

InspHire Corporate Edition Factsheet

- **Quotations:** - Allows the creation and maintenance of rental/Sales quotations for Account customers, inspHire Cash customers or Accounts from a supported CRM solution (inspHire CRM or Goldmine) which can be converted to a live order or marked as lost supporting the recording of reasons where configured to do so.
 Can set the probability percentage of a quote's conversion.
 Quote created for a CRM account when interlinked to inspHire CRM will create the quote as an opportunity within inspHire CRM, abandoning the Quote will pass the reason for abandoning it to the activity within inspHire CRM.

- **Orders:** - Allows the creation and maintenance of rental/Sales quotations for Account customers or inspHire Cash customers. Supporting
 - The rental of stock items
 - Re-rented items
 - Sale of items
 - Accessories of items in a tiered structure.
 - Multiple Delivery and collection charges of differing types for differing dates.
 - Items with differing date ranges (single date range per item record)
 - On site servicing
 - Miscellaneous one-off charges
 - Supplementary charges
 - Multiple staging processes with supporting documentation templates.
 - Stock availability checks and warnings.
 - Account credit checking (where supported depending on interlinked accounts solution).
 - Multiple system options to default and standardise system behaviour.
 - Ability to add additional customised report templates for use with the Rental screens.
 - Automatic document numbering in sequential order.
 - Automated document archiving of PDF copies.
 - Customer specific rates/charging.
 - Discount matrix/price lists.
 - Ability to set a "deal" price against an order with or without planned staggered invoice amounts.
 - Advanced invoicing.
 - Projects creation and maintenance for grouping of multiple Rental orders together for multiple customers at the same location.
 - Proforma invoicing for a percentage value of the order.
 - Processing of cash payments/transactions for inspHire Cash Customers (linked to the interlinked accounts packages CASH account).
 - Ability to specify types of items for later warehouse picking and allocation.
 - Specifying types of items or quantities that are not available for acquisition from a supplier as part of a back-to-back purchase order supporting multiple back-to-back orders from one or more suppliers.
 - Costings screen and report with a top-level breakdown of cost to revenue with a profit value and percentage.
 - An account address, delivery address and alternative collection address.
 - Audit trail of actions performed against the order.

- Grouping of orders for automated invoicing when desired.
 - Consolidated invoicing allowing one or multiple grouping of orders per customer based on a consolidation code (10 orders could be all on one invoice, split across three or an invoice generated per order as is the default behaviour).
 - Discount percentages against items, the order or both.
 - Able to apply insurance charges.
 - Automatic popup of notes against a customer's account.
 - Processing of Timesheet entries for recharging of operated equipment.
 - Mass processing of all items or those manually selected for delivery, collection and returning to stock.
 - Flexible staged process for returning of items.
 - Suspend charging on an Account, order, item by item basis or across the system for specified date ranges (Generally used for festive seasons or national holidays).
 - Un-allocate an order reverting to a quote.
 - Specify the number of days to be charged for instead of a date range.
 - Single charge for "Kit" or "Package" items.
 - Ability to copy an existing contract.
 - Exchange/replace active items with supporting documentation and reports.
 - Invoice Sales items on either a "Once delivered" or a "Sales and return basis", can be set against the stock record with an override that can be applied on a customer-by-customer basis per stock record.
 - Attaching of documents to an order, where inspHire Web Portal is in user, users and customers (that have a user account created) can attach documents to an order through the Web Portal.
 - Post Code lookup (with an active PostCode anywhere account).
 - advanced searching for Orders, Customers and Items.
 - Configurable rate charging tool.
 - Recording of instances where a sale/rental failed to take place with reasons that can be later reported on.
 - eBusiness module: - ability to display, maintain, process and view historic queries raised through the inspHire Web Portal for the adding or updating of items on orders and starting the process of returning them.
 This is an additional module which may incur additional costs, requires the use of the inspHire Web Portal.
- **Invoicing:** - Allows flexible mass invoice generation, maintenance and reporting supporting;
 - Configurable wizard based invoicing tool to preview and then generate invoices as part of an invoice run, from a single account for one depot/location to all accounts across all depots/locations.
 - Invoice run scheduling.
 - Ability to manually create an invoice and interlink this to an order/job.
 - Easy Credit note creation with the copying from an existing invoice.
 - Credit authorisation process.
 - Ability to manually adjust an invoice, adding item charges, removing them and adjusting existing.
 - Suite of default system reports for invoices and nominal/general ledger transactions.

