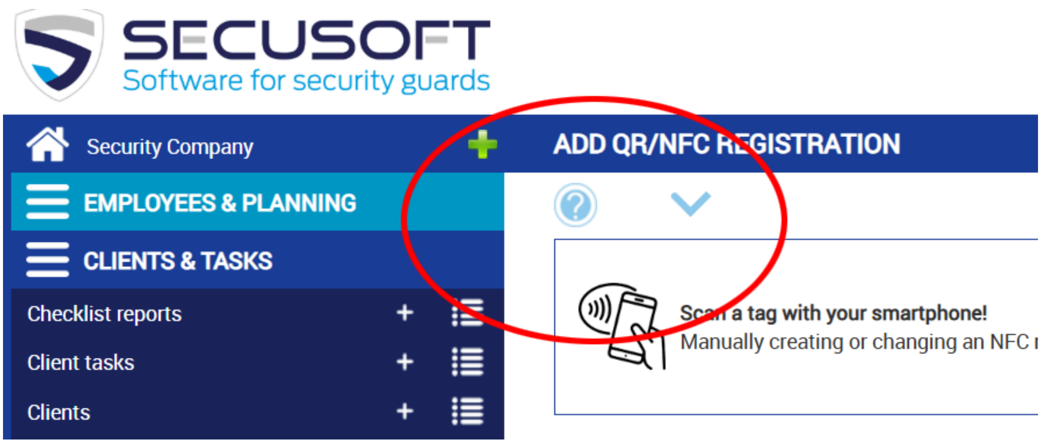
Have you finished your work in Secusoft and have you saved your last action via the button at the bottom right? You can then simply log out by clicking on the exit symbol at the top right, next to the Account/settings icon. You are then logged out.

8. Knowledge base

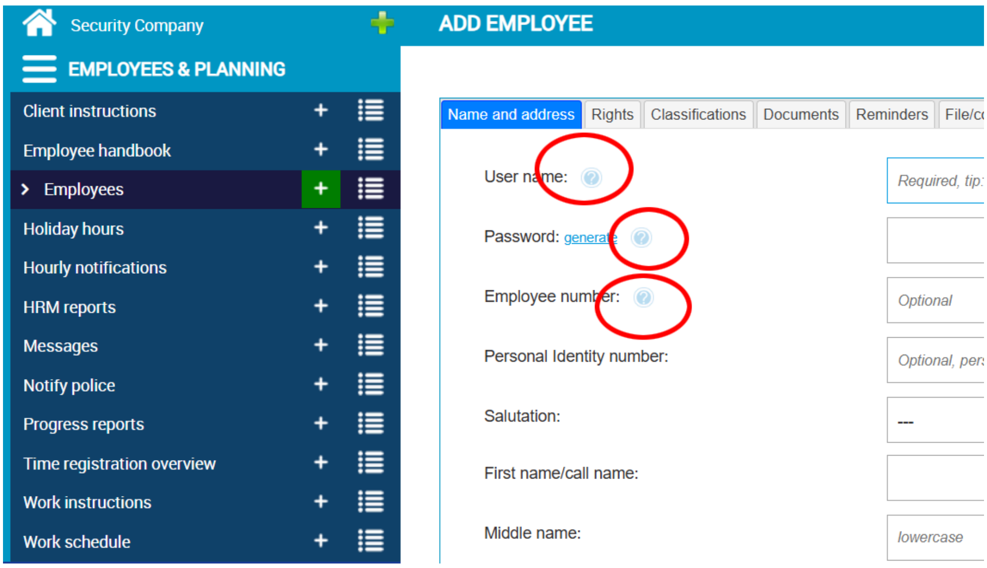
Secusoft has an extensive knowledge base to help you find the answers to your questions. You will find the knowledge base at the top right, under the Account and Log Out icons.

Secusoft support
Do you need help or do you have a specific question about using our software or modules? Please send an email to support@secusoft.com or call +31 85-1300760, where our support team is ready to help you. We do ask that you first consult the knowledge base, which contains the answers to the most frequently asked questions.

Explanation of modules
Would you like information about a specific module? Then you can click on the question mark that appears at the top left, when you have clicked on the plus sign or the overview of this module. A menu will then unfold with a brief explanation of the module in question, such as who can use this module, what exactly the module is, and what it does.

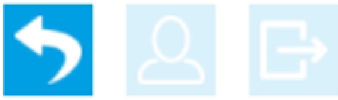
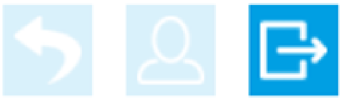
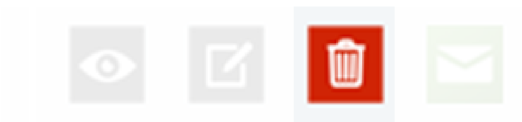


Explanation of a field to be filled in
Are you filling out the form and you don't know exactly what is being asked or why you have to fill it out? Then click on the small question mark next to the input field and you will receive more information about what information you need to enter.



YouTube channel with instructional videos
We have also made an instructional video for many of the modules, showing step by step how the module works. You can find these videos on our YouTube channel.

