Log in at speedyservices.com • Register at: www.speedyservices.com/register-myspeedy

MySpeedy User Guide

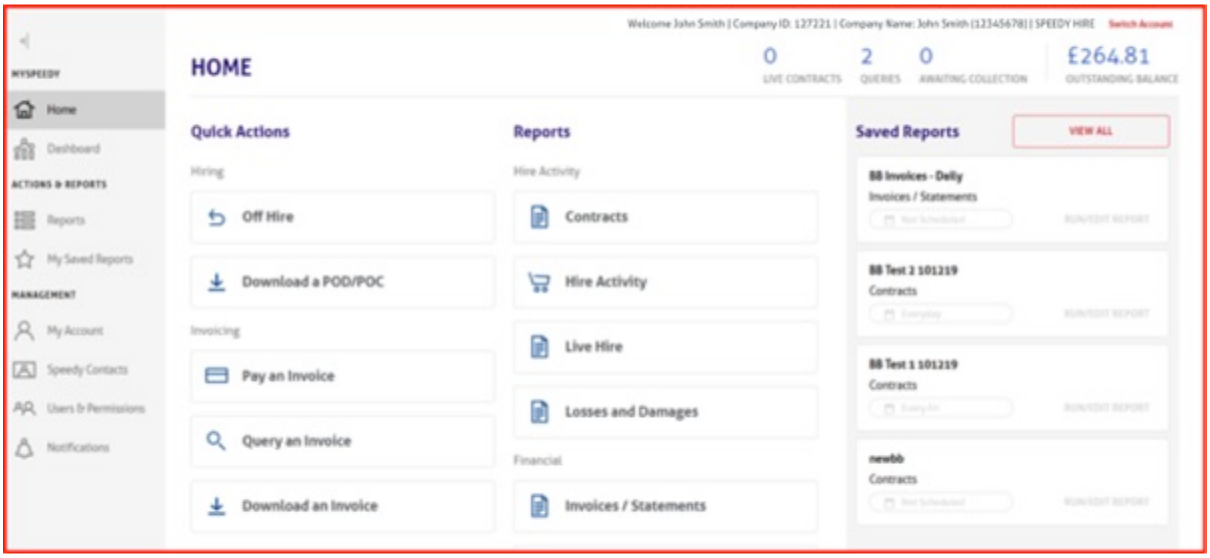
Contents

1. Introduction

MySpeedy gives you instant, secure access to all your hire information, together with a range of useful features - all in one convenient place.

View all your transactions and history in one place - deliveries, off hires, collections, and invoices. Access, download and print all your documents, including invoices, proof of delivery and collection notices, and compliance certificates. Define your own report filters and set up automatic report scheduling for delivery to you and your colleagues when you need them. Make online invoice payments and log queries. Set up and manage your own internal users with flexible user access levels.

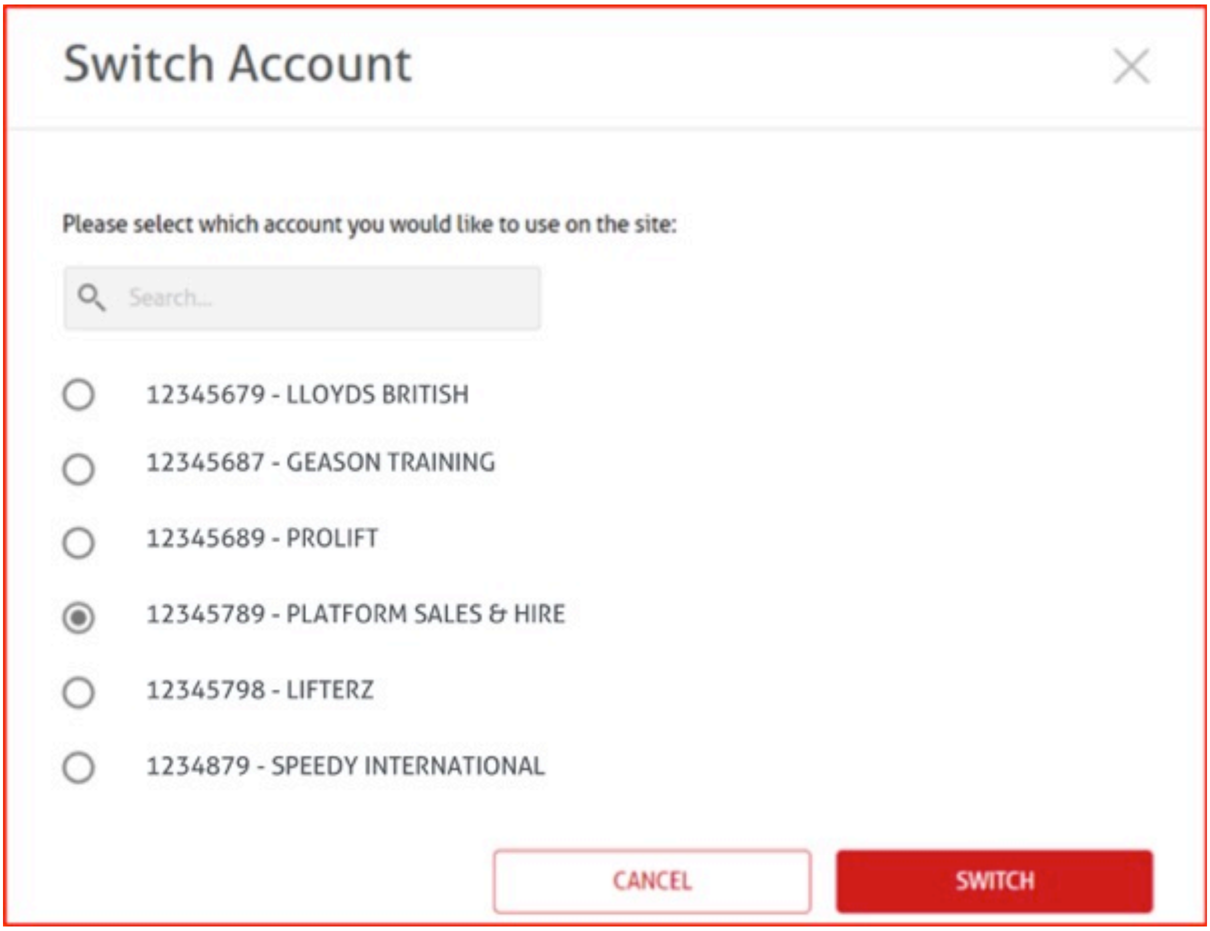
2. Homepage



The Homepage displays high level information relating to your selected account such as current no. of live hires and queries and provides easy access to the various functions available in the system.
The new Navigation pane can be expanded and contracted using the arrow in upper left corner to allow full use of the screen space. Options in the Navigation Pane can be used without the pane being expanded.
The Homepage also provides direct access to individual Reports, Quick Actions and Saved Reports. The Reports and Saved Reports sections provide Users with the ability to access and review reports relating to the activity on their account. The Quick Actions section allows Users to target individual items and quickly carry out the required action.

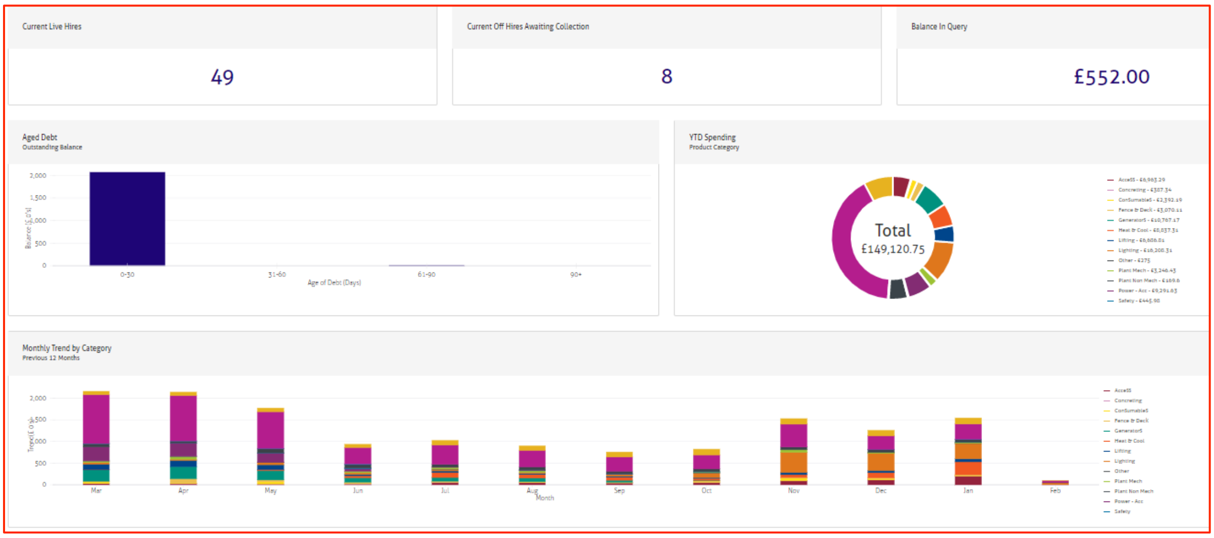
3. Switch Account

If you have more than one account linked to your login you can switch the account you are viewing on the homepage banner or the Dashboard by clicking on the Switch Account link in the upper right corner of the screen. Select the Account you require from the list or use the search function at the top of the list. When the Account is switched the banner / dashboard will update accordingly.



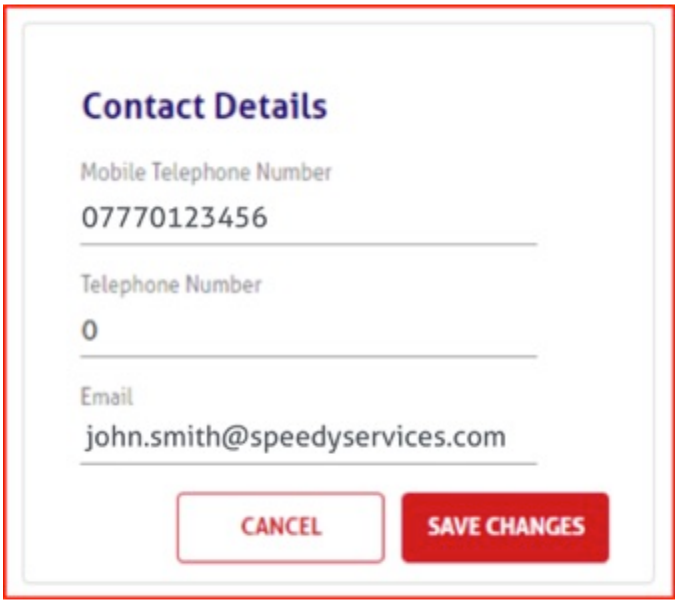
4. Dashboard

Users can view graphics of high level data relating to their account from the dashboard. Here they can see information relating to their current hires, outstanding invoices and queries and how their spend has been split across our products.



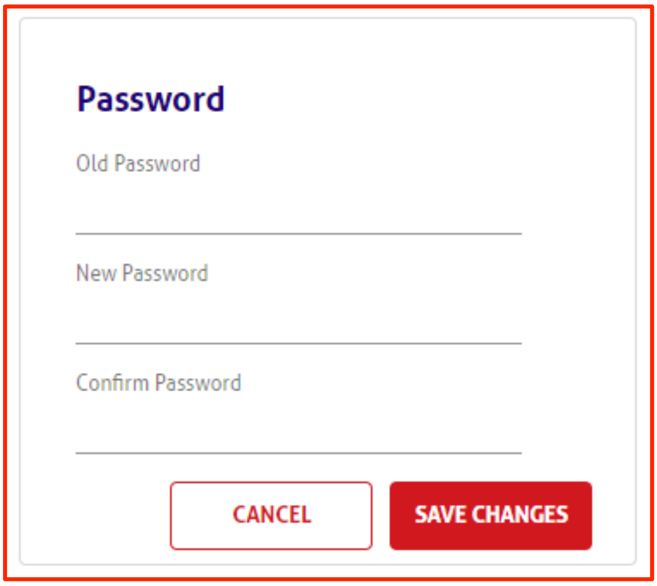
5. My Account

5.1. Update Details



5.2. Change Password

Should a User need to update their password this can also be handled from the My Account page by clicking ‘Edit Password’ and entering the existing password then adding and confirming a new password before clicking ‘Save Changes’.


Password
Old Password
New Password
Confirm Password
CANCEL
SAVE CHANGES

6. Users & Permissions

The Users and Permissions area will only be visible to MySpeedy Administrators. (Those Users who are responsible for the administration of a Company's MySpeedy account and therefore have the ability to create Users.)

6.1. Create User

The process to create a new User follows three straight forward steps; entering the Users details, selecting the Accounts and Sites they can interact with and setting the permissions they will be granted. To aid the administrator as each step is completed the exclamation mark by each header will cease to display to show that step has been completed.

