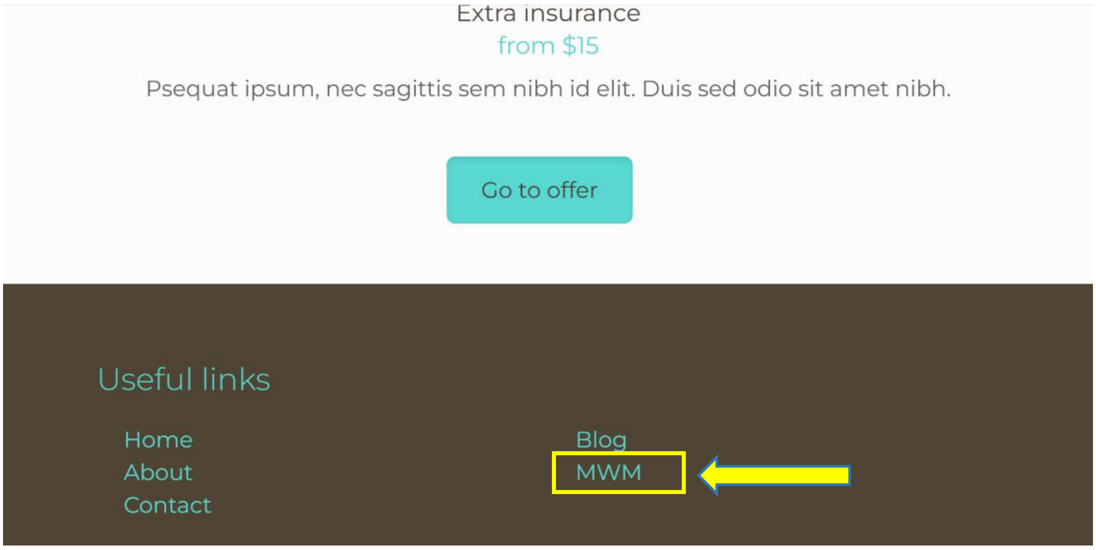
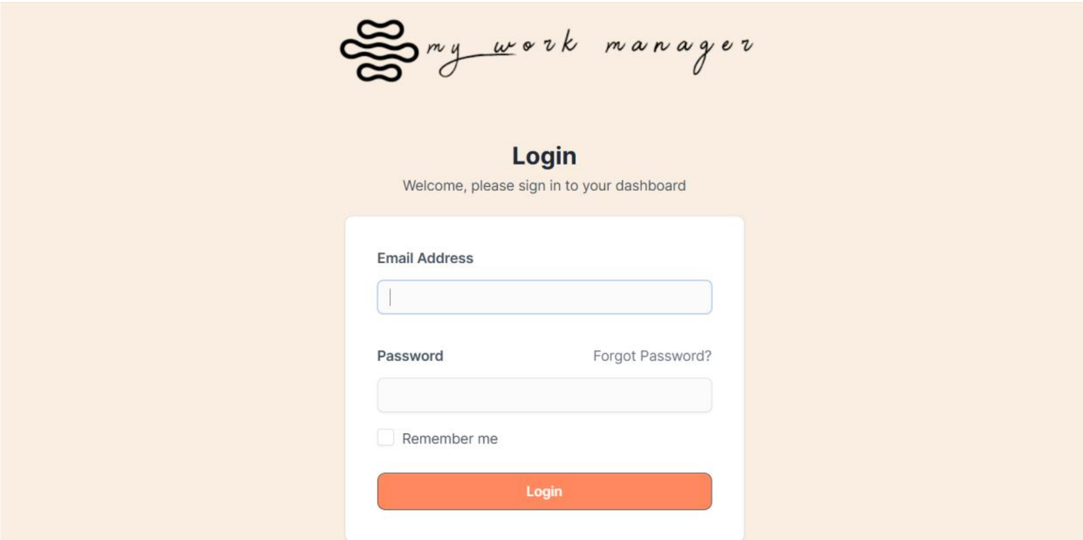
MWM - My Work Manager Tutorial

At WebBry, we build, all our websites that not only look great but also you can operate your entire business run smoothly, virtually, from the cloud. Our websites are easy to use and add real value to your brand.

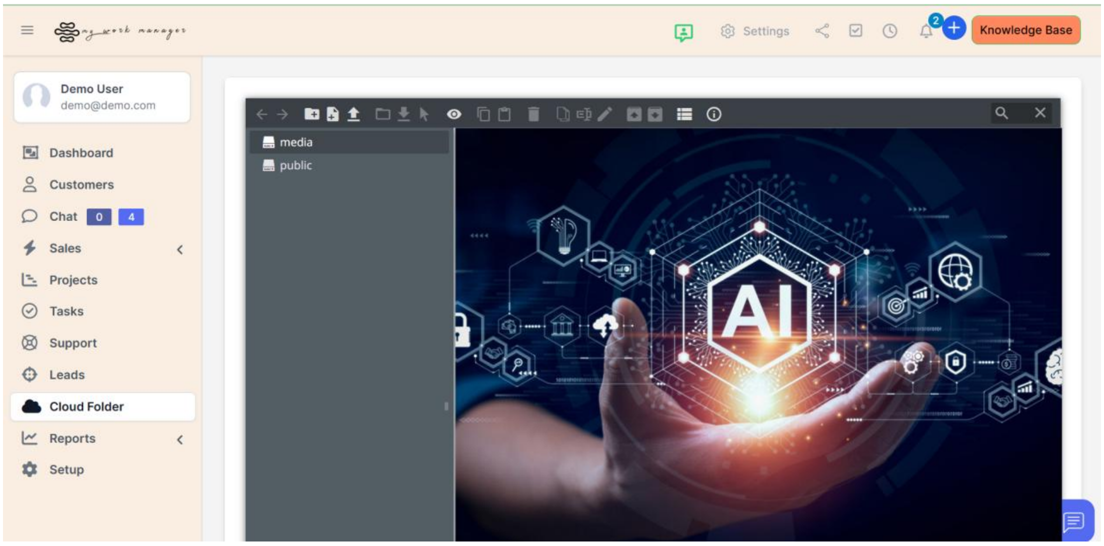
At the bottom of your website there is button titled MWM that is My Work Manager, when you click on it



