youmehub™

business productivity software

quick start guide v2.0

www.youmehub.com

welcome to **youme**hub™

business productivity software for designers

Mac

Universal

WINDOWS

www.youmehub.com

welcome to **youme**hub™

Youmehub is a business productivity solution for design studios & creative industries, Youmehub allows you to manage many aspects of your studio workflow. The system tracks companies, contacts, customers, clients and suppliers; allows you to create marketing campaigns and mail shots; manages an office diary; stores an inventory of products and provides an easy method for creating and tracking sales, purchases and expenses. The projects, jobs, schedules, files and time sheets modules allow project managers to track and manage people, time, costs and file assets. Finally software and hardware inventory modules help you manage all your hardware and software assets.

Installation

If you have purchased Youmehub Multi-User you will need a copy of FileMaker Pro 8 or higher software installed on your system (not included). If you intend to use Youmehub in a shared network environment it is recommended that FileMaker Server be used. Although FileMaker Pro has peer-to-peer networking capabilities, only FileMaker Server provides safe, faster hosting of your files for multiple clients and provides automated backups of your important data. Please refer to the FileMaker Pro or FileMaker Server installation and setup instructions.
With Youmehub Single-User, FileMaker Pro or FileMaker Server software is not be required.

Mac OS: Copy the 'Youmehub' folder from the CD or Disk Image archive either to your 'Documents' or 'Shared' folder on your hard disk.

Windows: Copy the 'Youmehub' folder from the CD or ZIP archive to either 'My Documents' or 'Shared Documents' folder on your hard disk.

If you are using FileMaker Server to host this solution it automatically opens and hosts FileMaker Pro files in the 'Databases' folder in this case copy the contents of the 'Youmehub' folder into the 'Database' folder:

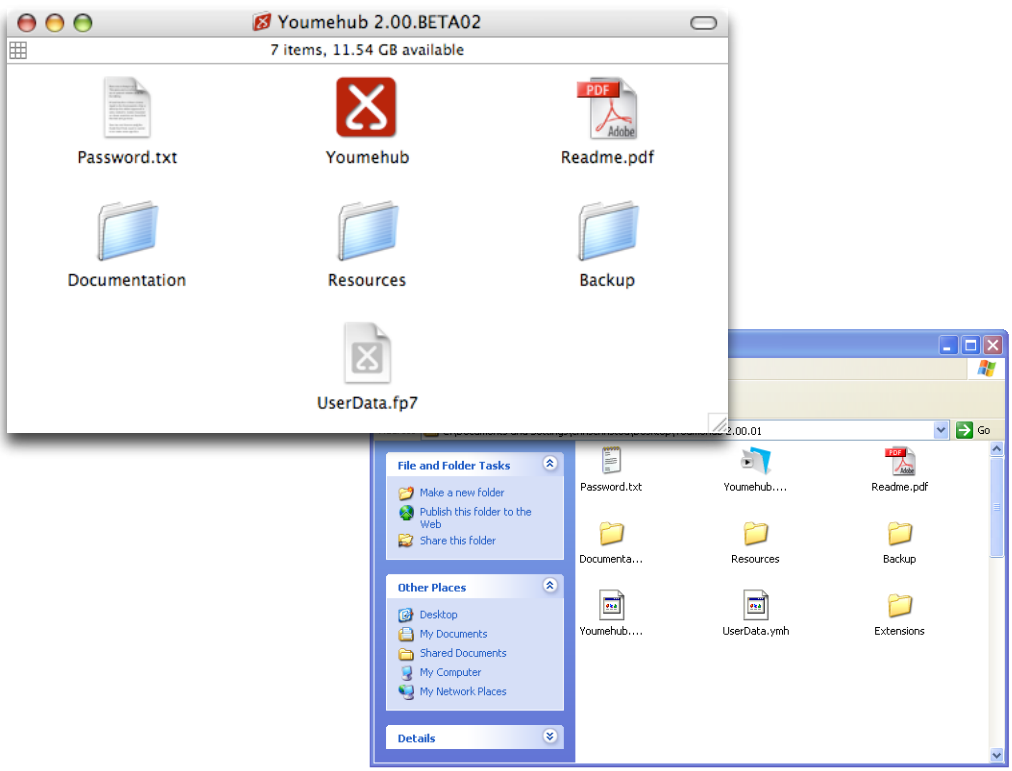
Mac OS: [hard disk]/Library/FileMaker Server/Data/Databases/
Windows: Program Files\FileMaker\FileMaker Server\Data\Databases\

Documentation Folder
The documentation folder contains PDF documentation such as this quick start guide, user manuals and license agreements.

Resources Folder
The resources folder contains resource files used by the system as well as outher folders where tempory data is stored.

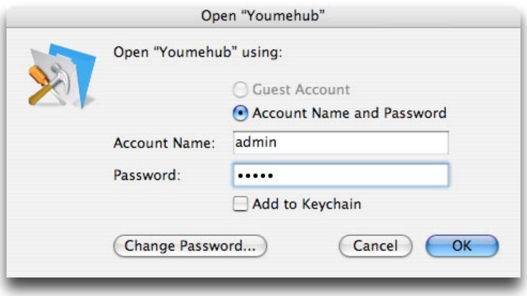
Backup Folder
The backup folder is used to store a backup copy of the system data. You will be prompted to perform a backup each time you log out from the machine hosting the solution.

User Data File
The user_data file contains all the system critical database data. Do not attempt to move, rename or delete this file as you may loose data or break database links and prevent the system from working properly.



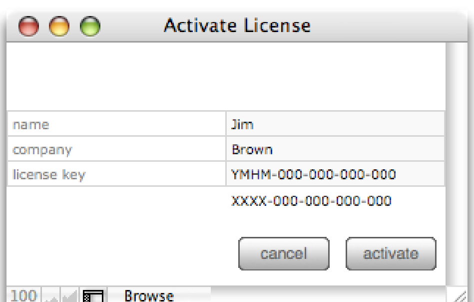
Login

After you have installed Youmehub, double-click the 'Youmehub' file icon (Mac OS) or 'Youmehub.exe' (Win OS) and enter the following account name and password in the login window:
Account Name: **admin** Password: **admin** (case sensitive).
This temporary user is assigned to the admin account name, which has admin privileges. You will need to go to preferences later and remove this user account once you have created another user with admin privileges.



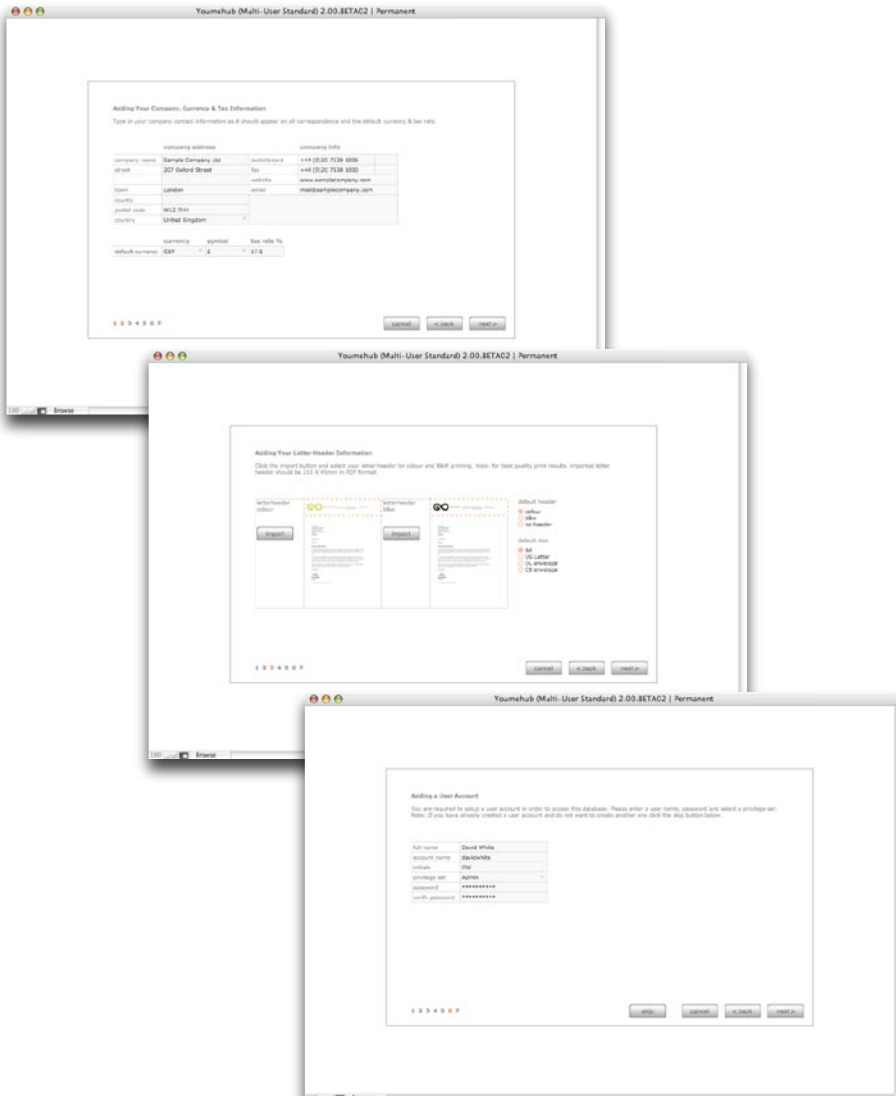
Activating your License

When you have successfully logged-in a message appears telling you that you are running the software in demo mode. Demo mode entitles you to a 30 day trial of the software after which you will need to purchase a license. Click 'activate' and enter your license key found on the license card. If you purchased Youmehub as a digital download on-line, then enter the license key that was emailed to you.