- Direct transfer of invoices and nominal/general ledger values to an account's solution (where configured and supported) with the use of a posting screen providing a transactions report after.
 - Batch authorisation process to manage transfer of transactions to interlinked accounts solution.
 - Invoice export routines for manual import into an accounts solution where a direct transfer is not desired/possible.
 - Mass emailing of invoices for account customers (requires configuration and access to an e-mail solution).
 - Ability to create invoices at the point of items being returned or defer the invoicing to a later point be this either a further returning of items for that order or in an invoice run.
- **Purchasing:** - This is an additional module which may incur additional costs to gain access to. Allows the creation and maintenance of purchase orders, these can be interlinked to a rental/Sales order or workshop job where desired, supporting;
- Back-to-Back purchase orders directly linked to a rental/sales order or workshop job. Costings are interlinked as are invoiced values for costing reporting.
 - Authorisation limits.
 - Increasing of stock levels and the creation of new unique stock records when receiving goods in from a purchase order. Automatic stock cost updates for those existing items.
 - Automatic creation of Fixed Asset Records and depreciation of these records to bring them in line with where the system has been depreciated up to (requires prior configuration).
 - Process invoices received from a supplier that can be accepted or marked for dispute.
 - For Re-renting of items, multiple invoices can be received allowing date ranges applied against each invoice line.
 - Direct transfer of purchase ledger/Accounts payable invoices and nominal/general ledger values to an account's solution (where configured and supported) with the use of a posting screen providing a transactions report after.
 - Automatic order creation for the increasing and maintaining of stock levels (requires prior configuration).
 - Where a quantity of items has been requested for existing orders/jobs, the receiving of these linked purchase order items can update the interlinked order/job item(s) placing the quantities of stock against these orders/jobs automatically instead of directly into available stock.
 - Preferred suppliers- supplier lists.
 - Purchase proposal lists, mass PO creation across multiple orders.
 - Requisition request – to obtain stock
 - Returning of items / re-rentals.
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- **Stock:** - Supports a Five tier stock structure for asset and stock control supporting;
- Manual stock record creation and maintenance.
 - Sales items, rental items, unique and non-unique items, automatically maintaining current stock levels of each.
 - Non-stock items, where the item does not physically exist but needs to be treated as an item for recording/charging; e.g. a cleaning charge or setup/installation fee.

- Interlinked FAR record creation, maintenance and disposal.
- Mass update of stock records on a group by group or all records basis with a global updates function.
- Mass stock check and automatic correction routine.
- Stock Take function for checking existing stock levels and identifying missing items, can be used in conjunction of the inspHire Mobile touch product.
- Automatic FAR creation and disposal (where configured).
- Mass FAR depreciation routine with each FAR record depreciating independently.
- FAR Additions depreciate as part of the main FAR record.
- Setting of default prices/rates, price list rates and customer specific rates against a record or group of items.
- Configurable price lists and discount matrix that can be applied against a combination of items, groups and customers.
- Multiple depot/location stock quantity records.
- Recording an image of an item that can be shown within the system, displayed on paperwork (report templates may require customisation), shown in inspHire IX and inspHire Web Portal.
- Attaching of documentation/files against a stock record which can be set to appear or print by default when processing an order; in case of a requirement for that item to be supplied with specific documentation.
- Recording of suppliers and default costs on a record-by-record or group basis.
- Automatic recording and updating of financial top-level information against each stock record.
- Recording of order accessories against a record or group which can be set as optional or mandatory and are provided when adding that item or group to an order.
- Recording of Purchase order accessories against a record or group which can be set as optional or mandatory and are provided when adding that item or group to a purchase order.
- Setting of default nominal/general ledger codes against an items group for revenue, cost and stock balance sheets.
- Recording of dimension (Height, Width and Depth) and weight.
- Recording of an insurable value.
- Record and update meter readings against an item, updating a meter reading can be against the stock record, in a meter reading screen, when booking an item from service e/repair, booking an item out from a workshop job or through the insphire Mobile Touch solution.
- Multiple service Periods against an item for various service types, each with different intervals for tracking and updating of when services are required. These can be updated individually, all at once or in grouped “Chunks” as part of service chaining (may require specific configuration for some aspects).
- Support import and export of PAT testing results with the use of the SimplyPATs solution (requires an additional module which is not part of the core product).
- Creation and maintenance of Test results; a customisable list of Tests to be performed with an overall pass or fail result. These can be specified against a Service/Repair, workshop Job and/or as default against a specific service Period. E.g. A service Period could be specified as an MOT required once every 365 Days with a default Test listing each check that needs to be performed.