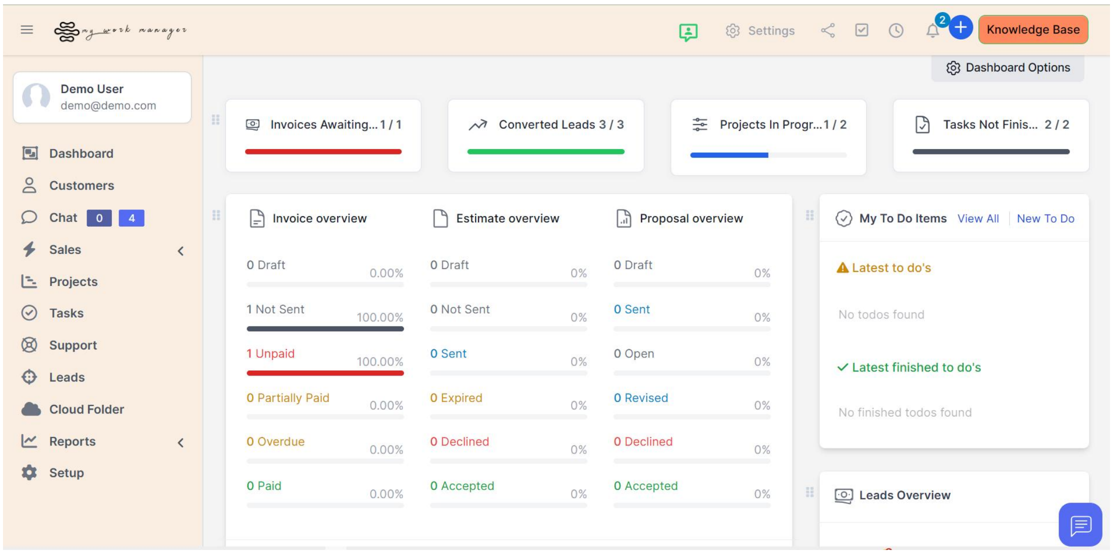
you see the login page, to your secure access to your virtual office. Enter your User name email and password, and you'll have secure access to your office from anywhere in the world.



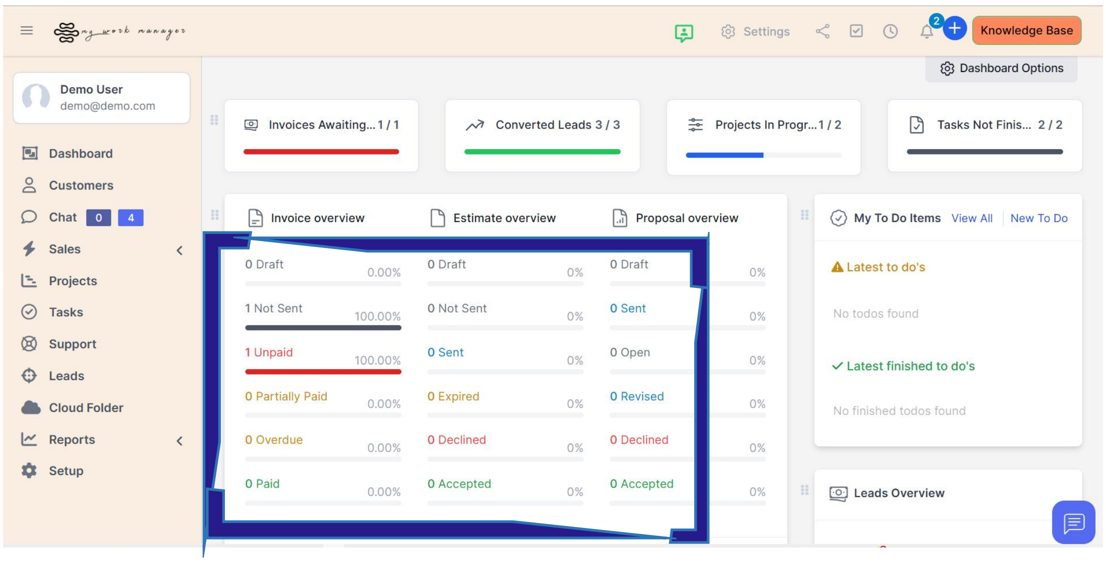
After login you will get the dashboard. That is power of WebBry, no other competitor has this unique feature of this virtual business in the cloud. It's an all-in-one business management system, powered by Artificial Intelligence - AI.



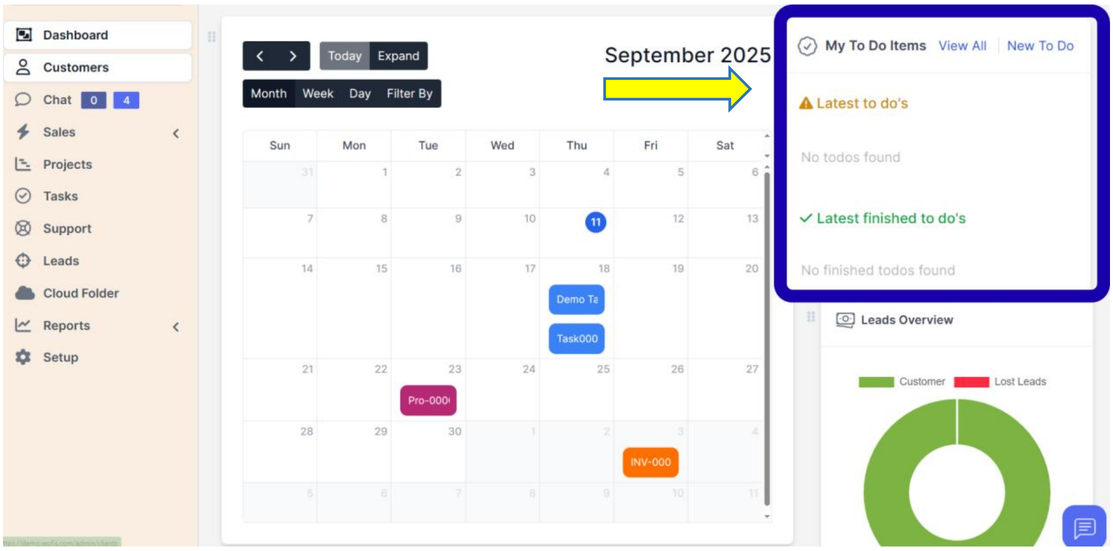
From leads that we can furnish on daily real time basis to you; to invoices, projects to client communication – everything is in one place. Let’s take a quick tour and see how our new AI enhances your work from leads to money in the bank.