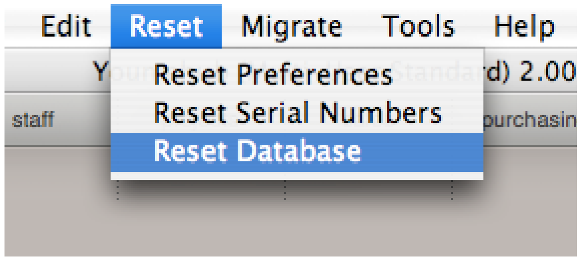
Setup Wizard

When you launch Youmehub for the first time you will be taken to the setup wizard which walks you through the process of configuring and personalising Youmehub to your business needs. These include global settings for your company information, letter header logo, user log-in accounts, network settings and system wide preferences which govern the behaviour of certain modules. It is also possible to make individual adjustments later by clicking the preferences button in the navigational bar.



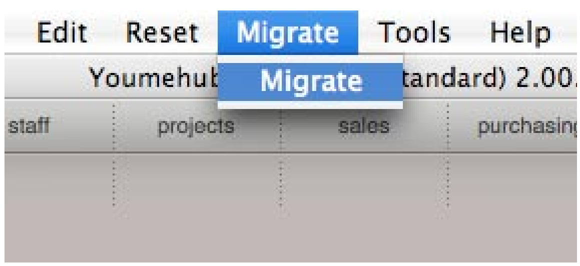
Reset Database

Youmehub comes pre-configured with example data to help you learn and understand how the system works. Before you begin to enter your own data however you may want to clear all existing example data and reset the system. Go to the preferences window and select Reset Database. Caution: The Reset Database command will DELETE all records and can't be undone!



Migrate

The Migrate command, located in the Migrate menu can be used when you want to migrate data from a previous version of Youmehub into a new database system. To migrate data you must first copy the 'UserData.fp7' (Multi-User) or 'UserData.ymh' (Single-User) file from your previous working database into '[path to database]/Youmehub/Resources/Import' folder of the new database. Select Migrate in the Migrate menu. Caution: This will DELETE all records and system preferences and replace it with the imported data.



Home Screen

The home screen has a navigational bar at the top and is divided into 8 modules each with its own sub-modules. CRM (Companies, Contacts and mMail), Calendar, Notes, Staff (Time Sheets, Expense Sheets, My Schedule), Projects (Projects, Jobs, Schedules and Files), Sales (Products, Estimates, Sales Orders and Invoices), Purchasing (Products, Purchase Orders), Inventory (Hardware and Software). Use the navigational bar to move between each module and sub-module.

Navigation Bar

Click these buttons to go to the required module.

Preferences

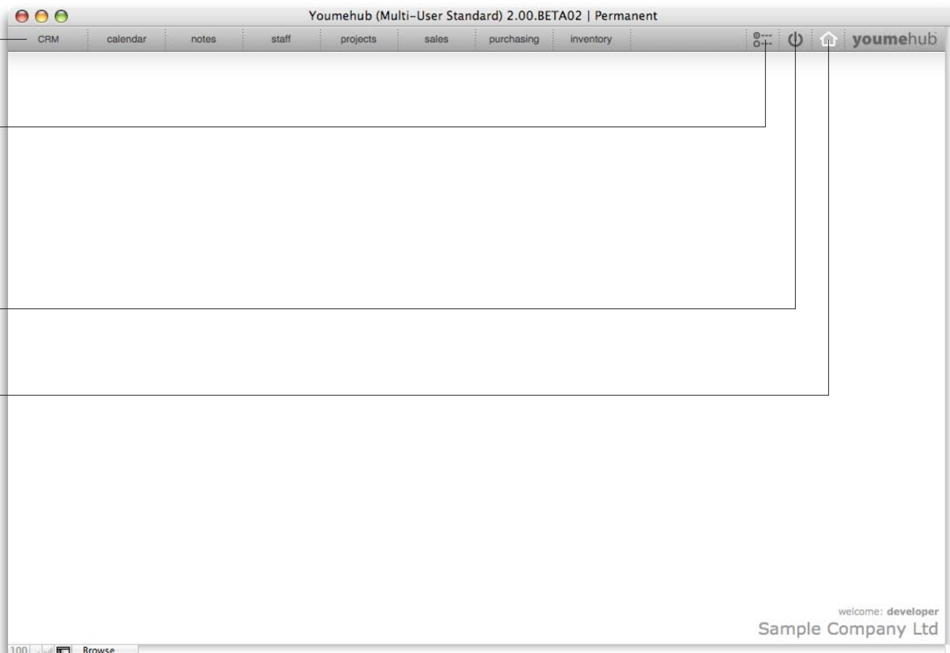
Click the preferences button to adjust or make changes to your letter header logo, company information, user log in accounts, network settings and other system wide preferences.

Log Out

Click the log out button to log out of the system.

Home

Click the Home button to go back to this screen.



Preferences Screen

The Preferences menu screen allows you to configure and personalise Youmehub to your business needs. These include global settings for your company information, letter header logo and user login accounts and system wide preferences which govern the behaviour of certain modules.

Company Info

Address
You'll find fields for your business trading name, address, web site, email and phone numbers. This information is called upon when raising orders etc.

Stationery
Import headers for your business stationery.

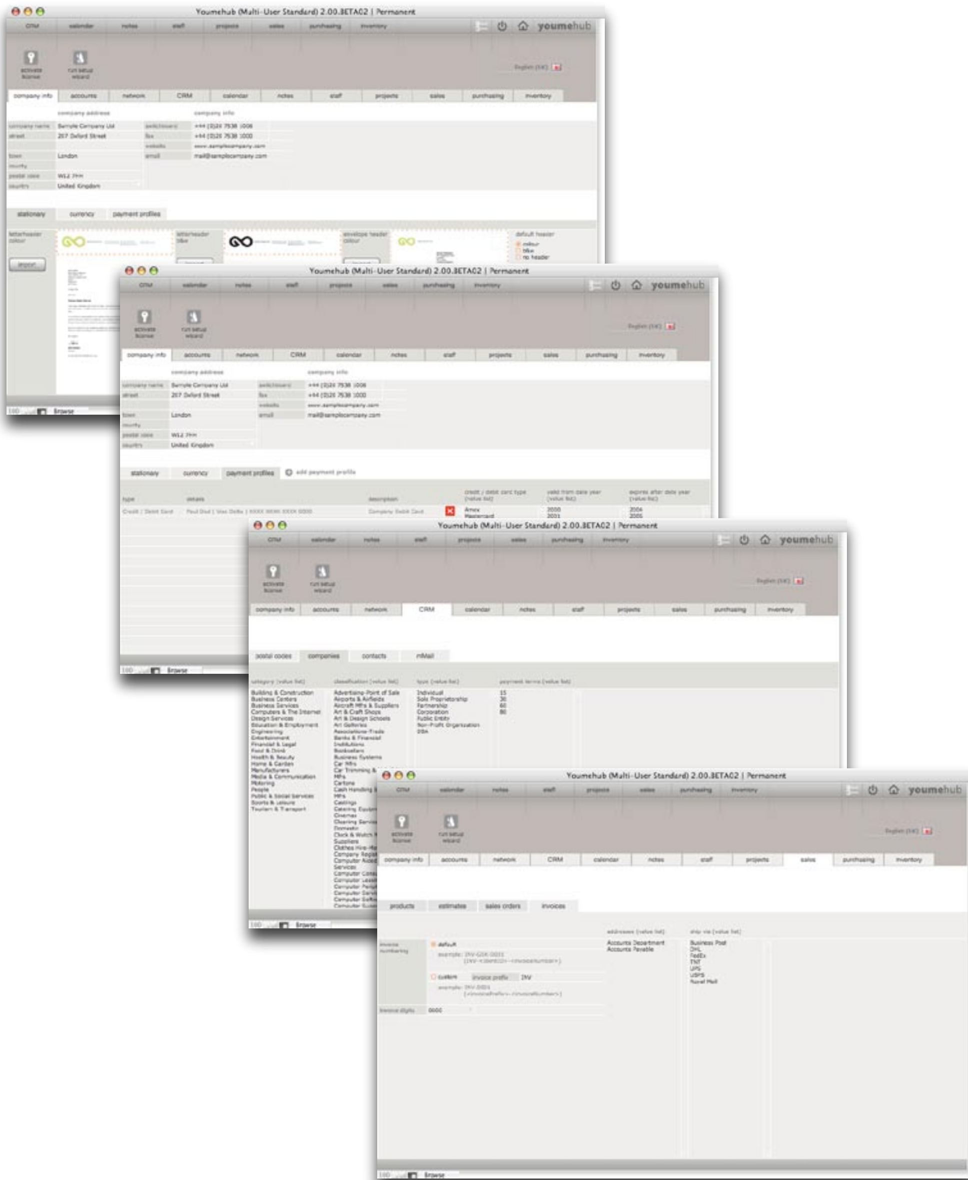
Currency
Assign your default currency and tax rate as well as any other currencies you trade in.

User Accounts

There is one account created for you already named 'Admin' plus any others you may have created during the setup process.
The admin account is a temporary account created for you to get you started. It is recommended that you remove this account once you have created another user account with admin privelages..

