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# MySpeedy User Guide

## Contents

1.	Introduction .....	4
2.	Homepage .....	4
3.	Switch Account .....	5
4.	Dashboard .....	6
5.	My Account.....	6
5.1.	Update Details .....	6
5.2.	Change Password.....	6
6.	Users & Permissions .....	8
6.1.	Create User .....	8
5.1.1	Step1 - User Details.....	8
5.1.2.	Step 2 - Accounts & Sites .....	9
5.1.3.	Step 3 - User Permissions .....	10
5.2.	Permission Profiles .....	11
5.2.1.	Create Permission Profile .....	11
5.2.2.	Manage Permissions Profile.....	12
5.3.	Update User .....	13
5.4.	Deactivate User.....	13
6.	Reporting .....	15
6.1.	Run a Report .....	15
6.2.	Save a Report.....	16
6.3.	Schedule a Report.....	17
6.4.	Amend a Saved Report .....	19
6.5.	Export a Report.....	19
6.6.	Download a Certificate .....	20
6.7.	Pay Invoices .....	21
6.8.	Query Invoices .....	22
6.9.	Download Invoices.....	24
6.10.	Download POD/POC's.....	25
6.11.	Off Hire Requests.....	25
7.	Quick Actions .....	28
7.1.	Off Hire .....	28

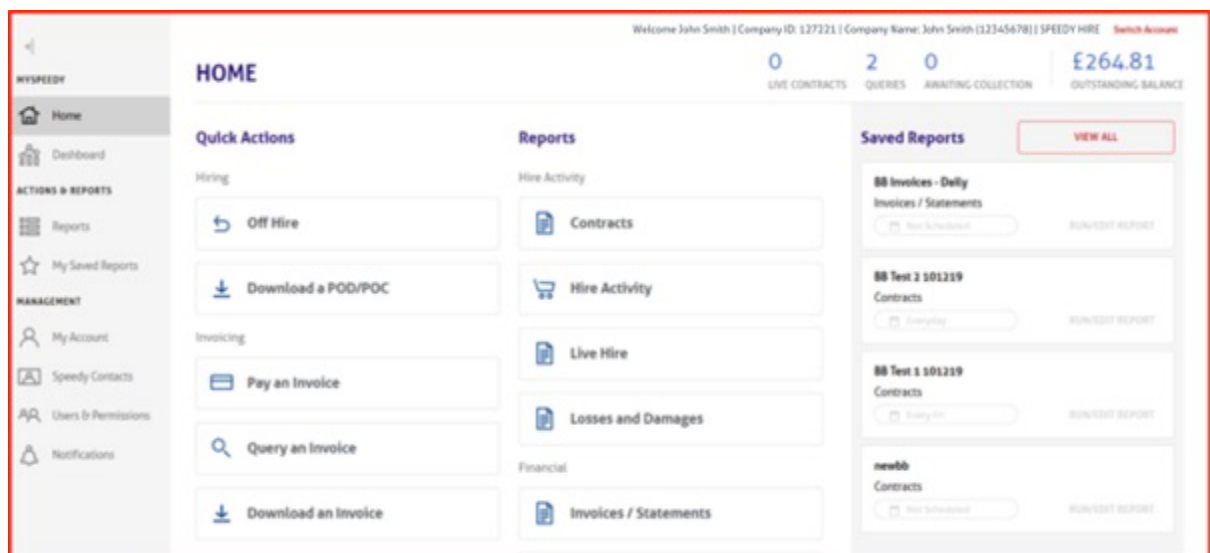
7.2.	Download POD/POC .....	29
7.3.	Pay an Invoice .....	29
7.4.	Query an Invoice .....	31
7.5.	Download an Invoice .....	32
7.6.	Download a Certificate .....	32

## 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

Welcome John Smith | Company ID: 127221 | Company Name: John Smith (12345678) | SPEEDY HIRE [Switch Account](#)

0

LIVE CONTRACTS

2

QUERIES

0

AWAITING COLLECTION

£264.81

OUTSTANDING BALANCE

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.

Switch Account

Please select which account you would like to use on the site:

Search...