- Set an item as not being allowed to have a discount and/or suspension of rental charges applied against it.
 - Internal and external memos with a free type box, providing the ability to store additional details for that stock record, the external memos can be set to appear on documentation supplied to customers.
 - Automatic recording of Stock transactions, any movement of stock is recorded by this purchasing, selling, delivering a rented item or returning it.
 - Ability to create manual stock transactions which will update current stock levels for self-correction where required and maintaining of an audit trail for that item.
 - Ability to flag stock items as belonging to a customer and maintaining service period against it; selling of unique items can be set to then belong to the customer it was sold to which you may then want to continue providing services for.
 - Ability to perform a service or repair against an item, updating the service period(s), overall cost and recording the results of a test against.
 - Ability to print test results (default report template provided, depending on the test/service this may want to be customised).
 - Create and maintain Re-rental accounts separately to those in the Purchase ledger/Accounts Payable (Account codes that are not present in the Purchase ledger/Accounts Payable invoices cannot be transferred to the Accounts solution).
 - Multiple screens showing stock, current stock levels, future/planned stock use at an item-by-item or group by group basis.
 - Automatic processing Of CoS (Cost of Sales) Nominal/General Ledger postings where configured and desired (Non-unique Sales items only).
 - Ability to convert an item from one type to another with a dedicated screen and routine. E.g. Convert a non-unique sale item to a unique rental item.
 - Transfer stock from one depot/location to another with a dedicated screen, process and supporting documentation.
 - Ability to quarantine stock stopping an items' use until booked out.
 - Ability to Reinstate FAR record.
 - Can create, maintain and delete Supplier recalls for stock providing warnings and tracking of recall repairs.
- **Logistics & stock Visibility:** - Supplied are a suite of screens and functions to assist with logistics and the visibility of stock, some are additional modules that may incur an additional cost.
- Stock Quick Views: - Listing all stock in a hierarchical structure, current status, stock levels, attributes orders, depot transfers and workshop jobs. Ability to view customer owned equipment.
 - Stock Transactions: - List stock movements for a stock record, all items within a group for one or all depots based on a date range or all dates an optional filtering for types of movements and types of stock records.
 - Deliveries and collections: - Showing all planned deliveries and collections on a week-by-week or day-by-day view per depot; able to further process an order, open an order and print a delivery/collection report and supported documentation for selected orders.
 - Group Availability: Shows stock levels for rental items in a date listed table format for the selected group, date and depot(s) with the ability to print the results.

