

The Manual

Forward

Welcome to eScaff, firstly, this document is a complete tutorial on how to use the software and how to get the most from it for your business. The software itself is simple to use and you can hand this manual to any member of staff and they will quickly begin to understand the logic of how it works.

We also offer FREE Training so contact us if you need this on 07525 648263

Once you integrate eScaff into your Company will be totally organised with jobs, dates, health and safety and the everything is accessible to all office staff so that you can walk into your office or view remotely from anywhere and see exactly where the business is on any given day.

You have the power to add jobs remotely or in the office, inspections can be done on site and update the office instantly.

The system is flexible and can be totally digital and you can run it from a PC, Mac, Tablet, or iPhone/Andriod phones. Or you can also print everything out if you like to keep the paperwork.

You also have a complete vehicle management system that records everything that you need to run a successful scaffolding business and vehicles

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FAQ's

Lets start by looking at how you can get eScaff and take advantage of the 30 days free offer that we are currently running.

1. How to get eScaff



Click here if you are a new to eScaff and it will direct you to the signup screen.

Here you will be asked for your full name, your email and your desired password, this password will be emailed to you should you forget it.

You will be asked to enter your payment details, once this is done you will have instant access to eScaff but you will not be charged for 30 days, this will give you plenty of time to learn And start to integrate it into your office with ease.

The next time you go to eScaff click the existing customer button and enter the email and password that you initially set up.

Aiready n	nave an account? Sign in?
	OR
Fullname	
Email	
Password	
Confirm Passy	word
Agree to the	terms and conditions.Click here
	Submit
	Cancel

2. Lets set your company up

Firstly we recommend having your company logo already prepared on your desktop, in fact if you create a folder on the desktop and call it eScaff Documents you will know exactly where to find anything that you upload to eScaff. (10. Health and Safety)

Welcome to eScaff lets get started by setting up your compans Customer / Company Name Demo Scaffolding	ny, upload your doc	ruments and set up your	staff		
		Address			
Demo Scaffolding					
		Little Lidgey Laity Mod	or Ponsanooth		
Telephone					
07525 648263		Truro			
Email		Postcode			
jeremy@escaff.uk		TR3 7HR	Upload your company Logo	Select	Subm
	Upload	led Documents			
Unload vour company documents	File Na	ime			
i.e Insurance, public, Liability , (not health & safety)		oyers Liability.docx		View Delete	
Add your key members of staff that will be allocated to jobs, so you	H&S	Policy.docx		View Delete	
can keep track of who is working on what job.					
	07525 648263 Email jeremy@escaff.uk Upload your company documents i.e Insurance, public, Liability , (not health & safety) Add key members of staff Add your key members of staff that will be allocated to jobs, so you	07525 648263 Email jeremy@escaff.uk Upload your company documents i.e Insurance, public, Liability , (not health & safety) Add key members of staff Add your key members of staff that will be allocated to jobs, so you can keep track of who is working on what job. Public	07525 648263 Email Postcode jeremy@escaff.uk TR3 7HR Uploaded Documents i.e Insurance, public, Liability , (not health & safety) Add key members of staff Add your key members of staff that will be allocated to jobs, so you can keep track of who is working on what job. Truro Postcode TR3 7HR Uploaded Documents File Name Employers Liability.docx H&S Policy.docx	Truro Email jeremy@escaff.uk Postcode TR3 7HR Upload your company Logo Uploaded Documents File Name Employers Liability, (not health & safety) Add key members of staff Add your key members of staff that will be allocated to jobs, so you can keep track of who is working on what job. Truro Postcode TR3 7HR Upload your company Logo Uploaded Documents File Name Employers Liability.docx H&S Policy.docx Public Liability.docx	Truro Email postcode TR3 7HR Upload your company Logo Select Uploaded Documents i.e Insurance, public, Liability, (not health & safety) Add key members of staff Add your key members of staff that will be allocated to jobs, so you can keep track of who is working on what job. Truro Postcode TR3 7HR Upload your company Logo Select Uploaded Documents File Name Employers Liability.docx H&S Policy.docx Public Liability.docx

Follow the numbers on this screen, so 1 is enter all of your company details as these are used throughout the software to keep your customers in touch with you.