12345679 - LLOYDS BRITISH

12345687 - GEASON TRAINING

12345689 - PROLIFT

12345789 - PLATFORM SALES & HIRE

12345798 - LIFTERZ

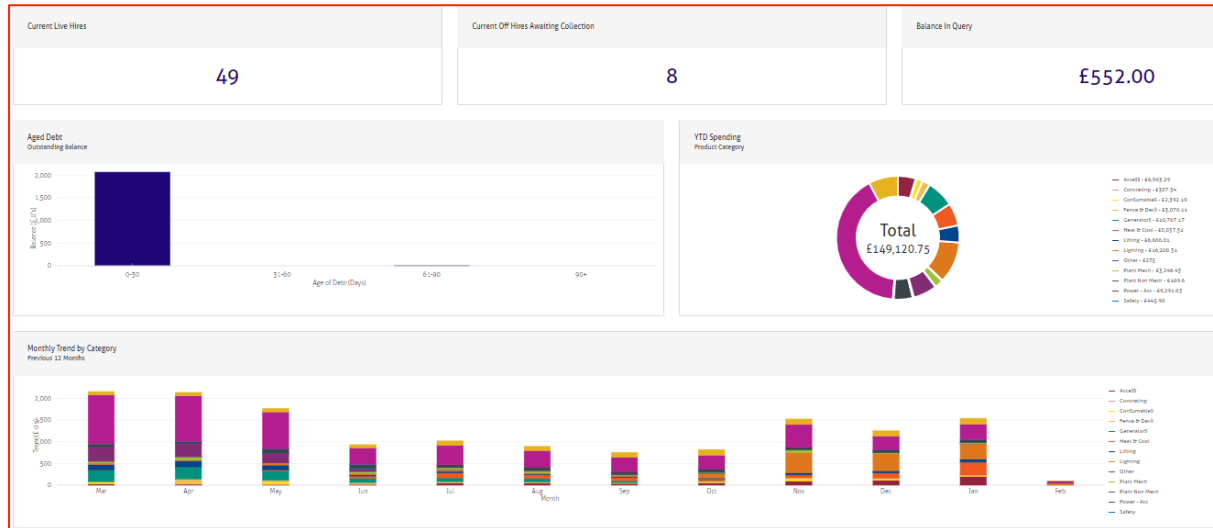
1234879 - SPEEDY INTERNATIONAL

CANCEL

SWITCH

## 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

The 'Contact Details' form allows users to update their contact information. It includes fields for Mobile Telephone Number (07770123456), Telephone Number (0), and Email (john.smith@speedyservices.com). The form features a 'CANCEL' button and a 'SAVE CHANGES' button.

### 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.

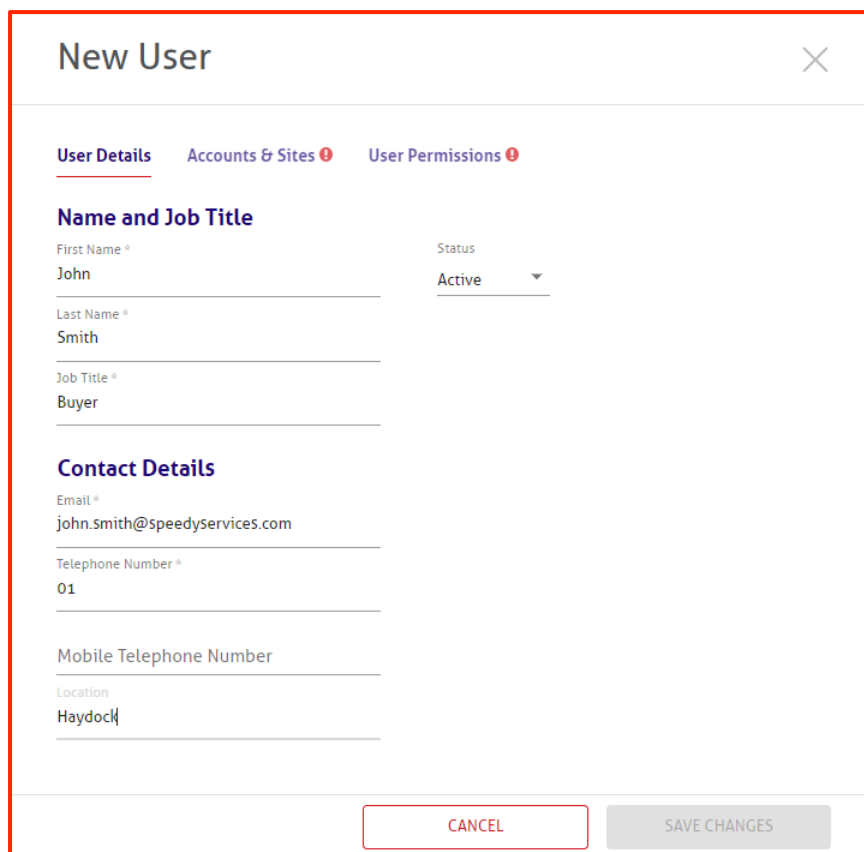
Once the User account has been set up they will be emailed the details of the login and password for their new MySpeedy account and instructions on how to reset their password on their first login to the MySpeedy system.

#### 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.



The screenshot shows a 'New User' modal window with a red border. It has a title bar with 'New User' and a close button. Below the title bar are three tabs: 'User Details' (active), 'Accounts & Sites' (with a red exclamation mark), and 'User Permissions' (with a red exclamation mark). The 'User Details' tab contains two sections: 'Name and Job Title' and 'Contact Details'. In the 'Name and Job Title' section, there are input fields for 'First Name' (containing 'John'), 'Last Name' (containing 'Smith'), and 'Job Title' (containing 'Buyer'). There is also a 'Status' dropdown menu currently set to 'Active'. In the 'Contact Details' section, there are input fields for 'Email' (containing 'john.smith@speedyservices.com'), 'Telephone Number' (containing '01'), 'Mobile Telephone Number', and 'Location' (containing 'Haydock'). At the bottom of the modal are two buttons: 'CANCEL' and 'SAVE CHANGES'.

**New User**

**User Details** Accounts & Sites **User Permissions**

**Name and Job Title**

First Name \* John Status Active

Last Name \* Smith

Job Title \* Buyer

**Contact Details**

Email \* john.smith@speedyservices.com

Telephone Number \* 01

Mobile Telephone Number

Location Haydock

CANCEL SAVE CHANGES



### 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.

John Smith

User Details

**Accounts & Sites**

User Permissions

Audit Log

Search...