We'll start on the dashboard, which immediately opens up to give you a view of what's happening in the billing section. These are all hyperlinked, so you could click straight through to see what invoices are unpaid or possibly what proposals have been declined or accepted.

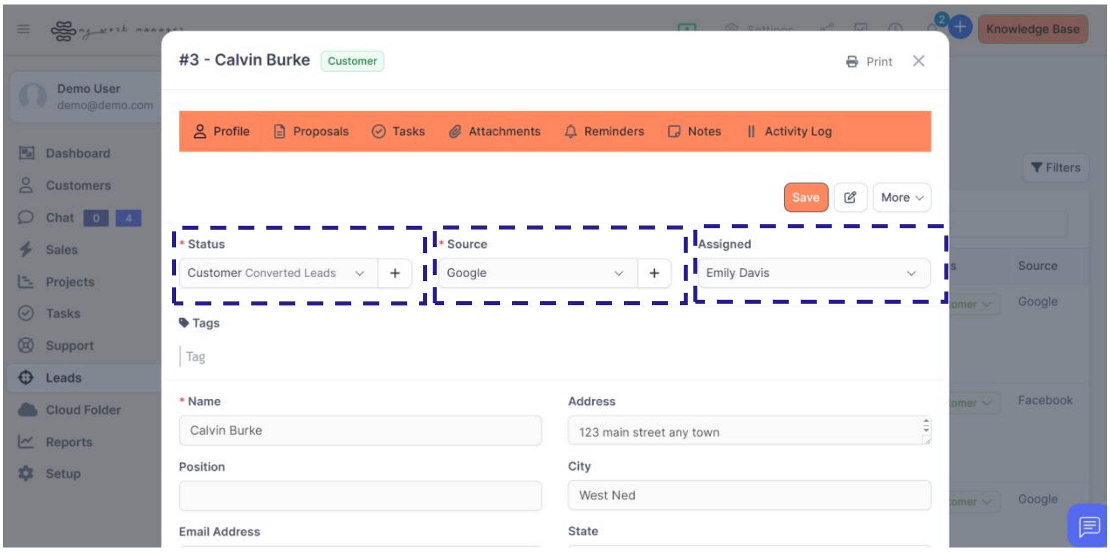


Immediately the system will give you a snippet of your to-do list, the projects and tasks coming your way, an overview of what's happening leads or projects wise, events, shows you the calendar, the payment record, and also shows you any contracts expiring and any tickets that is in the pipeline for staff to work on.



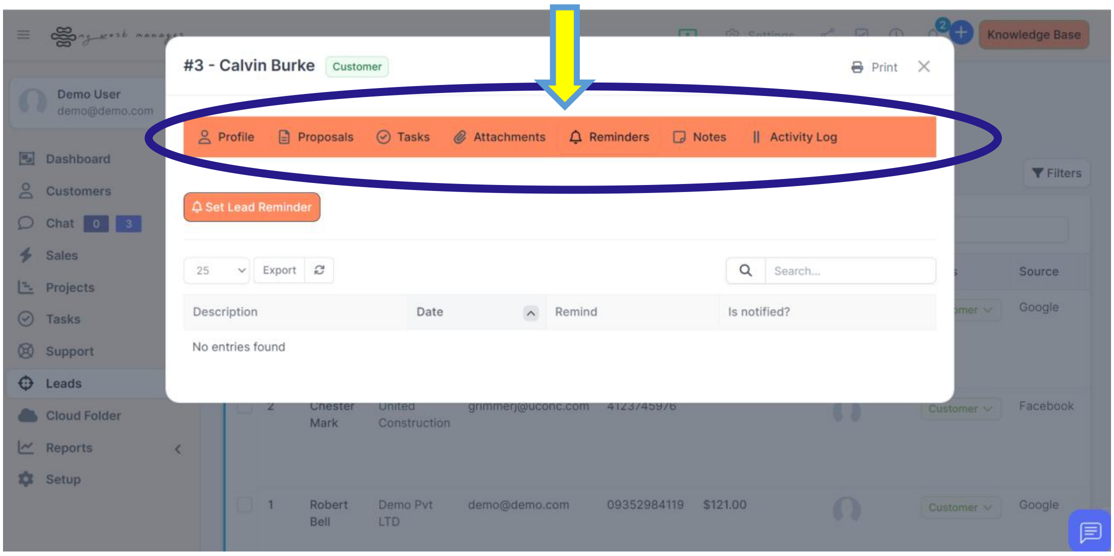
Let's start by actually looking at the lead section in MWM. Our new leads will actually help you grow your business with a powerful tool to effectively capture, manage, and convert potential opportunities into valuable leads. If you have subscribed to our daily real time fresh leads; then your leads will show up automatically in your inbox. To subscribe to this service in your trade in your zip codes, contact us.

When you do have your new leads, you simply click new and then you decide what statuses we'll put here, so they can go through different statuses, what those sources are, so possibly from networking or from other types of social media platforms, as well as who the lead will be assigned to. This way you can actually give staff goals around how many leads they have, what the lead has to do, and so forth.

