RIDESUM

Pocket Office Guide

Welcome to the guide for Ridesum Pocket Office!

The guide covers all features available in Ridesum Pocket Office.
It will go through everything you need to know in order to get started with your mobile office - and work more efficiently!

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5. *Customer information & feedback*

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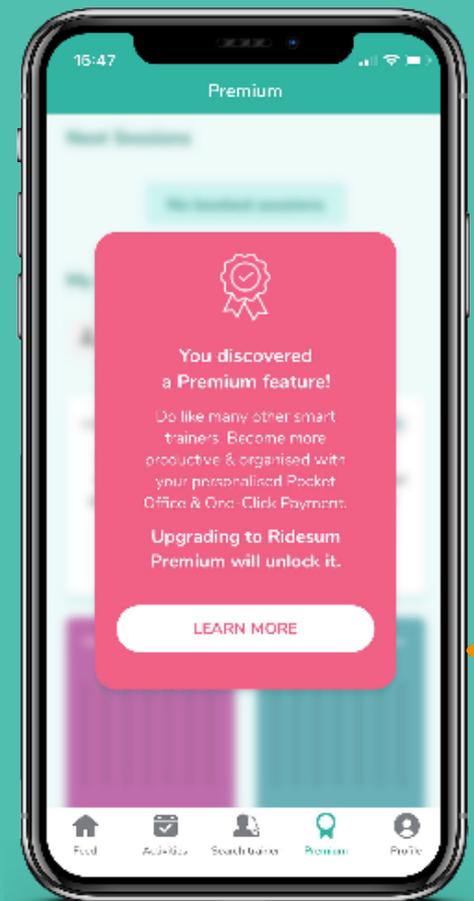
1. Go to "Premium" in the bottom menu

2. Click on "Read more"

3. Choose which packet you would like to upgrade to

- **BASIC**
  Suits you that invoice less than 10 trainings each month.
  Read more about Basic here
 Basic packet is free up until the sixth transaction!

- **PRO**
  Suits you that invoice more than 10 trainings each month.
 Read more about Pro here
  Pro-packet is free the first month, you have to fill in all your information but you don't pay until month two.
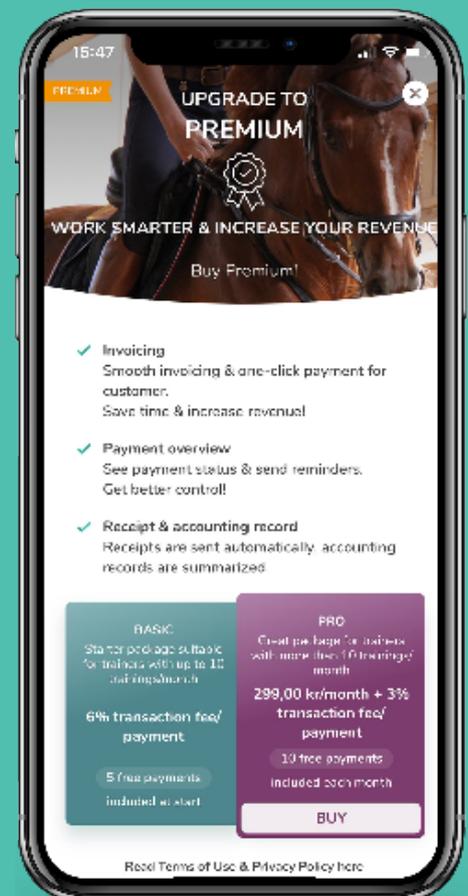
4. Click on the packet you want to choose
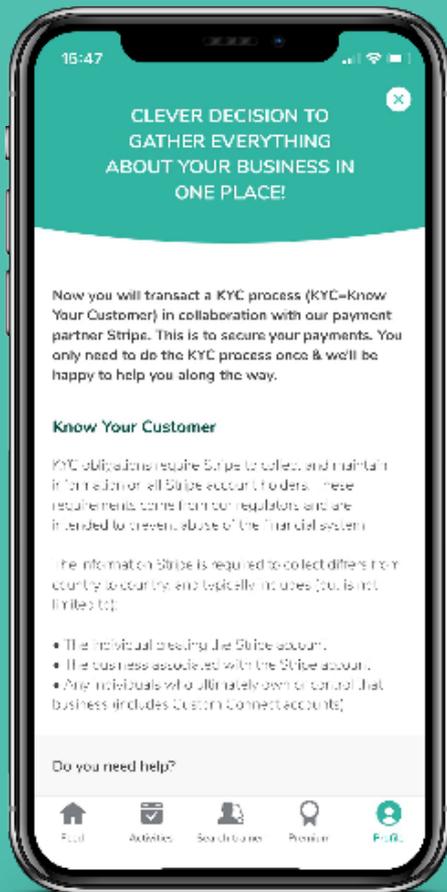
To get started with your payments, you have to complete a KYC = Know your customer.
It is required by law to prevent money laundering

1. KYC-process pops up automatically when you have choosen your packet
2. Read through the information about KYC and our payment partner Stripe

Stripe is the biggest global distributor of digital payment solutions. It is used by Uber, Volvo and many more.
Read more about Stripe HERE