<input checked="" type="checkbox"/>	<b>ACCOUNTS &amp; SITES</b>
> <input checked="" type="checkbox"/>	12345679 - LLOYDS BRITISH
> <input checked="" type="checkbox"/>	12345687 - GEASON TRAINING
> <input checked="" type="checkbox"/>	12345689 - PROLIFT
> <input checked="" type="checkbox"/>	12345789 - PLATFORM SALES & HIRE
> <input checked="" type="checkbox"/>	12345798 - LIFTERZ
> <input checked="" type="checkbox"/>	1234879 - SPEEDY INTERNATIONAL

CANCEL

SAVE CHANGES

### 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.

## John Smith

User Details

Accounts & Sites

User Permissions

Choose Profile  
(Custom) Save as new permissions profile

Select All ☒

Allowed to see pricing information (rates, discounts, list rate) ☒

Allowed to Hire/Buy ☒  
Optional, enter an additional email address to receive a copy of the confirmation email

Allow order collection from depot ☒

Allow new delivery address entry ☒

Allowed to Off Hire ☒  
Optional, enter an additional email address to receive a copy of the confirmation email

Allowed to see Delivery Collection Report ☒

Allowed to See Invoices Section ☒

Allowed to see Total Spend Report ☒

Allowed to see Age of Debt Summary ☒

Allowed to Query Invoices ☒

At least one permission must be checked

CANCEL

SAVE CHANGES

## 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.

### New Permissions Profile

Profile Name

Order - Off hire Only

Select All

☐

Allowed to see pricing information (rates, discounts, list rate)

☐

Allowed to Hire/Buy

☒

Allow order collection from depot

☐

Allow new delivery address entry

☐

Allowed to Off Hire

☒

Allowed to see Delivery Collection Report

☒

Allowed to See Invoices Section

☐

Allowed to see Total Spend Report

☐

Allowed to see Age of Debt summary

☐

Allowed to Query Invoices

☐

Allowed to see Secure File Library

☐

CANCEL

SAVE

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.

## Edit Permissions Profile

Choose Profile

Di Test

Save as new permissions profile

Select All

☒

Allowed to see pricing information (rates, discounts, list rate)

☒

Allowed to Hire/Buy

☒

Allow order collection from depot

☒

Allow new delivery address entry

☒

Allowed to Off Hire

☒

Allowed to see Delivery Collection Report

☒

Allowed to See Invoices Section

☒

Allowed to see Total Spend Report

☒

Allowed to see Age of Debt summary

☒

Allowed to Query Invoices

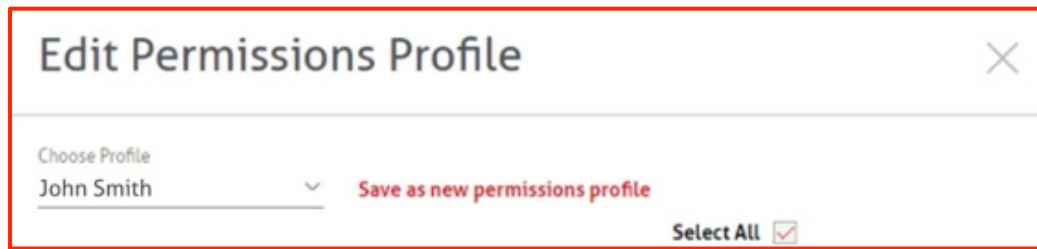
☒

CANCEL

SAVE

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.



Choose Profile  
John Smith

Save as new permissions profile

Select All ☒

Populate new profile name and click Save.



Please enter the name of the new profile

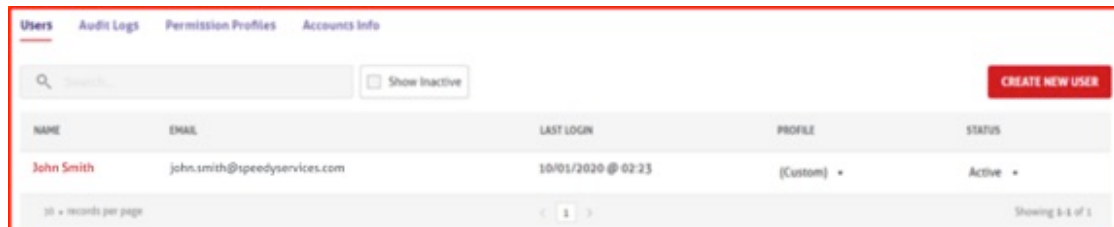
John Smith

CANCEL 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.

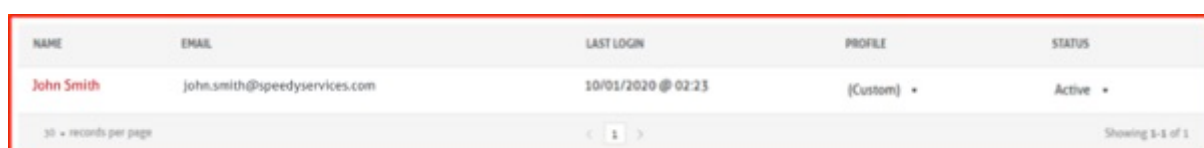


NAME	EMAIL	LAST LOGIN	PROFILE	STATUS
John Smith	john.smith@speedyservices.com	10/01/2020 @ 02:23	(Custom)	Active

### 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.**



NAME	EMAIL	LAST LOGIN	PROFILE	STATUS
John Smith	john.smith@speedyservices.com	10/01/2020 @ 02:23	(Custom)	Active