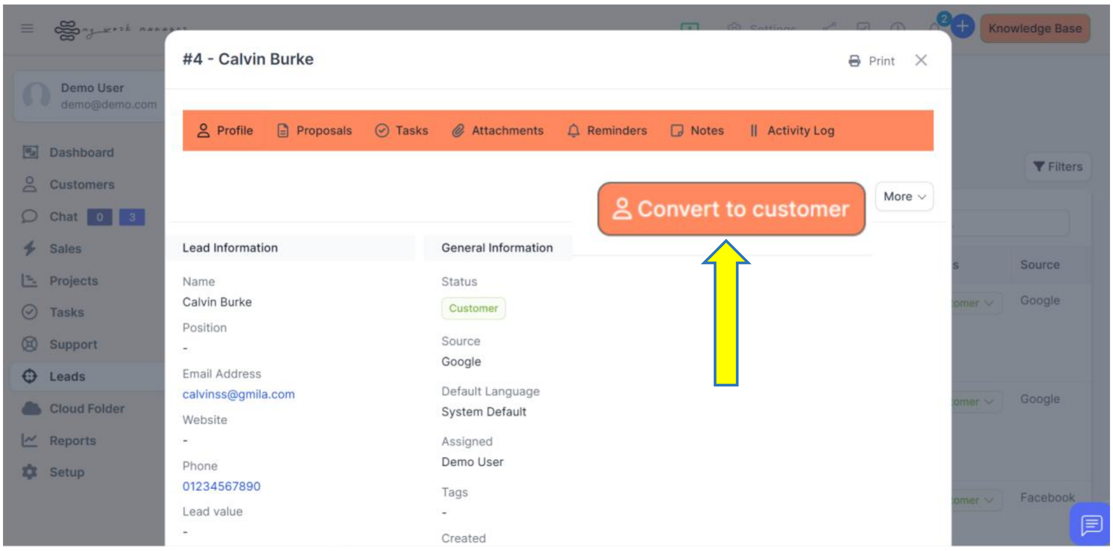


The nice thing is, when you create a lead, you now can add in a lot more information about that lead. You can have a look at any notes that you've made, which only you will see.

You can set reminders, have attachments worked, possibly look at any tasks or proposals you've sent them, and best of all,

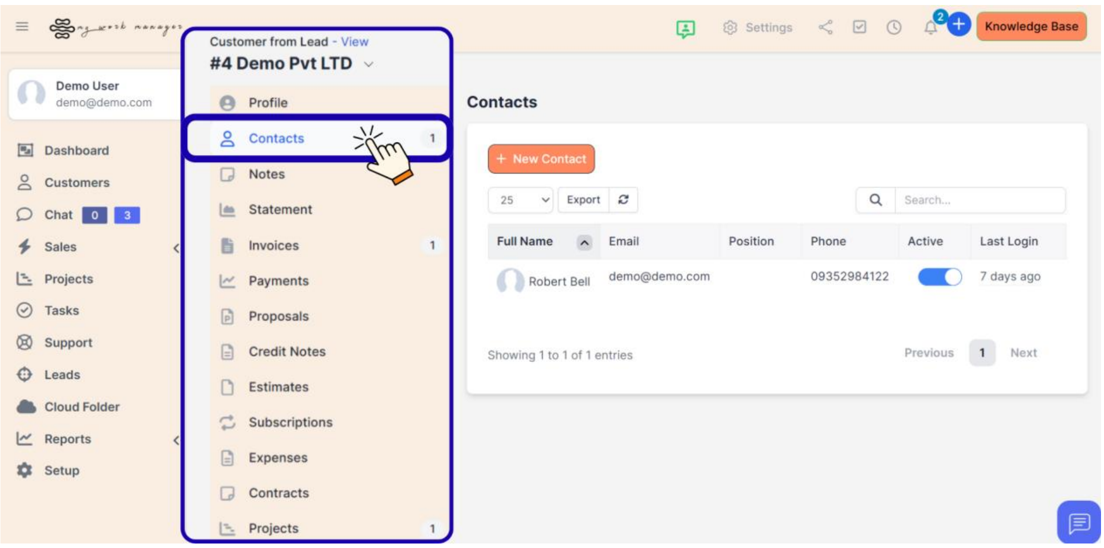


you have a convert to customer button. So what this means is that within two ticks, you can convert this customer from a lead into a customer, saving you time and effort and also bringing everything that you had in the lead section, like the notes, over to when that person becomes a customer.

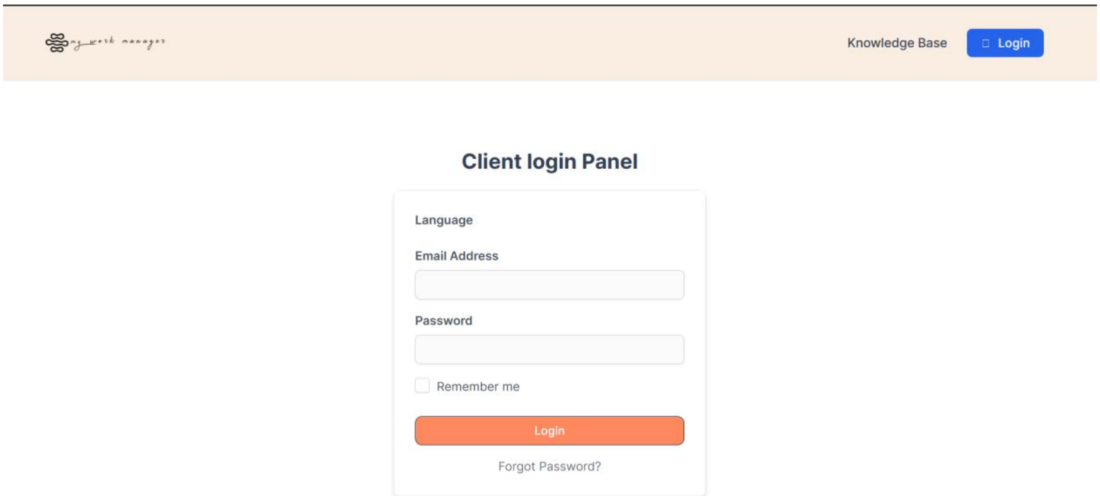


So this system is set up so that in the customer section, you can very quickly see the companies or the customers and your primary contacts are now those leads that you had.

So firstly, know that you can have numerous contacts at a company, because sometimes we deal specifically with one contact for financial reasons, and we actually do the work. You can see all notes, invoices, estimates, contracts, projects, tasks, even documents related to that customer.