Meaning of the icons:

	Add new (Plus sign)
	Overview of the data entered (4 points with stripes)
	Go back 1 page (light blue square with white arrow pointing to the left)
	My account settings (light blue square with white figure)
	Log out (light blue square with white square with right arrow)
	Click here for more explanation (light blue question mark with fold-out V)
	View the item in a printable version (black square with white eye)
	Change this item (black square with white square with pencil in it)
	Delete this item (red square with white trash can)
	Send this item by email (green envelope)

= Item has already been emailed, please resend

= Active/Show in selection menu is on, when adding services or reports this item is shown in the select/pulldown menu

= Active/Show in selection menu is turned off, when adding services or reports this item is not shown in the select/pulldown menu

= Open the location in Google Maps, start navigation on mobile

= View the item in a printable version

= Change the item in question

= Delete the item in question

= Create a round report for this client

= Create an alarm receipt for this client

= Instructions and QR code to program the NFC tag

= Open the location in Google Maps, start navigation on mobile

= Place the alarm receipt in the schedule

= Alarm receipt is in the schedule

= Duplicate the item and copy everything into a new entry

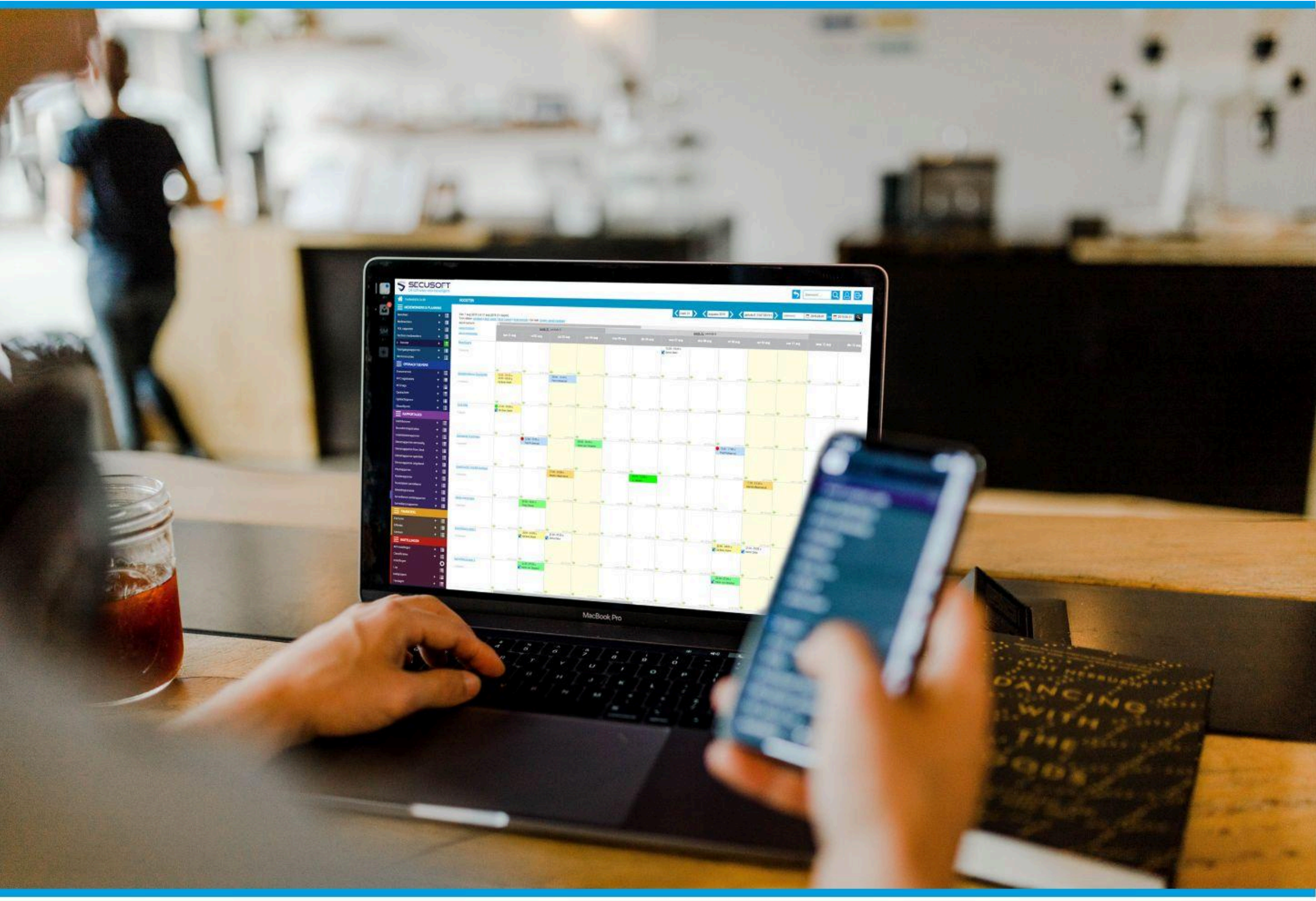
= Copy the data to a new invoice

= Register logged in visitor as present

= Register the departure of an attending visitor

= Clothing/badge/key has been issued

= Clothing/badge/key has been returned



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