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

John Smith

User Details

Accounts & Sites

User Permissions

Audit Log

Name and Job Title

First Name

John

Last Name

Smith

Job Title

Status

Active

## 6. Reporting

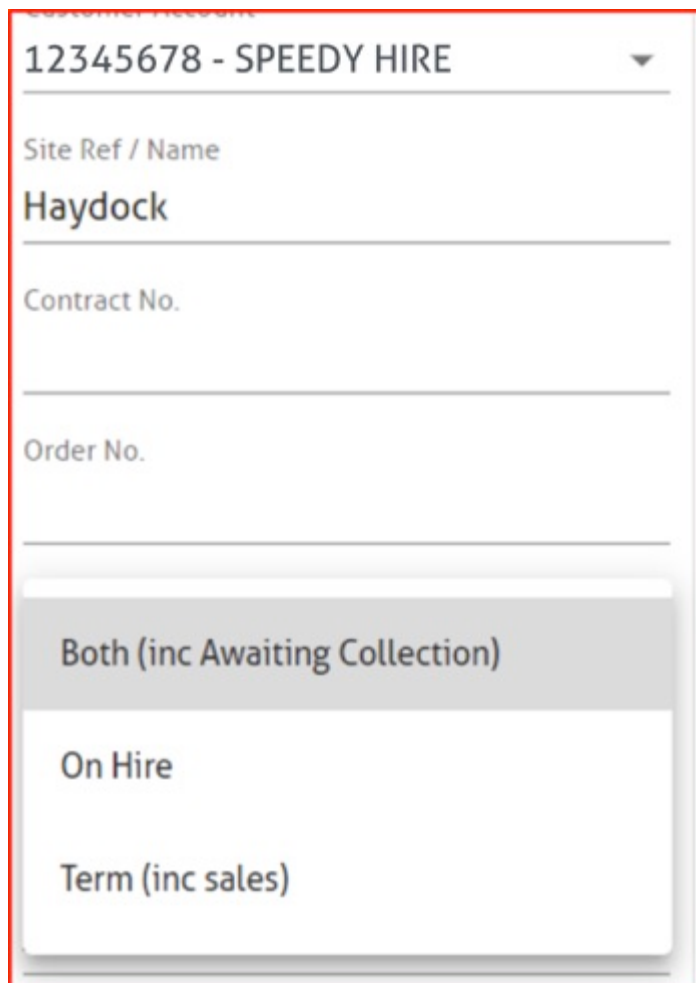
MySpeedy provides Users with robust yet easy to use reporting functionality where reports can be refined according to the Users requirement and saved for reuse without having to reset the report filters each time. They can even be scheduled for delivery at a later date to the user and selected recipients.

### 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.



The screenshot shows a web interface for a report generator. At the top, there is a dropdown menu with the text "12345678 - SPEEDY HIRE" and a downward arrow. Below this are three input fields: "Site Ref / Name" with the value "Haydock", "Contract No." (empty), and "Order No." (empty). At the bottom, there is a dropdown menu with three options: "Both (inc Awaiting Collection)" (highlighted in grey), "On Hire", and "Term (inc sales)".

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	00000000	BRISTOL SUPERSTORE (LIFTING)	BRISTOL SUPERSTORE (LIFTING)	Term	Pending off-hire request	27/07/2016
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-6789123		Camden Town 0603	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	14/03/2017
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-7891234		Camden Town 0603	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	16/01/2017
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-8912345		Camden town 0603	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	05/09/2016
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-9123456		Camden town 0603	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	12/04/2016

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	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	14/03/2017
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-6789123		Camden Town 0603	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	16/01/2017
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-7891234		Camden town 0603	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	05/09/2016
>	12345789 - SPEEDY ASSET SERVICES LIMITED	1234-8912345		Camden town 0603	00000000	SPEEDY ASSET SERVICES LIMITED	CSC Team	Term	Pending off-hire request	12/04/2016

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.

New Saved Reports

Report Name \*  
Speedy Contracts - By Depot

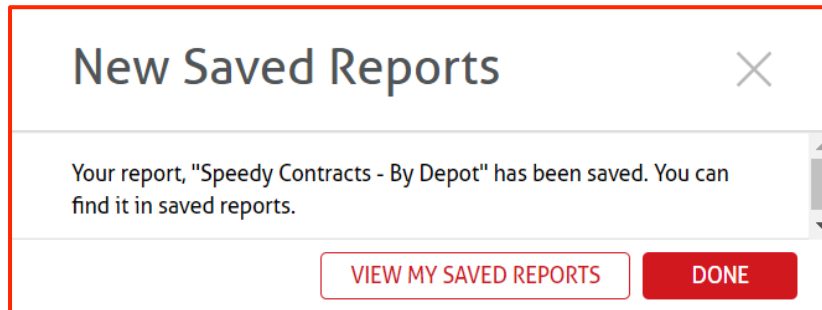
☐ Include Scheduling

CANCEL    SAVE REPORT



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.

<input type="checkbox"/>	REPORT NAME	REPORT TYPE	CREATED	ROLE	SCHEDULE	
<input type="checkbox"/>	Speedy Contracts - By Depot	Contracts	06/02/2020	Owner	NOT SCHEDULED	<a href="#">RUN</a>
<input type="checkbox"/>	SH Invoices - Daily	Invoices / Statements	09/01/2020	Owner	NOT SCHEDULED	<a href="#">RUN</a>

Populate the 'Include Scheduling' checkbox.

## Report Scheduler

Report Name

Speedy Contracts - By Depot

☐ Include Scheduling

CANCEL

SAVE REPORT

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

# Report Scheduler

Report Name

Speedy Contracts - By Depot

☒ Include Scheduling

Schedule

Specific Days

☒ Mon

☐ Tue

☐ Wed

☐ Thu

☒ Fri

☐ Sat

☐ Sun

Report Format \*

☐ PDF

☒ Excel

☐ CSV

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.

Recipients \*

ADD

This email is being sent to 1 recipients [Hide](#)

john.smith@speedyservices.com

Message \*

Contracts by Depot

CANCEL

SAVE REPORT

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.



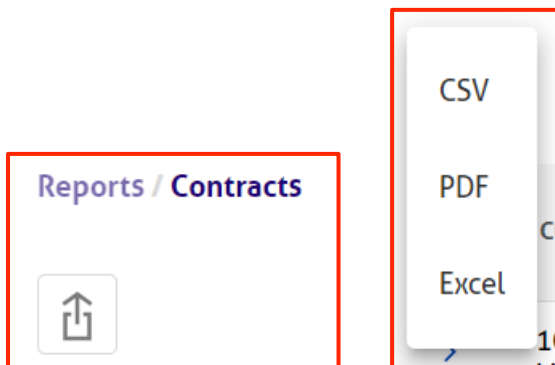
Make the required changes to the filters and click 'Save Changes'.

