



User Guide

The following user guide explains how to use the Skip Tracker system and configure it to suit your requirements.

If you need any further help, please do not hesitate to email us at **support@skiptracker.co.uk**



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The Dashboard

The Dashboard is the screen you first see when you log in. There are several options with what you can see here and they can be set per user:

- **Simple Dashboard** – This is set by default and just had buttons to some of the main areas of the system.
- **Standard Dashboard** – This contains a weekly calendar view and a list of the most recent active jobs. To set this view as your default go to **Users** -> **View Users** and then edit the user account you wish to change and untick the **Simple Dashboard** checkbox and click on **Save User**.
- **Other Page** – You can set the system to go to any of the main pages when you log in, such as the active hires page. To do this click on your username in the top right corner and click on **Settings**, then in the **General Settings** tab change the **Login Page** and then click on **Save**.

Getting Started

The system has been designed in a way to give you as much control as possible on the information within the system which in turn will make it easier to use and more efficient for your business. There are a few steps that are worth going through when you first start using the system which should make it work perfectly for you...

Configure Your Hire Settings

There are quite a few settings related to the creation of hires, to view them click on your username in the top right corner and click on **Settings**, and then click on the **Hire Settings** tab. The most common ones that are useful to be aware of are:

Hire Number Prefix – The letter that your Hire numbers will start with. Hire numbers will automatically increase by one every time a new hire is created.

Next Hire Number – The next number that will be used for a hire.

Transfer Ticket Text – If you enter text here you will then have the option when printing hires and invoices to include this text at the bottom of the PDF. Because of printing to PDF the formatting options are limited... to make a section of text bold start it with a `` tag and then end it with a `` tag. For example: ***This is the Title***

To add a tick box to be printed on the PDF, enter the tag `<box>`. For example: ***Tick Here: <box>***

If you have entered transfer text, when viewing a hire or invoice you will have an additional print button in the main buttons towards the top of the page.

Hires Title – The name of hires used throughout the system. This can be changed to anything you like, for example you could change it to Job.

Drop Off / Collections Title – The name of Drop Off / Collections throughout the system. This can be changed to anything you like, for example you could change it to Site Visit.

Engineers Title – The name of engineers throughout the system. This can be changed to anything you like, for example you could change it to Staff Member or Operator.



Customers Title – The name of customers throughout the system.

Sites Title – The name of sites throughout the system.

Next Actions – The next actions list is a list of actions you can create which can then easily be used to update Hires so that you can see what the next action is. You can add as many actions as you like here, just type the next action in the text box and select a background and text colour and click on the **Add** button.

When a Hire is set to a Next Action with a colour an icon will be shown in the Hire lists in the Next Action column.

Default Drop Off / Collection Task on Create Hire – When creating a hire and booking an engineer, to save you having to type in a common task for the visit you can set a default here, such as **Drop Off Skip**.

Default 2nd Drop Off / Collection Task on Create Hire - When creating a hire and booking an engineer you have the option to automatically create a second booking, to save you having to type in a common task for the visit you can set a default here, such as **Collect Skip**.

Hire Types – You can add as many Hire Types as you like which will then be shown when creating a hire, saving you having to type it in every time. You can also give each Hire Type a colour so that they can be easily differentiated in the hire list and calendar.

Hire Priorities – Hire priorities can be added here which can then be selected when creating a hire.

Hire List - Complete Drop Off / Collection Colour – Defines the colour of the rows of hires for which the Drop Off & Collection visits have been complete.

Customise Fields – The fields that are shown on for hires can be renamed and hidden if not required. To make changes type the new name in the relevant box and tick the checkbox next to fields you would like to hide and then click on **Save**.

Configure Your Email Templates

Emails can be sent from the system from various places such as when viewing hires or invoices. To change the templates of the emails sent click on your username in the top right corner and click on **Settings**, and then click on the **Email Settings** tab. Each email type has a range of Tags you can use to substitute relevant information when sending the email, simply use the tags in the email template and they will be replaced when viewing/sending the email.

Configure Your Tasks

To save you having to keep typing common things in the system when creating Hires and Quotes/Invoices, you can build and use your own task list.

To edit your tasks, click on your username in the top right corner and click on **Settings**, and then click on the **Task Settings** tab. Firstly, creating your Task Categories by clicking on the green **Add Category** button and add a category name, for example **Waste Type** and then click on **Save Task Category**.

Now add some Hire Tasks by clicking on the green **Add Task** button next to the **Hire Tasks** title. Enter the **Task Details**, for example Plasterboard, the **Task Type** will already be set to Hire, and then select the **Task Category** and click on the **Save Task** button.



