# **HARM** PRO

### certified training



#### ARM Pro all the power of ARM plus customisation to maximise efficiency



Manage new opportunities with high value reports





Track clients from enquiry to onboarding



Accessible from anywhere, anytime



Co-ordinate projects from inception to delivery by allocating tasks + managing timelines



Compile + analyse data + maintain security of client records



Maintain a history of client/prospect activity + communication



# what you will learn

- Login
- Customise Brand, style + homepage
- Manage staff + teams + permissions
- Administer clients + contacts
- Customise fields + relationships

- Customise + administer opportunities
- Customise + administer projects
- Prepare price books + templates
- Generate reports



## the 16 key components of ARM Pro

- Organisation access to website, IP, domain
- Administer links
- Organisation + test client login
- Retrieve forgotten passwords
- Customise + administer opportunities
- Update password details via myAccount
- Customise + administer projects
- Customise home page panels + favourites

- Generate reports
- Customise style, brand + shortcuts
- Integrate APIs
- Invoicing
- Administer staff
- Administer clients + contacts
- Customise + administer relationships
- My to-do list

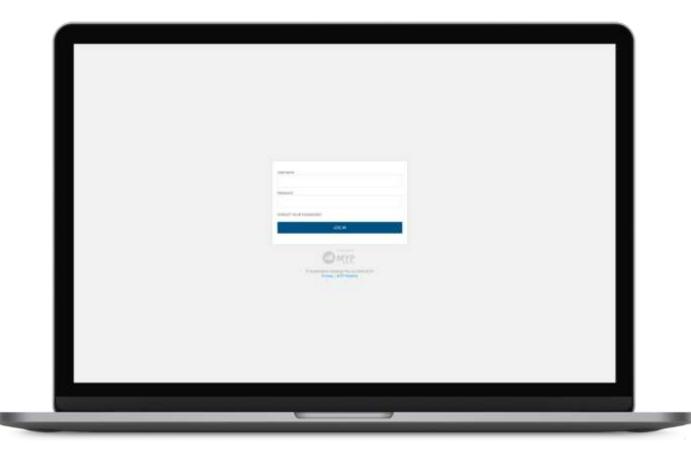


### getting started



#### 3 chances to log in

update your password, passcode, security question + myAssistant in myAccount





### myAccount

password, passcode, security question, two-factor authentication, myAssistant + certificates

| myACCOUNT  |   |  |                              |
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#### passcode instructions

You have the option to create a passcode with a minimum of 4 digits for your mobile login access. The first time you log in on your mobile device MUST use the standard Username + Password. Subsequent log ins can then be made using your stored passcode. We highly recommend that you also use the built-in security features on your mobile device (e.g. facial recognition).

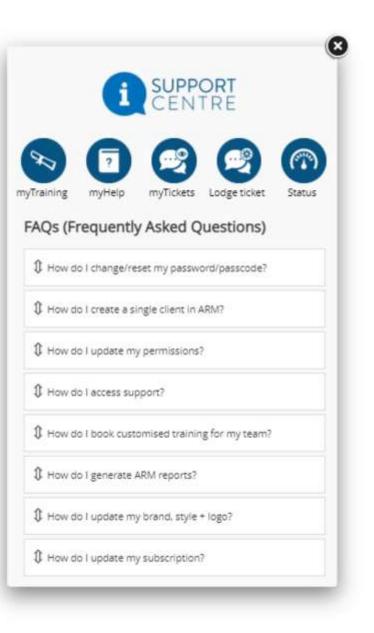
NB: If you have set up a passcode and you are not provided with the option to switch to PIN on log in, please ensure that you are not:

- Browsing in private browsing mode this deletes 'cookies' stored in your browser necessary for passcode login
- Automatically clearing browser data + cookies when closing your browser via settings or third party applications



### support centre

- Access myTraining + myHelp
- Lodge, view + update support tickets
- View site <u>status</u>
- View frequently asked questions





#### recommended permissions

It is extremely important that staff permissions are assigned correctly. <u>https://help.mypcorp.com/art/recommended-permissions/</u>

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Legend: 🔵 API link 🍘 CSV file