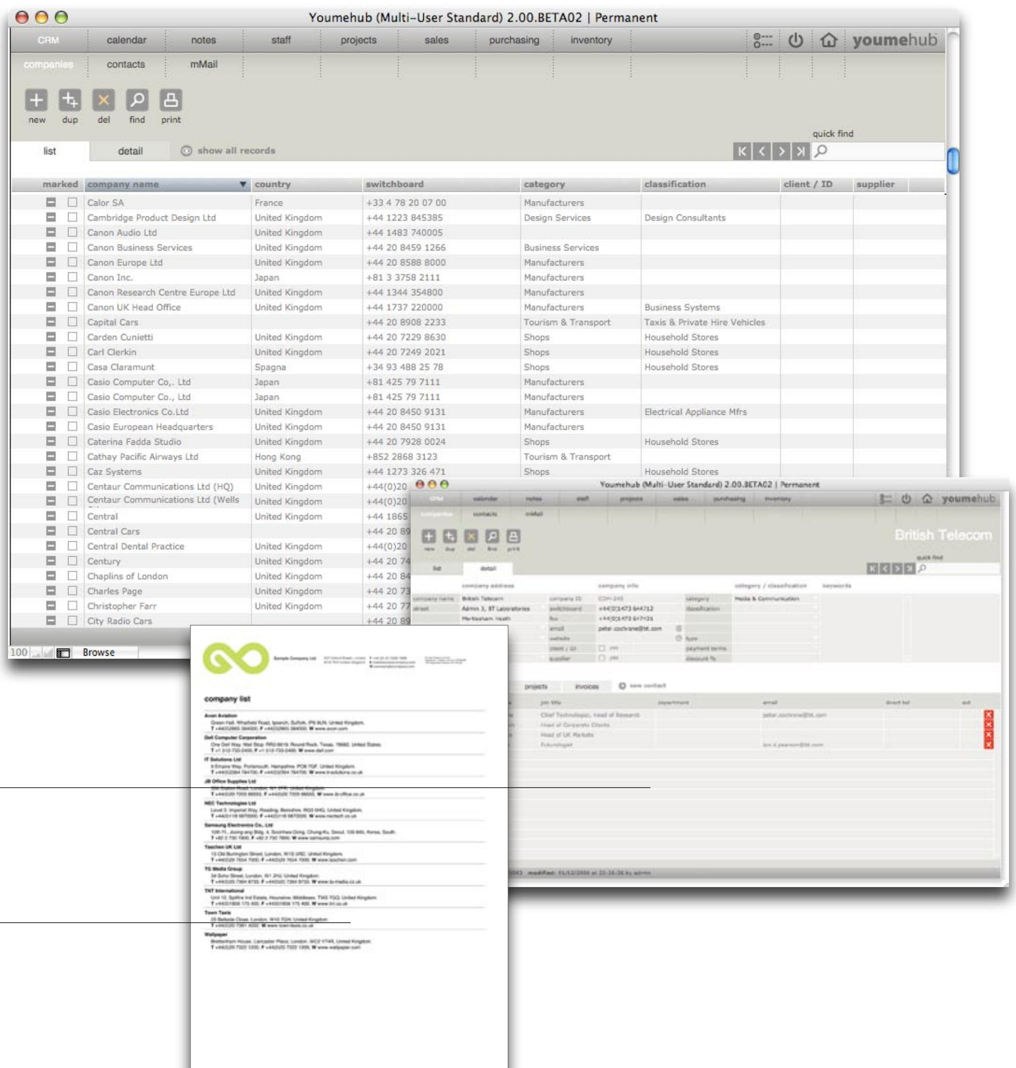
Other

Other tabs contain fields and settings for: network sharing, field value lists, serial number schema and other module specific settings.



Companies & Contacts

The Company & Contacts modules are where you maintain your companies contacts, customers, clients, suppliers or however you refer to the people you work with. These modules are at the heart of the system and are used by other modules for address lookups.



Contacts Tab
This lists all contacts associated to a company record. You can also add or remove contacts from this view.

Layouts/Reports
Print company lists contact lists, client lists, index cards, labels and envelopes by selecting the print button.

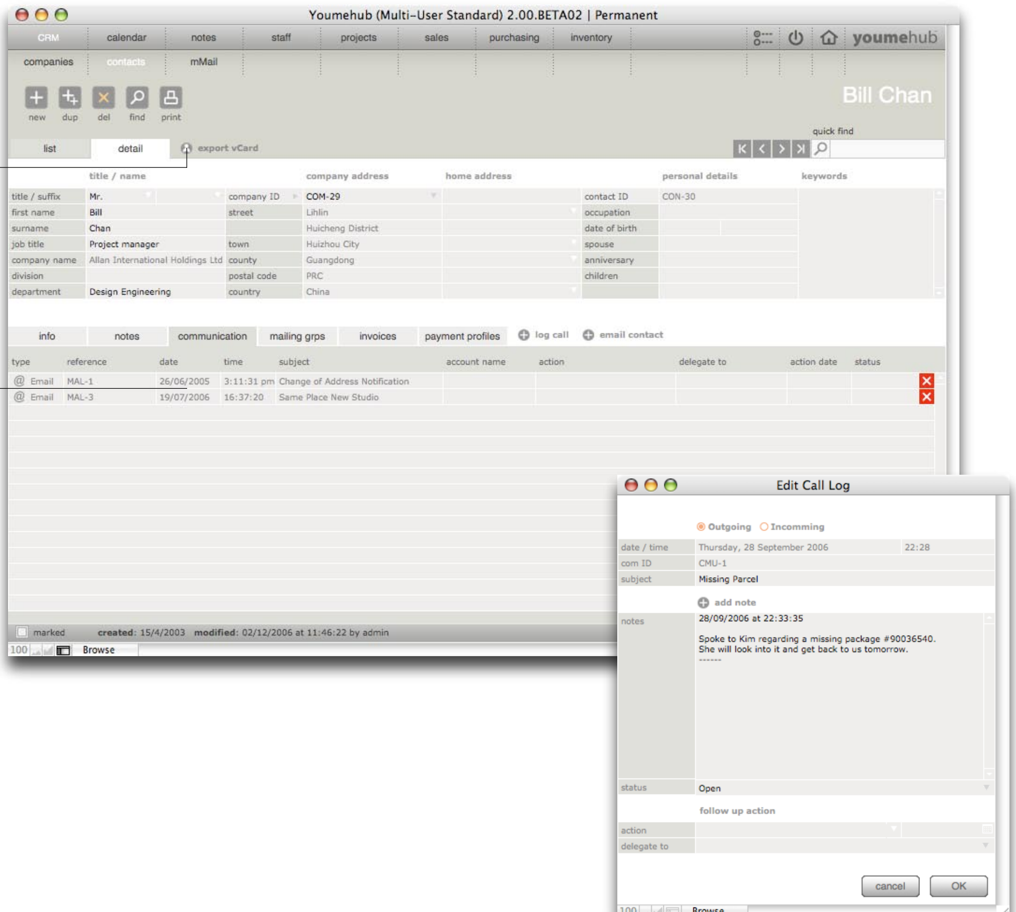
Companies & Contacts.....

Export vCard

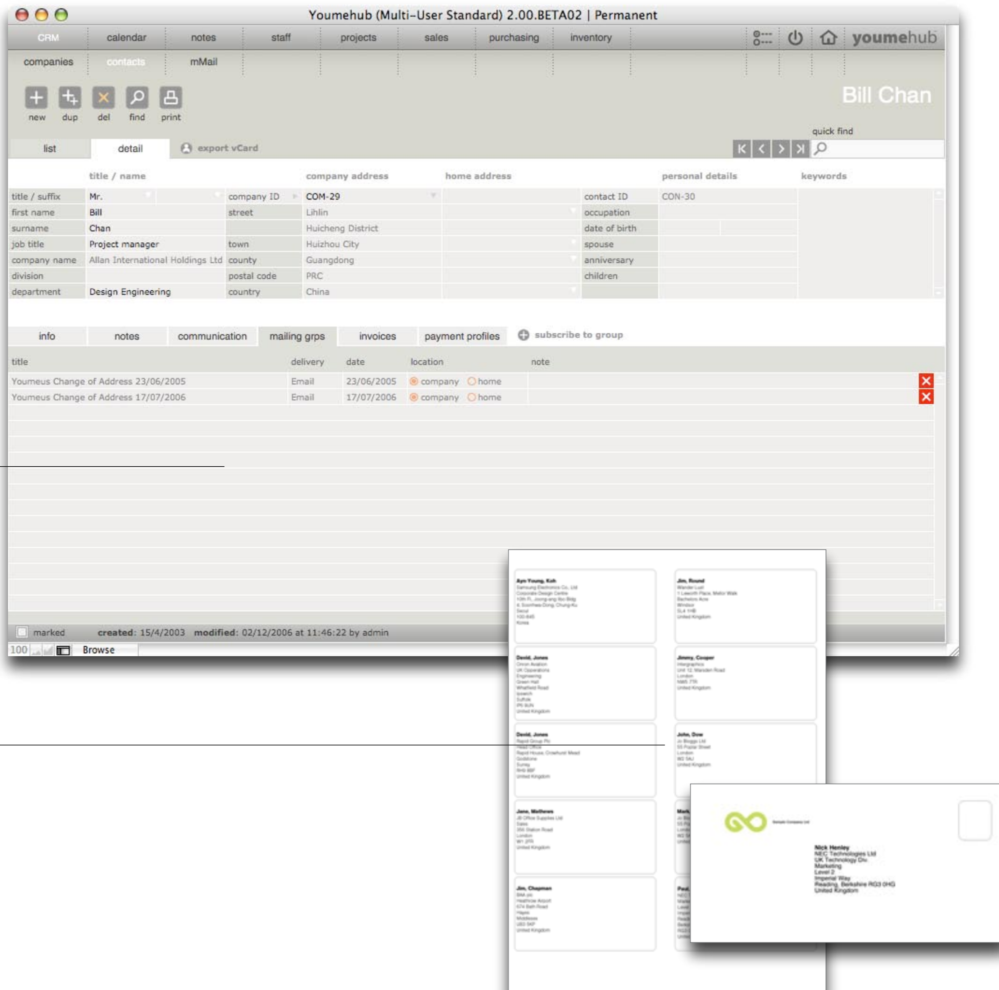
Click the Export vCard button to create exported XML files of the current record or found set, formatted in the universal vCard format. This file can be imported, or in some cases drag-and-dropped into most email address books.