Now, when creating Hires your task list will be available to easily add tasks to the hire without the need to type them out.

You can add as many tasks as you like and can re-order them by dragging and dropping them in the task list.

Now you are ready to create your first hire...

Creating Hires

To create a hire, there are several places you can get to the Create Hire page from:

- In the bar, click on the **Create button** and select **Hire**.
- From the **Active Hires** page, click on the **Add Hire** button at the top of the page.
- In the top navigation bar, click on **Hires** -> **Create Hire**.

Once on the Create Hire page you will have a range of fields to fill out relating to the hire. A lot of the fields you see here can be edited and renamed in the Settings as explained in the **Getting Started** section.

Customer Details

The **Customer Details** section is where information relating to the customer, site and general hire details are entered.

When you are creating a hire for a new customer, if you want to save the customer details tick the **New** checkbox above the Customer name field, or if you are updating a customer tick the **Update** checkbox. Once you have customers in your database when you start typing in the **Customer** box it will search the database and show a dropdown of matches which you can then click on to fill in the relevant boxes, saving you having to type them out every time.

Details of the other fields in this section are:

Hire Created By – This will automatically enter the name of the user that is creating the hire.

Print Work Report As – Work reports can be printed with the customer details on if for example you are doing the hire on behalf of another company.

Created Date – This is the date the hire record is created, it will default to today's date.

Preferred Date – This is the date that the customer would prefer to have the hire.

Hire Type – This is the hire type, this list can be created by you in the settings as detailed in the **Getting Started** section.

Notified Time – This is the time that you received the enquiry/booking.

Custom Job Number – You can add a custom job number to a hire in addition to the default number assigned by the system.

Hire Reference / Order Number – This is the reference for the hire or for example the PO or quote number from the customer.



Chargeable – Whether the hire is chargeable, for example if a customer has an account hires may not be chargeable on an individual basis.

Priority – The priority of the hire, this list can be created by you as explained in the *Getting Started* section.

Hire Value – This is the value of the hire. When an invoice is created from a hire this is the value which will be used. If you are VAT registered, enter the price excluding VAT here.

Customer Address – This is the address of the customer, not necessarily the address of where the hire is.

Site Address – This is the address of the site where the hire is.

Hire Products / Services

The Hire Products / Services section is where you can add details of the hire. The Tasks box on the left has a list of all the tasks that you have entered in the tasks list as details in the Getting Started section.

The Hire Products/Services box on the right is a free text box which you can type in.

To enter one of the tasks into the box, simply double click on the item in the list and a new line will be added to the text box with that task. You can then add to the description if required.

Book Drop Off / Collection

When creating a hire, you can Book Drop Offs / Collections at the same time. This section can be set to be expanded or collapsed per user by going to *Users* -> *View all Users* and then editing the user and selecting/deselecting the *Expand Book Site Visit on Job Create* option and then clicking on *Save User*.

Book in Date – The date the Drop Off/Collection is being booked in for.

Book in Time – The time the Drop Off/Collection is being booked in for.

Drop Off / Collection Task – The task to be performed. The default for this can be set in the settings as explained in the *Getting Started* section.

Assign Operator – The operator/staff member booked for the Drop Off/Collection. This will be shown in the calendar and can be used to colour the calendar entries.

Create 2nd Drop Off / Collection Task – If an option is selected here it will automatically create a 2nd booking. For example, the first booking would be for the drop off of a skip, and the second booking would be for the collection.

The remaining sections allow you to automatically send emails and SMS text messages to the customer or operators. Simple tick the box next to the message you want to send and that will enable the relevant message.



Stock

Stock items can be assigned to a Hire so that you can easily keep track of what stock you have and its availability. Stock will remain assigned to the Hire until the hire is completed at which point it will be shown as available again.

If a Hire has stock assigned to it, the stock and quantity will be printed on the Hire Sheet.

Other Details & Save

You can add general notes to the hire here which will not be shown on any printed PDFs etc.

When ready click on the **Save Hire** button and the hire will be created and the Drop Off/Collections booked in and you will be redirected to the view hire page.

Viewing Hires

Hires can be viewed and accessed from various places within the system. The most common is from the Dashboard or from the Active Hires page.

The list of hires shows a general overview of information for each hire. The list is coloured depending on the hire status.

To view a hire, click on the row or on the **View Hire** button.

The view hire page shows all the information for the hire and allows you to perform functions specific to the hire.