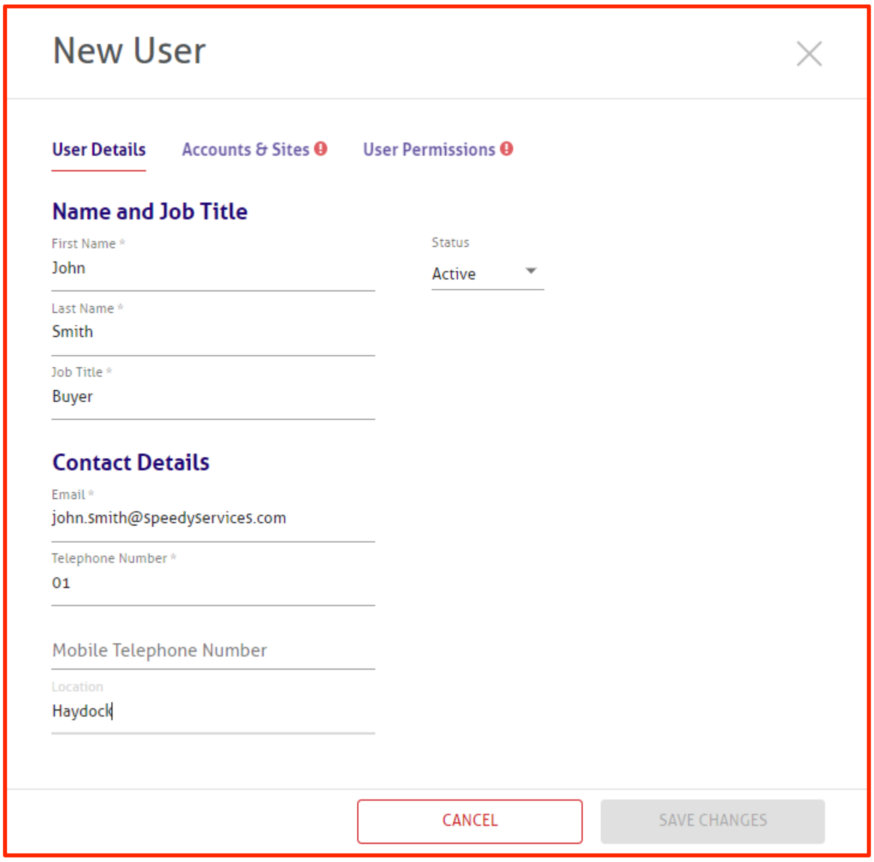
Once the User account has been set up they will be emailed the details of the login and password for their new MySpeedy account and instructions on how to reset their password on their first login to the MySpeedy system.

5.1.1 Step1 - User Details

The User Details section is used to log a User's Name, Job Title and Contact details.

This section is completed at time of User creation but can also be updated as required.

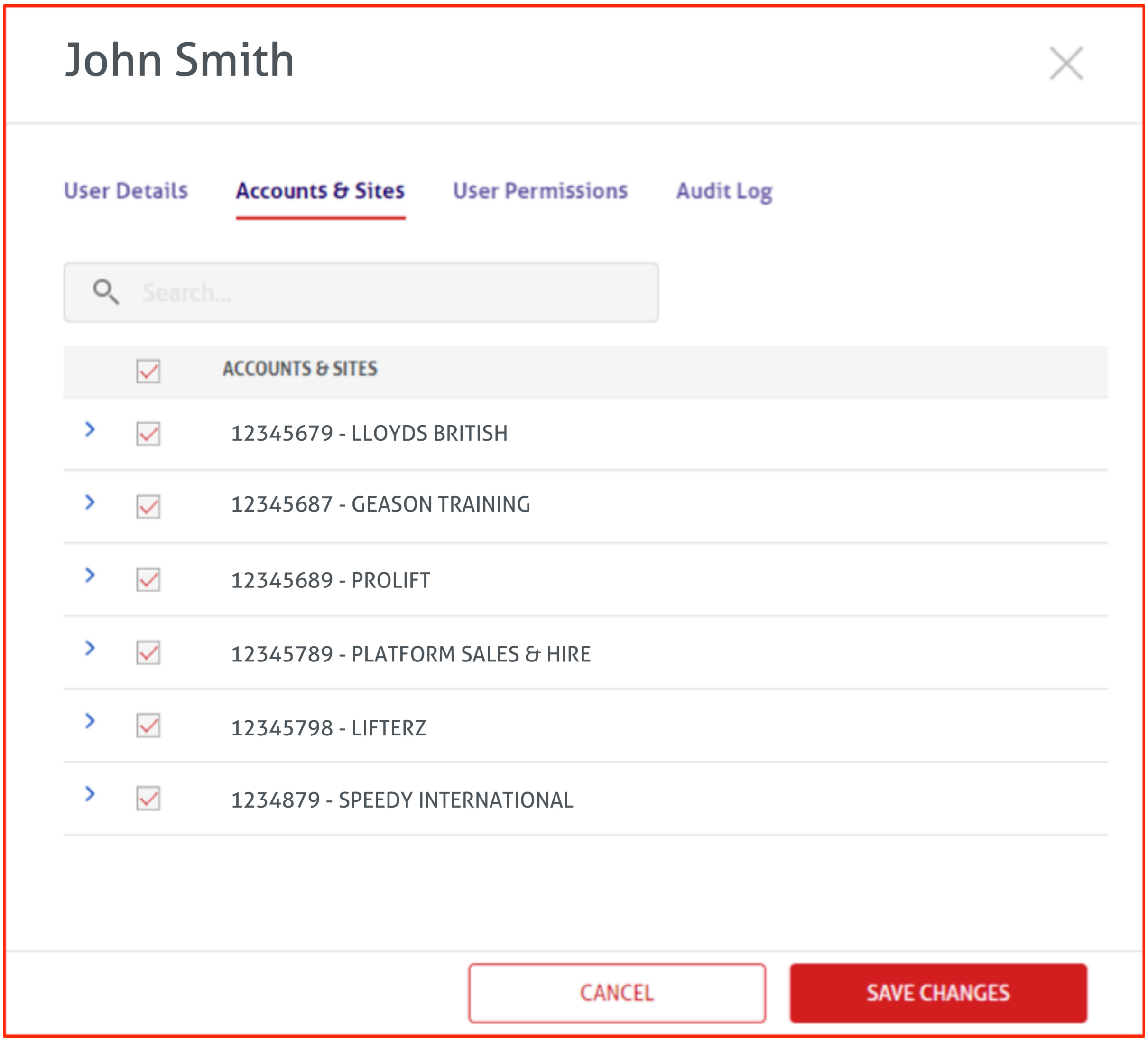
The Users status can also be updated to Active / Inactive from this screen.



5.1.2. Step 2 - Accounts & Sites

The Accounts & Sites section is used to define which Accounts / Sites a User is permitted to transact with. A User's permissions could be set up to allow transactions on all sites related to all linked accounts, specified accounts or only specific sites on an account by account basis. If a User is only awarded site specific rights on a particular account then they will be unable to create new delivery addresses for this account.

Accounts / Sites are selected by populating the check boxes to the left of the displayed list. A select all checkbox is available in the table header for ease of use. Selecting the checkbox against an account will allow a user to transact for all sites linked to the selected account. To select specific sites click the blue arrow to the left of the checkbox to expand the site list to make site level selections.



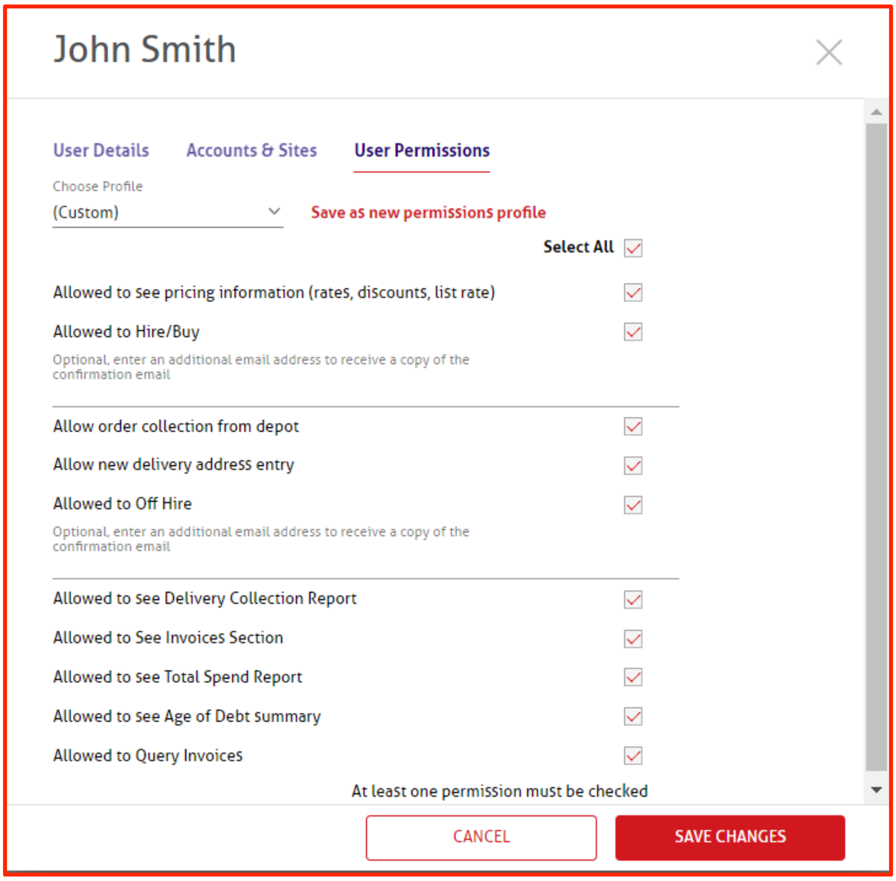
5.1.3. Step 3 - User Permissions

The User Permissions section allows Administrators to select the permissions to be granted to a User. This can be done on an individual User basis or the Administrator can define and store permissions as profiles that can be assigned to a User by selecting the required profile from a drop down list; these profiles can be assigned to multiple Users and can be easily modified and new profiles saved for further use at a later date.

Selecting the Allowed to Hire/Buy permission indicates that the User is permitted to place orders via MySpeedy on desktop or through the Speedy mobile app. Once this permission has been set then Allow Order Collection from Depot and Allow New Delivery Address Entry will become available to select.

Allowing a User to order collection from depot will allow the User to place an order for depot collection (not delivered to site). And Allowing a User to add a new delivery address will enable the User to enter a new site address instead of using an existing site address. Where a User only has site specific access on an account they will not be permitted to create new delivery addresses for that account.

Where a User has been granted permissions to Hire/Buy or Off Hire, Administrators have the option to add a cc' email address to the system. When an order or off hire request is placed then a copy of the confirmation email will also be sent to the provided cc' email address.



5.2. Permission Profiles

To assist in the creation of Users Administrators can set up Permissions profiles to be assigned to Users either at creation or as an admin task.

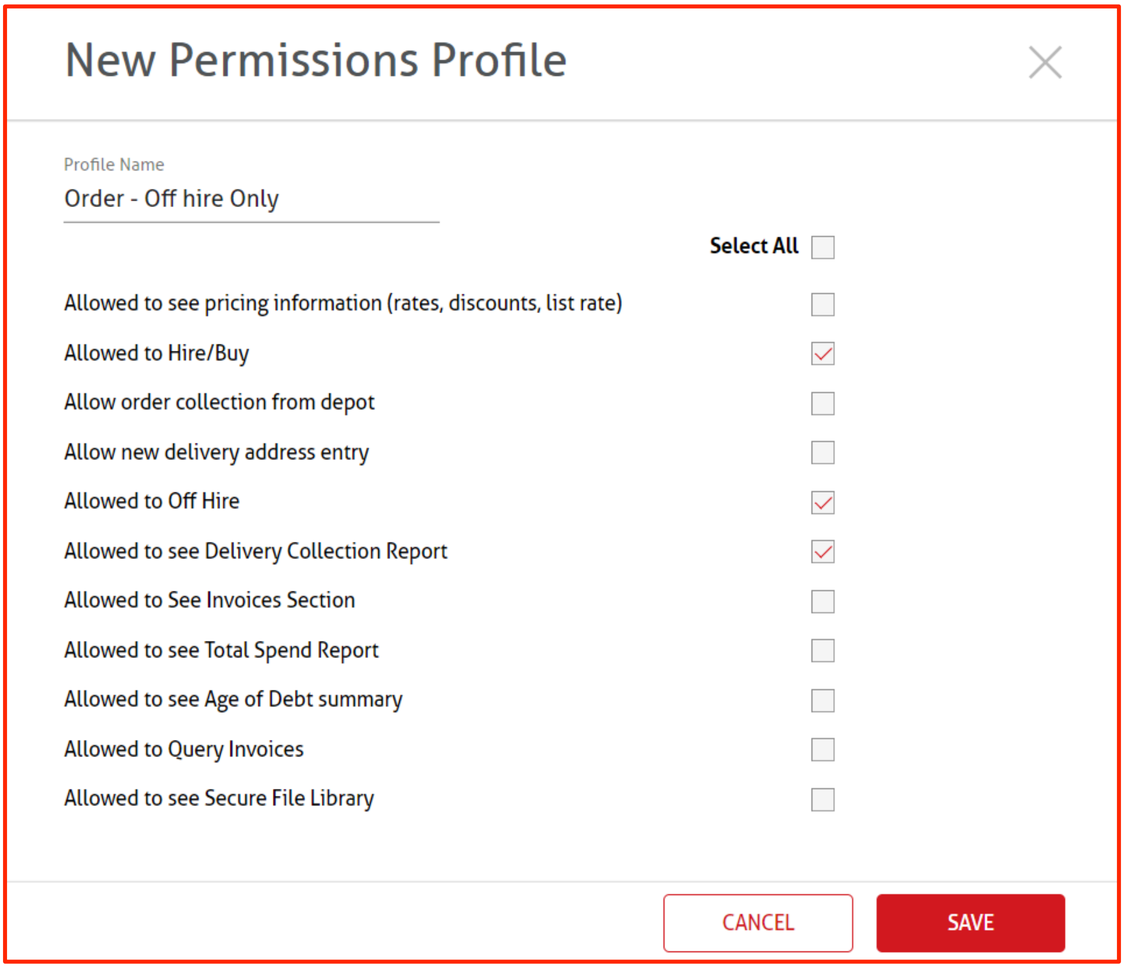
Permission profiles can be set up / amended from either the Permission Profiles page in the Users & Permissions area or from within a User record.