Next 2 on the list is to upload your company documents, these are your Employers Liability, Health and Safety Policy and Public Liability. These are currently required by law and your customers will expect to see these. They are not compulsory to use eScaff, but it is wise to have these in place within your company. Once uploaded these are visible to any new clients, so you only do this once.

Finally 3 upload your company logo - this is jpg or png format and we can help you with this if you are experiencing and issues.

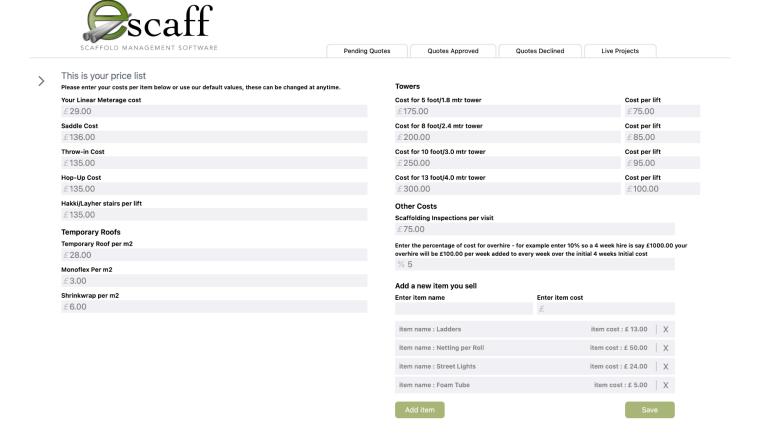
So you have now setup your login and set your company up with the address details and email, uploaded your logo and any company documents you want to share with your customers.

The next part of setting eScaff up is to fine tune your prices. The price list is used when you create quotations so lets dive in and show you this next process.

3. The Price list

The price list consists of most everyday items you Hire, but you have the facility to add any item that you want and hire out or sell.

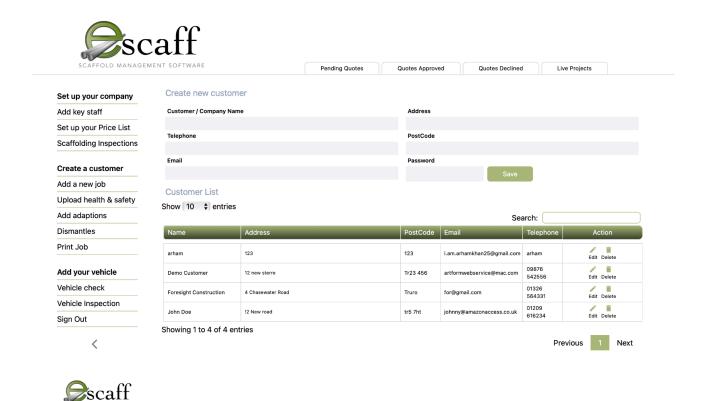
The prices you see are default prices set up by us so you may need to alter these to suit your own business. Simply change the value and click the Save button. Go through this until you are happy with the values of each item, you can always go back to the priceless and alter it at anytime.



Any items not listed that you want to add to your estimate can simple be added, name them for example, Shute and enter the value of one shute, say £20.00 when you build your estimate you can select this item and enter the number of chutes you need for that job. eScaff does the calculations for VAT, overhire etc.

Once you are happy with your price list click the Save Button and lets move on to adding customers.

4. Adding a new customer/s

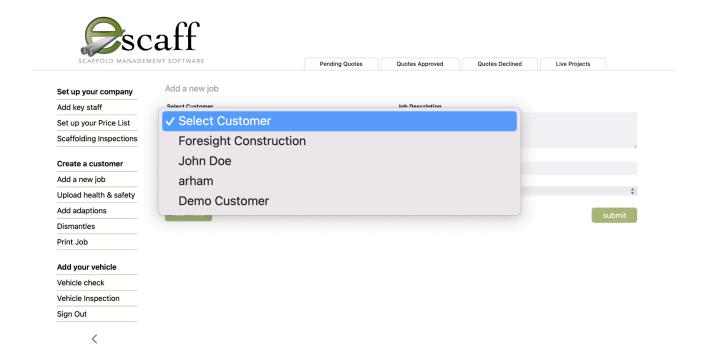


Select Create a New Customer from the menu and simply add their details, you will notice that not only do you add their address but also their email and you add a password, this is important and once you create a customer they receive these login details to access their account, where they can look at your quotations for any jobs you have with them, the customer can approve these quotations and then they are sent back to your live projects area.