You can upload files to the hire, define the next action, add hire notes, add correspondence records and view other hires for the same customer/site.

You can book Drop Offs / Collections in the same way as detailed in the **Creating Hires** section.

The buttons at the top of the page perform the following functions:

Complete this Hire – This will mark the hire as complete and remove it from the active hires lists. To view completed hires, on the top nav menu go to **Hires** -> **Completed Hires**. A completed hire can be cleared and made active again by clicking on the green **Completed** button next to the hire number title when viewing the hire.

Set as Invoiced – Once a hire has been completed it can also be marked as invoiced, which will hide it from the completed hires list. To view invoiced hires, on the top nav menu go to **Hires** -> **Invoiced Hires**. An invoiced hire can be cleared and made completed again by clicking on the green **Invoiced** button next to the hire number title when viewing the hire.

Note: When an invoice is generated from a hire it will automatically mark the hire as completed and invoiced, this can be turned off in the **Invoice Settings** tab of the **Settings** page.

Send SMS – If you have SMS credits in your account you can send an SMS text message to customers, cites and engineers. You can also create templates for text messages in the SMS Settings tab on the Settings page.

Book Drop Off/Collection – Opens a pop up to book a drop off / collection in the same way as on the Create Hire page.



Delete – Will delete the hire.

Edit – Allows you to edit the hire details.

Duplicate – Copy the hire details into a new hire. This will not duplicate any booked drop offs / collections.

Print Hire Sheet – Generates a PDF with your company header/details with information of the hire.

Generate Invoice – Allows you to generate an invoice to either the customer or site. Once save the hire will be marked as complete and invoiced and will have a reference to the invoice it generated.

Drop Off / Collections

Reports can be generated for Drop Off / Collections if required. To add a report, click on the Add Report button in the row of the drop off/collection. A pop up will appear with fields to complete for the reports. A signature can also be added to the report. Once saved the report can generate a PDF or be emailed to the customer.

Licenses/Permits

When viewing a hire there is a section for you to add details of licenses and permits associated with the hire. If an added license goes past it's expiry date a warning message will be shown at the top of the page and also on the Active Hires and Dashboard views.

To add a license, click on the green **Add** button at the top of the Licenses section, complete the form that appears and then click on the **Save** button.

Hire Values

To view a list off all hires and their values, from the top navigation bar click on **Hires -> Hire Values** and a table will show all active hires and their values.

To filter this table by customer, use the filter option in the top right.

Map of Hires

The map of hires shows all active hires in the location of the site postcode on a map.

Clicking on a pin will show information for the hire and a link which you can click on to view the full hire details.

The pins on the map can be coloured by either the hire type or the operator colour for the operator booked on the drop off/collection for that hire. This can be set in the **Map Settings** tab of the **Settings** page.



Calendar

The calendar of hires shows all booked drop offs/collections for active hires on the relevant date.

Clicking on an item in the calendar will open the view hire page with full details for the hire.

The calendar on the dashboard can be configured per user to show either a week view or month view. To set this for each user go to Users -> View Users and select the user you wish to edit and select Week or Month in the **Default Dashboard Calendar View** and then click on **Save User**.

You can also add events to the calendar by clicking on the **Add Event** button in the top right corner of the Calendar page. This will open a pop up where you can specify the event details. For example, you could add staff holidays.

The calendar can be displayed on other devices such as a phone or iPad. To do this you need to generate a calendar code by going to the **Settings** and then going to the **Calendar Settings** tab. In the **Reset Calendar Codes** section you can reset your calendar code. At the bottom of the section there is a URL which includes your calendar code which is what you will need to add the calendar to your device.

To add the calendar, you may need to search the internet for instructions for your specific device but fundamentally you need to add an internet calendar and enter the URL from above. The sync is one way and items you add to your device calendar will not be shown in the system.

Customers

You can create an unlimited number of customers in the system. They can be added when creating a hire or by going to the **Customers** section and clicking on the **Add Customer** button.

A customer can also have an unlimited number of sites assigned to it, again they can be added when either creating hires or by viewing the customer and clicking on the **Add Site** button.

When you view a customer, you can see all the sites, active hires and invoices associated with that customer. You can also upload files relevant to only that customer.

Quotes & Invoices

Quotes and invoices can easily be generated and printed/emailed from within the system.

Invoices can be generated from Hires making it easy to track the process through the system.

The quote/invoice form allows you to add all the customer and site information and add itemised products and services. Once complete you can generate a PDF version by clicking on the **Print** button.