NOTE: If an existing Permission Profile is amended and saved without being renamed be aware that any User that has previously been assigned that profile will then be awarded the modified permissions.

5.2.1. Create Permission Profile

From the Permissions Profiles tab click the 'Create New Profile' button.

Enter a Profile Name and select required permissions by populating checkboxes.



Click 'Save' to create the Profile.

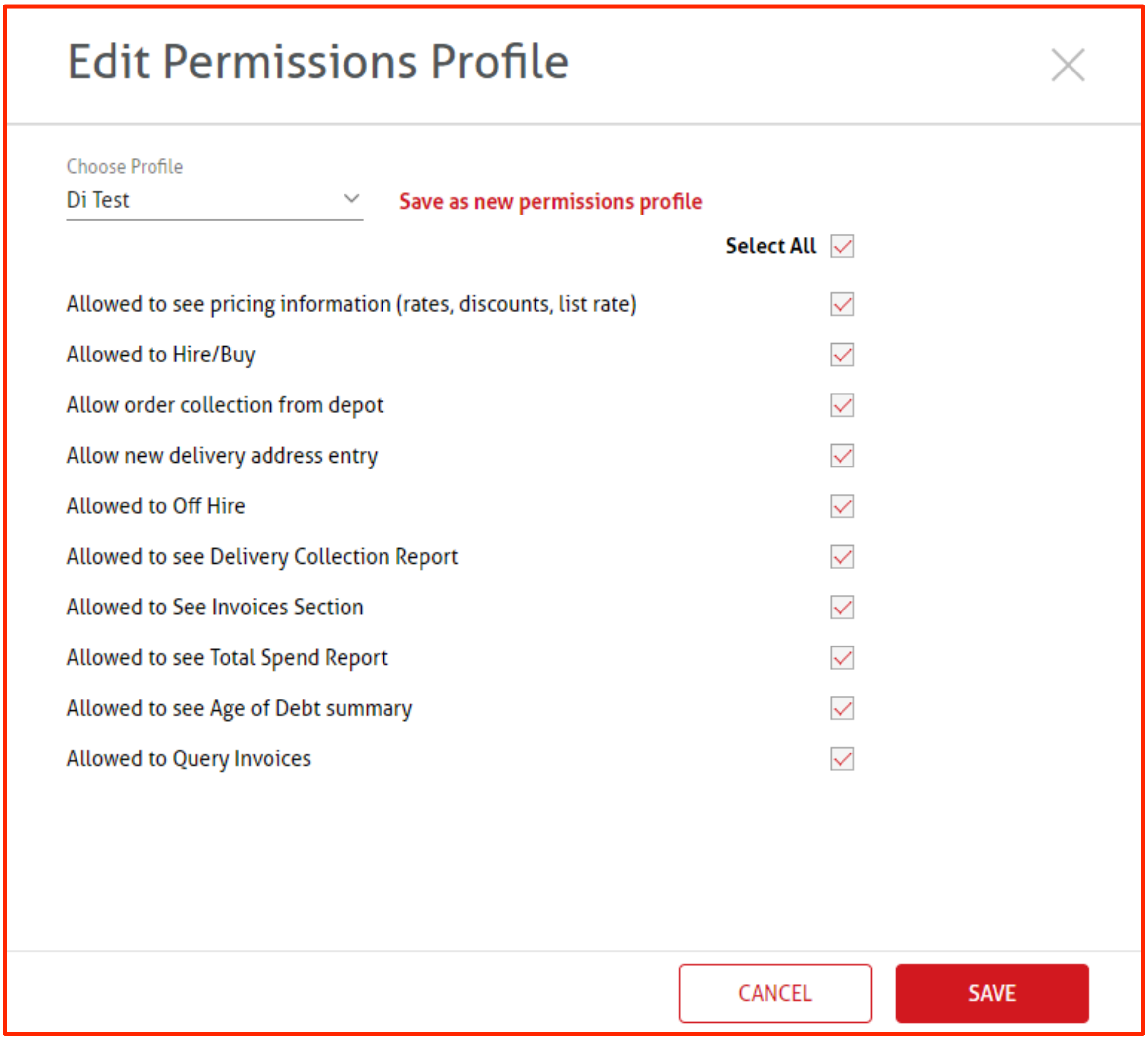
5.2.2. Manage Permissions Profile

Permissions assigned to a profile can be managed by opening the profile from the Permission Profiles tab or by accessing a User's Permissions on their User record.

NOTE: When a permission profile is updated any User that has been previously assigned that profile will automatically have their permissions updated to match the new selections.

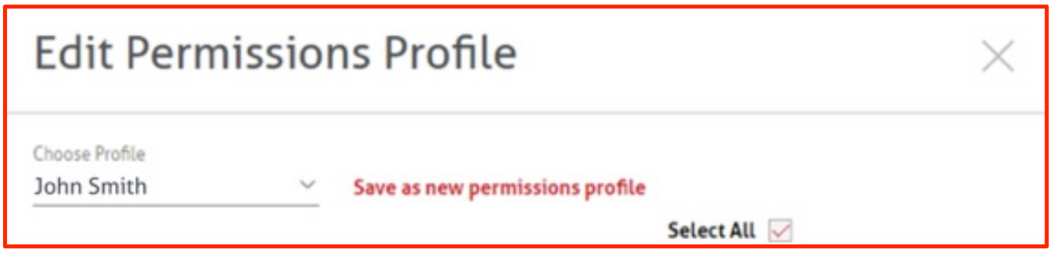
In Users & Permissions from the Permission Profiles tab select an existing profile. Amend the checkbox selections as required and click 'Save.

From a User record, click on the User Permissions option to see the current permissions assigned to a user with the profile in question. Where permissions need to be amended update the checkbox selections.



If the existing permission profile is to be updated, click 'Save Changes'.

If a new permissions profile is to be created click the ‘Save as new permissions profile’ link.



Populate new profile name and click Save.

5.3. Update User

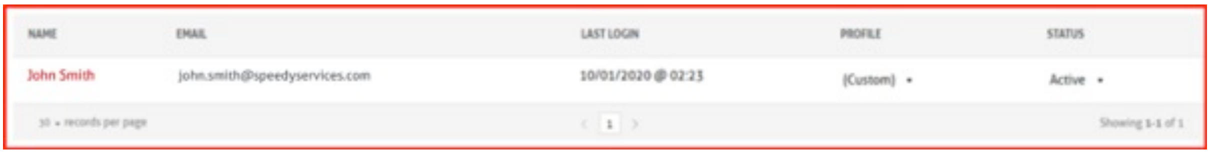
A User can be updated by opening the User record and amending data which is no longer correct and clicking ‘Save Changes’ when the record has been updated.

A Users permissions profile and Status can also be updated from the User list on the Users & Permissions page without the need to open the individual User record.

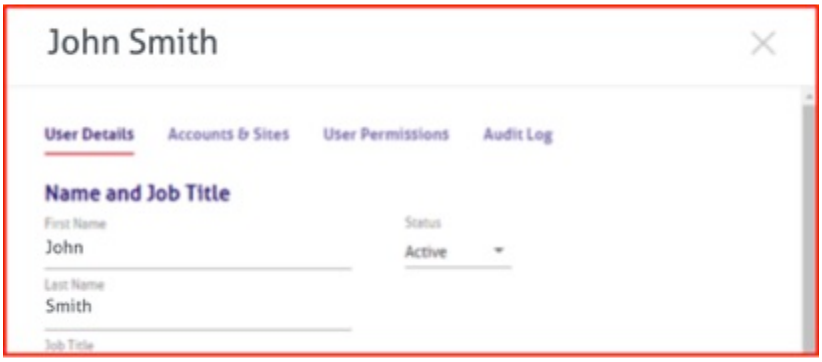
5.4. Deactivate User

A User can be deactivated by modifying their Status in the list displayed on the Users and Permissions page.

NOTE: It is the responsibility of the MySpeedy Administrator to maintain the Users linked to their account by deactivating those Users no longer requiring access to MySpeedy; including those no longer employed by their company. Speedy Services are not responsible for User maintenance.



A User can also be deactivated from the User Details tab of an opened User record.



6. Reporting

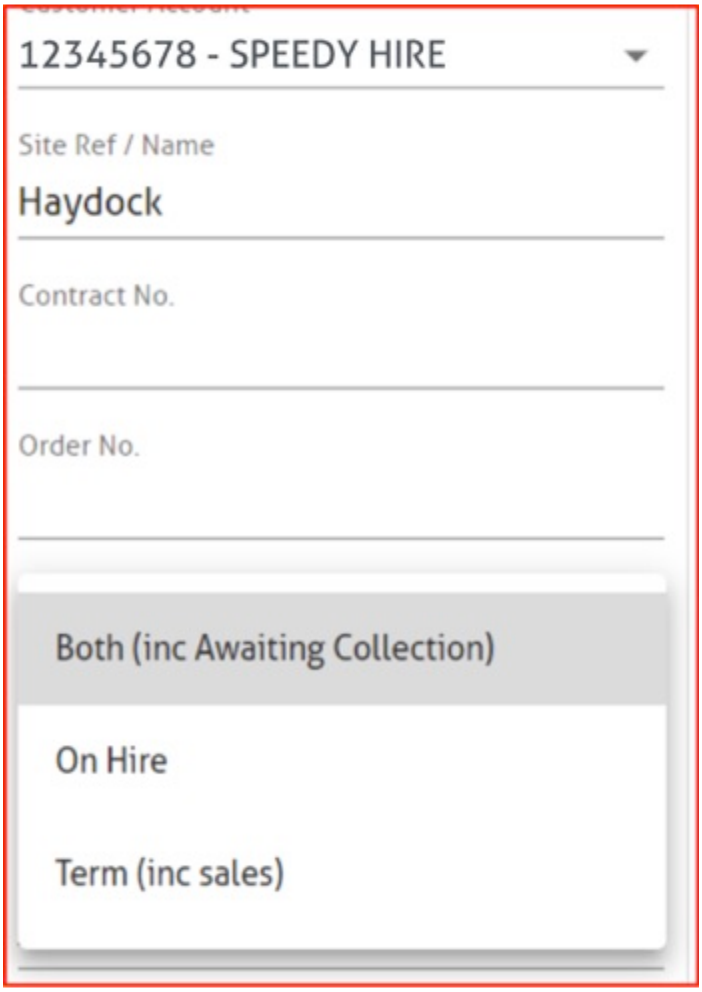
MySpeedy provides Users with robust yet easy to use reporting functionality where reports can be refined according to the Users requirement and saved for reuse without having to reset the report filters each time. They can even be scheduled for delivery at a later date to the user and selected recipients.

6.1. Run a Report

Reporting can be accessed from the Navigation pane by selecting the Reports page or by clicking on the individual report icons on the home page.

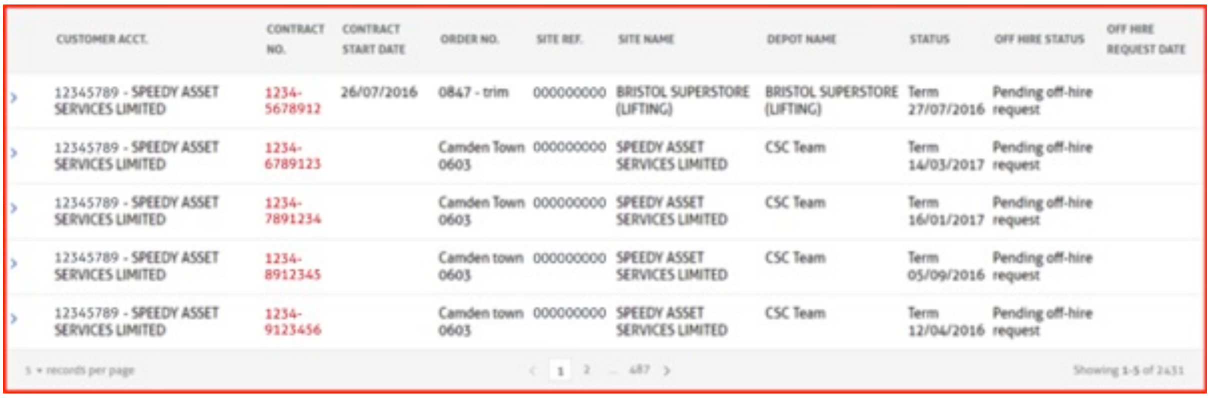
Whichever option is chosen the Report Generator will be displayed on the left hand side of the screen. From there the User can apply various filters or even change the report selected.