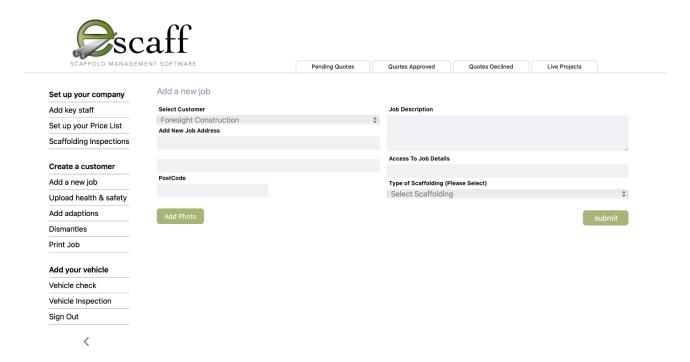
We have built eScaff so that you can add all of your customers at once or as and when you need to. Its a good exercise to make sure you have unto date details of your clients as they will be emailed all details including handovers, inspections and RAMS.

We have noticed that eScaff emails may appear in your customers junk folder, so we recommend that an email or call to tell them you have sent them login details is good practice. This is your clients email program and not eScaff.

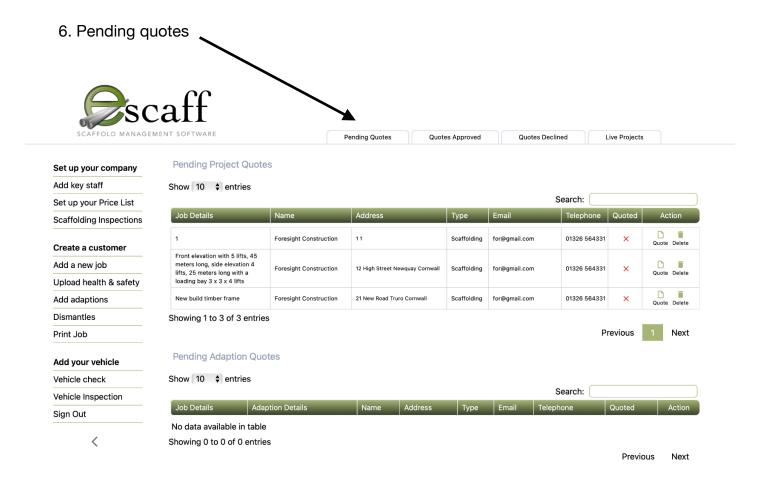
5. Adding a job to a customer



Firstly select one of your customers from the drop down menu, then we can add a job to that customer.



Fill out all of the details like the address and postcode, this is important for your scaffolders to find the job. Also IMPORTANT is to select the type of scaffolding, is it a temporary roof or a scaffolding job. Finally add any photos to the job by clicking the add photos button. You can have these ready on your desktop. The job description is important as these details are what your scaffolders work from so be specific and it will help them know what has to be done and it will help you build your quotation.

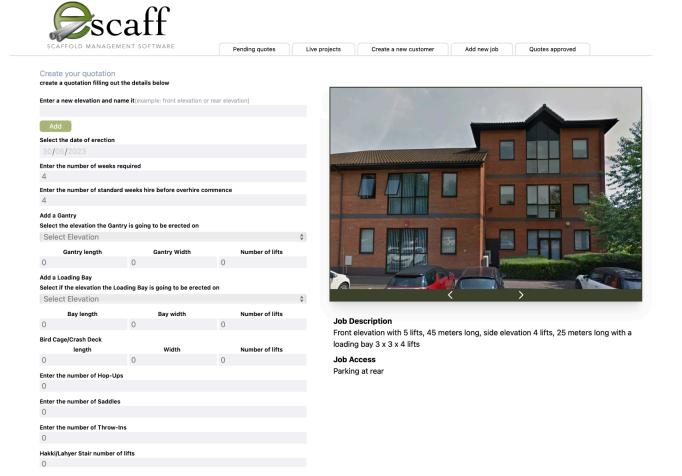


Pending quotes are jobs that you have added to a customer on the previous page, you will see a list of jobs here and there is an Action header, in the action area you can delete a job, or quote a job, but you can also see that jobs that have not been quoted have a red cross beside them.