Recording Payments

Once an invoice has been paid you can record the payment details by viewing the invoice and clicking on the Record Payment button. A popup will show allowing you to specify the date the payment was made and the method and amount.

Once an invoice has been paid in full it will show as **Paid** in the invoice list, all others will show as **Outstanding**.



Sending Overdue Reminders

As well as sending quotes and invoices in standard emails, you can also email overdue emails from within the system. The template for the overdue email can be set in the **Invoice Settings** tab on the **Settings** page.

When viewing an invoice click on the **Email Invoice** button and then click on the **Change Text to Overdue Reminder** button, this will change the email content to the overdue template.

Monthly Invoices

If you have customers that you send monthly invoices to which have all the hires for that month on you can set a customer as a **Monthly Invoice Customer**. To do this, go to the **Customers** section and **View** the customer. Then click on the **Edit** button for the customer and change the **Monthly Invoices** option to **Yes** and then click on the **Save Customer** button.

Any hires now created for this customer will not have the generate invoice button.

To generate a monthly invoice, click on **Invoices** in the top navigation bar and click on the **Monthly Invoices** button. The page that loads will list all Monthly Invoice customers and the hires they have had that are un-invoiced. To create an invoice, tick the box to the left of all hires you want to add to the invoice and then click on the **Generate Invoice** button. This will open the create invoice page with the customers details entered and a line item for each hire selected.

Once the invoice is saved, all the hires selected will be marked as invoiced.

Products

You can add products into the system which can then be added to quotes and invoices. To manage and add products, from the top navigation bar go to **Quotes -> Products** or **Invoices -> Products**.

To add a new product, click on the Add Product button in the top right corner. A page will show where you can enter the details for the product. You can define up to 4 price options for each product such as supply only or supply and install. Once you have finished entering the details for the product, click on the **Create Product** button.

To add a product to a quote or invoice, on the create page either start typing the product name and select it from the drop down list, or click on the **View Products** button on the line item and select the product from the list.

Reminders

The reminders section of the system allows you to add reminders in the system that will be shown in the calendar. To view all active reminders, from the top navigation menu click on **Reminders -> View Reminders**. The main reminders page will show a list of all active reminders.

To view a reminder, click on the **View** button. Reminders can be associated to Customers and Sites and will be shown on the respective pages. Details of the reminder can be emailed by clicking on the **Email Reminder** button at the top.

To mark a reminder as complete, click on the **Complete this Reminder** button at the top. The reminder will now not be shown on the active reminders page, instead it will be shown on the



Completed Reminders page which can be accessed from the top navigation. It will remain in view on the calendar but will have a tick next to it to show it has been completed.

To generate a hire from a reminder, click on the **Generate Job** button at the top.

Stock

Stock can be added to the system so that you can easily keep track of what stock you have available and the hires it has been assigned to.

To view stock that has been added to the system click on **Stock** in the top navigation bar and then click on **View Stock**. The Stock page will open listing all stock that has been assigned to the system and how many are currently available for each item.

Clicking on the **View Hire Report** button will load a table of all currently active hires that have that item assigned to them.

To add a new stock item, click on the **Add Stock** button at the top of the stock page.

The **Add Stock** page will appear where you can enter the name, description and quantity of the stock item, click on the **Save** button to save the item and go back to the stock page.

To assign a stock item to a hire, when viewing the hire click on the green **Add** button in the stock section. A popup will appear where you can select the item from the list. Select the quantity to assign to the hire and then click on the **Save** button. The stock item will now be shown in the stock list for the hire and the stock list will also be shown on the Print Hire Sheet PDF.

Stock items will remain assigned to the hire until the hire is completed. Stock items do not need to be removed from completed hires, they will automatically become available again.

Users

The standard package allows you to have up to 10 users within the system. If you require more, please contact us by emailing info@skiptracker.co.uk.

User Types

You can create as many user types as you like which allow you to specify the level of access they have. When you register the system automatically **System Admin** which has every permission enabled. To add a new user account type, from the top menu go to **Users -> User Account Types** and at the bottom of the page enter the new name for the user account type and click on the **Save Type** Button. When the page reloads you can edit the users' permissions by ticking/un-ticking the relevant boxes and then clicking on the **Save Changes** button.

Adding a User

To add a user to the system, from the top navigation menu go to **Users -> View Users** and then click on the **Add User** button.

Enter the details for the user, the available options are:

Account Type – Defines what permissions this user has, as defined in the previous section.



Simple Dashboard – Whether the user will have the simple dashboard or the standard one.