Communications Tab

This lists all communications relating to that contact; mail, email (sent through the mMail module) and phone call logs.



Companies & Contacts.....



Mailing Groups Tab

Mailing groups enable you to subscribe indinidual contacts or list of contacts to a mailing group. This is useful when you are creating marketing campaigns or mail shots and is used by the mMail module for sending letters and emails to large groups of people.

Layouts/Reports

Print mailing lists, labels and envelopes by selecting the print button.

mMail

mMail is a mail-marketing module that can be used to compose and log your marketing communications. You can create and store letters or emails and mail or email them to a group of contacts.

Detail Tab

You'll find fields for addressee, salutation, name (used to define how you prefer to address your mail), category, date, mailing group , message, signature and footer.

Edit Mailing Groups

Click the edit mailing groups button to create, edit or delete mailing groups.

Email To Group

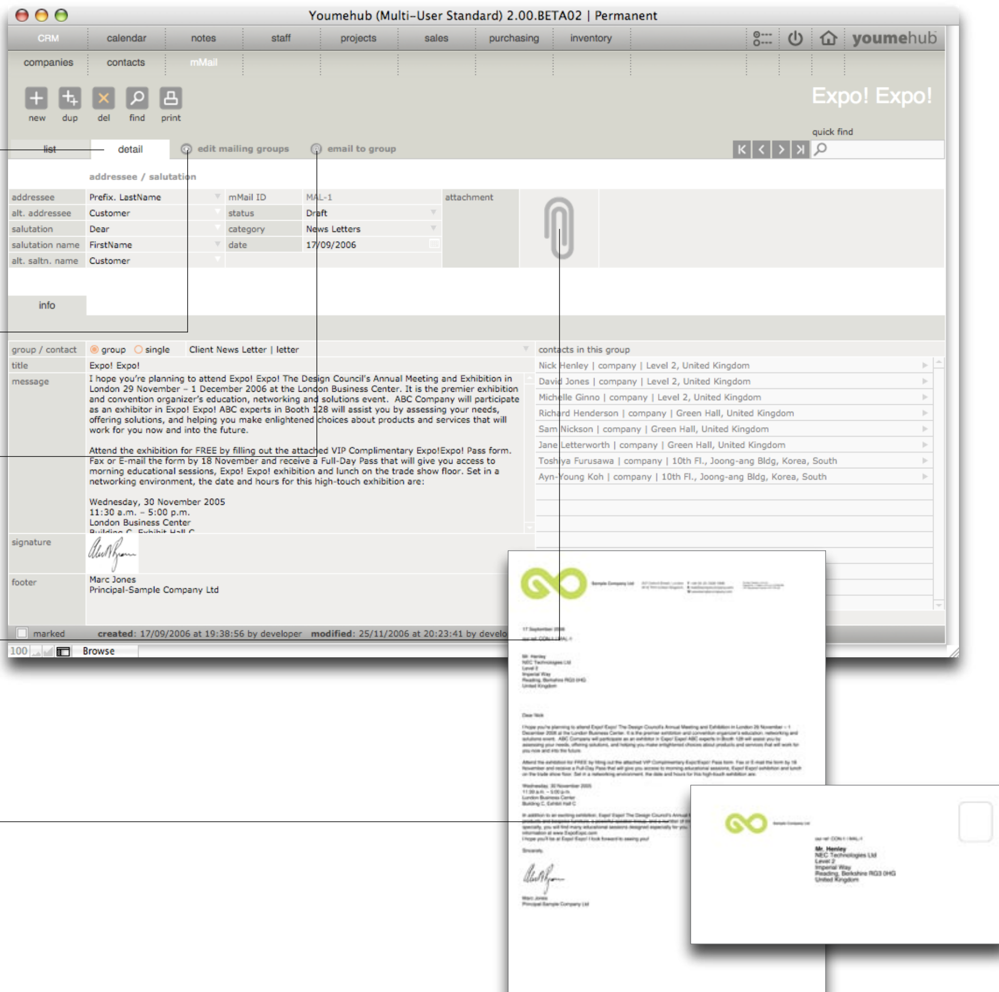
Click the email to group button to email the mMail record to all recipients in the assigned mailing group. Emails are sent to and processed by your email client software.

Attachment

You'll can also add a file attachment to a mMail record by clicking on the attachment field. This is useful if you are sending the record as an email with attachment.

Layouts/Reports

Print letters, labels and envelopes by selecting the print button.



Calendar

The Calendar module is for managing general office and staff appointments. You can toggle between month, week and day screens to view appointments.

Filter Calendar

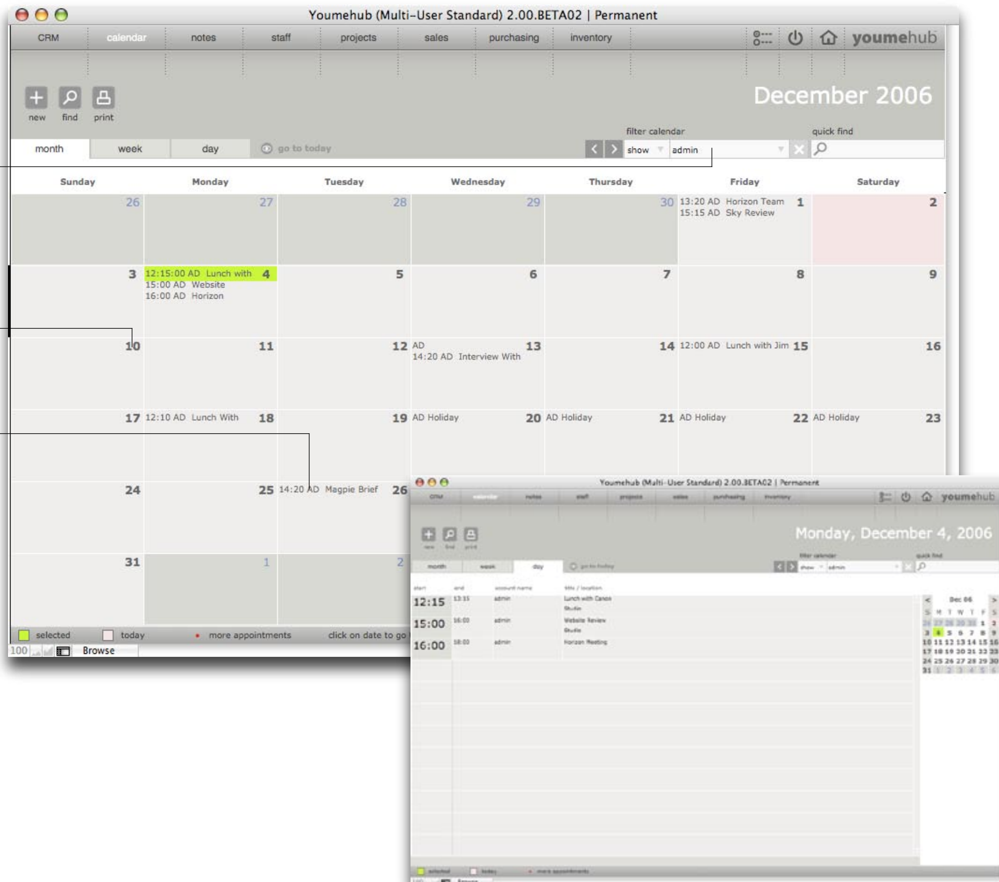
The filter calendar field allows you to show or hide individual staff appointments from the screen giving an uncluttered view of their appointments.

Appointments

Click on a date to go there, shift-click creates a new appointment.

Appointment Items

Click on an appointment item to edit it.



Notes

The Notes module is where you can store general office notes, articles, technical knowledge records etc. You can also email a note with a single click.

Detail Tab

You'll find fields for title, issue, date and category.

Email Button

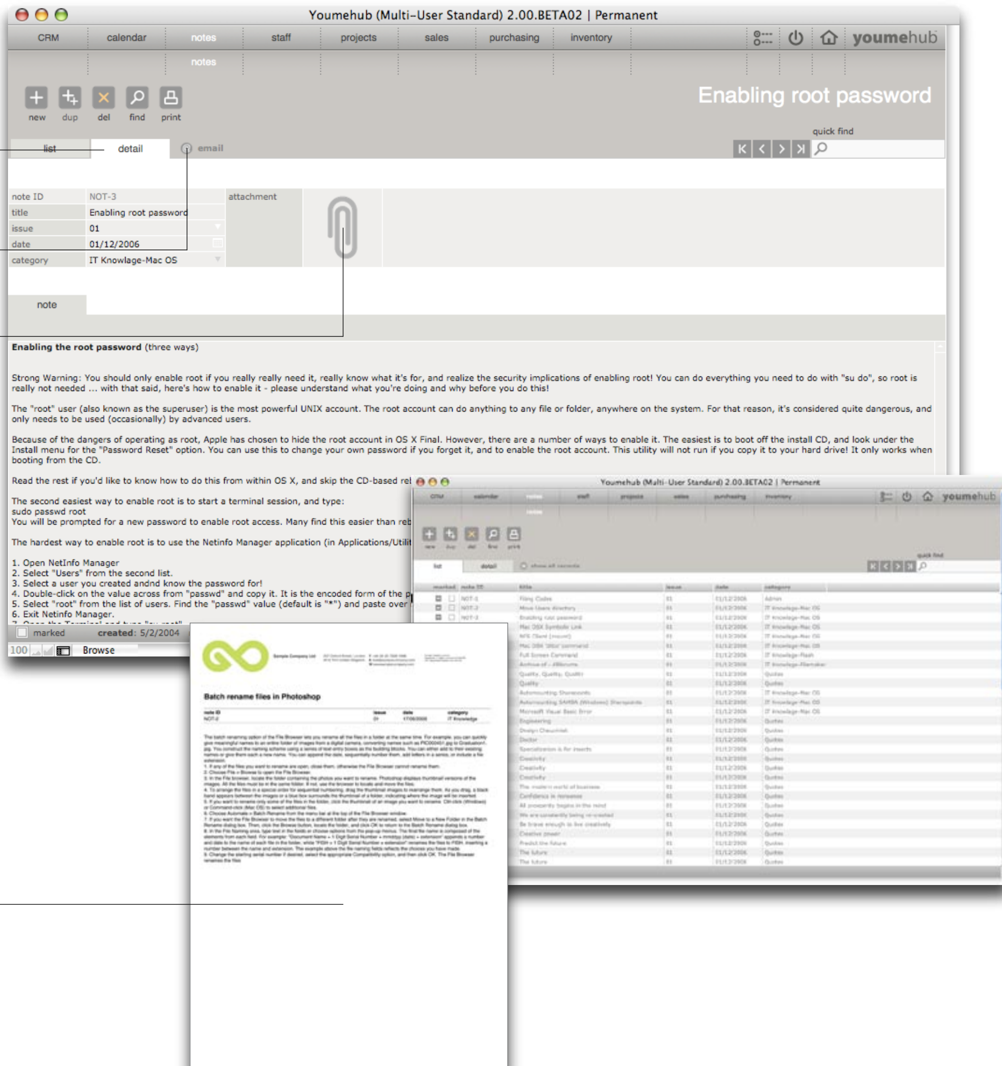
Click the email button to email the record.