Filters allow the User to select from drop down lists, set date ranges or add text where appropriate to refine the data returned when the report is run.



Once the User has completed their filter selections when they click ‘Run report’ the system will return the data matching the selections made.

The number of rows displayed can be amended by altering the selected records per page in the bottom left of the report.

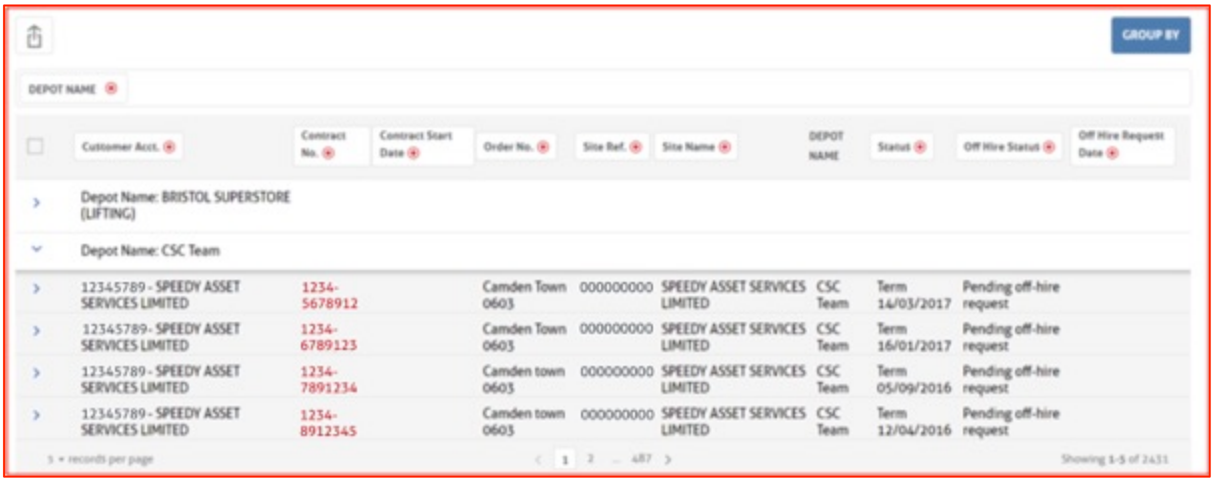


	CUSTOMER ACCT.	CONTRACT NO.	CONTRACT START DATE	ORDER NO.	SITE REF.	SITE NAME	DEPOT NAME	STATUS	OFF HIRE STATUS	OFF HIRE REQUEST DATE
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-5678912	26/07/2016	0847 - trim	000000000	BRISTOL SUPERSTORE (LIFTING)	BRISTOL SUPERSTORE (LIFTING)	Term 27/07/2016	Pending off-hire request	
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-6789123		Camden Town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 14/03/2017	Pending off-hire request	
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-7891234		Camden Town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 16/01/2017	Pending off-hire request	
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-8912345		Camden town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 05/09/2016	Pending off-hire request	
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-9123456		Camden town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 12/04/2016	Pending off-hire request	

5 • records per page < 1 2 ... 487 > Showing 1-5 of 2431

Users can sort the results of a report by clicking on a Column header.

By clicking the 'Group By' button the User can group results by dragging one of the column headers into the box that will now appear above the header row. Clicking the blue arrow to the left of the grouping will expand the report to show the grouped rows.



GROUP BY

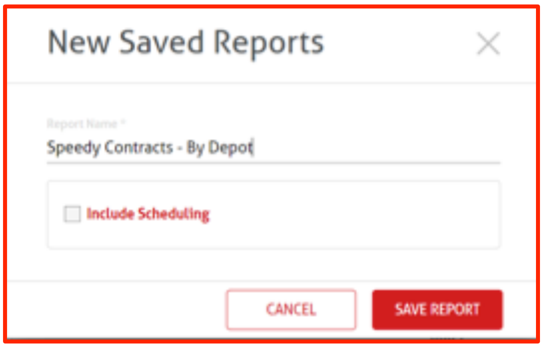
DEPOT NAME

	Customer Acct.	Contract No.	Contract Start Date	Order No.	Site Ref.	Site Name	DEPOT NAME	Status	Off Hire Status	Off Hire Request Date
>	Depot Name: BRISTOL SUPERSTORE (LIFTING)									
˅	Depot Name: CSC Team									
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-5678912		Camden Town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 14/03/2017	Pending off-hire request	
>	12345789- SPEEDY ASSET SERVICES LIMITED	1234-6789123		Camden Town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 16/01/2017	Pending off-hire request	
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-7891234		Camden town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 05/09/2016	Pending off-hire request	
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-8912345		Camden town 0603	000000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term 12/04/2016	Pending off-hire request	

5 • records per page < 1 2 ... 487 > Showing 1-5 of 2431

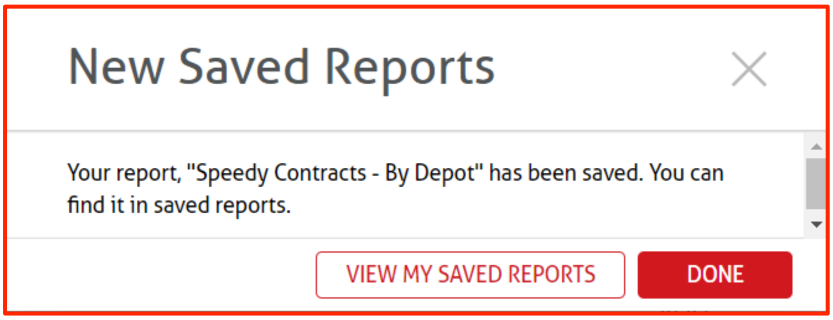
6.2. Save a Report

When a report has been set up by a User the defined filters can easily be retained for future use by saving the report. Simply set the required filters and click the 'Save As' button.



Name the report and click ‘Save Report’.

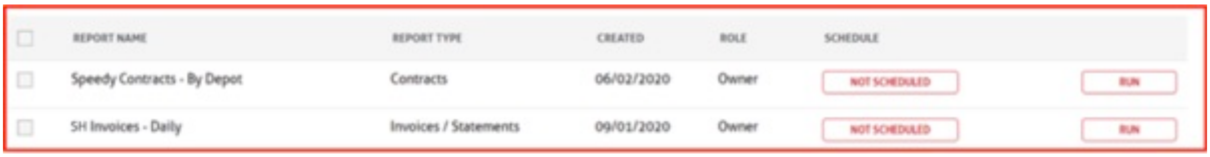
The saved report can then be accessed from the Saved Reports page or the Saved Reports pane on the homepage.



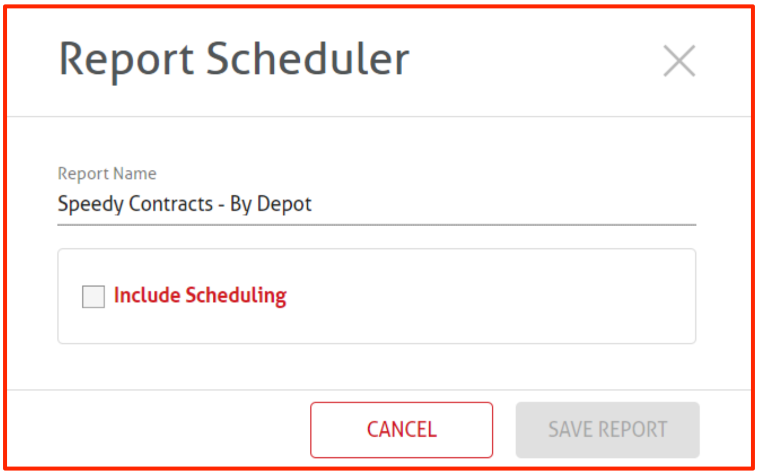
6.3. Schedule a Report

If it is likely that a report will be needed regularly a schedule for delivery of the report can be created; delivering a copy of the report in the Users chosen format without the need to login and rerun the report each time it is required. Additional recipients can also be added to the report schedule.

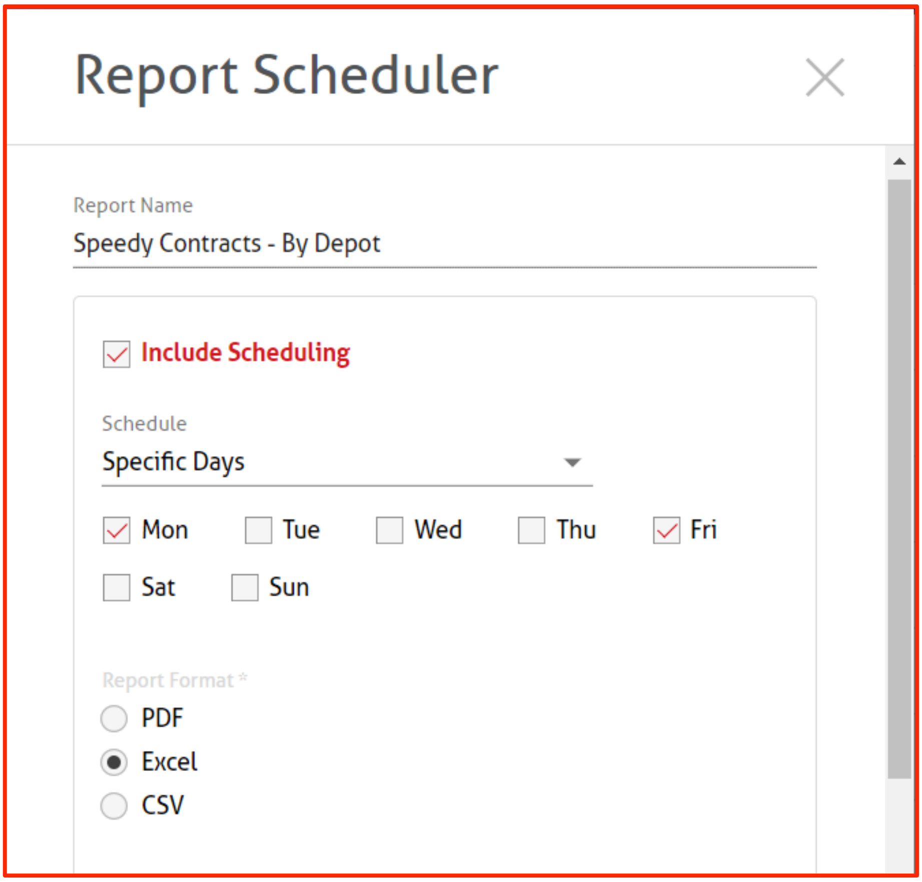
Schedules can be set up during creation of a report or added at a later date by clicking on the button in the Schedule column of the My Saved Reports screen for the report requiring a schedule.



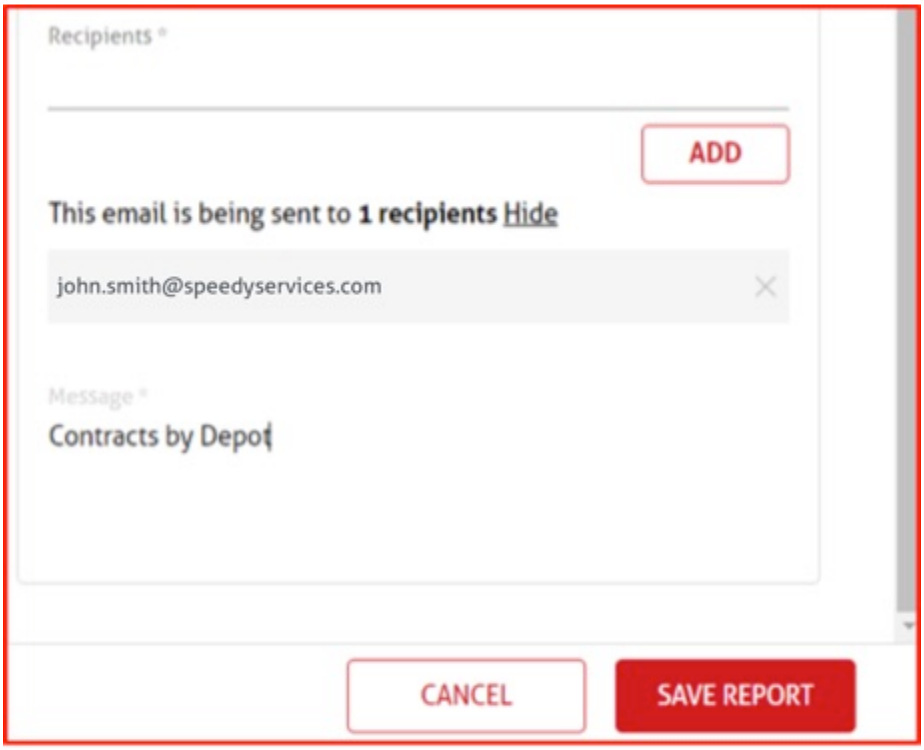
Populate the ‘Include Scheduling’ checkbox.



Set schedule requirements (Daily or Specific Days) and report format.



Add email address for each recipient the report is to be sent to and add text to be sent with the email to the Message box.



Click ‘Save Report’.

6.4. Amend a Saved Report

Report filters and schedules can be easily amended and saved either with the current title or a renamed to create a new report.