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.

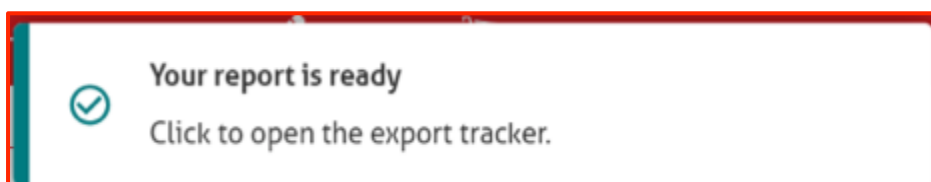
Click on the export button to the left above the report pane and select a format.



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



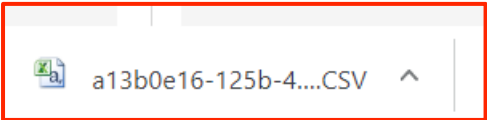
In the upper right of the screen you will see progress updates.



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

Export Queue 1			
DESCRIPTION	PROGRESS	ACTIONS	
Contracts Report - Requested @ 3:44PM	<div></div> Ready	<a href="#">↓</a>	<a href="#">⋮</a>

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

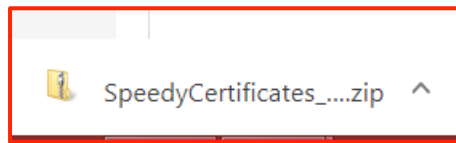
To pay download Certificates from a report run the Asset Inspections report, the filters in the report generator can be set to refine the amount of data displayed in the report.

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.

Reports / Asset Inspections									
<div>DOWNLOAD ALL SELECTED CERTIFICATES</div> <div></div>									
<input type="checkbox"/>	CUST ACCOUNT	JOB ID	LAST INSPECTION	NEXT INSPECTION	CERT NO	INSP TYPE	ASSET NO.	PRODUCT	CHAMPION GROUP
<input checked="" type="checkbox"/>	12345689 - PROLIFT	199	03/05/2012	03/11/2012	350	Thorough Exam 2	07-8403	M02505-S	LIFTING (ME001)
<input checked="" type="checkbox"/>	12345689 - PROLIFT	1816	02/08/2012	02/02/2013	36602	Thorough Exam 1	R6GP/2	M07205-S	LIFTING (ME001)
<input type="checkbox"/>	12345689 - PROLIFT	1816	02/08/2012	02/02/2013	36603	Thorough Exam 1	RBS6CE/1	M07205-S	LIFTING (ME001)

Click Download All Selected Certificates.

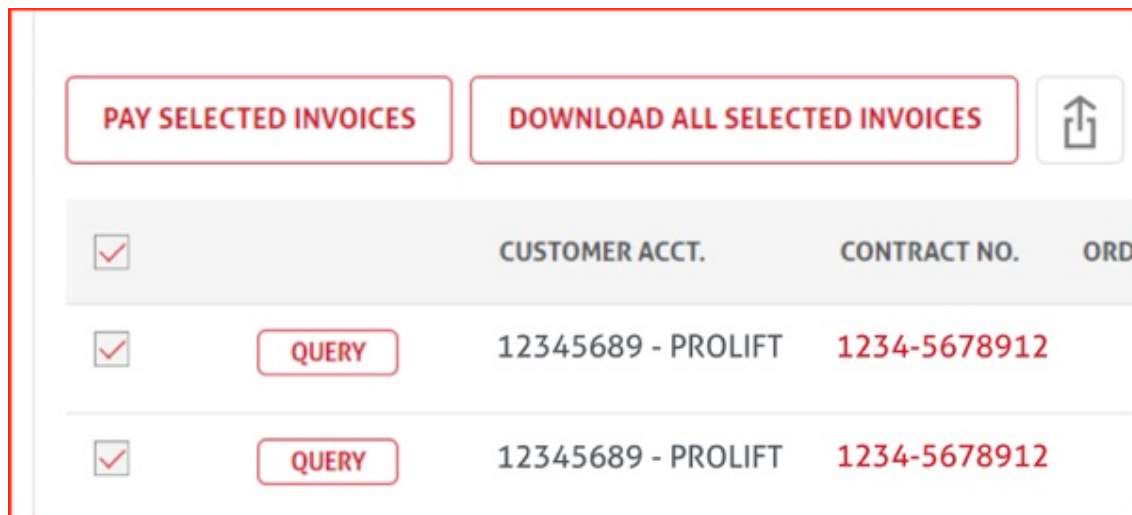
Open zip file by clicking on icon in lower left of screen.



## 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.

Payment

Please enter and confirm your payment details

---

Payment Amount **£12.00**  
Date: **11/02/2020**  
Reference: **MYSPEEDY000001**

---

\* Indicates a mandatory field

Card number \*

Enter your card number without spaces.

Expiry Date \*

MMYY (e.g. 1220)

Start Date

MMYY (e.g. 1220)

Issue number

Name on Card \*

Card Security Code \*

Enter the last 3 digits on the signature strip on the back of your card.

Place Your Order \*

Confirm

Cancel

You may be taken to your card issuer's website for card validation.

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.

<input type="checkbox"/>		CUSTOMER ACCT.	CONTRACT NO.
<input type="checkbox"/>	<a href="#">QUERY</a>	12345789 - PLATFORM SALES & HIRE	2345-0123456

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

< Query an Invoice No: 91234567

Name \*

Phone Number \*

Reason \*

Notes \*

Upload Files

SUBMIT QUERY

Number of existing queries for this invoice: 0

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.