- Transport booking - Logistic planning tool for displaying planned activities on a day-by-day basis, able to allocate activities to a journey, assign a vehicle, driver and drivers' mate(s); order the sequence of visits, activate a journey and print activity documentation for journeys.
Steps of journeys are supported within inspHire Mobile touch for recording arrival and departure times of visits whilst capturing signatures against activities where supported (this requires the use of the interlinked inspHire Mobile Touch product).
 - Asset tracker: - Ability to interlink to supported third party logistic tracking utilities to report on stock items current location in real-time (depending on frequency of data update from third party). Showing linked assets as pins on a map that can be filtered depending on items current state, shows current interlinked activities for the asset with the ability to drill into these. Able to zoom in/out of the map and move around for a more detailed or summarised view.
Requires the Asset tracker module which may incur additional costs.
 - Item Bookings screen: - Displays the availability and planned usage of unique items in a table format for items within a selected group; allows changing of dates, items and allocated items within the screen for ease of stock planning.
 - Operations screen: - Displays all entities with a delivery or collection charge for the date and depot.
- **Customers:** - Supporting direct interlinking to an account's solution for populating Sales ledger and purchase ledger account details into the inspHire Corporate Edition Product for use therein.
 - Sales ledger accounts: - Display top level account information. Ability to create orders, jobs and invoices against an account. Record custom notes, maintain a list of contacts, specify account specific settings including default invoice run codes, invoice consolidation codes, discounts, membership to a price list, default salesperson, default insurance, email address to send invoices, delivery addresses and custom values.
 - Cash customers: - Ability to create inspHire cash customers linked to a default CASH account in the account's solution allowing the creation and maintenance of these accounts.
 - Customer order view:- List customer accounts (Cash or Sales ledger) with search criteria, displaying current balances (where supported form the accounts solution link), aged balances, aged transactions, existing and historic orders, jobs and invoices with the functionality to drill into these entities or print documentation from them and the ability to export results to excel.
 - Views Customer: - Itemised list of rental order items.
 - Creation and maintenance of delivery addresses that can be generic or customer specific.
 - **inspHire Cash Customers:** - inspHire Cash Customers are intended for use where you need to create an order for a customer that you have not yet a sales ledger account and would not need one, supporting;
 - Creation and maintenance of top-level account information such as name, address, contact info, identity references, capturing an image of the individual, attaching documentation to the account and custom values.

- Creation of orders, jobs and invoices for inspHire cash customers allowing the processing of cash transactions (payments, deposits and refunds) against these entities that are recorded against the cash account maintaining an account balance.
 - Processing of cash transactions against an inspHire Cash account that can be interlinked to an activity.
 - Processing and recording of till transactions.
 - Maintaining a total of monies kept within a till for “cashing up” later.
 - An “End of day routine” for “cashing up” a till, recording the value left in the till, list values within the till for the transactions processed that day and supporting reports listing total values and a list of those cash transactions that have taken place; for use on a location by location basis. End of Day routine can be previewed before comital and re-printed at a later point.
 - Posting of cash transactions to the accounts package cash account (where interlinked and supported).
 - Customisable cash/bank account details for the posting of cash transactions on a location by location basis.
 - Ability to reconcile cash transactions to one another (deposit/payment to an invoice, a refund to a credit note etc...).
 - Cash customer statement report ran through a wizard to provide statements that can be printed.
- **Workshop:** - Workshop module for performing repairs and maintenance on own stock records or customer owned equipment. This is an additional module which may incur additional costs.
- Supports;
- Creation and maintenance of dedicated workshop jobs per item.
 - Service or repair own stock items or customer equipment with or without an existing stock record (allowing repair of customers own adhoc items).
 - Ability to add stock records to a job for use as part of the repair/service.
 - Ability to recharge and invoice customers for services/repairs performed.
 - Recording of top-level information against the job.
 - Interlinking the job to a service period.
 - Interlinking the job to a test result requiring the test to be performed with a test result and certificate.
 - Stepped processes with supporting documentation templates.
 - Dedicated wizard-based invoice run for mass invoicing and completion of workshop jobs.
 - Workshop Templates that can be interlinked to a stock records service period for ease of job creation for regular performed jobs/tasks.
 - BOM: - Build of materials, ability to create new unique stock records from a combination of existing stock records.
 - Ability to create and maintain lists of questions as part of fault resolutions intended to help with customers calling with equipment usage issues and arranging on site servicing/repairs.
 - Fitter booking: – designed to be used in conjunction with fault resolution, ability to schedule, maintain and monitor engineers sent on-site for on-site repairs/services. Can be used in conjunction with the inspHire Mobile Touch solution where in use.

