



certified training



# ARM Pro

all the power of ARM plus  
customisation to maximise efficiency



Manage new opportunities with high value reports



Establish links + relationships



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

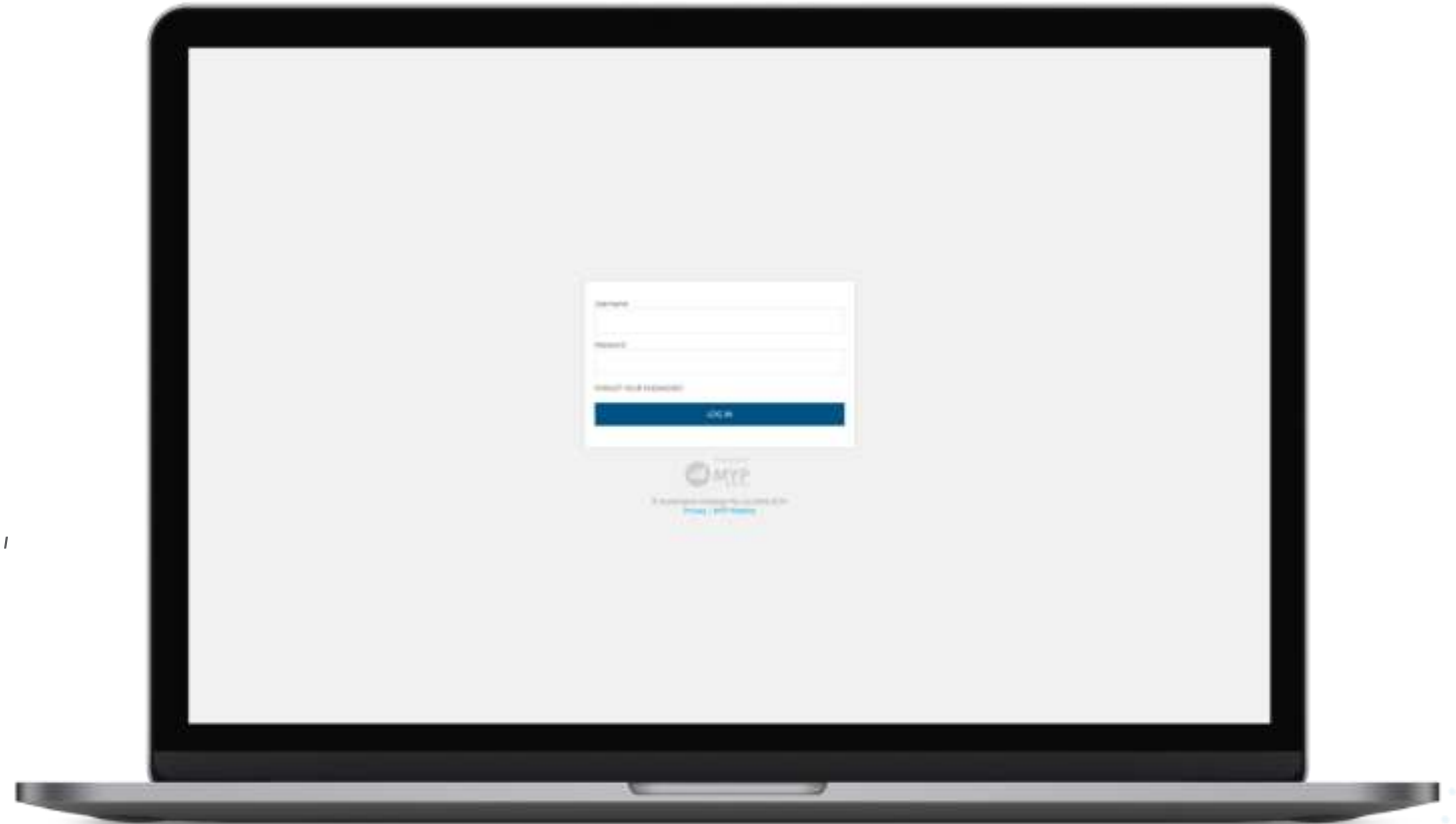
# getting started



Log in at  
[mycorp.com](https://mycorp.com)

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

First name: john    Last name: Smith    Position title: CEO

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**PASSWORD**  
Do you want to change your password?  
 Yes    No

Email address (change via ARM - Administration - Staff): john.smith@mypcorp.org

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**SECURITY QUESTION**  
Security question (asked if you forget your password): Mother's maiden name  
Answer:

SAVE

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**TWO-FACTOR AUTHENTICATION**  
Two-factor authentication (2FA) methods provide users with additional account access security, logging in requires both a password and an authentication code from a mobile device.  
 Enabled    Disabled  
By default, 2FA is NOT enabled in MYP. To enable, please select the 'Enabled' option and follow the set-up instructions.