< Query an Invoice No: 7114140138

Name \*

Phone Number \*

Reason \*

Notes \*

Upload Files

SUBMIT QUERY

Number of existing queries for this invoice: 2

Submitted: 19/02/2020 | Pending  
**Pending**

Submitted: 19/02/2020 | Pending  
**Pending**

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

< Query an Invoice No: 7114140138

Submitted: 19/02/2020 | Pending  
**Pending**

Submitted: 19/02/2020 | Pending  
**Pending**

### Query Details

Name  
fg

Phone Number  
09

Reason  
Diamond Wear

Notes  
only used 1 mm and not 10mm

### Uploaded Files

### Activity

19/02/2020      Query raised

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.

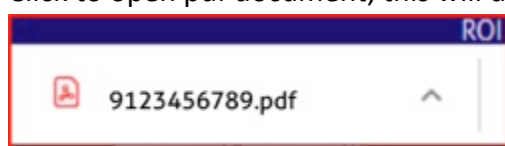
Select the invoices to be downloaded by either populating the Select All checkbox in the report header or select each invoice to be downloaded by checking the box to the left of each row.

PAY SELECTED INVOICES

DOWNLOAD ALL SELECTED INVOICES

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

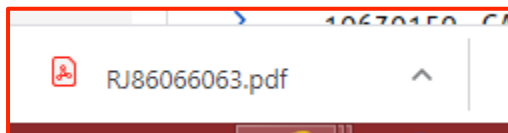
To download POD/POC from a report run the Contracts report which can be filtered to a specific Site or Order number to display a more relevant set of data.

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	OFF HIR
>	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.

OFF-HIRE SELECTED														
<input type="checkbox"/>	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
<input checked="" type="checkbox"/>	12345689 - GEASON TRAINING	3412-9856134	0000000001	19/08/2019	25/08/2019	JOHN SMITH	009371799	COT ERITH SS	DAB 2AN	1	16/0030-h	R40051270	EXTENSION LEAD 2.5MM 16AMP 110V 14M	Week
<input checked="" type="checkbox"/>	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.

Would you like to change any of the collection addresses?				CHANGE COLLECTION ADDRESS
PRODUCT CODE (ASSET NUMBER)	CONTRACT NUMBER (ORDER NUMBER)	DESCRIPTION	QUANTITY	
COLLECTION ADDRESS: 19 BILTON ROAD, ERITH, KENT, DA8 2AN, UK				ADD COLLECTION INSTRUCTIONS
16/0050-h R40051270	0512-9856134	EXTENSION LEAD 2.5MM 16AMP 110V 14M	1 / 1	×
COLLECTION ADDRESS: 315-316 VISCOUNT WAY, HATTON CROSS, HEATHROW, TW6 2JL, UK				ADD COLLECTION INSTRUCTIONS
22/0020-h R40047018	0512-6184935	FLUORESCENT PLASTERERS LIGHT - 5'	1 / 1	×

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'.

1 item selected						CANCEL	CHANGE
PRODUCT CODE (ASSET NUMBER)	CONTRACT NUMBER (ORDER NUMBER)	DESCRIPTION	QUANTITY	DATE			
COLLECTION ADDRESS: 26 RUSSELL ROAD, EDINBURGH, MIDLOTHIAN, EH11 2LP, UK						ADD COLLECTION INSTRUCTIONS	
<input checked="" type="checkbox"/> 08/2248-h 08/2248	0512-6791234	HAYWEAR LABEL TOOL TAGS	1 / 2	10/02/2020			×

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.

## Change Collection Location

Update the off-hire location of 1 product(s)

PostCode \*

wa12 0jq FIND ADDRESS

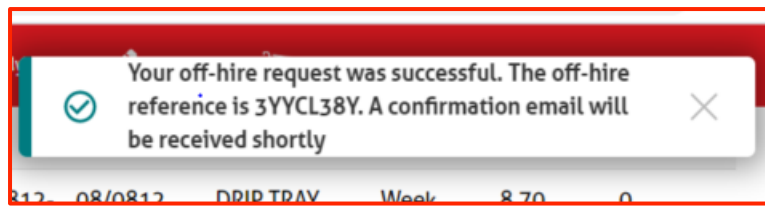
Choose an address

17 addresses found

I can't find the address in the list

CANCEL DONE

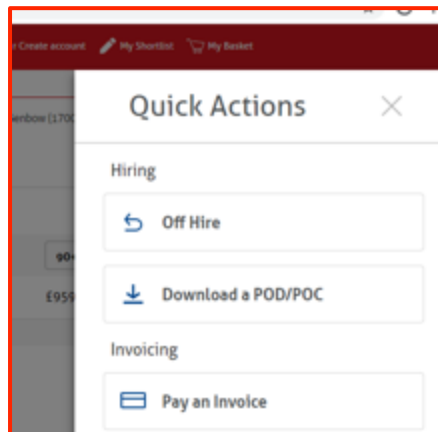
Click 'Request Off Hire'.



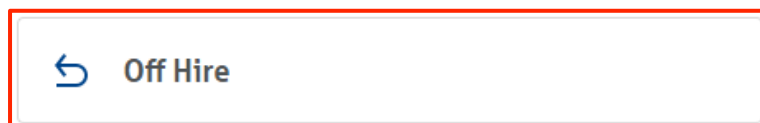
A confirmation message with the off hire reference will be displayed to the top right of the screen. The User and any registered 'cc' email recipient will be sent a confirmation email detailing confirmation of the off hire request including the Off Hire Reference.