To update the filters set on a report run the existing report from the Saved Reports page and open the report generator from the left of the screen by clicking on the arrow at the top of the page.

Make the required changes to the filters and click ‘Save Changes’.

If the User wishes to retain the existing report and save the changes as a new report click ‘Save As’.

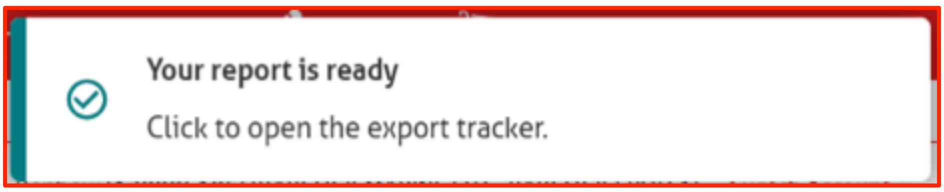
6.5. Export a Report

Users can elect to export the reports they have generated to their choice of format; Excel, pdf or csv.

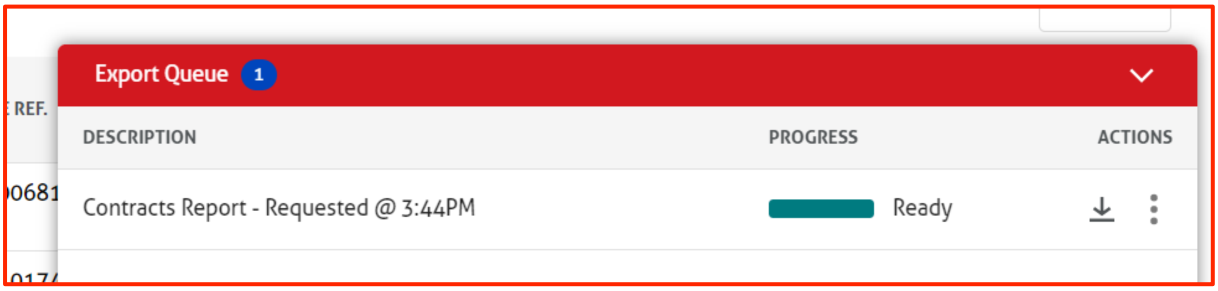
Click on the export button to the left above the report pane and select a format.

The report will be added to your export queue in the lower right of the screen.

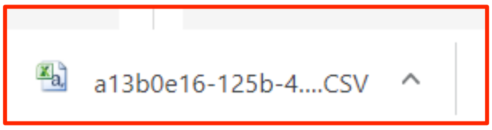
In the upper right of the screen you will see progress updates.



Click on the Export queue or the progress message to see the items in your export queue.



Click on the download arrow.



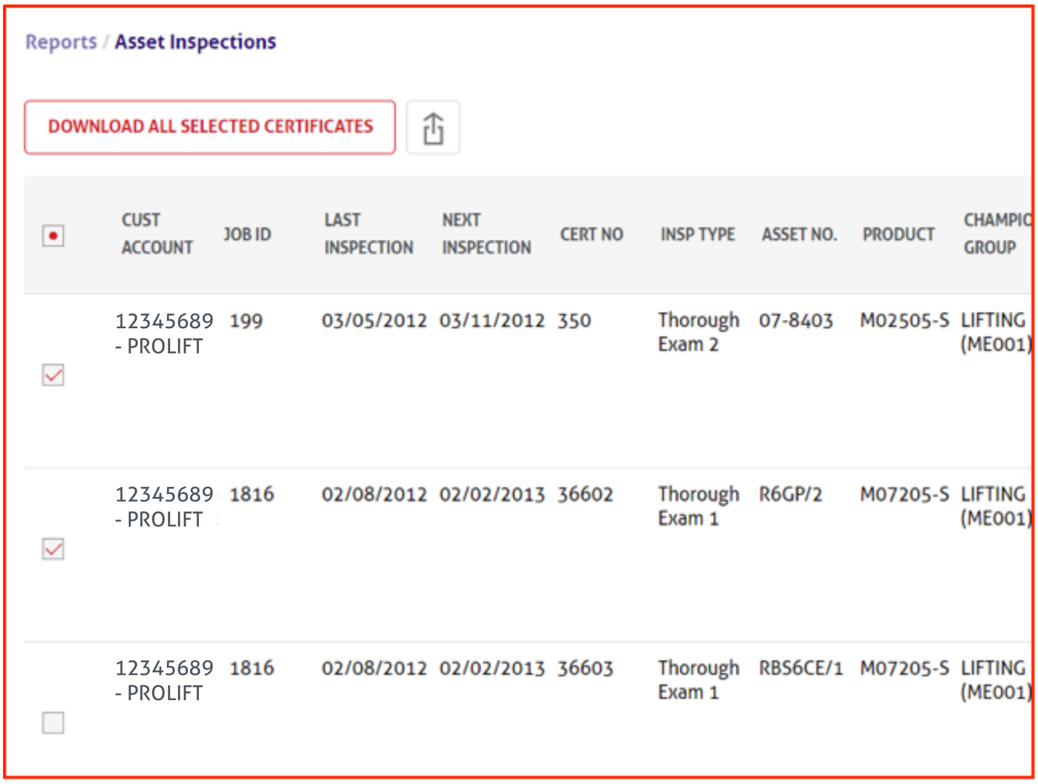
Click to open the downloaded file.

When you have accessed the reports in your export queue to remove them from the list click the three buttons in the Actions column, and click “Remove”.

6.6. Download a Certificate

To pay download Certificates from a report run the Asset Inspections report, the filters in the report generator can be set to refine the amount of data displayed in the report.

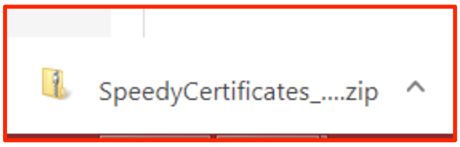
Select the certificates to be downloaded by either populating the Select All checkbox in the report header or select each certificate to be downloaded by checking the box to the left of each row.



	CUST ACCOUNT	JOB ID	LAST INSPECTION	NEXT INSPECTION	CERT NO	INSP TYPE	ASSET NO.	PRODUCT	CHAMPIO GROUP
☑	12345689 - PROLIFT	199	03/05/2012	03/11/2012	350	Thorough Exam 2	07-8403	M02505-S	LIFTING (ME001)
☑	12345689 - PROLIFT	1816	02/08/2012	02/02/2013	36602	Thorough Exam 1	R6GP/2	M07205-S	LIFTING (ME001)
☐	12345689 - PROLIFT	1816	02/08/2012	02/02/2013	36603	Thorough Exam 1	RBS6CE/1	M07205-S	LIFTING (ME001)

Click Download All Selected Certificates.

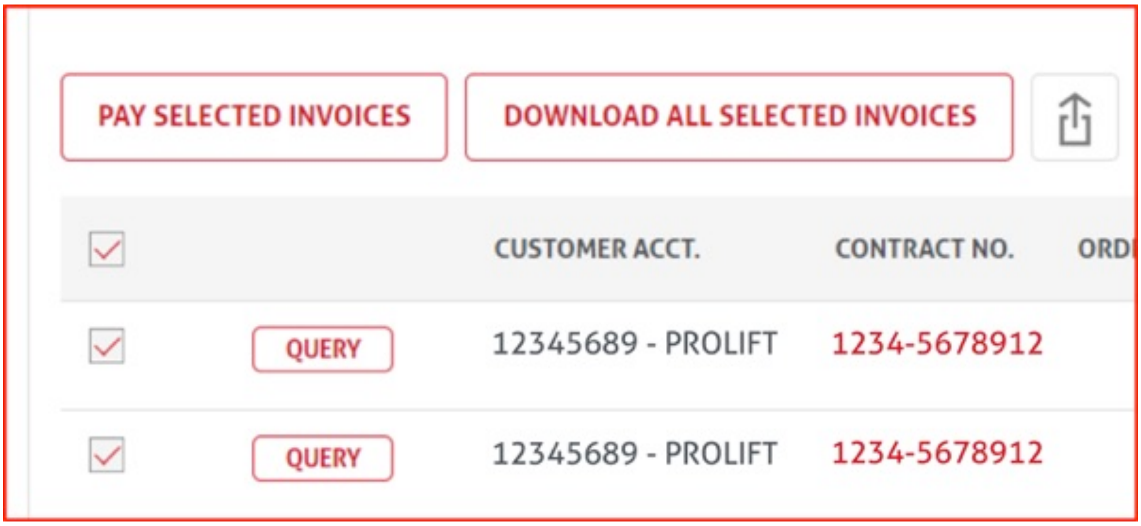
Open zip file by clicking on icon in lower left of screen.



6.7. Pay Invoices

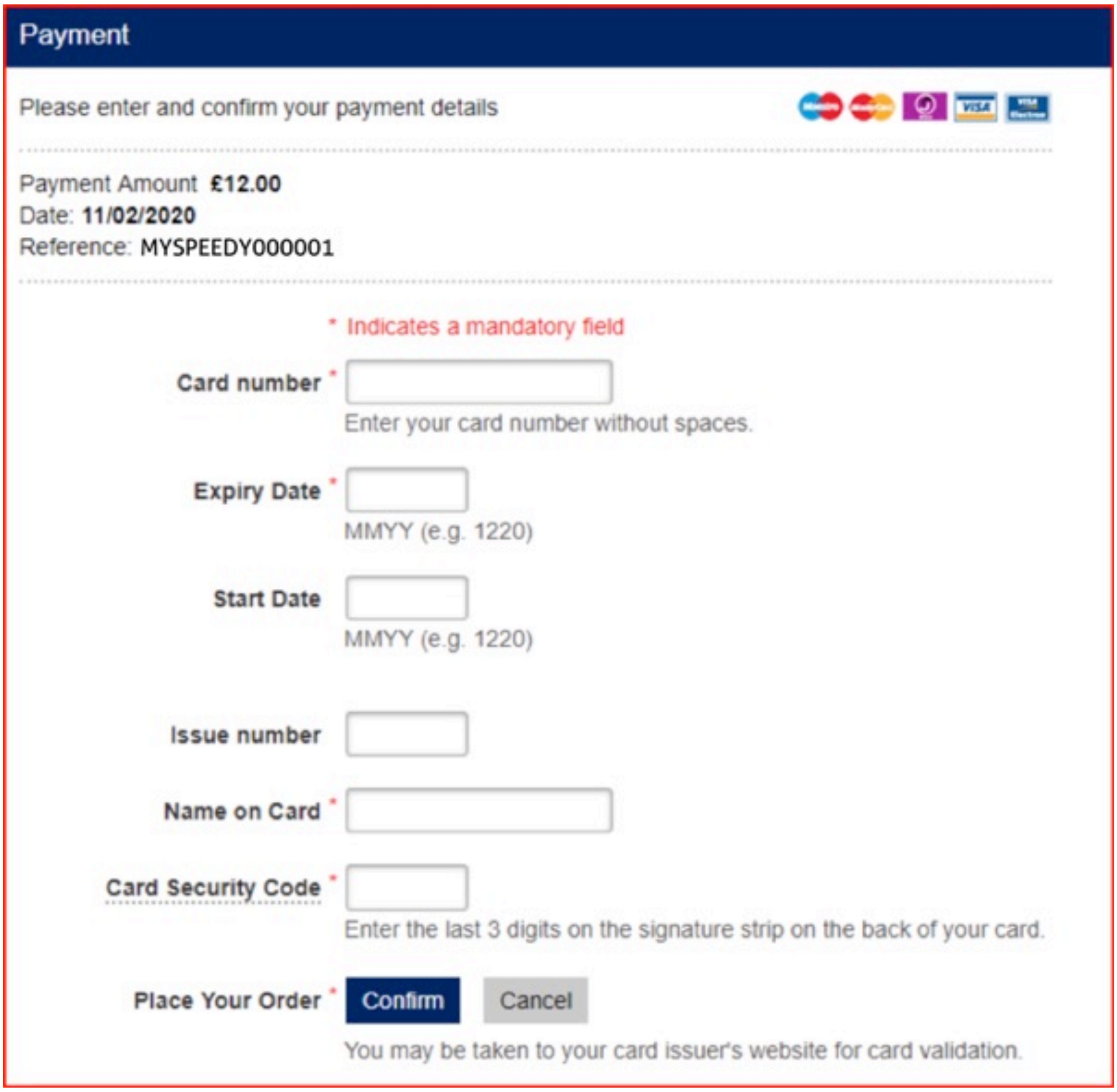
To pay invoices from a report run the Invoices / Statements report, the Payment Status filter in the report generator can be set to ‘Outstanding’ to display only those items still awaiting payment.

Select the invoices to be paid by either populating the Select All checkbox in the report header or select each row to be paid by checking the box to the left of each row.



Click ‘Pay Selected Invoices’

The User will then be taken to the payment portal to enter their payment card details and complete the payment process.