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**PASSCODE (MOBILE DEVICES)**  
You have the option to create a passcode with a minimum of 4 digits for your mobile login access. The first login on your mobile device **MUST** use the standard Username and Password. Subsequent logins 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.  
For security purposes, if you do not log in to MYP via your device for a period of 3 months, your next login will again need to use the standard Username and Password.  
**NB: If you have set up a passcode and you are not provided with the option to switch to PIN on login, please ensure that you are not:**  
1. Browsing in private browsing mode – this steers cookies stored in your browser necessary for passcode login  
2. Automatically clearing browser data + cookies when closing your browser via settings or third party applications

New passcode:

SAVE

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**myASSISTANT**  
Located in banner on every page, your myAssistant helps guide you through MYP. Create a custom personality for your assistant below.  
Edit myAssistant name: myASSISTANT

upload Avatar (requirements - square, 30 x 30 px):  No file chosen

SAVE

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**myCERTIFICATES (7)**

INCLUDED TESTING CERTIFICATES	myTRAINING CERTIFICATES
190009-SMITH-john-ARM-Pre-Certificate 	190429-SMITH-john-ARM-Certificate 
	190429-SMITH-john-Get-Started-Certificate 

# passcode instructions

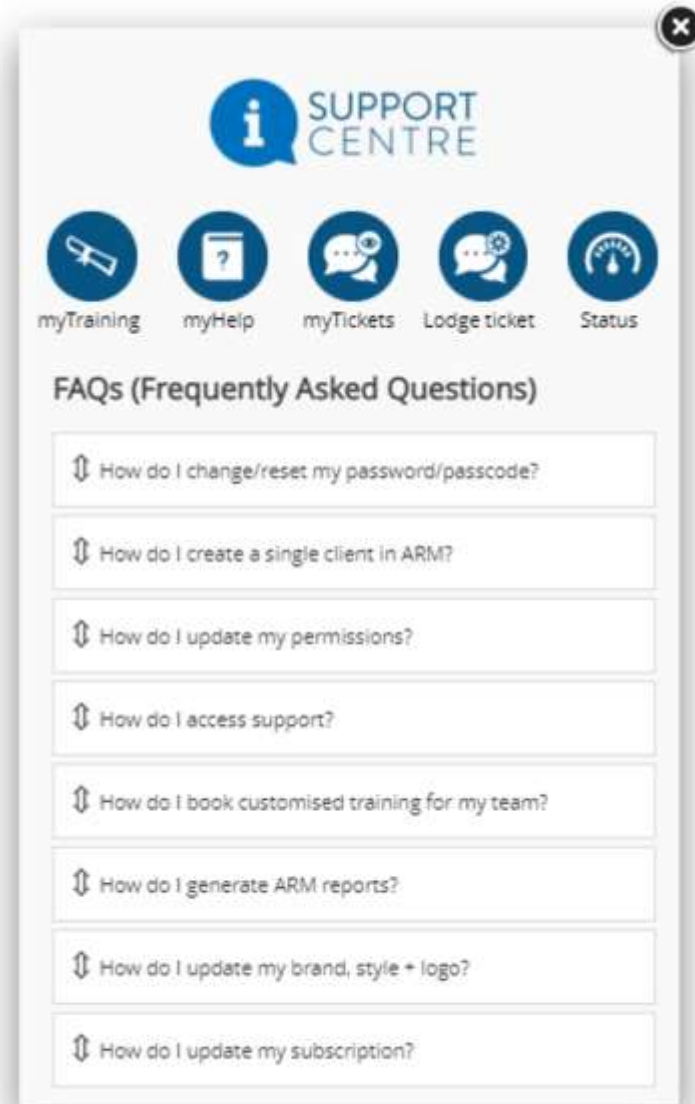
You have the option to create a passcode with a minimum of 4 digits for your mobile login access. The first time you log in on your mobile device MUST use the standard Username + Password. Subsequent log ins can then be made using your stored passcode. We highly recommend that you also use the built-in 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 [status](#)
- View frequently asked questions



