

# Entering Equipment and Insurance details in 360Pro

Below are instructions on how to:

Enter your Equipment and Rates Page 1

Enter your Equipment Accessory(ies) (i.e. Attachments) Page 2

Enter your Equipment Insurance details Page 2

Enter your Company Insurance details Page 3

If at any stage you require technical assistance, please email support@simplylogical.net

#### **Entering Equipment and Rate Details:**

- 1. When logged into 360Pro, click on the **Equipment** tab at the top (the last tab)
- 2. Click Offer Equipment to enter the details for your first piece of equipment
- 3. Select an equipment item from the **Equipment Item** drop down options
- 4. Please enter AS MUCH detail as possible for the equipment
- 5. ALL Rates are GST EXCLUSIVE and can allow for two decimal places (do not enter a \$ symbol)
- 6. If you want to enter Accessory(ies) (i.e. Attachments) for your equipment item see Entering

  Accessory (ies) (Attachments) for your equipment item instructions on page 2
- 7. After you have entered the information about your piece of equipment, click Save
  - a. If you want to enter Insurance details for this equipment item see Entering
    insurance details for your equipment item instructions on page 2
  - b. If you do not want to enter Insurance details for this equipment item either click Save again to return to the Equipment list view OR if you are intending to submit details and rates for multiple pieces of equipment, click Save and Offer More Equipment
- **8.** After entering your Insurance details, click **Save** again to return to the Equipment list OR if you are intending to submit details and rates for multiple pieces of equipment, click **Save** and **Offer More Equipment**
- **9.** You can edit the equipment details by clicking on the Make/Model name listed on the Equipment tab
- **10.** You can offer more equipment rates at any time before the job closes via the Offer Equipment button (step 2 above)
- ❖ You can enter equipment details and rates for as many equipment items as you want

- ❖ You can enter multiple equipment details and rates for the same equipment item type Entering Accessory (ies) (Attachments) for your Equipment item:
  - If you would like to add equipment accessories check the box Include Accessories? and then click on the Add New Accessory button
  - **2.** Either type in the name of the accessory or select from one of the options in the Select Accessory drop down
  - **3.** Enter rate(s) if applicable
  - 4. Click Add
  - 5. Accessories entered will be listed under the Accessories tab

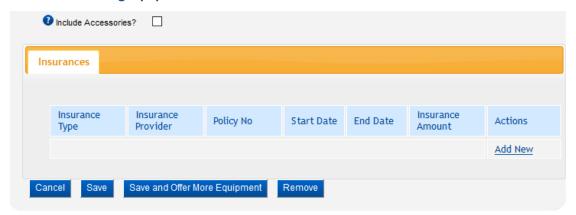


- **6.** You can multiple accessories for the each equipment item
- **7.** You cannot edit Accessories, you'll have to click Remove and enter the correct details (as per steps 1-4 above)

#### **Entering insurance details for your Equipment item:**

Please note: to enter a Company insurance item, see **Entering Company insurance details** on page 3 of this Guide

After entering the equipment details and rates (and Accessories if applicable), click Save –
this will populate an Insurance tab at the bottom of the Equipment page (as per step 7
within the Entering Equipment and Rate Details instructions



- 2. Click Add New
- 3. Select the Insurance Type from the drop down
- 4. Enter the Insurance Provider Name, Policy Number, Start and Expiry Date, and Coverage Amount (if applicable)
- **5.** Click **Save** (clicking Save will enable you to attach a file to the insurance item)
  - a. After clicking Save, you'll be able to attach file(s) via the **Add File** button and then click **Save** again
  - b. If you are not attaching a document, click Close
- 6. You can multiple insurance items for the each equipment item by clicking Add New
- **7.** You can edit the insurance items details by clicking Edit on the right hand side beside the insurance details
- 8. After you have entered the information about your piece of equipment, you can click 'Save'
- **9.** If you are intending to submit details and rates for multiple pieces of equipment, click 'Save and Offer More Equipment'

## Entering your Company Insurance details 360Pro

Below are instructions on how to enter your Company insurance details (to enter insurance details for a specific equipment item, see **Entering insurance details for your equipment item** above) **Entering Company insurance details:** 

- 1. Click on the **Equipment** tab at the top (the last tab)
- 2. Click Company Insurances to enter insurance details

### Plant & Equipment Hire 170728

Your response is not yet complete. To show progress, please mouse over the traffic light or click on the "Review" button to reveal questions you have yet to respond to. Complete all questions to expose the "Submit" button.



- 3. Click on Add New
- 4. Select the Insurance Type from the drop down

- 5. Enter the Insurance Provider, Policy Number, Start and Expiry Date, and Coverage Amount (if applicable)
- **6.** Click **Save** (clicking Save will enable you to attach a file to the insurance item)
  - a. After clicking Save, you'll be able to attach file(s) via the **Add File** button and then click **Save** again
  - b. If you are not attaching a file, click Close
- 7. You can add multiple Company insurance items by clicking Add New
- **8.** You can edit/delete the insurance items details by clicking **Edit** or **Delete** on the right hand side beside the insurance details
- 9. After entering all Company insurances, click Close
- **10.** You can edit/delete the insurance items details by clicking **Company Insurances** button again and then **Edit** or **Delete** on the right hand side beside the insurance details

If at any stage you require technical assistance, please email <a href="mailto:support@simplylogical.net">support@simplylogical.net</a>