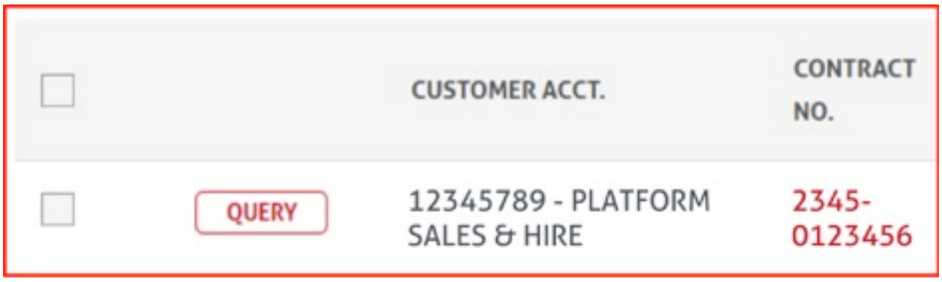


Complete all mandatory fields as indicated.

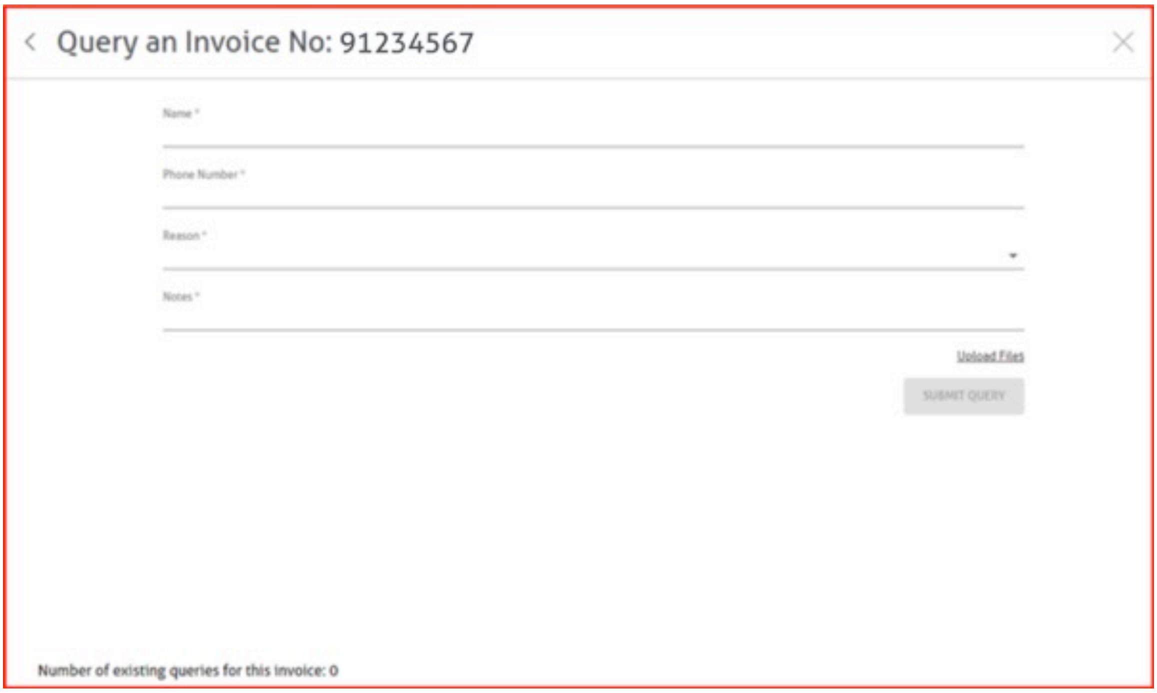
6.8. Query Invoices

To query an invoice from a report run the Invoices / Statements report, the Payment Status filter in the report generator can be set to 'Outstanding' to display only those items still awaiting payment.

To raise a query click the 'Query' button to the left of the row to be queried.

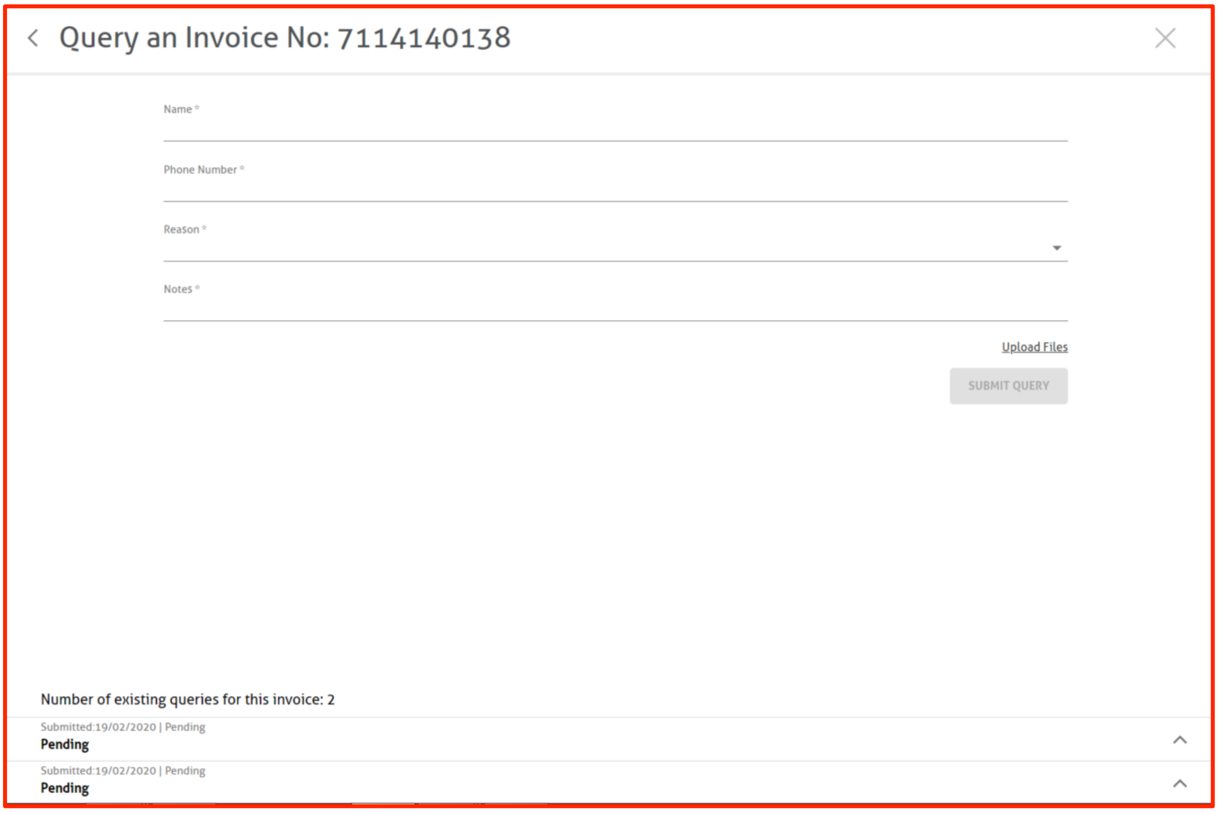


Populate the Name, Phone Number, Reason and Notes fields on the Query pane.

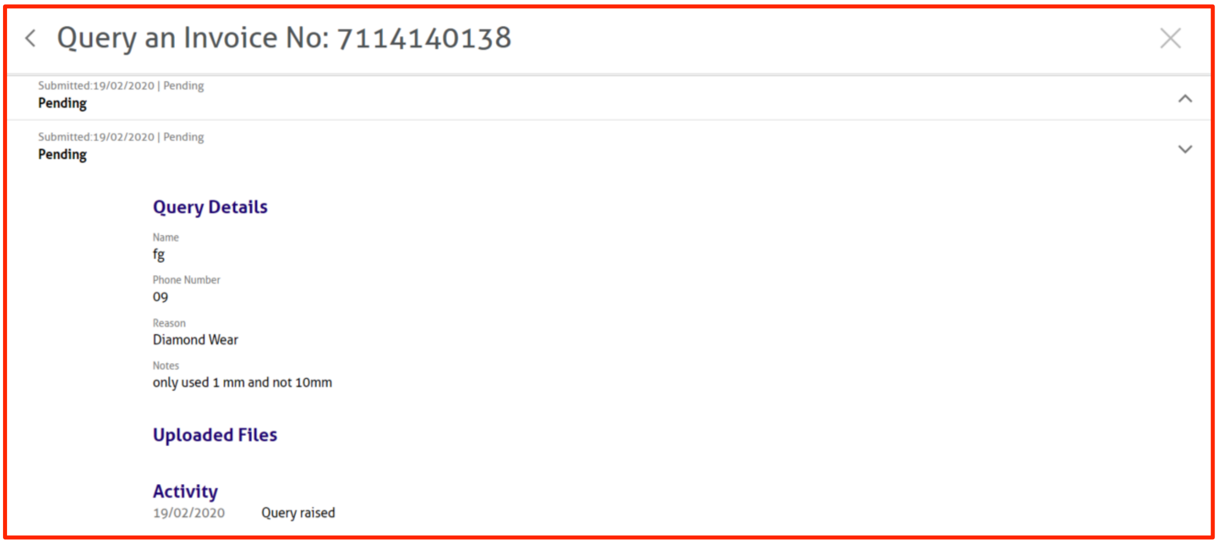


If you have supporting files click the ‘Upload Files’ link. You can then either drag and drop your files from your folders or click ‘Select File’ to browse your folders. Any existing queries relating to the selected record will be displayed at the bottom of the query pane.

When queries have been raised previously in relation to the selected Invoice these will be displayed at the bottom of the Query an Invoice pane.



To view the details of the existing query click the expansion arrow to the right of the query.

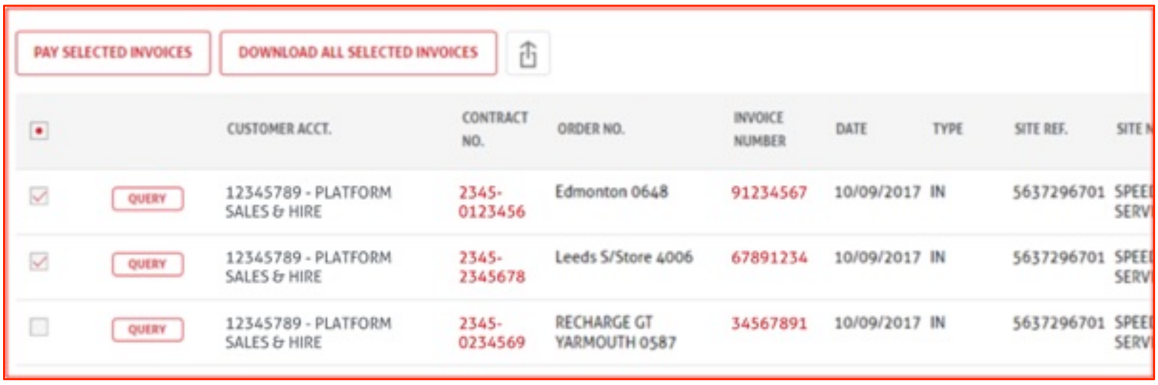


Once the required fields are populated, click 'Submit Query'.

6.9. Download Invoices

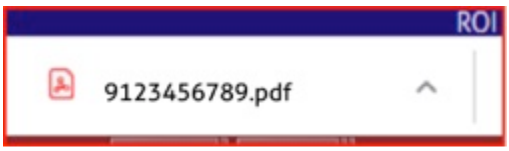
To download invoices from a report run the Invoices / Statements report, the Payment Status filter in the report generator can be set to 'Outstanding' to display only those items still awaiting payment.

Select the invoices to be downloaded by either populating the Select All checkbox in the report header or select each invoice to be downloaded by checking the box to the left of each row.



Click the 'Download All Selected Invoices' button.

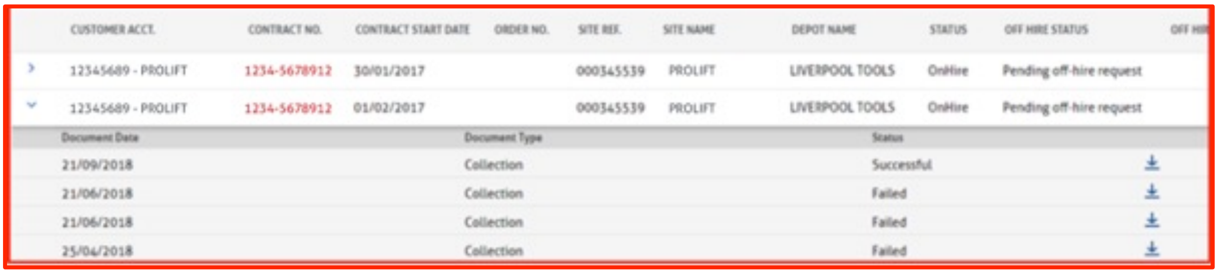
Click to open pdf document, this will display in a new tab.



6.10. Download POD/POC's

To download POD/POC from a report run the Contracts report which can be filtered to a specific Site or Order number to display a more relevant set of data.

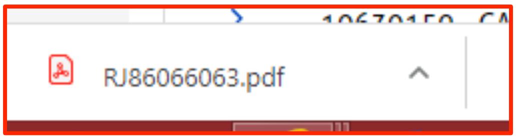
Click on the arrow to the left of a row to display delivery/collection information for the selected contract.
To download the required POD/POC, click the download icon.