The screenshot shows a 'SUPPORT CENTRE' interface. At the top, there is a logo with an 'i' in a blue circle and the text 'SUPPORT CENTRE'. Below the logo are five circular icons: a magnifying glass for 'myTraining', a question mark for 'myHelp', two speech bubbles for 'myTickets', a speech bubble with a plus sign for 'Lodge ticket', and a status indicator for 'Status'. Below these icons is a section titled 'FAQs (Frequently Asked Questions)' containing eight questions, each with a double-headed arrow icon on the left:

- How do I change/reset my password/passcode?
- How do I create a single client in ARM?
- How do I update my permissions?
- How do I access support?
- How do I book customised training for my team?
- How do I generate ARM reports?
- How do I update my brand, style + logo?
- How do I update my subscription?



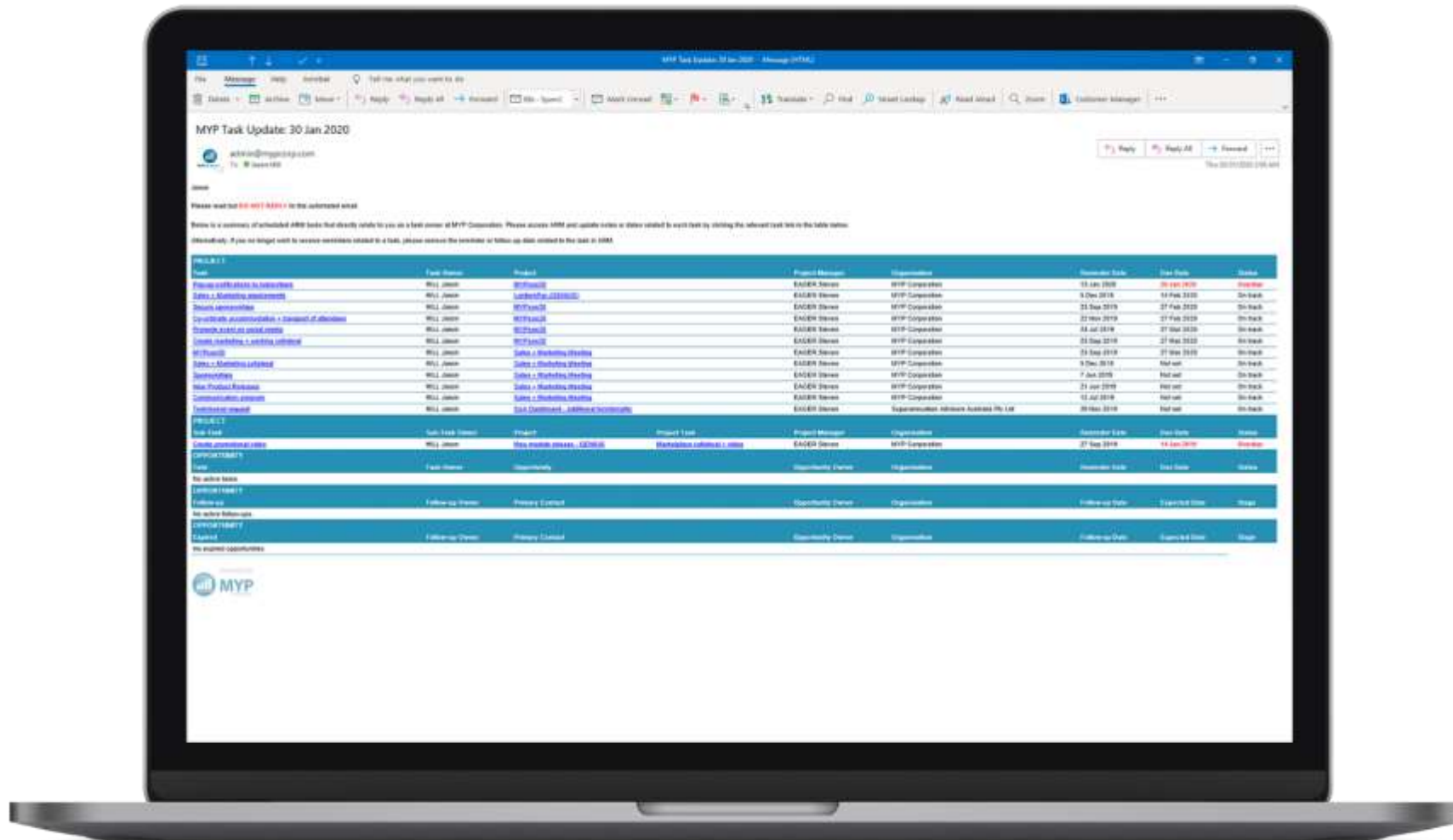


# MYP API mappings

Legend: ● API link ● CSV file

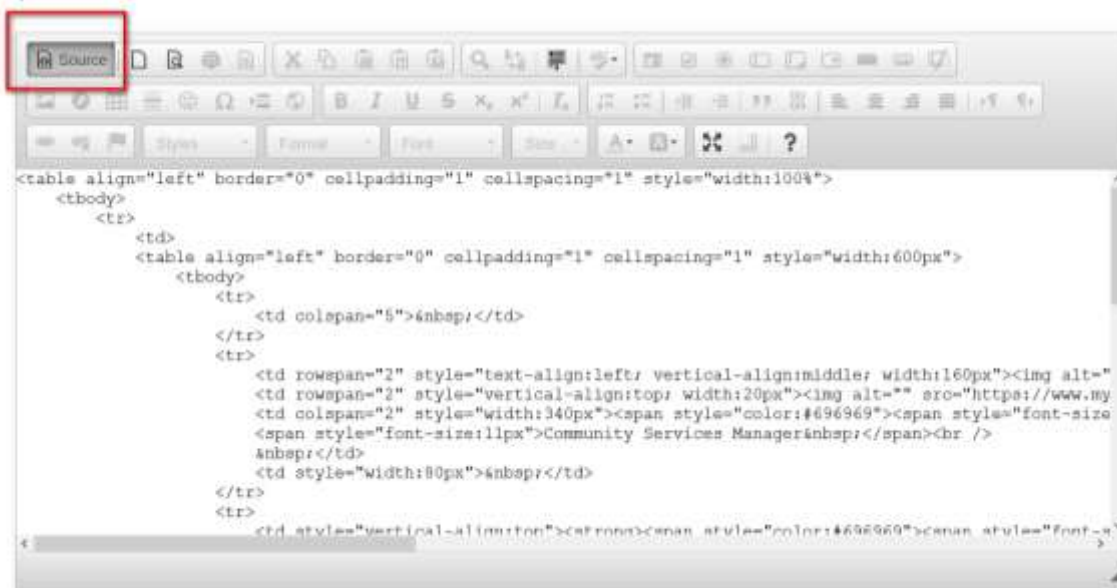
	Timesheets	Invoices	Leave
GENIUS + PocketWatch			
			
			 
			
GENIUS			
			
CIVICA			
			
			
			