- **Reporting:** - Customisable reports (with the use of Crystal Report Designer); customer amended report templates are not warranted by inspHire.
 - Suite of standard system and stationary reports provided with the system.
 - Reports can be exported to Microsoft Word, Excel, adobe acrobat and emailed.
 - Reports can be scheduled to run on an automated basis and emailed out to intended recipients using customised selection criteria.
 - Dedicated smart view screen for data querying and reporting that can be fully customised. Views can be restricted to specific users/user groups and set to appear at login for a reminder/work list(s).
 - Ability to specify stationary reports default behaviour on a depot-by-depot or user-by-user basis for report being displayed or directly printed, copies printed, any interlinked attached documentation default printer and printer tray (where supported, some printer drivers may not be compatible with one or more of these functions).

- **System settings:** - Top level system settings allowing various areas of the system to be configured including;
 - VAT/Tax Codes: - Creation and maintenance of VAT/Tax codes used throughout the system (code must match the accounts packages VAT/Tax codes where interlinked).
 - Depots: - creation and maintenance of separate individual locations that stock, activities and orders can be recorded against.
 - Data Maps: - ability to create a new database for the creation a new or test system (new database will not be configured or contain data).
 - Multi-currency: - Creation and maintenance of currencies with exchange rates invoicing in a customers' or a base currency.
 - Rate Charges: - Customisable rate engine creation tool for rental charging.
 - Calendars: - ability to create and maintain calendars with codes for use within the system to record which days within a year are/are not chargeable.
 - Timesheets: - Creation and maintenance of timesheet templates used in conjunction with rate charges for recording and charging operated equipment and meter-based rental.
 - Supplementary charges: - Creation and maintenance of Supplementary charges.
 - Credit supplements: - Creation and maintenance of Credit supplements.
 - Payment terms: - Creation and maintenance of Payment terms.
 - Reasons: - Creation and maintenance of Reason codes used throughout the system.
 - Supports multiple parameter sets, where each can maintain its own set of stock, activities and accounts link. Multiple parameter sets may incur additional charges.
 - Supports multiple regions and countries, allowing locations be assigned to a combination of these.

- **Monthly routines:** - A suite of routines to mass process invoices, data and data updates.
 - Invoice run: - Ability to create multiple invoices running a routine through a wizard-based system for your daily/weekly/monthly or other invoicing needs for existing and since complete rental and sales orders. Built in three step check system to ensure invoicing is supported with features such as mass creation and with ability to preview and review prior to creation. Multiple report template options for displaying and showing results.

