

Your setup guide

8 steps. Each one saves you time. We guide you through every one.

SET UP YOUR SHOP

1 **Logo and letterheads**

Look like the pro shop you are, on every page.

- ☐ Your logo on every quote, invoice and letterhead.
- ☐ Your shop colour on everything. Already set.
- ☐ Customers trust a sharp letterhead. You win more jobs.

Portal → Settings. Then Prints for your QR posters.

Got pre-printed letterheads? Even better.

You keep them. We print right onto them.

1. You keep using the paper you paid for.
2. Meckly's header steps aside for yours.
3. Nothing prints over your logo.
4. You see a test page before the real one.

Workshop app → Settings → Print layout.

2 **Services**

Quotes in seconds, priced your way.

- ☐ You add services in click, click, click.
- ☐ Your names. Your prices.
- ☐ Your hourly rate goes on every job for you.
- ☐ Shop consumables added to each service for you.
- ☐ Enviro levy added for you. Never forgotten.

Workshop app → Services.

3 **Hours and staff**

Bookings fit your day. Each person sees only what they need.

- ☐ Bookings only land in your opening hours.
- ☐ Your whole team in one place.
- ☐ You pick a role for each. They see only their part.
- ☐ You turn staff on or off any time.
- ☐ Hours tracked when staff clock in and out.
- ☐ Leave requests come straight to you.

Workshop app → Staff → Roster and Employees.



You're good to go.

You can book jobs today. The rest comes as you go.

LEARN YOUR DAY

4



Verify with Stripe **15 days**

You take online card payments. Money goes to your bank.

- ☐ Customers pay by card from their phone.
- ☐ You get paid faster.
- ☐ Done in about 5 minutes.
- ☐ We text you the moment you are switched on.

Portal → Dashboard → the blue bar.

5



Book a job and take the keys

Every car checked in. Nothing lost.

- ☐ You book a job from your phone.
- ☐ Customer and car saved for next time.
- ☐ Your mechanics see the job on their board.
- ☐ Keys in, job tracked. No lost paper tickets.

Workshop app → New job.

6



End of day

Know how your day went in one minute.

- ☐ You see every job done today.
- ☐ You see the money that came in.
- ☐ GST collected, ready for your BAS.

Workshop app → Reports → Daily snapshot.

7



Stock

The right part on the shelf when you need it.

- ☐ You know what is on the shelf.
- ☐ You order from all your suppliers in one place.
- ☐ Counts update when parts arrive.
- ☐ Stock take done fast. Your books stay right.

Workshop app → Stock.

8



Overdue service reminders

Customers come back without you chasing.

- ☐ Meckly texts customers when a service is due.
- ☐ You see who is overdue.
- ☐ More cars back in your bays.

Workshop app → Marketing report.

Stuck? Ask us.

We guide you through every step. We answer every question.

meckly.com/help