## 7. Quick Actions

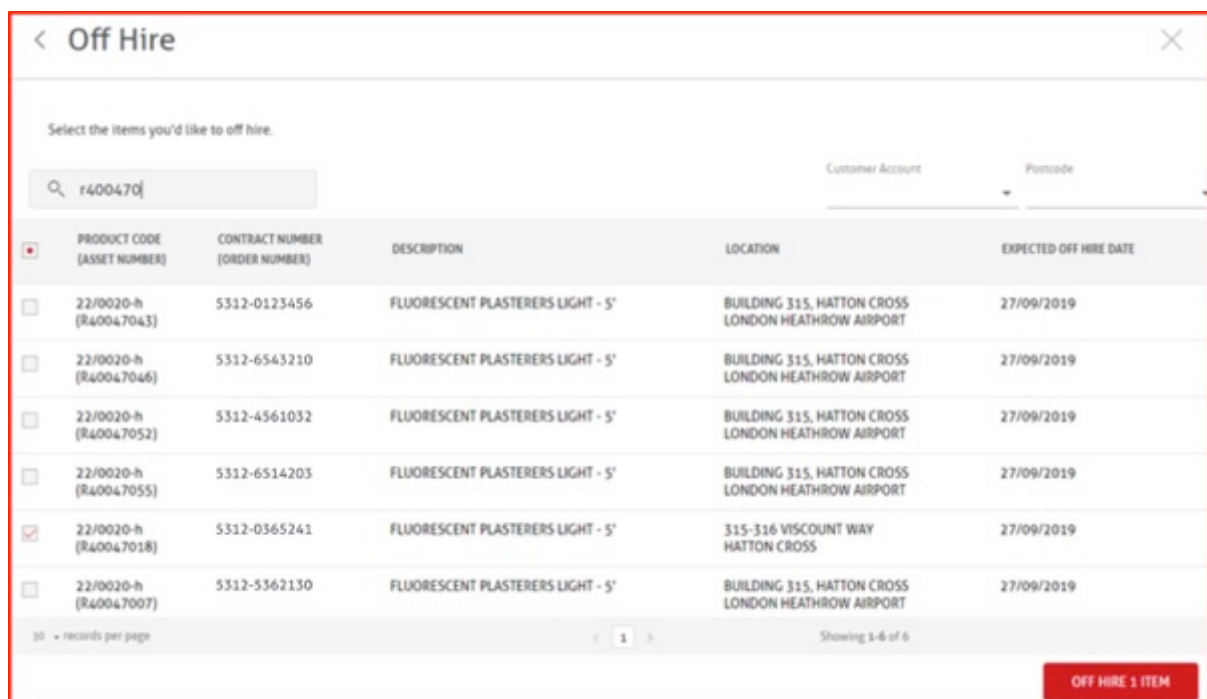
Quick actions are available on the homepage or by clicking the 'Quick Actions' button on the top right of the screen and provide easy access to quickly carry out actions, like querying invoices or downloading POD/POC's, when the User only wishes to work with one record and has the information to quickly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

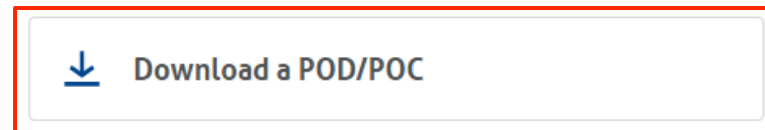


Select the items to be off hired and click 'Off Hire (x) Item' button.

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

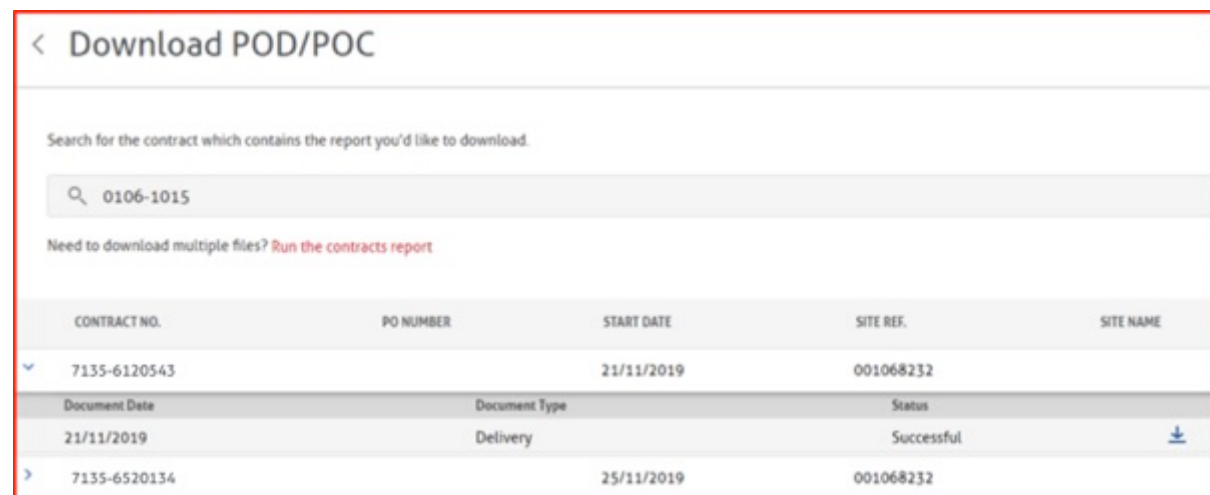
The off hire reference will be displayed in the top right of the screen and a confirmation email will be sent to the requestor and any cc' emails designated by the MySpeedy administrator.


## 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.

A screenshot of a web application interface titled "Download POD/POC". It features a search bar with the text "0106-1015" and a link "Need to download multiple files? Run the contracts report". Below is a table with columns: CONTRACT NO., PO NUMBER, START DATE, SITE REF., and SITE NAME. The first row is expanded, showing a sub-table with columns: Document Date, Document Type, Status, and a download icon. The sub-table has two rows: one for "21/11/2019" with "Delivery" type and "Successful" status, and another for "7135-6520134" with "25/11/2019" date and "001068232" site ref. A red border highlights the entire interface area.