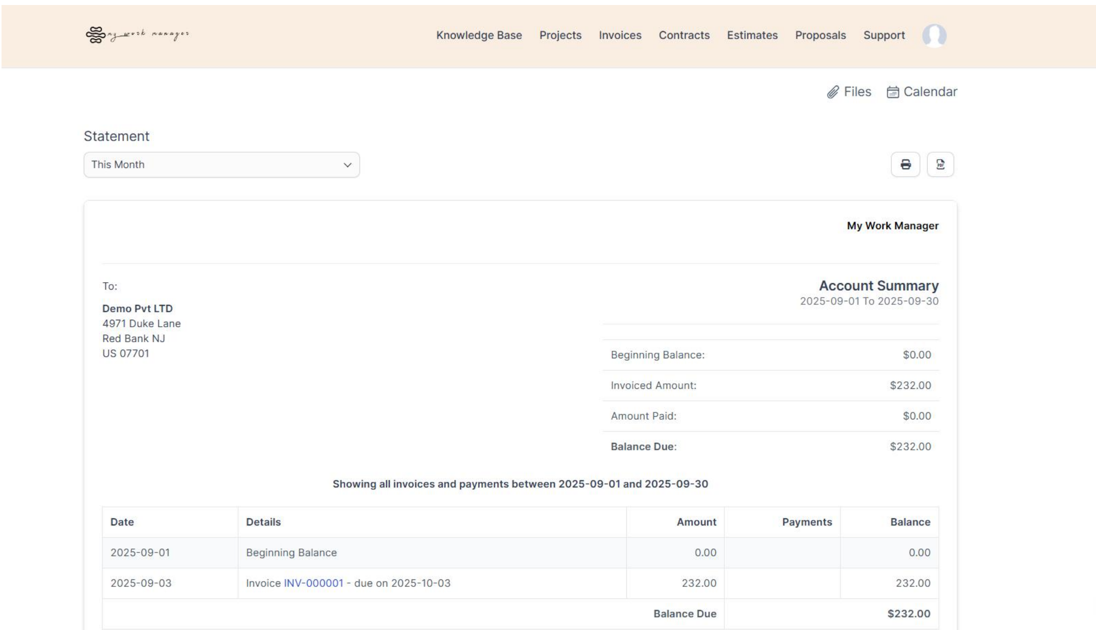


You can also very quickly view the client portal, which allows you to see what the customer sees, making your life so much more easier. When a client logs in to their side of your system, which is your client portal, they will have a username and a password.

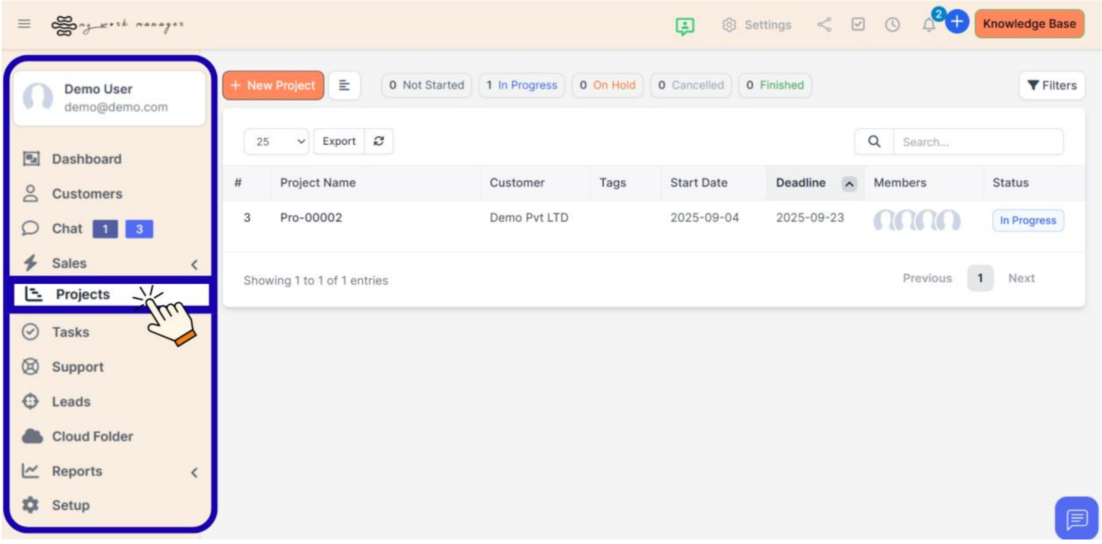


They'll go in and immediately it will open with an overview of invoices for them. They could generate their own statement, if that's what they so wanted to see exactly what was going on for this year, for this month or specific period.

This also saves you a lot of time around when customers ask for statements. A really great aspect is that a client can talk to you about a project as it's happening. They can firstly see the project.



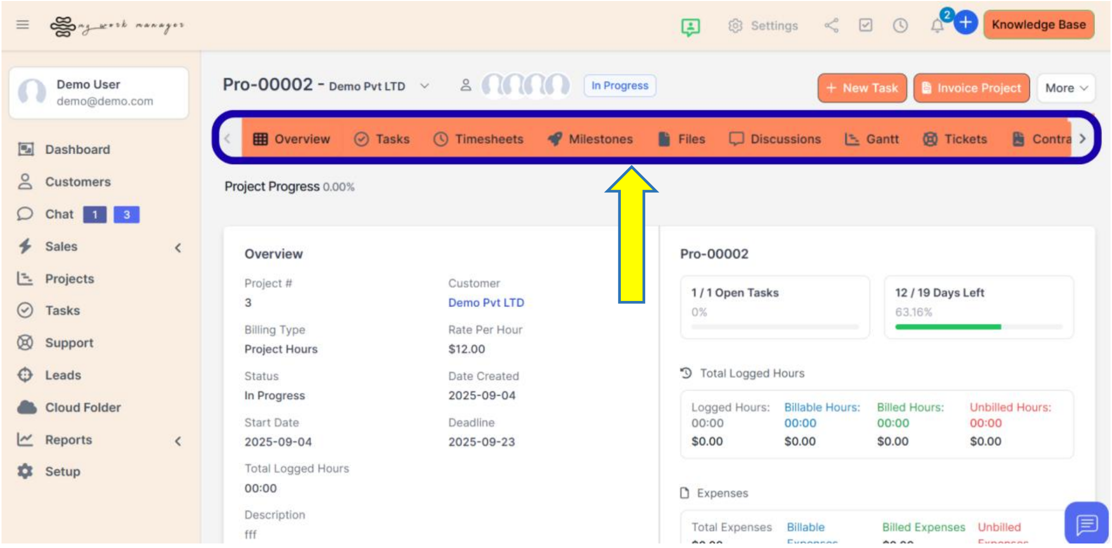
They can see the tasks related to the project. They can have a discussion with you right here, right now within this section and it stays within the project. So what this means is now you never have to go back to emails or ask anybody what was said.



The entire history of the communication stays within the project, which allows for a much easier handover between employees if that's what's needed.