Hide From Engineer Dropdown – If ticked this user will not be shown on the forms for booking drop offs/collections. For example, this could be an office-based administrator.

Expand Book Site Visit on Job Create – If ticked the booking form on the create hire page will be expanded.

Send Site Visit Report Alerts – If ticked this user will receive email alerts when a new site report is added.

Hide User from User Grid – If ticked this user will be hidden from the User Grid view.

Default Dashboard Calendar View – Defines which calendar view this user will have on the standard dashboard.

Account Expires – If you only want this user to have temporary access you can set an expiry date here. If the user attempts to log in on or after this date they will be denied access.

User Colour – This colour is used on the calendar and map to define the hire/pin colours. This is only used if the relevant stings to use user colours on the calendar/map have been set in the settings page.

Your Subscription

When you sign up for Skip Tracker you will have a 7-day trial and will not need to enter your payment details.

If you want to continue your subscription, click on your username in the top right corner and click on the **Subscription Settings** option.

You can enter your details by clicking on the green button which will take you to a secure page to enter your card details. Once entered your subscription will automatically renew every month and your card will be charged.

If you need to update your payment details you can click on the **Update Payment Details** button on the **Subscription Settings** page.

You can cancel your subscription at anytime by clicking on the **Cancel Subscription** button on the **Subscription Settings** page.

System Settings

There are a lot of system settings, some of which are self-explanatory, and some you will never need to change. Below is a list of all settings and what they do:

General Settings Tab

Company Logo – This is the logo that is used in PDFs and reports created within the system. If you need help sizing your logo please email info@skiptracker.co.uk and we will be happy to help.

Company Details – These are your company details. If you enter a VAT number, the VAT options and calculations will automatically be enabled on quotes and invoices.



Base Postcode – This is the postcode of main location. This also defines where the map view will be centred.

Send Emails From – This is the email address all emails from the system will be sent from. By default it is set to notifications@skiptracker.co.uk, please only change this if advised to do so by us. All emails sent out of the system have the reply address set to your email address so any replies will come to your inbox.

Hide User Grid – The user grid shows a table of all users and their booked drop off/collections. If ticked this functionality will be hidden from the **Users** menu.

Help Boxes – Use this to enable or disable all help boxes.

Login Page – If you would like to go to a page other than the dashboard when logging on, set it here.

Hire Settings Tab

Hire Number Prefix – The letter(s) that your Hire numbers will start with. Hire numbers will automatically increase by one every time a new hire is created.

Next Hire Number – The next number that will be used for a hire.

Transfer Ticket Text – If you enter text here you will then have the option when printing hires and invoices to include this text at the bottom of the PDF. Because of printing to PDF the formatting options are limited... to make a section of text bold start it with a `` tag and then end it with a `` tag. For example: ***This is the Title***

To add a tick box to be printed on the PDF, enter the tag `<box>`. For example: ***Tick Here: `<box>`***

If you have entered transfer text, when viewing a hire or invoice you will have an additional print button in the main buttons towards the top of the page.

Hires Title – The name of hires used throughout the system. This can be changed to anything you like, for example you could change it to Job.

Drop Off / Collections Title – The name of Drop Off / Collections throughout the system. This can be changed to anything you like, for example you could change it to Site Visit.

Engineers Title – The name of engineers throughout the system. This can be changed to anything you like, for example you could change it to Staff Member or Operator.

Customers Title – The name of customers throughout the system.

Sites Title – The name of sites throughout the system.

Customers Page Booking List - When you view a customer there is a list of all active Bookings, to show completed and invoiced too tick the box.

Next Actions – The next actions list is a list of actions you can create which can then easily be used to update Hires so that you can see what the next action is. You can add as many actions as you like here, just add the next action in the text box and click on the **Add** button.

Default Drop Off / Collection Task on Create Hire – When creating a hire and booking an engineer, to save you having to type in a common task for the visit you can set a default here, such as **Drop Off Skip**.



Default 2nd Drop Off / Collection Task on Create Hire - When creating a hire and booking an engineer you have the option to automatically create a second booking, to save you having to type in a common task for the visit you can set a default here, such as **Collect Skip**.

Hire Types – You can add as many Hire Types as you like which will then be shown when creating a hire, saving you having to type it in every time. You can also give each Hire Type a colour so that they can be easily differentiated in the hire list and calendar.

Hire Priorities – Hire priorities can be added here which can then be selected when creating a hire.