Attachment

Click the attachment field to add a file attachment to the record.

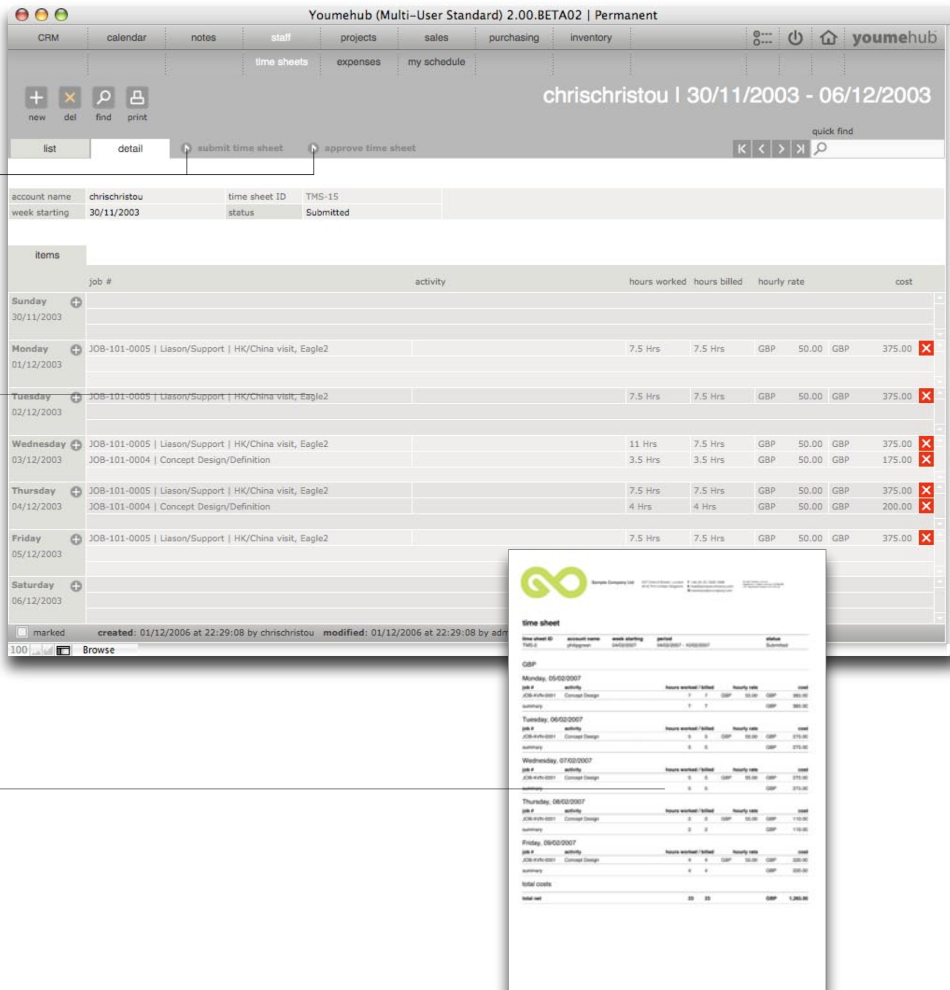
Layouts/Reports

Print a note by selecting the print button.



Time Sheets

The Time Sheets module is where staff log their time spent on specific jobs. The items table is used to log the date, job number, activity, hours worked, hours billed and hourly rate. Time sheet entries are automatically tracked by the Jobs module giving project managers an up to date view of accumulated time costs spent on a particular job.



Submit Time Sheet

Click the submit time sheet button at the end of the week to mark the record 'Submitted'. Administrators can approve a time sheet record by clicking on the approve time sheet button to mark the record 'Approved'.

Items Tab

The items table displays the time sheet entries for that record. You will find fields for job number, activity, hours worked, hours billed and hourly rate. Clicking on the plus symbol in the day field will create a new time sheet entry for that day.

Layouts/Reports

Print staff time sheets by selecting the print button.

Expenses

The Expenses module is where staff log their company expenses. The expenses table is used to log the date, account code, description and cost. Staff can then submit the expenses table to the Purchasing module to raise a purchase order for payment.

Submit Expense Sheet

Click the submit expense sheet button to submit the expense table to the purchasing module. This automatically raises a purchase order for payment.

Items Tab

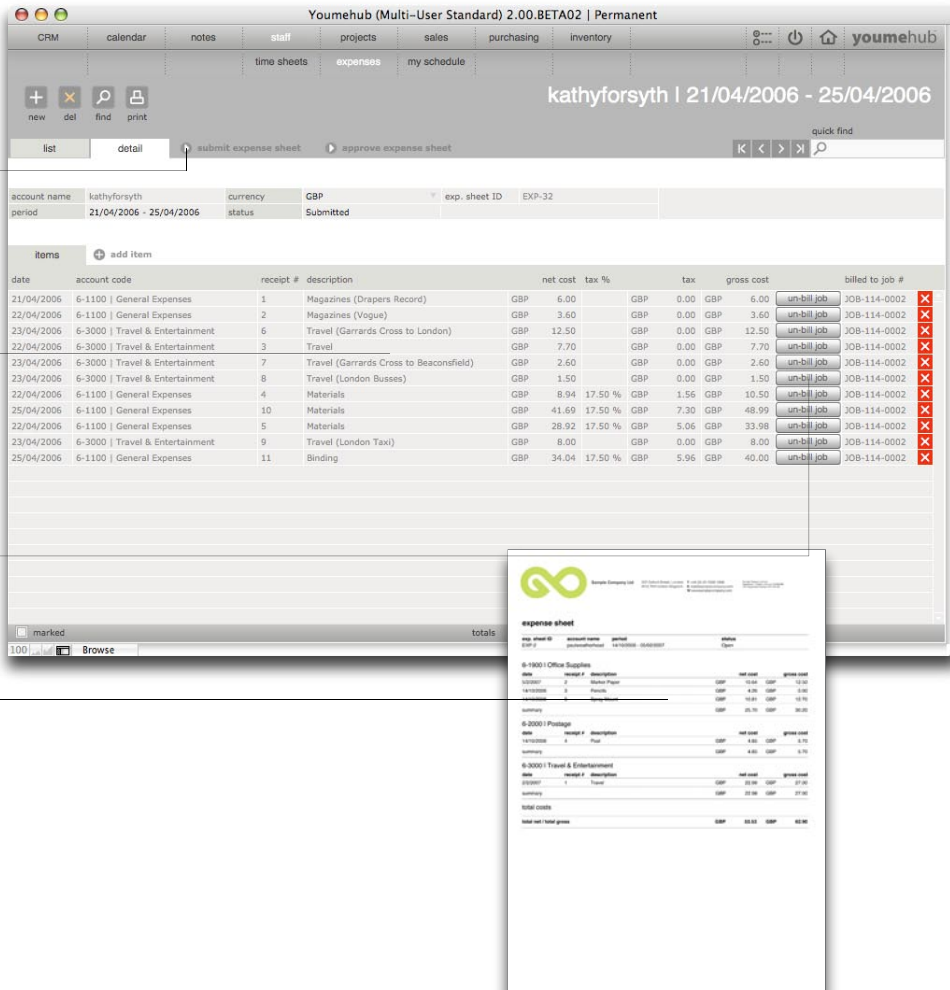
The items table displays the expense sheet entries. You will find fields for date account code, activity, hours worked, description and cost. Clicking on the add item button will create a new expense sheet entry.

Bill to Job Button

Expense items can be billed to any active job by clicking on the bill to job button. This creates a job expense entry in the jobs module.