CUSTOMER ACCT.	CONTRACT NO.	CONTRACT START DATE	ORDER NO.	SITE REF.	SITE NAME	DEPOT NAME	STATUS	OFF HIRE STATUS
12345689 - PROLIFT	1234-5678912	30/01/2017		000345539	PROLIFT	LIVERPOOL TOOLS	OnHire	Pending off-hire request
12345689 - PROLIFT	1234-5678912	01/02/2017		000345539	PROLIFT	LIVERPOOL TOOLS	OnHire	Pending off-hire request

Document Date	Document Type	Status
21/09/2018	Collection	Successful
21/06/2018	Collection	Failed
21/06/2018	Collection	Failed
25/04/2018	Collection	Failed

Click on the file to open the pdf.

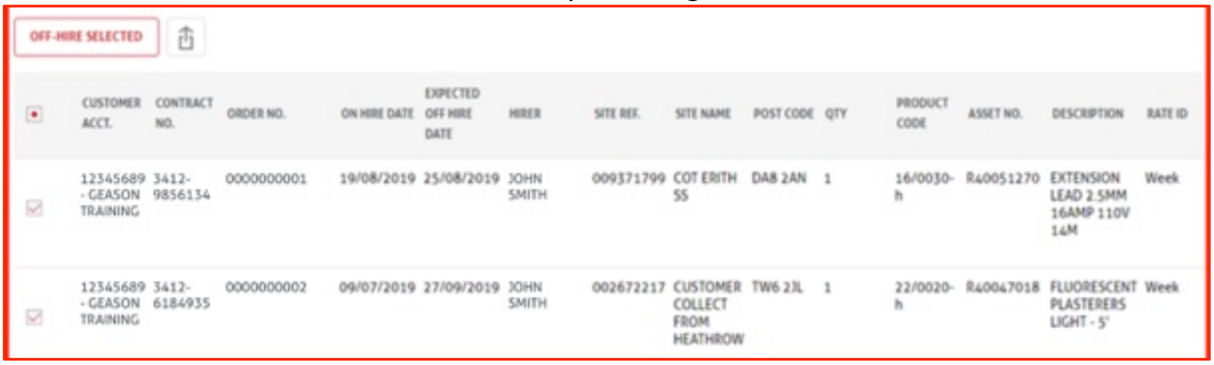


The pdf document will then display on screen and can be saved or printed as required.

6.11. Off Hire Requests

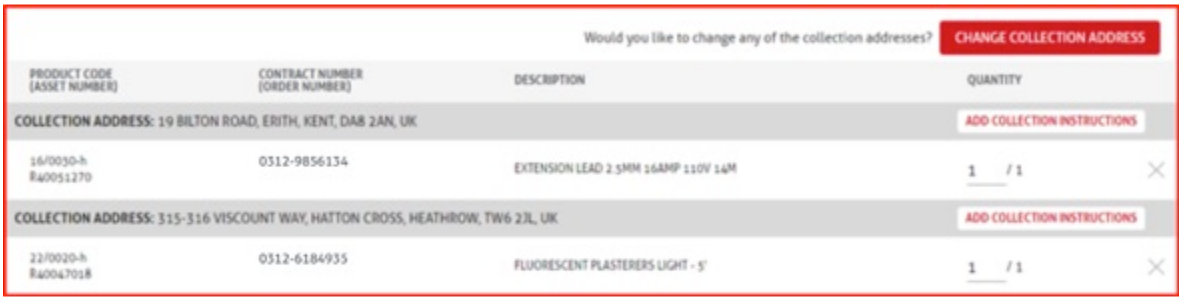
To request an Off Hire via MySpeedy run the Live Hire report, setting filters as required.

Select the items to be off hired by either populating the Select All checkbox in the report header or select each item to be off hired by checking the boxes to the left of each row.



CUSTOMER ACCT.	CONTRACT NO.	ORDER NO.	ON HIRE DATE	EXPECTED OFF HIRE DATE	HIRER	SITE REF.	SITE NAME	POST CODE	QTY	PRODUCT CODE	ASSET NO.	DESCRIPTION	RATE ID
12345689 - GEASON TRAINING	3412-9856134	0000000001	19/08/2019	25/08/2019	JOHN SMITH	009371799	COT ERITH 55	DA8 2AN	1	16/0030-h	R40051270	EXTENSION LEAD 2.5MM 16AMP 110V 14M	Week
12345689 - GEASON TRAINING	3412-6184935	0000000002	09/07/2019	27/09/2019	JOHN SMITH	002672217	CUSTOMER COLLECT FROM HEATHROW	TW6 2JL	1	22/0020-h	R40047018	FLUORESCENT PLASTERERS LIGHT - 5'	Week

Click the 'Off Hire Selected' button.
Add collection date and amend quantity as required. For 5 day charging Customers this cannot be set to a date falling on a weekend.



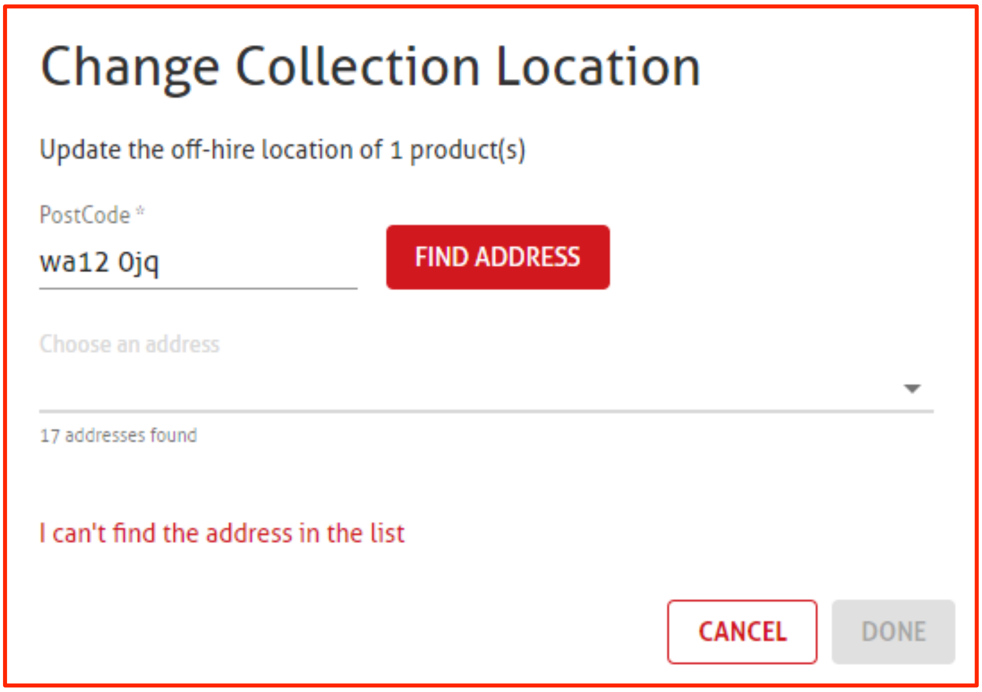
Instructions for collection can be added by clicking the ‘Add Collection Instructions’ button.

If the items have been moved to another site the user can provide these details by clicking the ‘Change Collection Address’ button.

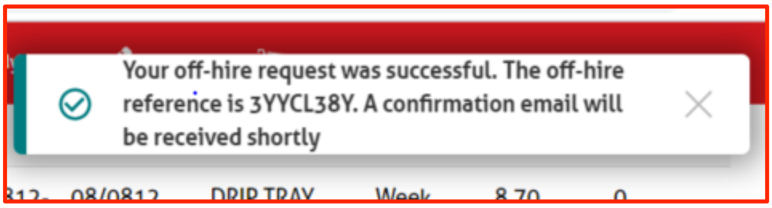
Select the item requiring updated collection details by checking the box to the left of the item and clicking ‘Change’.

Enter the postcode for the correct site and click ‘Find Address’.

Choose address from the drop down list or click ‘I can’t find the address in the list’ link and add the missing address details.



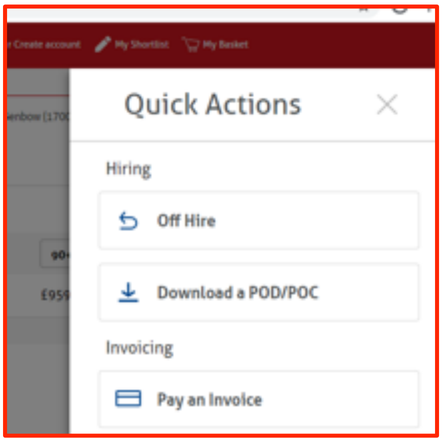
Click ‘Request Off Hire’.



A confirmation message with the off hire reference will be displayed to the top right of the screen. The User and any registered 'cc' email recipient will be sent a confirmation email detailing confirmation of the off hire request including the Off Hire Reference.

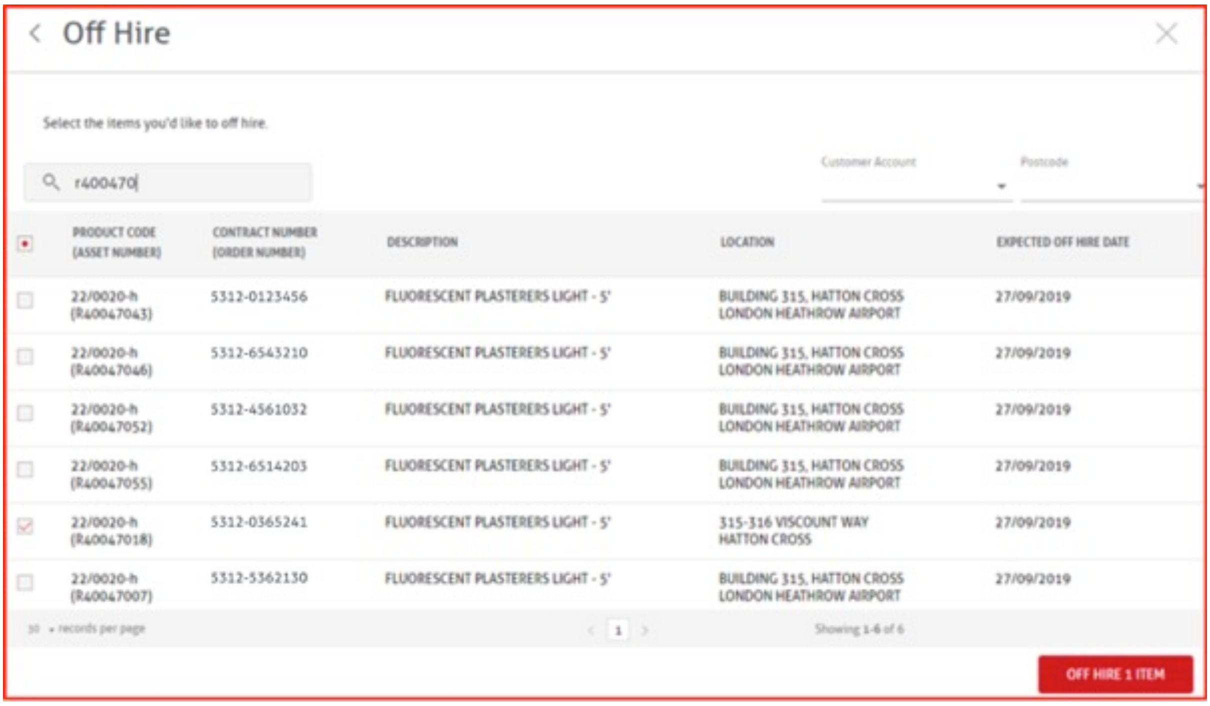
7. Quick Actions

Quick actions are available on the homepage or by clicking the ‘Quick Actions’ button on the top right of the screen and provide easy access to quickly carry out actions, like querying invoices or downloading POD/POC’s, when the User only wishes to work with one record and has the information to quickly identify and select the record.



7.1. Off Hire

Click the Off Hire Quick Action button and use the search function to find the required item.



Select the items to be off hired and click ‘Off Hire (x) Item’ button.

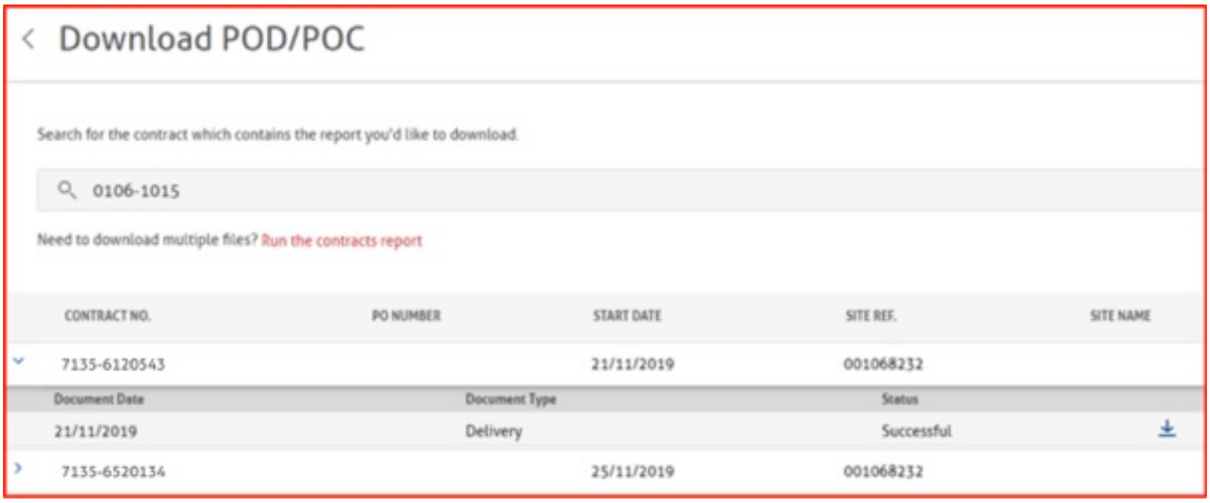
Add any collection instructions, amend quantities and update collection address if required as per Off Hire process. Click 'Request Off Hire' button.