The three jobs in the above illustration have not been quoted for as you can see that they have a red cross, jobs that have been quoted for will display a green tick mark.

Now that we have added a customer, added a job to that customer lets go ahead and click on the quote icon in the action area.

7. Quoting a job.

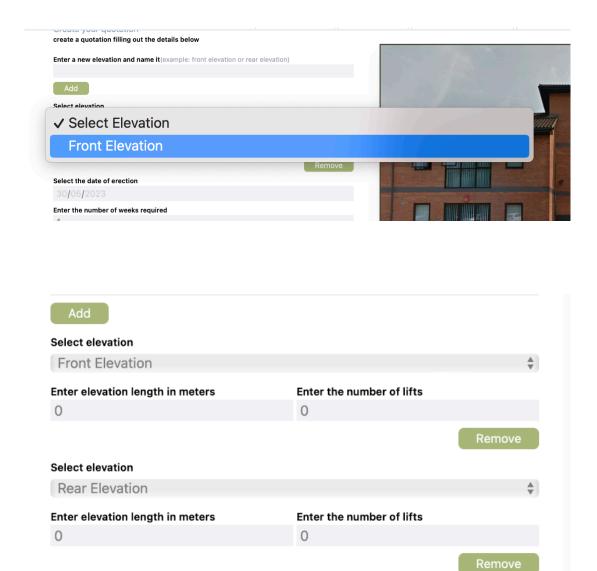


As you can see from the above illustration that the images you have already loaded to the customers job appear inside of the estimator making it easy reference whilst you build your quote. You can click through the images above for each elevation photo.

You will also notice that the detailed description that you entered in the Adding a new job to a customer section appears here below the photo, once you gain experience with eScaff you will learn to be specific with the details as this detail is what your scaffolders work from.

Work your way down the quotation form but firstly adding the elevations. Click on the add button and name your elevation I.e. Front Elevation, then add any other elevations.

As you work your way through the quote you must select the elevation you have added to assign scaffolding to that elevation.



Here in this example we have added a front elevation and a rear elevation. This way you can build up a complete quotation of any building of any shape by naming the sections appropriately. Add the length of each elevation and how many lifts.

Select the date of erection

Select the date of erection from the drop down and the number of weeks the customer requires. We have added another option for overhire here which needs explaining, if your customer want a job for say 20 weeks you can negotiate the number of weeks they have it before overhire kicks in, the estimator software will do all of the calculations for you.

If you want to add items like a gantry or a loading bay you must select the elevation these will be going on and of course their dimensions.

Work your way down the form adding any towers required, if any. until you reach the

bottom, where you can select to have scaffolding inspections, if you select this eScaff tracks the date and notifies you wen the next inspection is due.

Enter the street license details, and select the VAT button if VAT will be due, and the amount that VAT is charged at, currently 20%

Weekly Scaffolding Inspections		
Enter the Street license Cost		
0		
Customer is VAT Registered		
0		
External Design Cost		
0		
Additional items		
Add		
Total cost		
£0		
Calculate Submit		

Hit the calculate button and check the value generated looks correct as its easy to enter a number incorrectly, once you are happy with this click submit.

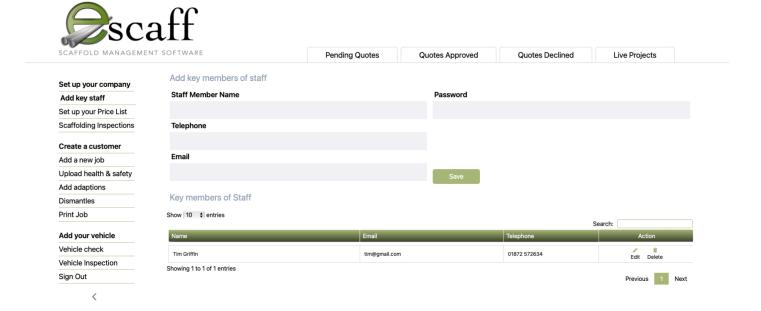
Hey presto, well done, first job quoted.