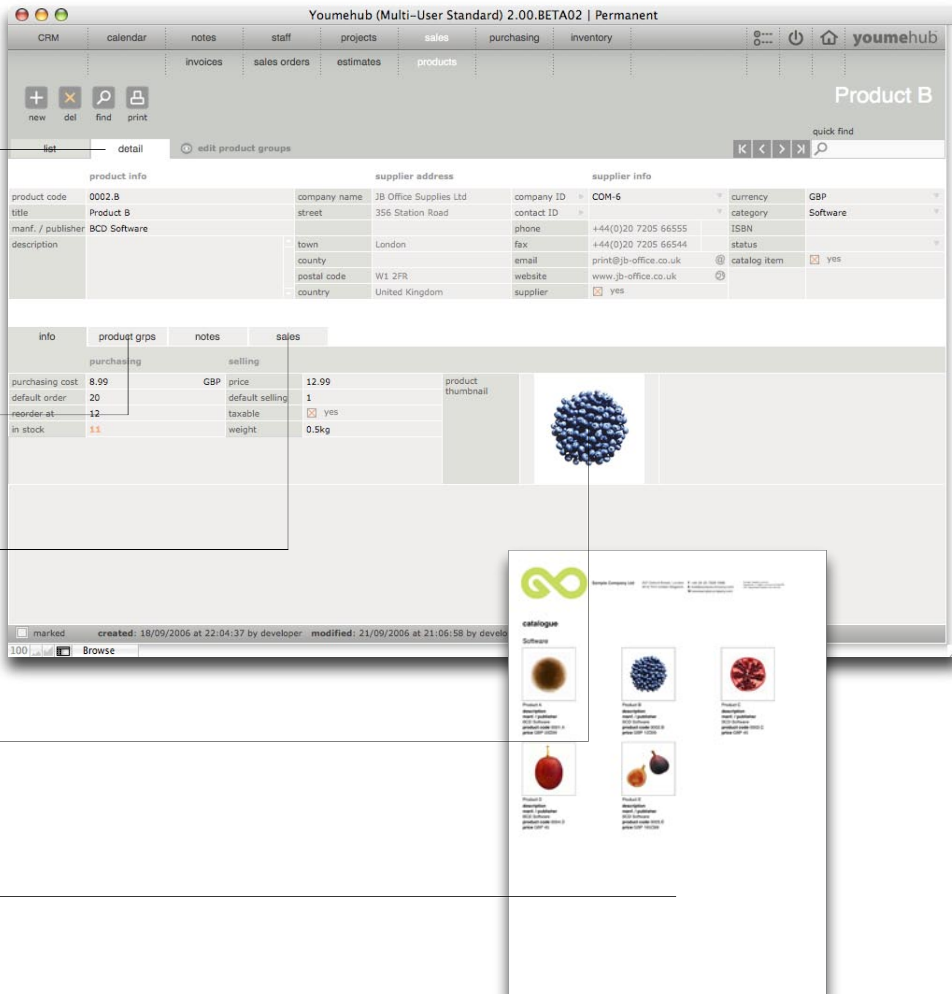
Layouts/Reports

Print staff expense sheets by selecting the print button.



Products (Sales)

This module contains an inventory of all the products you offer and is called upon by the Estimates, Sales Orders, Invoices and Jobs modules when rasing sales orders and expenses.



Detail Tab
You'll find fields for product code, title, manufacturer/ publisher, category and status (used to identify the product) and purchasing cost, price, taxable, weight and default selling quantities used by the invoices module. Taxes are calculated based on the tax value found in a given invoice.

Product Groups Tab
Product groups enable you to subscribe products to a product group. This is usefull if you regulary sell a specific group of products.

Sales Tab
The sales screen displays all sales of that specific product. The filter fields allow you to filter the list by date range. This is useful if you want to see the total sales of that product during a specific period.

Product Thumbnail
Click here to insert a product image. A dialog window will prompt you for a file to import. You can import many image and media files.

Layouts/Reports
Print product lists, product specification sheets, product catalogues and sales reports by selecting the print button.

Estimates, Sales Orders & Invoices

Estimates & Invoices modules track all your sales of products, job time costs and expenses. Estimates & Invoices maintain their own copies of a billing and shipping address information. The reason for this is to keep a database of historical orders.

Detail Tab

You'll find fields for order date, invoice date, billing & shipping contact info, title, items and payment status.

Record Payment Button

The 'record payment' button enables you to record the payment method and amount. You can record as many payments as you like until the full balance is met. You will then be prompted to change the invoice status to paid.

Items Tab

The items table displays the line items relating to that invoice record. You will find fields for description, quantity, unit cost and tax rate. Clicking on the arrow in the product code field will open a search window to the products database. Here you can search for a product to add to the invoice items. You can also add a bundled group of products to an invoice by clicking on the add product group items button.

Notes Tab

The notes screen enables you to enter notes relating to that invoice. Clicking on the add notes button will create a time stamp placed at the beginning of each note entry.

Layouts/Reports

Print estimates, sales orders, invoices, lists, and envelopes by selecting the print button.

Products (Purchases)

This module contains an inventory of all the products you regurley purchase and is called upon by the Purchases module when rasing purchase orders.

Detail Tab

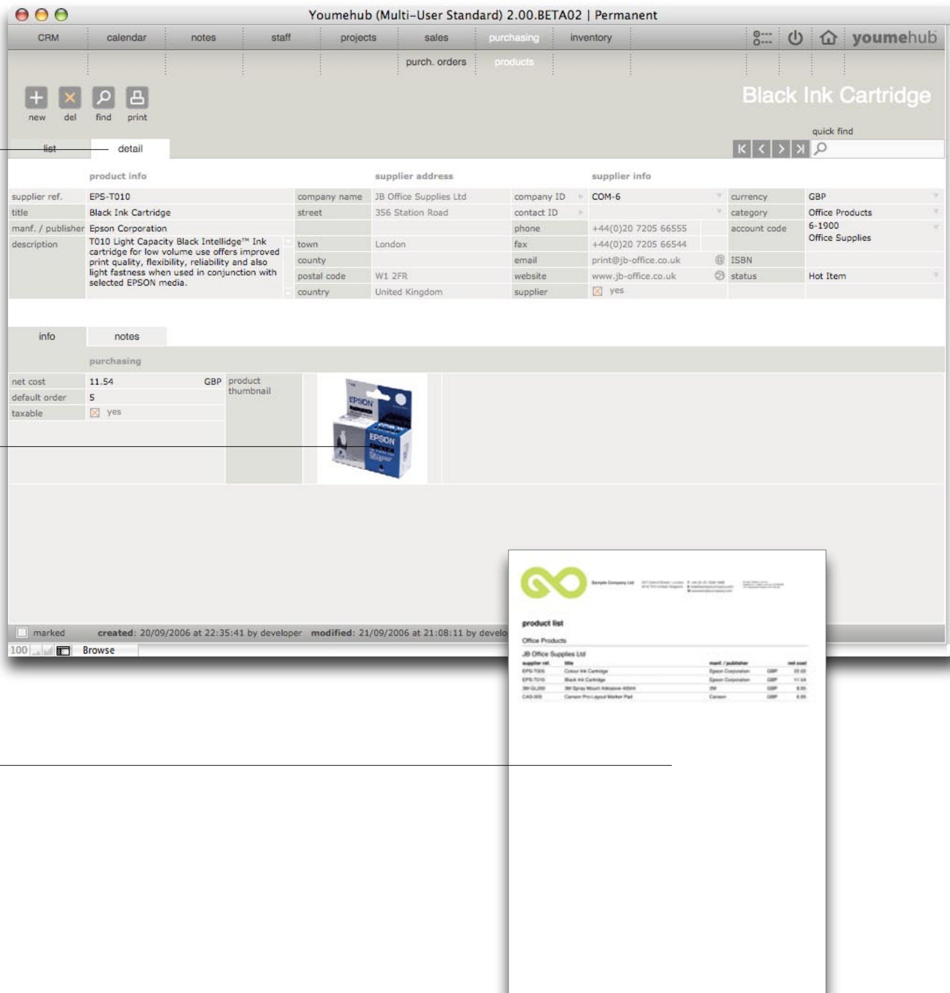
You'll find fields for product code, title, manufacturer/publisher, category and status (used to identify the product) and purchasing cost, price, taxable, weight and default selling quantities used by the invoices module. Taxes are calculated based on the tax value found in a given estimate, sales order or invoice.

Product Thumbnail

Click the product thumbnail field to import a product image. A dialog window will prompt you for a file to import. You can import a number of different image and media file formats.

Layouts/Reports

Print product lists, product specification sheets, product catalogues and sales reports by selecting the print button.



Purchases

The Purchasing module tracks all your purchase orders and expenses. As in the invoices module, purchases maintain their own copies of billing and shipping address information.

Detail Tab
You'll find fields for order date, order reference, order with, billing & shipping contact info, title, items and payment status.