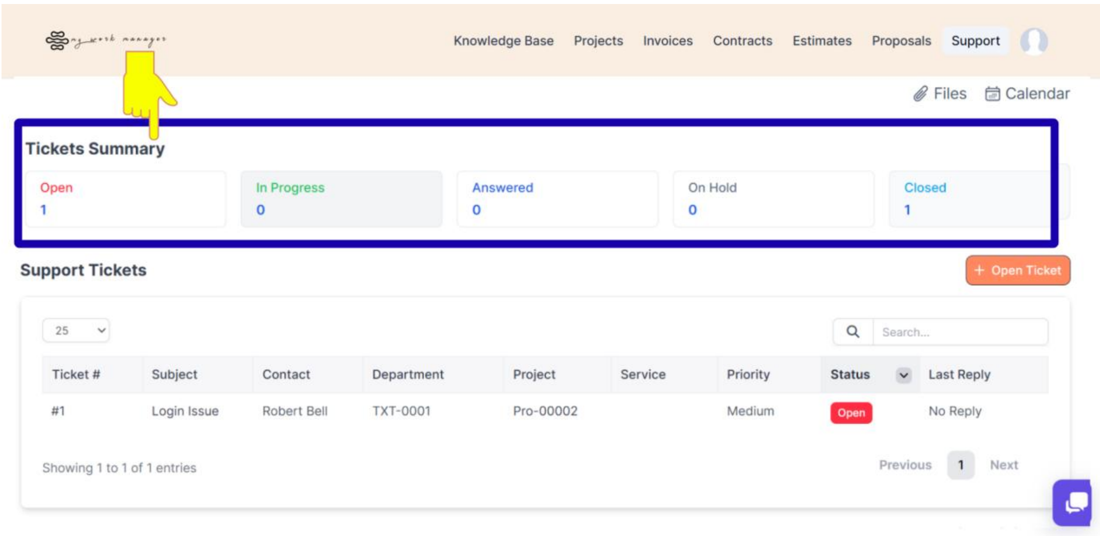
You can actually see that there's a lot of functionality that exists within the project section. And remember, tasks and projects is about service delivery.

So this could be anything from managing a legal case to implementing solar in a house or possibly a development to nurturing a coaching relationship with clients. It doesn't matter what your service offering is, you are delivering a service ultimately. So therefore, it is a project with tasks in it.



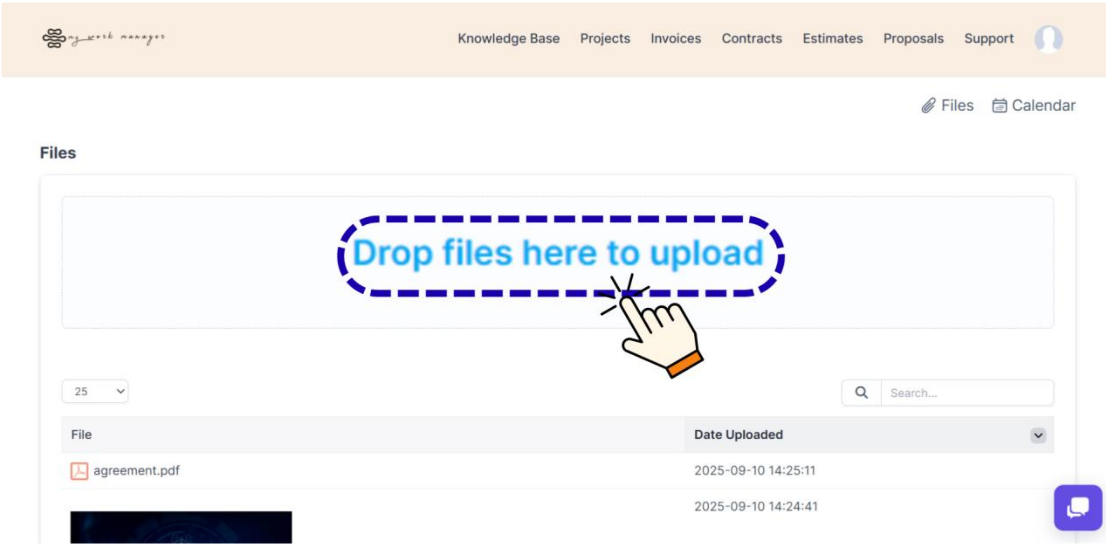
Furthermore, within the portal, you can also see that your client can immediately log a support ticket with you.

And again, it takes everything out from things being done on email to bringing it simply in to one spot. So it doesn't matter whether you're walking down the street on your cell phone or your client's on his cell phone or at his PC.

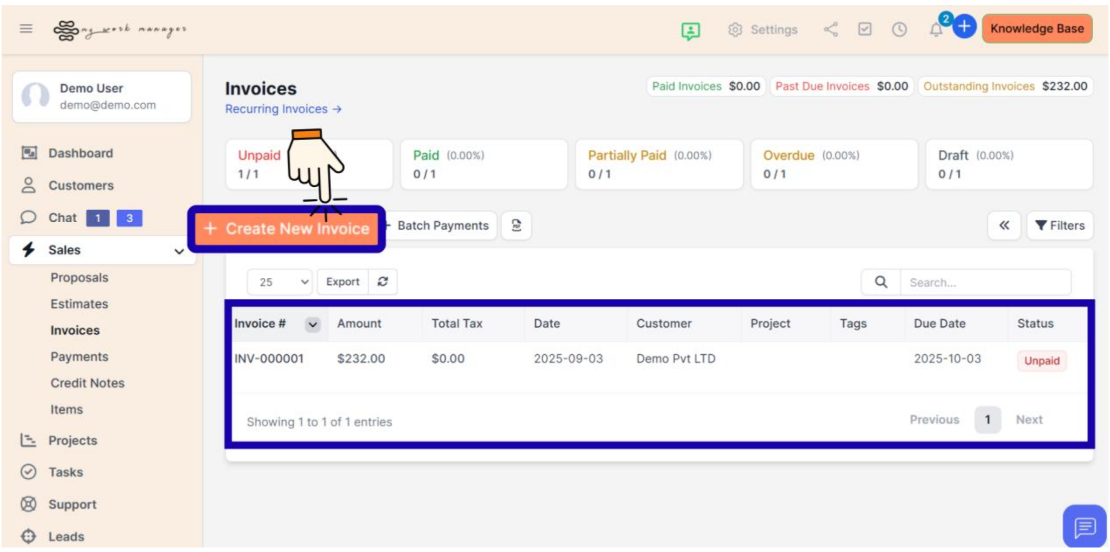


He could take a snapshot of something, load it up, because you could attach a document, and send it to you.