Hire List - Complete Drop Off / Collection Colour – Defines the colour of the rows of hires for which the Drop Off & Collection visits have been complete.

Hire List - Booked Drop Off / Collection Colour - Defines the colour of the rows of hires for which the Drop Off & Collection visits have been booked.

Report Footer Left – This is the text that will be shown in the bottom left corner of PDFs generated from the system such as hire sheets.

Customer Fields – Use these tick boxes to hide the mileage cost and hourly rate fields.

Drop Off / Collection Report - Swap Notified section for Mileage and Priority Section for Travel Time on Drop Off / Collection report.

Hide Next Action Text - Hide the default text generated for the next actions column on hire lists.

Show Value on Hire Sheet - Show the Hire value on the PDF Hire sheet.

Hide Past Drop Off / Collections on Hire Sheet - Tick this to show only future drop offs/collections on hire sheet.

Customise Fields – The fields that are shown on for hires can be renamed and hidden if not required. To make changes type the new name in the relevant box and tick the checkbox next to fields you would like to hide and then click on **Save**.

Email Templates Tab

Book In Form - Email to Customer – This is the email that is sent to a customer when creating a drop off/collection.

Book In Form - Email to Site – This is the email that is sent to a site when creating a drop off/collection.

Book In Form - Email to Engineer – This is the email that is sent to an engineer when creating a drop off/collection.

Send Visit Report to Customer – Email – This is the email that is sent to a customer when sending a drop off/collection report.

Send Reminder Email – This is the email template for reminder emails.

License Text – Default license text.

Terms & Conditions Attachment – You can update a file here which can then be attached to outgoing emails.



Stock Settings Tab

Name for Stock Section – You can rename the stock section here.

Stock Column – Tick this box to show the stock column on the hire lists instead of the hire description.

Calendar Settings Tab

Calendar Colours – If ticked this will use the colours assigned to users on the calendar items as opposed to the colours for different job types.

Show Completed Hires – Tick this box to show completed hires on the calendar, by default they are hidden.

Reset Calendar Codes – This will reset the calendar code which is needed if using your calendar in an external application/device.

Map Settings Tab

Map Colours - If ticked this will use the colours assigned to users on the map pins as opposed to the colours for different job types.

Show Current Hires – Tick this to only show drop offs/collection in the future.

Task Settings Tab

This is where you can add and manage the tasks that are used when creating hires and quotes and invoices.

Quote Settings Tab

Default Quotation Terms – This will be shown at the bottom of the PDFs generated from quotes.

Product Price Fields – When adding products to your products list you can have different price options. Define what they are called and if they are shown here.

Default Hourly Rate – This is the default hourly rate used for quotes.

Default Start Time – This is the default start time that will be entered on quotes.

Default Start Time – This is the default start time that will be entered on quotes.

Next Quote Number – The next number that will be assigned when you create a quote.

Default Quotation Email Settings – This is the email that is sent to a customer when sending a quote.

Invoice Settings Tab

Invoice Prefix - The letter(s) that your invoice numbers will start with. Invoice numbers will automatically increase by one every time a new invoice is created.

Default Invoice Notes – The default notes/text shown at the bottom of invoices.

Default Invoice Terms – The default invoice terms shown at the bottom of invoices.



Default Hourly Rate – The default hourly rate used on invoices.

Show Invoiced Hires on Hire List - Tick this box to show invoiced hires on the active hire lists.

Hide Mileage, Cost Per Mile, Hourly Rate and Return Trips Fields – If ticked these fields will be hidden from invoices.

When generating invoices from a job, automatically mark the job as invoiced and completed when saving the invoice? – If ticked this will automatically mark a hire as complete and invoiced when an invoice is generated from it.

Next Invoice Number - The next number that will be assigned when you create an invoice.

Default Invoice Email Settings – This is the email that is sent to a customer when sending an invoice.

SMS Settings Tab

SMS Credits – This shows how many SMS credits you have remaining. To purchase more credits, enter the number you require and click on **Continue to Payment**.

SMS Display Name – This is the name that user will see when they receive an SMS message from the system.

Book In Form - SMS to Engineer – This is the template for the SMS message sent to engineers when booking a drop off/collection.

Book In Form - SMS to Customer – This is the template for the SMS message sent to customers when booking a drop off/collection.

Book In Form - SMS to Site – This is the template for the SMS message sent to sites when booking a drop off/collection.

SMS Templates – You can add and manage your SMS templates here. These will be available when sending SMS messages from the view hire page.

SMS Credit Purchase History – This shows a history of the SMS credits you have purchased within the system.