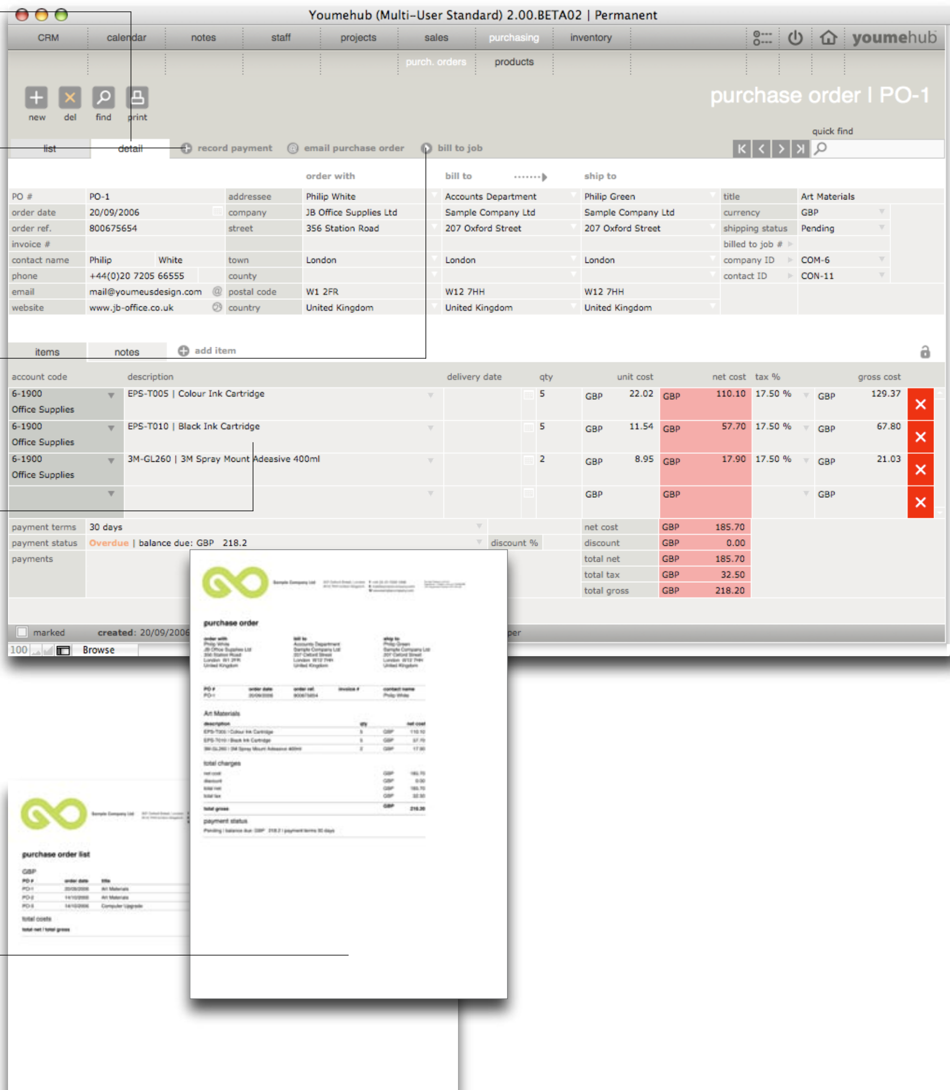
Record Payment
The 'record payment' button enables you to record the payment method and amount. You can record as many payments as you like until the full balance is met. You will then be prompted to change the purchase order status to paid.

Bill to Job
Purchase order costs can be billed to any active job by clicking on the bill to job button. This creates a job expense entry in the jobs module.

Items Tab
The items table displays the line items relating to the purchase order record. You will find fields for description, quantity, unit cost and tax rate. Clicking on the arrow in the description field will open a search window to the products database. Here you can search for a product to add to the order items.

Notes Tab
The notes screen enables you to enter notes relating to that invoice. Clicking on the Add Notes button will create a time stamp placed at the beginning of each note entry.

Layouts/Reports
Print purchases lists, account code lists, purchase orders, remittance advice notes and envelopes by selecting the print button.



Projects & Jobs

Each project can have any number of jobs attached to it, each with its own time costs, job expenses, schedules and file assets. Similarly you can attach schedules and file assets directly to a project.

Detail Tab
You'll find fields for project number, name, description, start & end dates, status, notes etc.

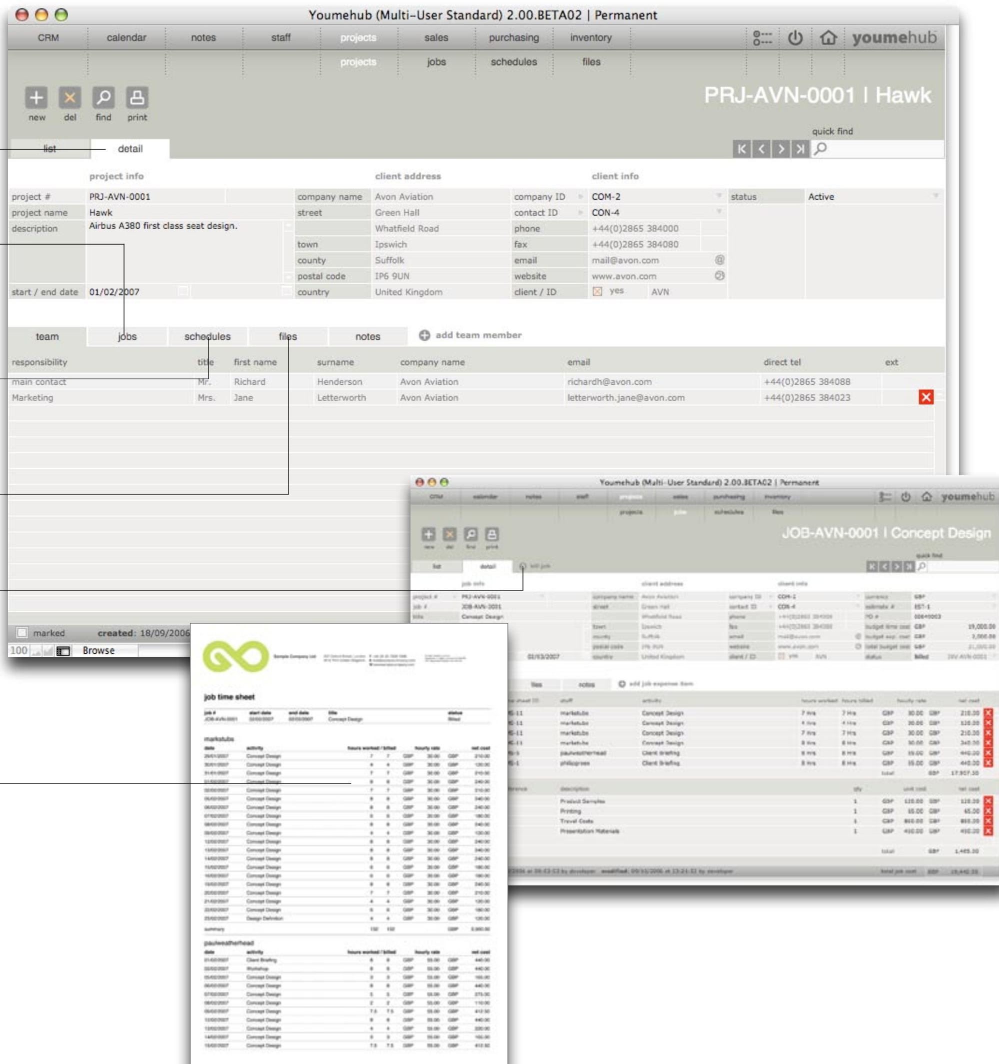
Jobs Tab
This lists all associated jobs and their status. You can also add or remove jobs from this table.

Schedules Tab
This lists all associated schedules. You can also add or remove schedules from this table.

Files Tab
This lists all associated file assets. You can also add or remove files from this table.

Bill Job
The bill job button will collect all accumulated time costs and expenses associated to that job and compile an invoice addressed to the client.

Layouts/Reports
Print project & job lists, job time sheets, job expense sheets and job cost reports by selecting the print button.



Schedules

Schedules allow you to detail individual project or job programmes, with deadline actions and activities attached to each phase.

Detail Tab

This screen displays a gantt style visual of the schedule.

Edit Activity List

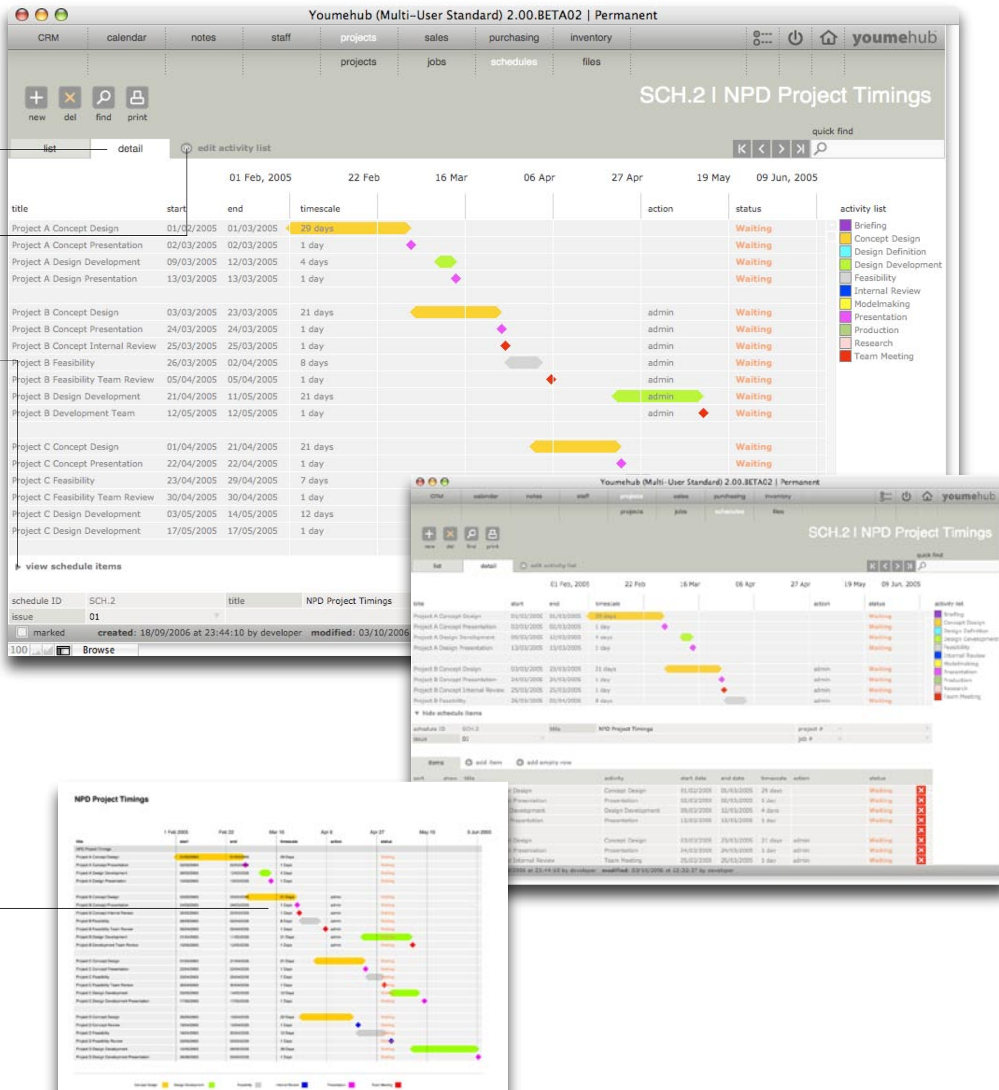
You can modify or generate your own activity lists and coloured bars by clicking on the edit activity list button.