Your quotation has been sent directly to your client, for approval.

They have already been sent their login details and probably on your first job with eScaff give them a call and ask them to check they have received the quote as it may have ended up in their junk folder, once they adjust their email program to except eScaff emails then it won't happen again. Your customer logs in and checks your quotation, once they approve your quote it then appears on your Live Projects area shown below.



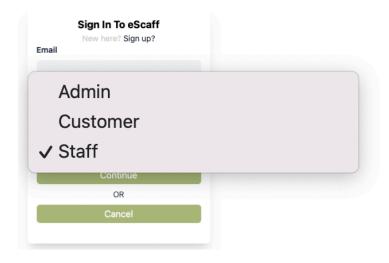
8. Adding key staff



What are key Staff - we have added this feature to eScaff so that you can assign a member of staff to be able to login to the system and back at the office you can assign jobs to any of your key staff - this means that if they are on a mobile they can login and see all of the jobs that are assigned to him and his team. This detail comes from the Admin side when they enter the photos and descriptions, so being specific at the time of adding a job is important as these details are pushed to you key staffs phones.

Alternatively you can print the job out from the menu to a4 sheets for them to take to site. The form is very much like adding a new customer that you have already completed, you will add there email and password - this you can give them whenever you wish as it is stored in the table above. Once the key staff login they can let the office know that they have started and completed the job assigned by clicking a button on their phone, this is really useful as it keeps you Live Projects board up to date.

Alternatively you can mark the job as completed yourself from the Live Projects board.

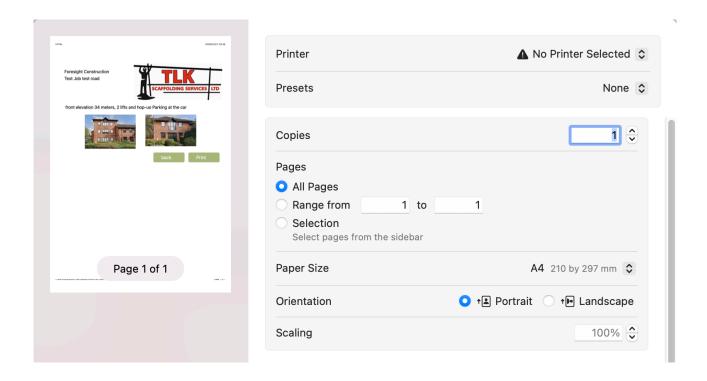


A key member of your staff has logged into their phone and can view all of the details you have entered about the job, this job has the description of where it is located, the elevation details and the list of the equipment sizes that you need to take to site.



Alternatively you can print the details out and provide your scaffolders with a4 sheets.

9. Print out any job

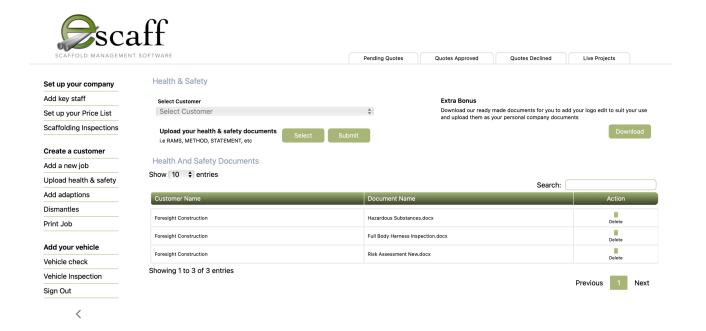


Click on the print job menu and it will display all of you active jobs, select the job you want and click on the print menu you normally use on your PC, the software will format the details for A4 sheets