And immediately on your side, you'll get an email advising you that a ticket's been logged. And as you can see here, the system's made for you to actually reply to the customer as well.

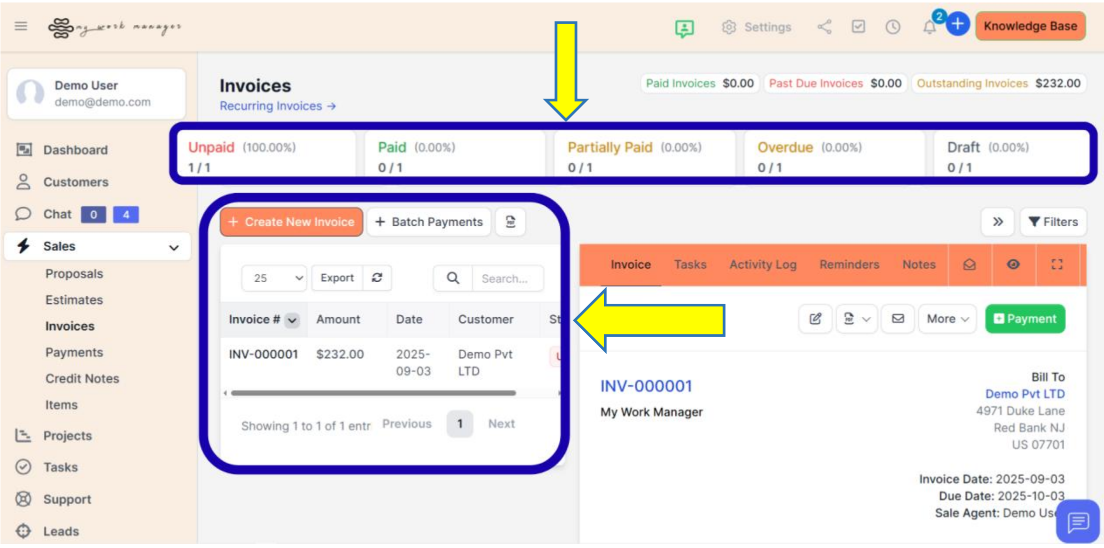


So from the customer viewing, we've gone back into our side of the system. Let's actually just have a look at some of the invoices side. So invoices are pretty standard. Proposals and estimates look pretty similar. You'll be able to generate an invoice for your customer. And as you can see here, the system will have actually invoice tracking numbers.



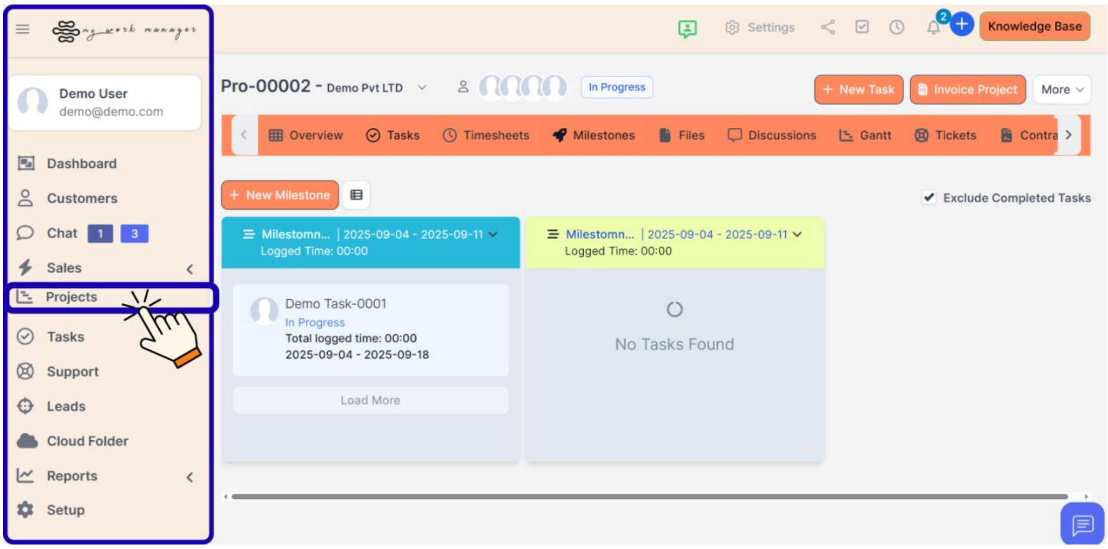
It'll have the bill to address, possibly the shipping address if it's different. You can choose whether or not you want to have this year. There's slight customization's, of course, with any system.

You can log your items onto the account. And what's really great is that each one of the invoices has a status, whether it's paid, unpaid, partially paid. And this quickly allows you to see what is the status of your accounts. Okay, so that's a quick look at invoicing. Let's hop over and actually look at projects from our side. So we've seen the client side.



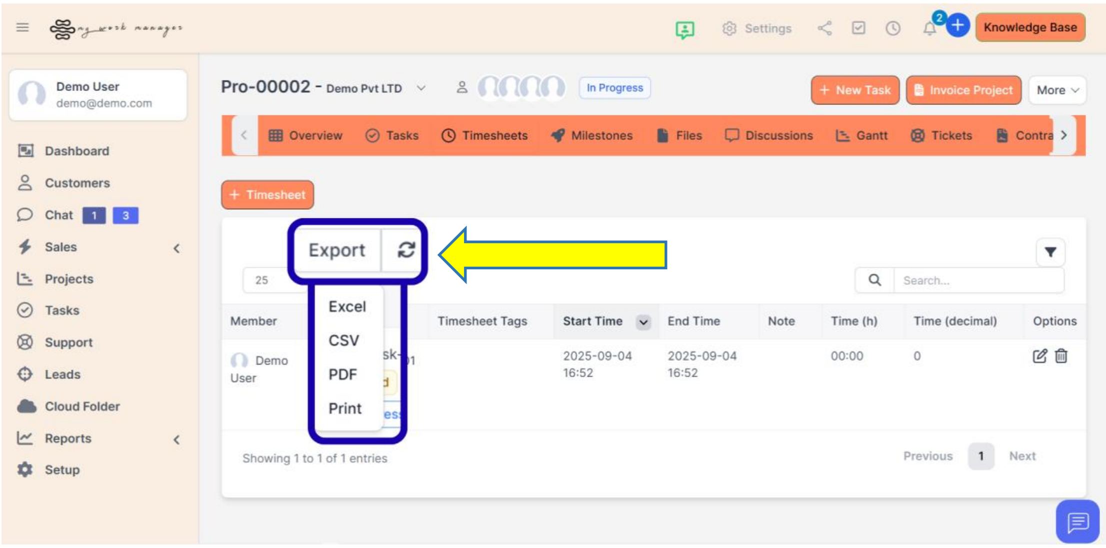
So now we can see outside of a project. We simply can see much more because we can curb the type of features the client has access to. We set all of these things up. We create the tasks.