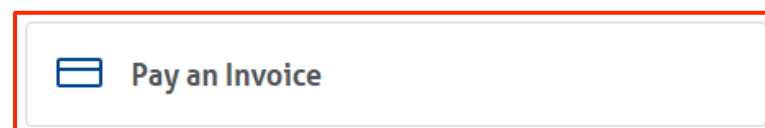
CONTRACT NO.	PO NUMBER	START DATE	SITE REF.	SITE NAME
7135-6120543		21/11/2019	001068232	
<b>Document Date</b> <b>Document Type</b> <b>Status</b>				
21/11/2019		Delivery	Successful	
7135-6520134		25/11/2019	001068232	

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

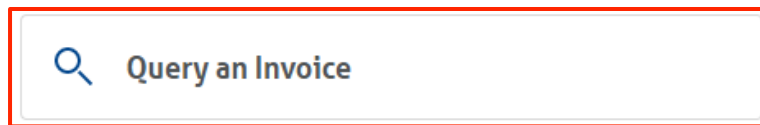


Click the Pay an Invoice Quick Action button and use the search function to find the required item.

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



## 7.4. Query an Invoice



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

A screenshot of a web application interface titled "Query an Invoice" with a close button (X) in the top right. Below the title is a search bar with the placeholder text "Search for the invoice you'd like to query." and the input "711274". Below the search bar is a link: "Need to query multiple invoices? Run the Invoices & Statements report". Below this is a table with 5 columns: INVOICE NO., DATE, CONTRACT NO., PO NO., and STATUS. The table contains 3 rows of data. To the right of each row is a red button labeled "QUERY". At the bottom of the table, there is a pagination bar showing "5 records per page", a page indicator "< 1 >", and "Showing 1-3 of 3".

INVOICE NO.	DATE	CONTRACT NO.	PO NO.	STATUS	
7112743004	30/11/2018	9000-1000001		Not In Query	QUERY
7112743205	30/11/2018	9000-1000004		Not In Query	QUERY
7112743292	30/11/2018	9000-1000005		Not In Query	QUERY

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.

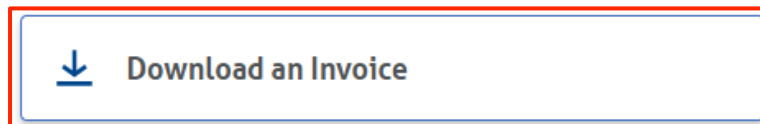
A screenshot of a web application interface titled "Query an Invoice No: 91234567" with a close button (X) in the top right. The form contains four input fields: "Name \*", "Phone Number \*", "Reason \*" (with a dropdown arrow), and "Notes \*". Below the "Reason \*" field is a link "Upload Files". At the bottom right is a button labeled "SUBMIT QUERY". At the bottom left, it says "Number of existing queries for this invoice: 0".

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.

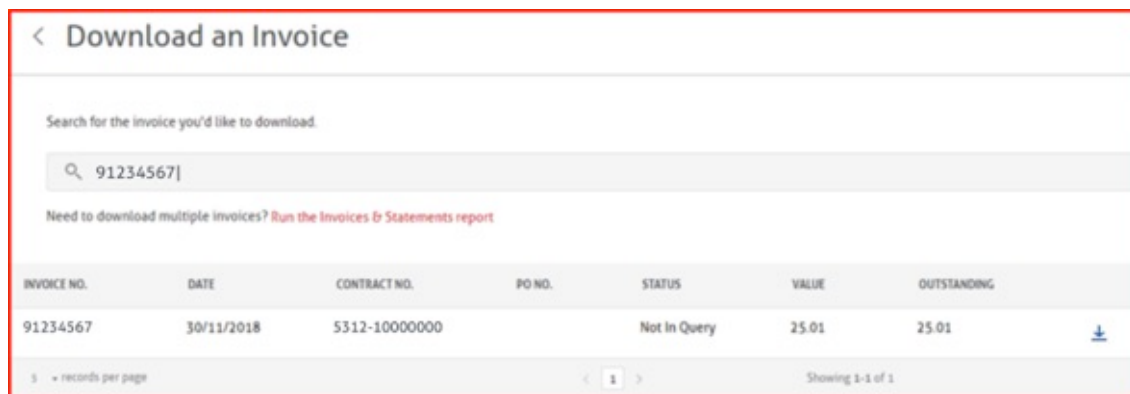
Any existing queries relating to the selected record will be displayed at the bottom of the query pane.

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

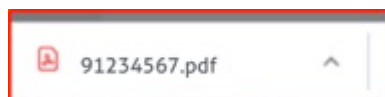
## 7.5. Download an Invoice



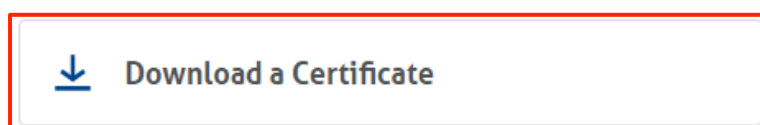
Click the Download an Invoice Quick Action button and use the search function to find the required item.



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.



< Download Certificate

×

Search for the most recent test/inspection certificate using the product asset number

🔍 F1-0882

Need to download multiple certificates? [Run the Service & Maintenance - Inspections report](#)

ASSET NO.	DESCRIPTION	LAST INSPECTION	INSP. STATUS
F1-0882	MISC GRABS, LIFTERS & HANDLES SWL 1.3 TE D.O.M. 2012 LIFTING CLUTCH	11/03/2019	Passed

5 records per page

< 1 >

Showing 1-1 of 1

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