- Stock Month End routine: - Update to all stock records financial information for that month whilst processing monthly FAR depreciation for interlinked FAR records creating the nominal/general ledger postings required for sending to an interlinked accounts package (where present and supported). With supported report templates.
 - Accounts package posting routines: - Posting screens for the Sales/Receivable, Purchase/Payable and Nominal/General ledgers. Each screen can be filtered per location, list all transactions, using batches of pre-approved transactions. Sending transactions directly to an interlinked Accounts solution or choice of exportable file formats.
 - Electronic invoicing: - Process invoices directly to a supported interlinked third-party electronic invoicing system for ease of automatic payments. (requires an additional module which is not part of the core product).
 - Emailing invoices: - Where configured and interlinked to an email account, simple mass emailing of invoices or re-sending of invoices via email with a configurable subject line and message.
- **System Tools:** - Suite of tools to ease use and maintenance of the inspHire Office Product including;
- Data Maintenance: - Ability to rebuild database tables and system stored procedures ensuring that these are as system standard with a health check for locating database indexes with high data fragmentation; rebuilding of tables also rebuilds database indexes which can improve performance on large databases where this has not taken place in some time. Ability to view current database records with a lock in place and free these if necessary.
 - Refresh lookup: - Perform a live check and update of Sales/Receivable, Purchase/Payable and Nominal/General ledgers from an interlinked accounts package into the inspHire data.
 - Stock check and fix routine: - performs checks against stock records within the selected group for inconsistencies, providing the functionality to correct any issues identified that can be done so automatically. Listing results which can be sent to a report.
 - Scan to PDF: - Dedicated routine to automatically check a network folder for files processed through the Scan To PDF solution and automatically attached scanned files to entities within the inspHire system (signed documents to an order; test certificates to a job/stock item). (requires an additional module which is not part of the core product).
 - Push messaging: - Dedicated screen to display, create and maintain messages pushed to inspHire Mobile Touch users. Requires the inspHire Mobile Touch Solution.
 - GDPR: - Dedicated GDPR screen for searching on provided individual data, reporting results of what is stored where, the ability to update, obfuscate or remove entries as required with supported audit trails.
 - E-Sign: - Additional module that may incur additional costs; interlinks to supported digital signature capturing solutions (which would each require an appropriate licence) to capture signature on stationary reports and in the instance of quotes automatically further progress the order, archiving a copy of the signed document adding notes to the order as part of an audit trail.

- Profiles: - Profiles allows the creation of custom information that can be stored against most top-level data entries, including but not limited to Orders, Purchase orders, stock, Workshop jobs, invoices, depot transfers, FAR.
- Search Preferences: - ability to customise the searching criteria for multiple search options throughout the system.
- Costing: - Ability to record costings that allow reporting on costs, revenue and profit margins broken down into cost groups on an order by order basis for reporting.
 HR: - Additional module allowing the recording and maintenance of Human resource details. Requires the HR module which may incur additional costs.
- Vertex integration: - Allows Populating of Tax/Vat codes from Vertex. Requires the Vertex module which may incur additional costs and an active Vertex Account.

Dashboards

Web service-based web page for top level analytics of the interlinked Core product (inspHire Corporate or inspHire Office). Included with either of the Core Products inspHire Corporate or inspHire Office edition.

- **Access:** - Accessible through the interlinked Core product (inspHire Corporate or inspHire Office) and an internal web site. Access to Data analytical Pods can be restricted by inspHire user groups.
- **Pods:** - Data Pods can be customised to show specific sets of data (items only for one depot, only sales items revenue) and have their title customised.
- **Page layout:** - The page layout can be customised on a user-by-user basis to show any/all pods as desired in a grid format.

CADE (Customer Accounts Database Manager)

Light weight windows application using a T-SQL backend database structure, intended for use in place of an accounts solution when one is not present, or it is desired to not link the inspHire Core Product directly with an existing account solution. Included with either of the Core Products inspHire Corporate or inspHire Office edition.

- **Accounts maintenance:** - Allows the creation and maintenance of Sales ledger and Purchase ledger accounts to the extent of an account code, account name, address and contact details.
- **Nominal/General Ledger:** - Allows the creation and maintenance of Nominal/General ledger codes to the extent of a code and description.

InspHire IX

Web service-based web pages to provide top level information on Stock and Customers nearby. Included with either of the Core Products inspHire Corporate or inspHire Office edition.

- **Stock:** - Allows the searching on and display of top-level information on existing stock record.

- **Customers:** - Allows the searching of customers within a specified radius to your current location showing these with “pins” on a map (UK addresses only). Can display top level information on customers selected. Uses the postcode against the customer’s account to identify the customers location.

Platform installer

One-click application for an all in one solution to upgrade the Core inspHire product (inspHire Corporate or inspHire Office). Requires an active Support/Customer Care Plus agreement to be in place and an active account on the inspHire customer Portal.

Upgrade: - Provides a list of products latest versions for download and installation. Built in database and report template backup utility as part of a wizard-based process. Built in checks for enough database and disk storage, versions of required plug ins and systems memory