LMN ANNUAL UPDATE CHECKLIST

LMN FEATURE/TOOL	SETTING	UPDATE DESCRIPTION	UPDATED?
Account	Company Information	Update Company Information (If Required) - Did your office move? Have you set up a Yard? Updated your Company Logo?	☐
	Portal and Payments	Update Company Defaults related to Customer Portal - Have you updated/changed your webiste? Have you changed your accpted payment methods?	☐
Users & Staff	LMN Users	Update Users (Active / Permissions / Assignments) - Have you added to your staff? Have you promoted anyone?	☐
	Staff	Update Staff (Active / Staff Groups / Wage Costs)	☐
	Staff Groups	Update Staff Groups - Organize your staff list by roles within the company. Maybe certain employees can only do work in one division	☐
My Settings	Profile Information	Update if username or email have been changed by individual user	☐
	Report Settings	Update if individual information has been changed by individual user	☐
	Notifications	Update if any Notifications need to be changed by individual user	☐
Budget	Annual Budget	Update Budget Previous / Forecast - Review Quarterly or semi-annually if possible.	☐
Pricelist	Labor	Update Labor Costs - Make sure your Staff "Wage Cost" data is also updated and accurate	☐
	Equipment	Update Equipment Costs - If you've paid off a financed vehicle, update cost. If you've started a new lease, update cost, etc.	☐
	Material	Update Material Costs - Check with your vendors on pricing updates related to material costs	☐
	Subs	Update Subcontractor Costs - If you've added/removed any subcontractors, make sure they are added here	☐
	Other	Update Other Item Costs (**REMEMBER** *NO Overhead Recovery markup added to these items, profit margin only*)	☐
	Taxes	Update Taxes (if required) - Verify State/Provincial taxes are up to date	☐
Estimates	Estimate Settings	Update Default Estimate Name - Naming convention should be updated if you are using Custom Text fields indicating "Year"	☐
		Update Default Estimate Status Mapping - If you have added additional steps in the estimating process, you can add these here	☐
	Terms & Conditions	Update Terms & Conditions (Dates, etc) - Identify if any of the Terms & Conditions have dates listed, that these are updated.	☐
	Statuses	Update Estimate Statuses (If Required) - If your process has changed, you can add additional requirements here	☐
	Divisions	Update Divisions (Sales Goal, Labor Hours, Closing Rate) - Review your Budget's Sales Forecast and update Divisions accordingly.	☐
	Cost Codes	Update Cost Codes (See QuickBooks Service Items) - Speak with your Company's QuickBooks/Accounting expert if updates are required	☐
	Standard Estimates	Archive any completed Design-Build estimates - This will keep your list clean with only current Installation projects	☐
	Service Estimates	Archive any completed Maintenance estimates - This will keep your list clean with only current Maintenance Contracts	☐
Jobs	Job Types	Update Job Types - Update if you want to diversify your work for reporting further than just by division.	☐
	Default Tasks	Update Default Tasks - Update if you have tasks that Crews need to better track their times on specific types of jobs automatically.	☐
	Services	Update Services - Moving forward, update these if default scheduling/billing options have changed.	☐
	Hourly Rates	Update Hourly Rates - Make sure your Price List Labor Items are updated prior to updating Hourly Rates.	☐
	Job List	Archive Completed Design-Build Jobs - This will clean up your Job List to only have ongoing/current installations showing	☐
		Archive Completed Maintenance Jobs - This will clean up your Job List to only have ongoing/current maintenance contracts showing	☐
	Job Groups	Update Job Groups - Stay organized with only active Jobs in the correct list.	☐
Schedule	Schedule Settings	Update Default Schedule Visit Name - Only visible on Whiteboard and Calendar views	☐
	Work Calendars	Update Work Calendars (If Required) - Update/Add If you want to diversify viewable scheduled Jobs	☐
	Schedule Crews	Update Schedule Crews (If Required) - Update/Add if you've had employee/user changes	☐
	Holidays	Update Stat Holiday Calendar - Only applicable to Design-Build jobs.	☐
	Schedule Templates	Update Schedule Templates - Update/Add if you've added new services. Change dates based on new year/seasons	☐
Timesheets	Timesheet Settings	Update Timesheet Jobs Settings - Update if you want to change Job Info and/or provide GPS routing for crews.	☐
		Update Timesheet Foreman Permissions Settings (If Required)	☐
		Update Timesheet Work Schedule (If Required)	☐
		Update Timesheet Other Settings (If Required) - Update if you originally selected a "*generic*" Time Zone.	☐
	Payroll Codes	Update QuickBooks Payroll Codes (If Required) - QuickBooks Desktop users only.	☐
	Payroll & Overtime Settings	Update Default Overtime Settings (If Required)	☐
		Update Default Payroll Codes (If Required)	☐
Invoices	Invoice Settings	Update Invoicing Settings (Default Contract Start/End Date for Maintenance only) - Update notes, or Due Date if changed.	☐
	Payment Settings	Update Payment Settings (Payment Methods accepted) - Update if new payment methods are now accepted of have changed	☐
Client Communications	SMS Notifications	Update SMS Notification Templates (If Required) - Update if templates contain fixed dates in the main body of text.	☐