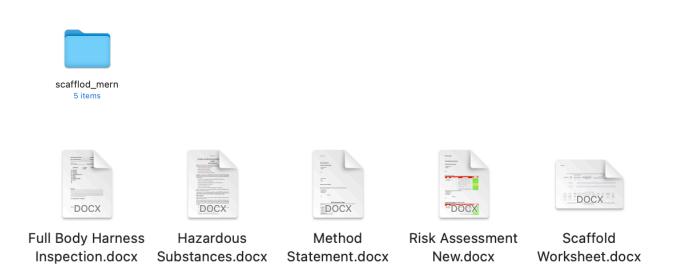
10. Health and Safety

eScaff deals with health and safety in a unique manner and you can push all of the details to your clients area easily, everything is organised, inspections and handovers are also pushed to the client side, so that they have everything they need and you dont have to worry about it.

Lets start by clicking on the Upload Health and Safety Menu, you are presented with the illustration below



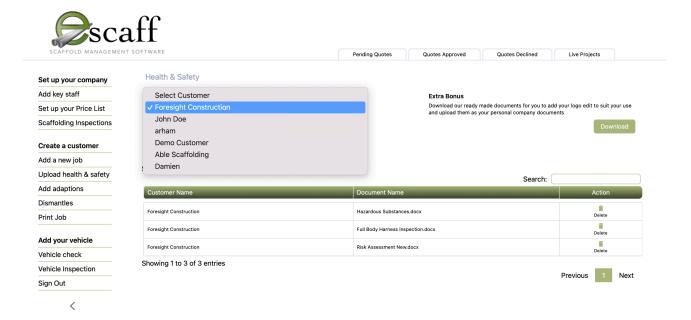
You will notice the Extra Bonus button, this will download our bonus documents, these are ready made documents you can use for most of your health and safety on site, just add your logo or print them out and attach to the printouts for your scaffolders to take to site, once signed.



So now that you have downloaded these documents you can just save them to a folder on your desktop and upload them to any client you have on the system.

Lets add these to a client on the system.

As you will see on the previous page illustration you select the customer from the dropdown menu and then select which documents you want the customer to have and simply click on the Submit button.

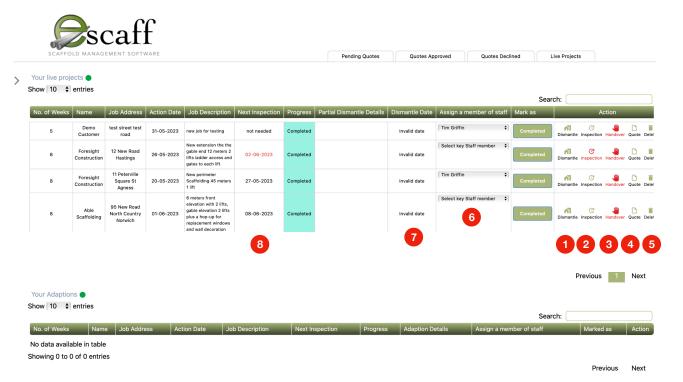


Here ive selected Foresight Construction and uploaded the Hazardous Substances, Full Body Harness Inspection and the Risk Assessment documents. Simply click on Submit button.

Once the client logs into their account they will see all of your company documents and the Health and Safety documents you have just uploaded, this works for Inspections and handovers also.