View Schedule Items

The schedules table displays a list of all the schedules items; title, start & end dates, activity and actions. You can add or edit milestones, deadlines actions, and activities.

Layouts/Reports

Print schedule lists and gantt charts by selecting the print button.



Files

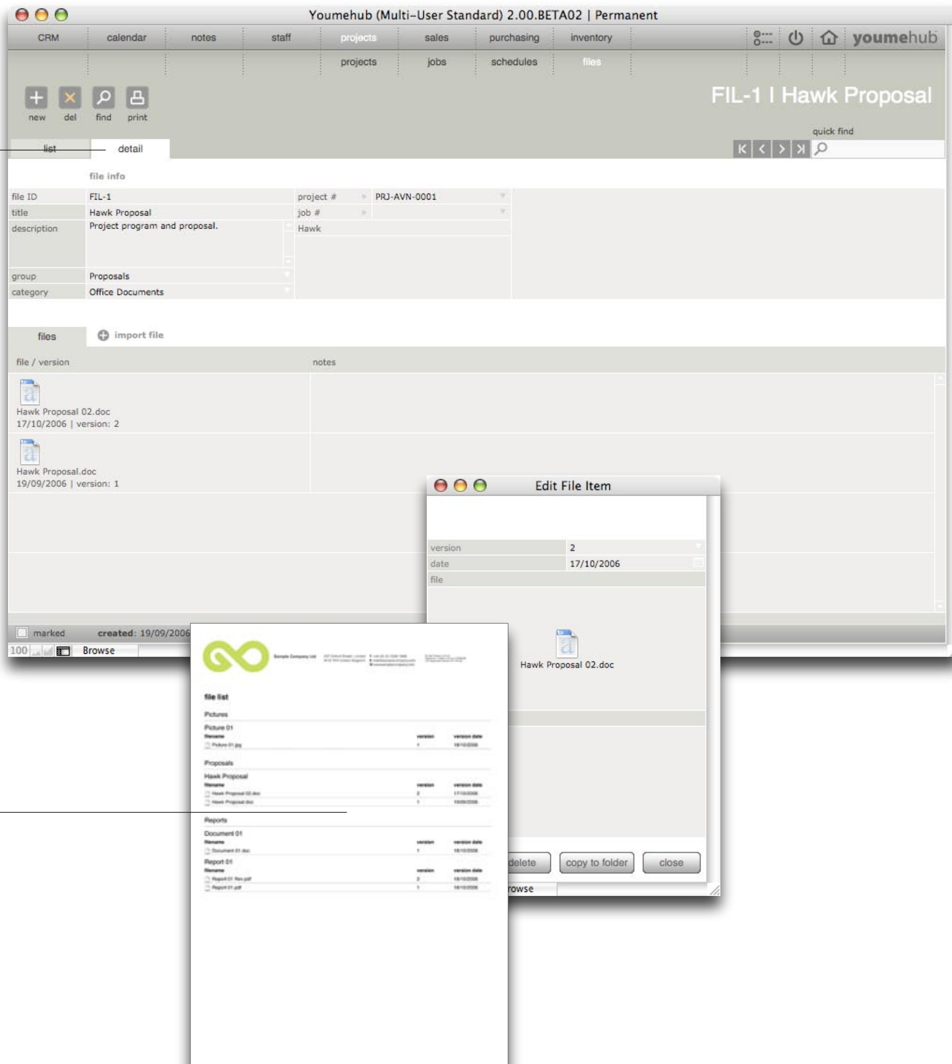
The files module contains an inventory of all your digital file assets. Digital records can be imported and linked to a project or job record.

Detail Tab

You'll find fields for title, description, group, category, project & job numbers etc. Click the import file button to import a file into the record. You can import several files into the record, each with its own version number and notation.

Layouts/Reports

Print file lists by selecting the print button.



Hardware

This module is where you maintain an inventory of all your office hardware assets. You can store information on the serial number make/model, specifications and maintain a log of services and repairs.

Detail Tab

You'll find fields for make, model, serial number, manufacture, support contact etc.

Info Tab

This details hardware specification information and system accounts & passwords.

Installed Software Tab

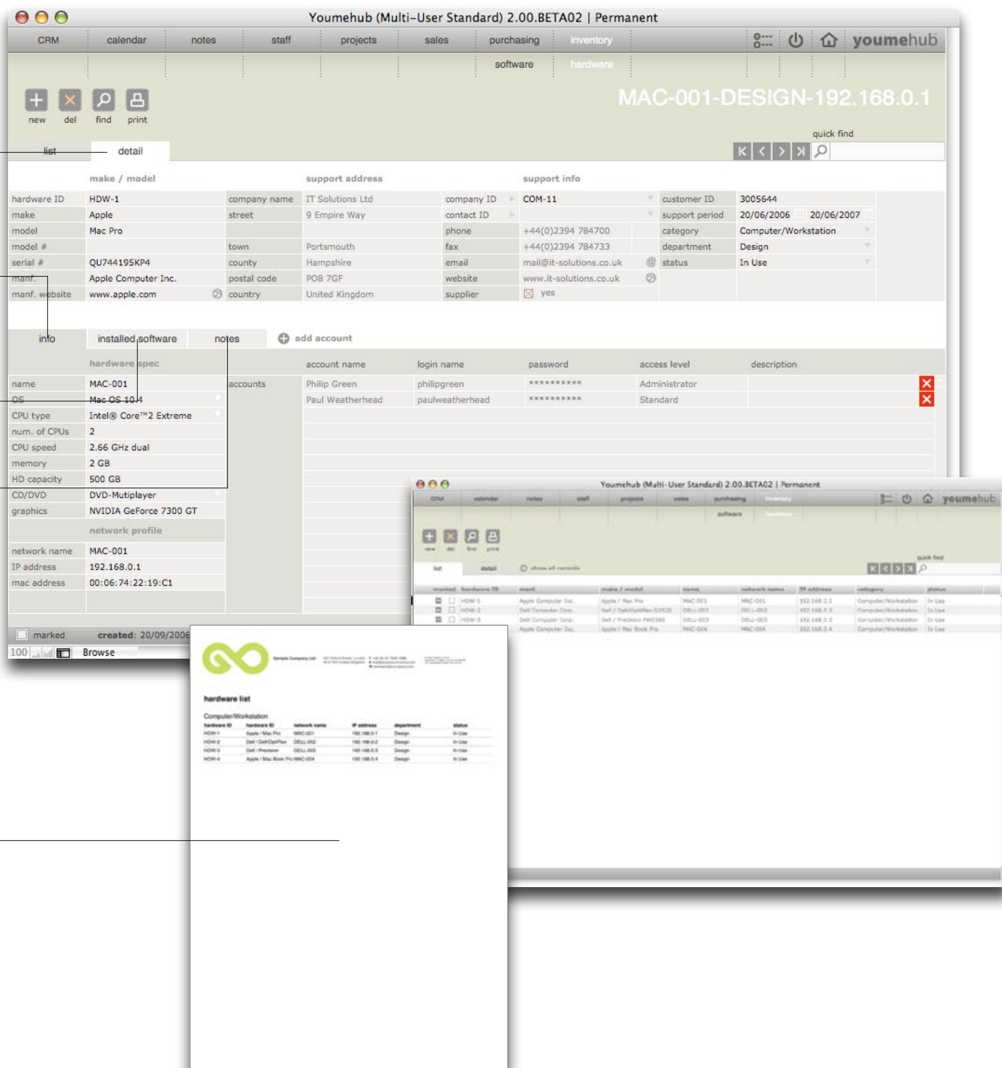
This lists all installed software.

Notes Tab

The notes screen allows you to enter notes relating to the hardware record. Clicking the add note button will create a time stamp placed at the beginning of each note entry. This is useful if you want to keep a log of services, repairs etc.

Layouts/Reports

Print hardware lists and labels by selecting the print button.



Software

This module is where you maintain an inventory of all your computer software assets. You can store information on the publisher, software title, versions and licence keys.

Detail Tab

You'll find fields for software title, publisher, description, support contact etc.

Licenses Tab

Store details on software version, platform, and the hardware it is installed on.

Notes Tab

The notes screen allows you to enter notes relating to the software record. Clicking the add note button will create a time stamp placed at the beginning of each note entry.

Layouts/Reports

Print software lists and CD labels by selecting the print button.

System Requirements

Macintosh
Hardware Requirements:
Macinatosh computer with
PowerPC G3, G4, or G5 processor;
Macintosh computer with Intel-based
processor;
256MB of RAM, CD or DVD drive;
Hard Disk drive, Display with
resolution of 1024X768 or higher

Software Requirements:
Mac OS X 10.3.9 for PowerPC proces-
sors; 10.4.5 for intel-based processors;
FileMaker Pro 8 or higher for
(Multi-User) products only

Network Sharing Requirements:
TCP/IP

Windows
Hardware Requirements:
Intel-compatible computer with
Pentium III 500 MHz or higher
250MB of RAM, CD or DVD drive;
Hard Disk drive, SVGA video adapter;
Display with resolution of 1024X768
or higher

Software Requirements:
Windows 2000 (Service Pack 4),
Windows XP (Service Pack 2);
FileMaker Pro 8 or higher for
(Multi-User) products only

Network Sharing Requirements:
TCP/IP