We assign employees to those tasks. We create the milestones. What's really great, especially in the legal environment or in the accounting environment, is that we can assign, we can fill in a time-sheet, attach that to a task if we wanted to, and attach that straight into an actual invoice.



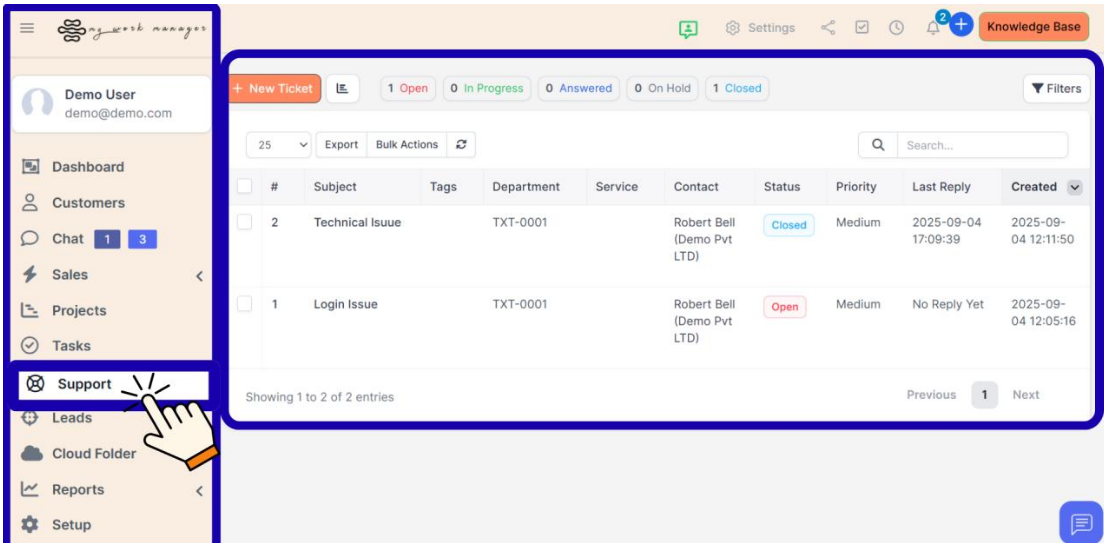
So no more does a lawyer or accountant or engineer need to hold a separate spreadsheet on Excel noting how many hours you've spent with each client. You can have all of that done in the system for you. End of the day.

We can make sure that they've got access from everything or limit access from contracts, the ability to bulk export, control their functionality on what they can do possibly on expenses or what they can do on invoices, those types of things, what the actual abilities are in proposals and projects and so forth, which is quite important as we grow our business.

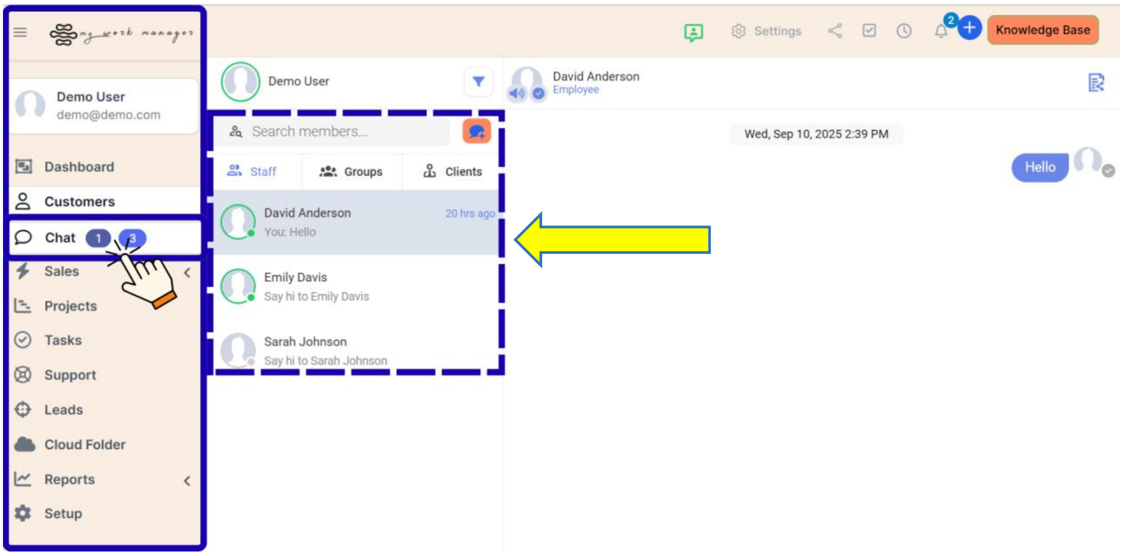


Okay, So last but not least is the support area, the ticketing area. So like we showed you within the test system, once a customer logs a query on their side, we get an email on our side and we automatically can go in and we can see all of the support tickets that are pending with different customers and we can view them and reply to them in this exact status.

We can also answer them or just close them off or place them on hold, that way we all know what is happening with the ticketing and we know what queries we have or have not attended to.



So best of all, MWM can be customized and integrated with other popular systems and it's also got its very own add-on features for manufacturing, HR, accounting, chat for communication and more.



At Success by Design we customize MWM for your business, so please contact us for a demo today.