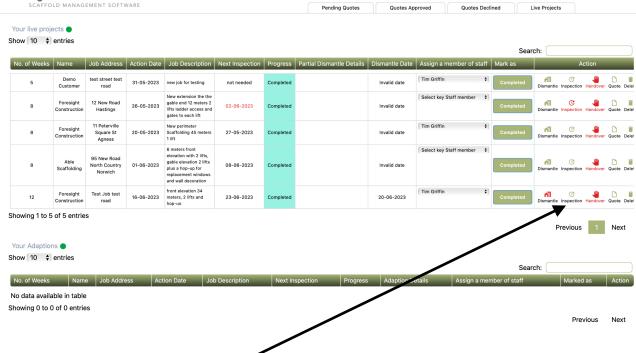
11. The Live Projects area



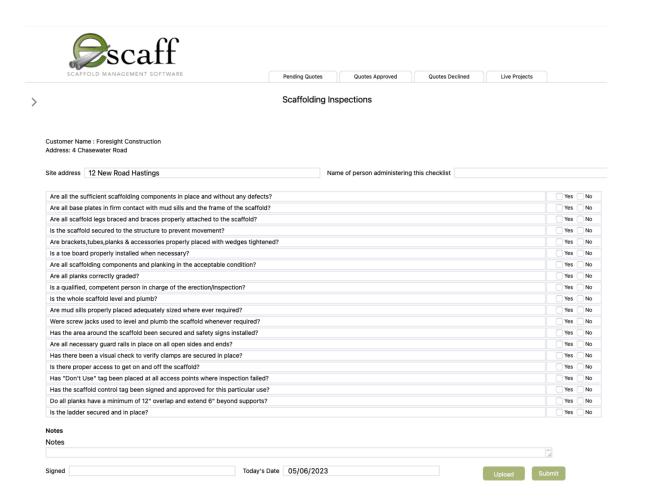
- 1 Notifies you when a dismantle is due (turns red when its due)
- 2 Notifies you when an inspection is due (turns red when its due)
- 3 Notifies you when a Handover is due (turns red when its due)
- Access the Quotation
- Delete the job
- Assign a Key Member of staff to a job
- Dismantle date if any (if no dismantles then it will display invalid date)
- 8 Next Inspection date (will turn red when the date is reached)

12. Scaffolding Inspections





You access your scaffolding inspection from your Live Projects Board, eScaff shows your inspections due in red, or you can just click on any one of them and print them out.



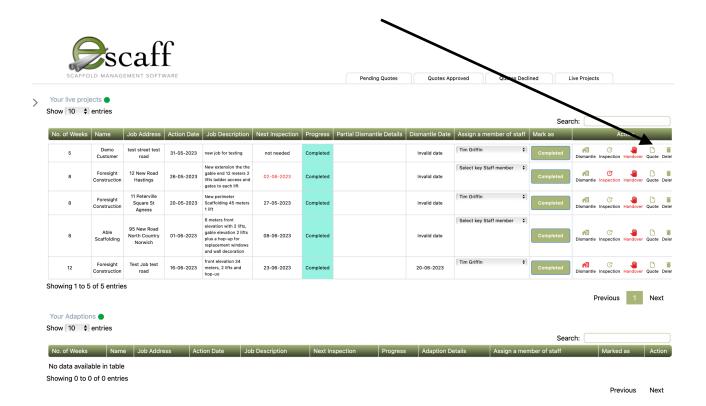
You can access your inspection form in 2 ways - via the office, if you want to hand your inspector all of your inspections that you need to be completed or you can access them on site to do live checks with your phone.

Once you select an inspection from the live projects board you will notice that the address is pre-filled in saving you time. You can upload a picture of the scaffolding tag once you have completed you checks.

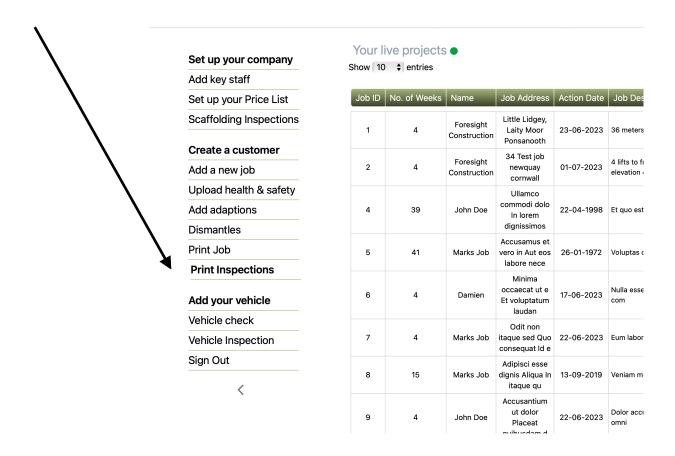
When you have completed your checks just click submit and this will be stored on your clients login area so they can access all of the inspections that you have done. Making it simple for them to see the checks you have done, also in adverse weather just select any job that needs an additional check and fill out the details.

eScaff offers many ways to do the same job and you will find your way of doing things, but in every case the details are stored and can be retrieved in the future whenever you need it, with a full search facility.