The off hire reference will be displayed in the top right of the screen and a confirmation email will be sent to the requestor and any cc' emails designated by the MySpeedy administrator.

7.2. Download POD/POC

Click the Off Hire Quick Action button and use the search function to find the required item.

Expand the row for the correct contract to see the related deliveries / collections.



Click the download button for the required POD/POC.

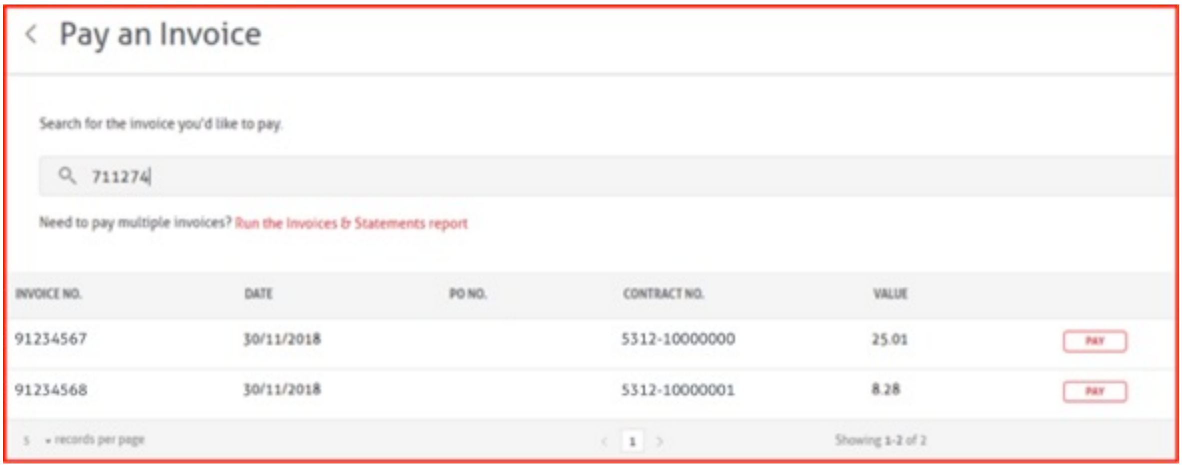
Click the file to open.

Pdf document will open in a new tab.

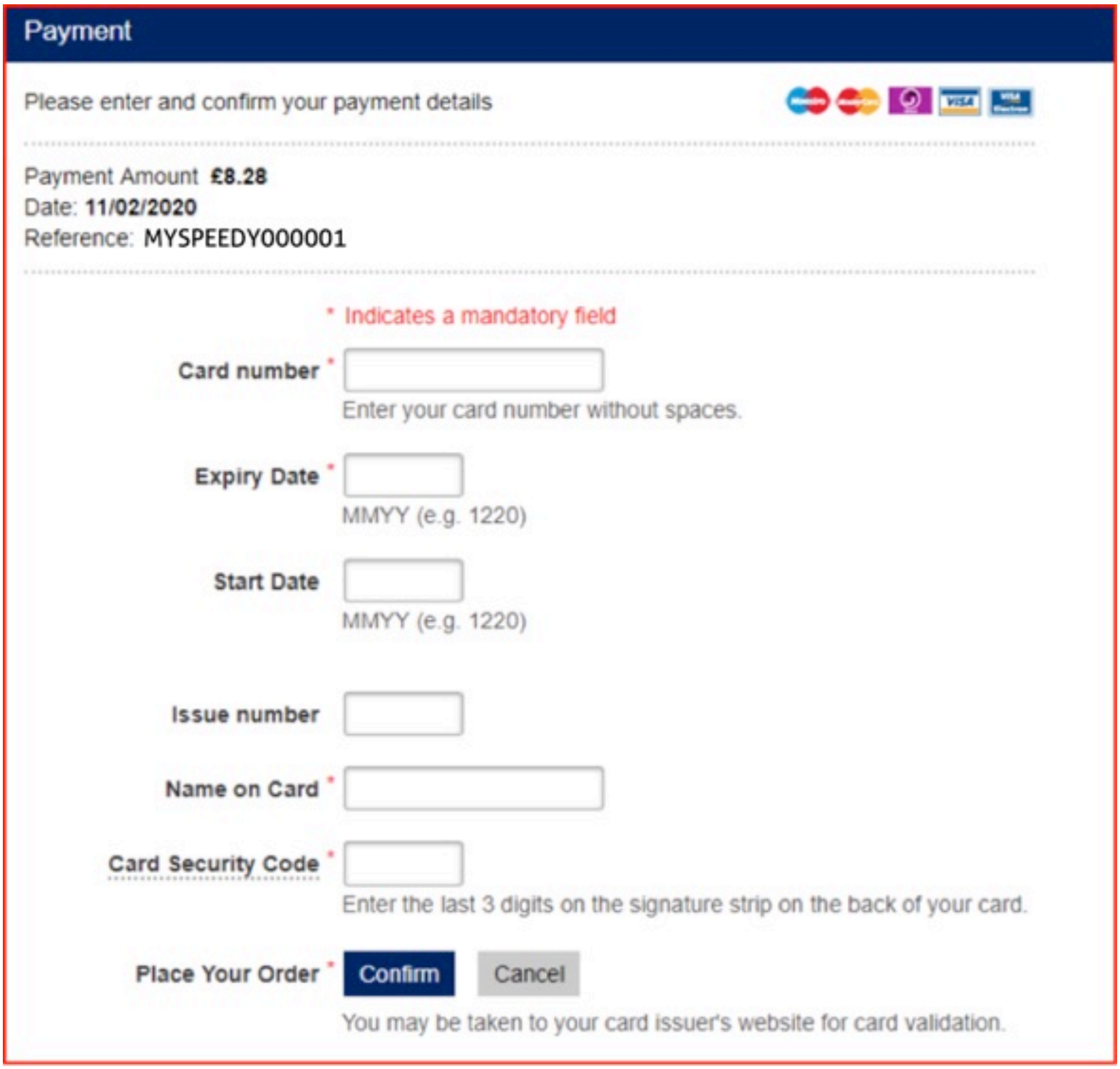
7.3. Pay an Invoice

Click the Pay an Invoice Quick Action button and use the search function to find the required item.

Click 'Pay' button on row for invoice to be paid.

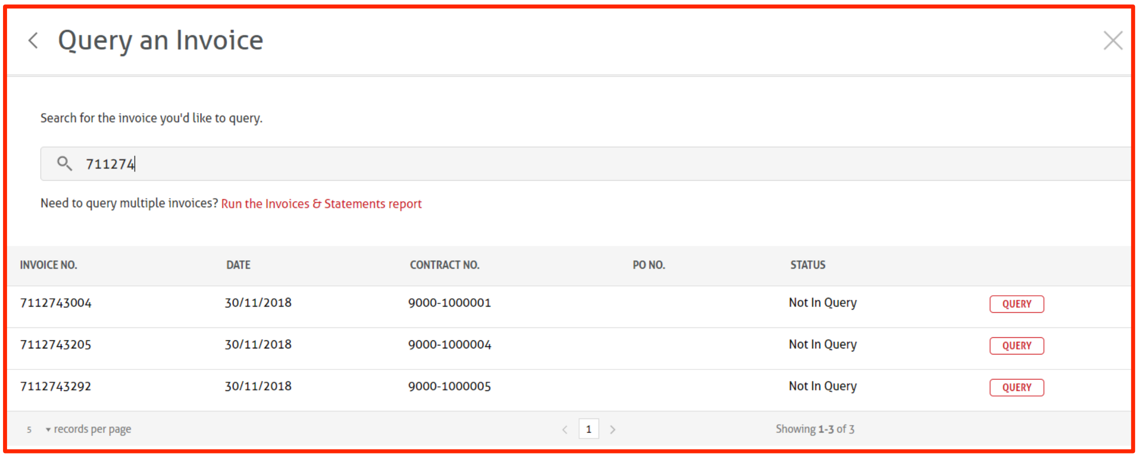


The User will then be taken to the payment portal to enter their payment card details and complete the payment process. Complete all mandatory fields as indicated.



7.4. Query an Invoice

Click the Query an Invoice Quick Action button and use the search function to find the required item.



Click the ‘Query’ button to the right of the screen for the invoice in question.

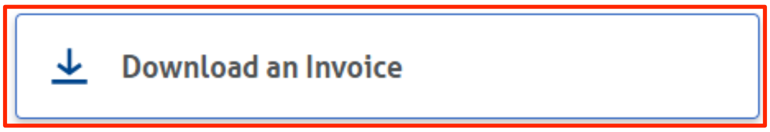
Populate the Name, Phone Number, Reason and Notes fields on the Query pane.

If you have supporting files click the ‘Upload Files’ link. You can then either drag and drop your files from your folders or click ‘Select File’ to browse your folders and make the required selection.

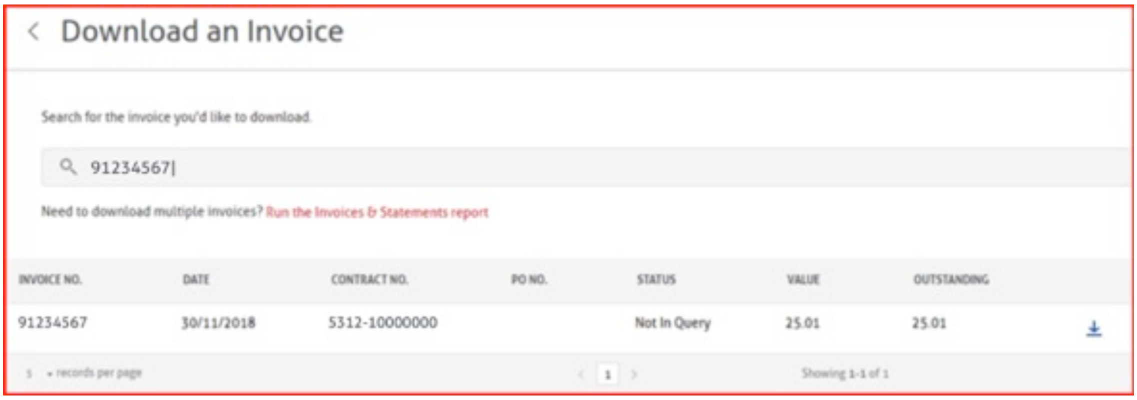
Any existing queries relating to the selected record will be displayed at the bottom of the query pane.

Once the required fields are populated, click ‘Submit Query’.

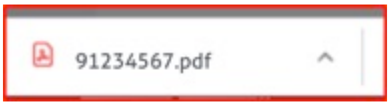
7.5. Download an Invoice



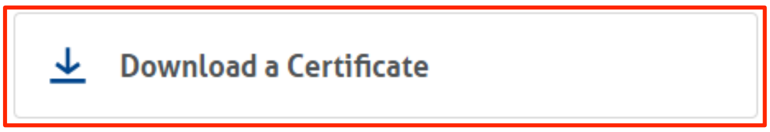
Click the Download an Invoice Quick Action button and use the search function to find the required item.



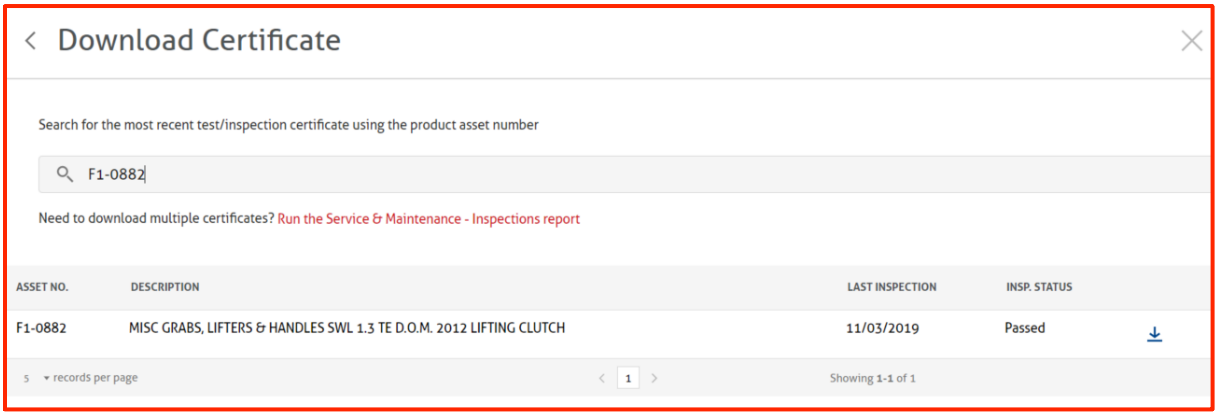
Click the download icon and click on document link to open pdf.



7.6. Download a Certificate



Click the Download a Certificate Quick Action button and use the search function to find the required item.



Click the download icon and click on document link to open pdf.