# MYP API mappings

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## daily task email

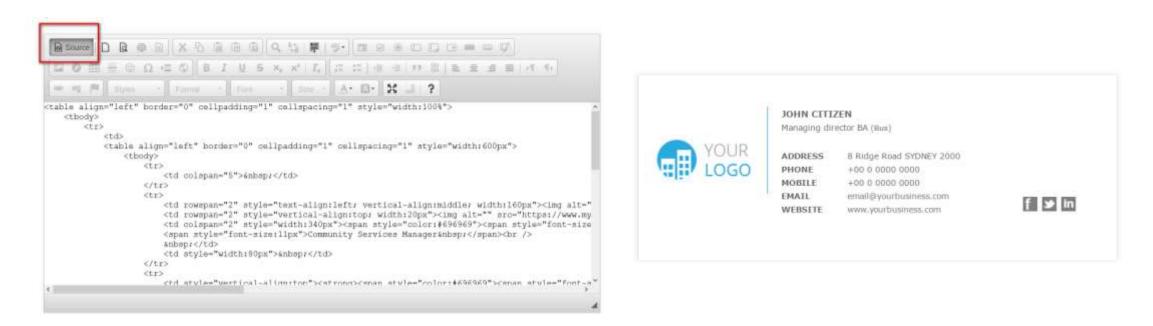
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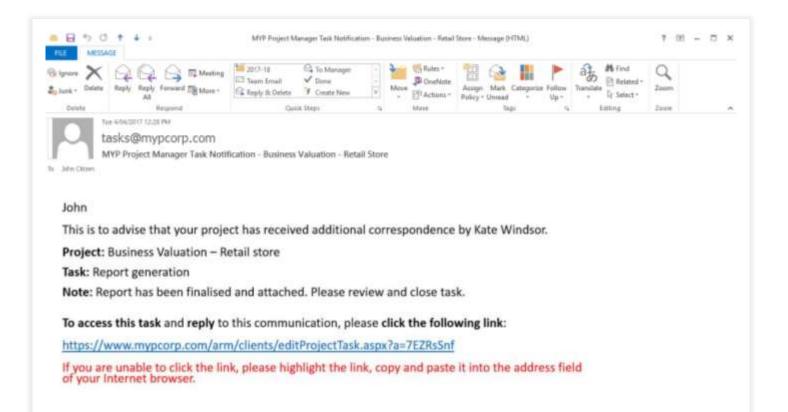
mypcorp.com

#### customised signatures

#### ARM Pro > Staff > Contact options > Edit email signature



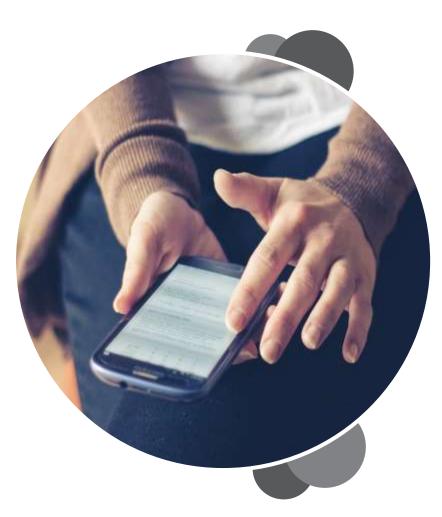






#### next steps

- Customise fields
- Create project templates
- Create staff teams + apply to relevant staff
- Create price books + templates
- Customise opportunities
- Create an opportunity 'cheat sheet'





# learn to use your systems, your way delivery styles to suit your needs

#### MYP Training online group training

MYP Training sessions are run on a regular basis. These online sessions are scheduled regularly and you are welcome to attend as many times as you like. These are a great way to refresh your skills.

#### Want to attend?

Check out all the details of upcoming MYP Training sessions + book your place via the calendar on your MYP home page.

#### MYP Tailored Training

#### custom onsite or online sessions

MYP Tailored Training sessions are available if you require a session specifically for your organisation. These sessions are custom-designed by our trainers and can be run onsite or online for a fee.

#### Want to know more?

Simply log in to MYP + submit a booking enquiry via the 'Subscription + Training Management' area.

#### covering everything you need to know

MYP Training, 24/7 myTraining and Tailored Training sessions cover two types of content to ensure you are getting the most from MYP.



'Certified' sessions cover specific modules and, upon completion, attendees gain access to Level 2 Support.



'Professional Development' sessions are designed to further develop skills in specialist areas.





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