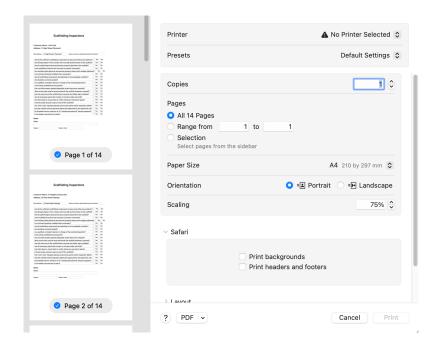
Handovers are dealt with the same as Inspections except you are more likely to do your hangovers from the office and they will be sent directly to your client - but in either case you can print them out.



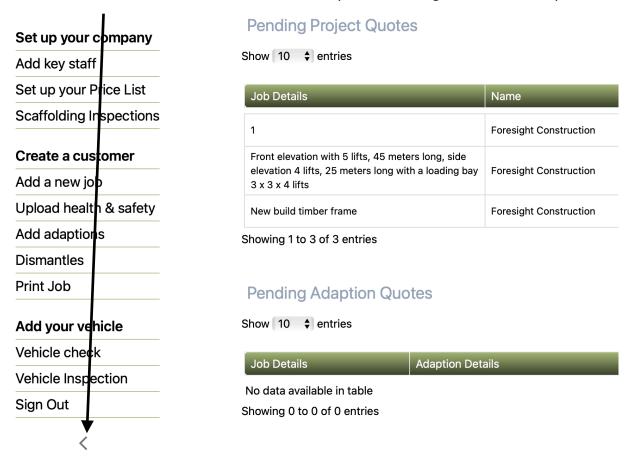
You can now print out all of your scaffold inspections for all of your live jobs-once you click on Print Inspections it will show all of the inspections to be printed, you will need to adjust your printer options so that these fit on the pages accurately as each printer has different page set-up options that our software can not control - so a couple of test needed here.



The print dialogue on a Mac computer prints the inspections at 75% perfectly.

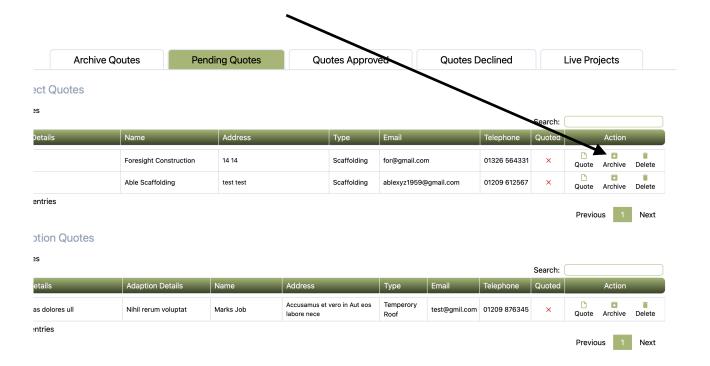


- Q. We have completed a quote for a customer and they have phoned and changed the job so I need to requite it How do I do this?
- A. If you go to the Live Projects and the Action panel, click on the quote icon, deleted the elevations and re-enter them and make you changes Only the elevations have to be physically removed, any other items can be overtyped. Re submit your quotation and this will again be sent to the client for approval.
- Q. How to hide the side menu?
- A. Click on the < icon and the side menu will collapse, click it again and it will expand



- Q. How do I get to the Health and Safety documents?
- A. Click on the Upload Health & Safety in the Side Menu and where it says Extra Bonus, click the download button, this will download new documents for you to fill in and give to your scaffolders to take to site. You also have the facility to upload these direct to your customer, as these documents are site specific it is difficult to cover every project type, so we suggest downloading them, adding your logo and filling them out and then upload them to your client.

- Q. I want to archive some of my pending quotes in case the customer decides later that they want to go ahead with the job after all.
- A. Go to the pending quotes and click on the Archive icon in the Action Pallet, this will move it to the Archive Quotes Tab for future reference.



Please send us an email of any Questions you may have and we can include them in the list for other users to benefit - send to admin@email.uk