PocketWatch			
			
attaché			
			
			
ORACLE NETSUITE			
			
SUBSCRIBE 			
			

# daily task email



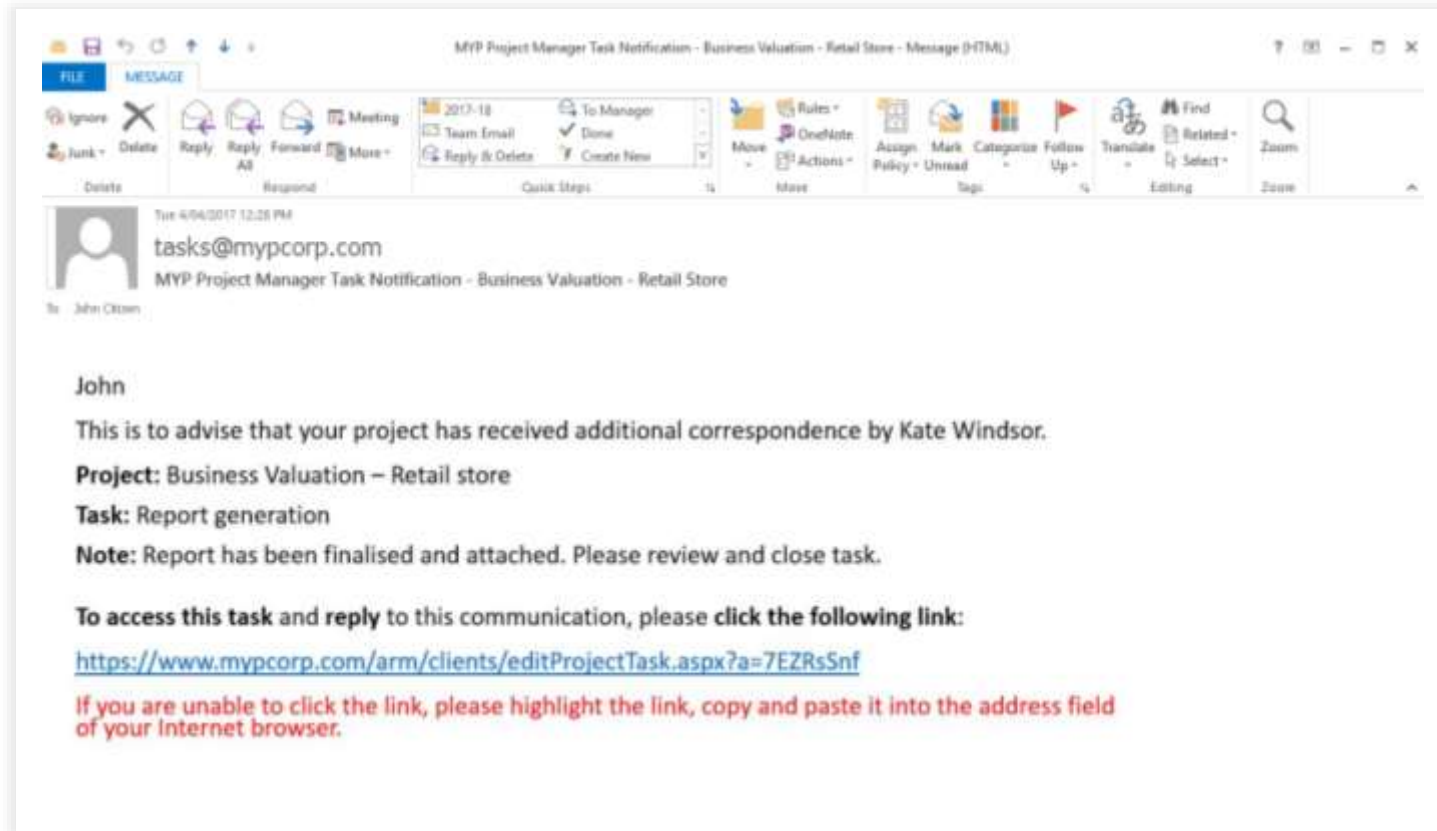
# customised signatures

ARM Pro > Staff > Contact options > Edit email signature



```
<table align="left" border="0" cellpadding="1" cellspacing="1" style="width:100%">
  <tbody>
    <tr>
      <td>
        <table align="left" border="0" cellpadding="1" cellspacing="1" style="width:600px">
          <tbody>
            <tr>
              <td colspan="5">&nbsp;</td>
            </tr>
            <tr>
              <td rowspan="2" style="text-align:left; vertical-align:middle; width:160px"><img alt="
              <td rowspan="2" style="vertical-align:top; width:20px"><span style="color:#696969"><span style="font-size
              <span style="font-size:11px">Community Services Manager&nbsp;</span><br />
              &nbsp;</td>
              <td style="width:80px">&nbsp;</td>
            </tr>
            <tr>
              <td style="vertical-align:top"><strong><span style="color:#696969"><span style="font-s
```





# 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.

# keep up-to-date with everything MYP



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for the latest new features, tips, tricks and training session timetables



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exclusive Facebook Group for Community Subscribers

[facebook.com/groups/2072086089501953](https://facebook.com/groups/2072086089501953)