3. When you have read through, click on "Start KYC"

4. You will now be transferred to our payment partner Stripe so that you can create a Stripe-account

5. As soon as you have saved any information in Stripe (ex. company name), we are able to go in and help you fill in the remaining information via Stripe's dashboard
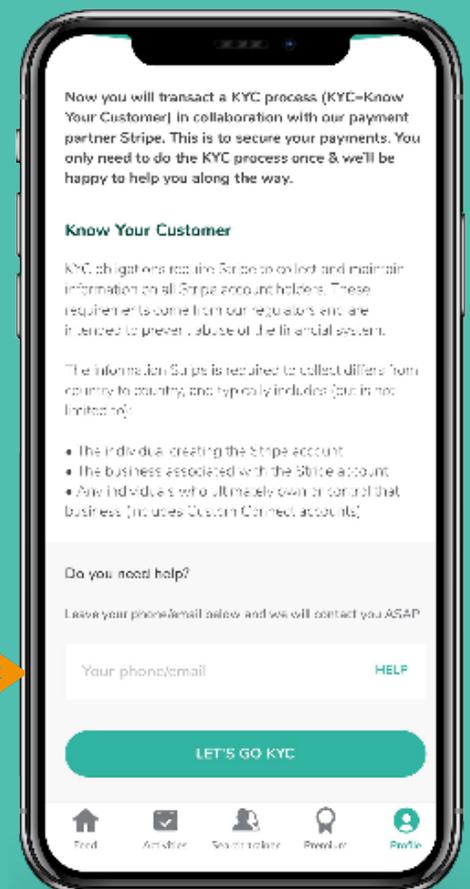
OBS!
In need of help? Fill in your phone number or e-mail in the bottom field and customer support will get back to you

If you have started KYC but didn't finish and left it, you can get back to Stripe through these steps:

1. Go to "Premium" in the bottom menu

2. Click on the square named "Payments"
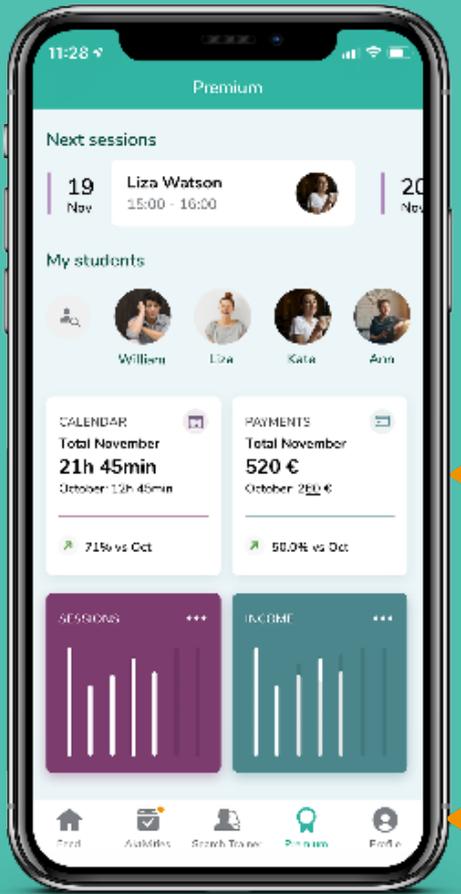
3. Click on "Go to Stripe"

4. You will now be transferred to Stripe and can finish setting up your Stripe account
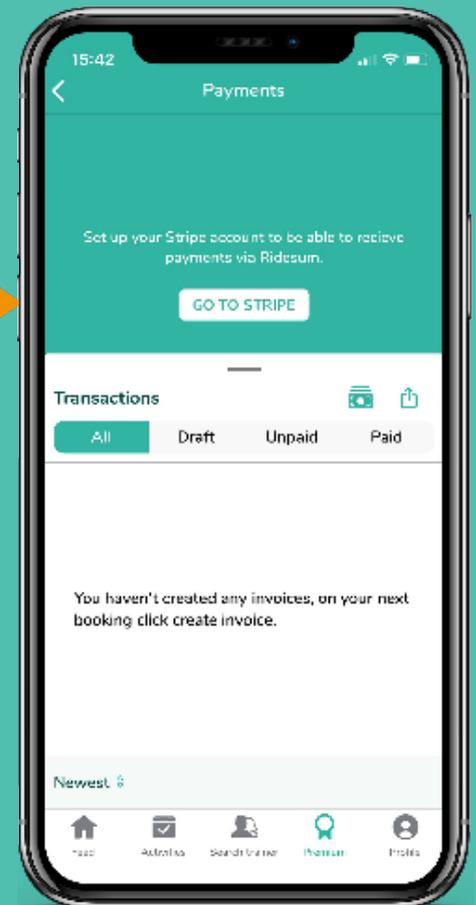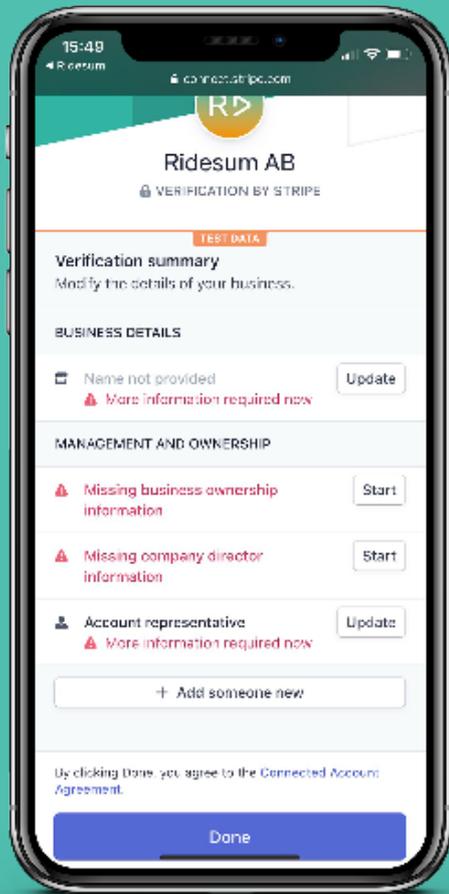
1. Under "Business detail" -

Click on "Update"
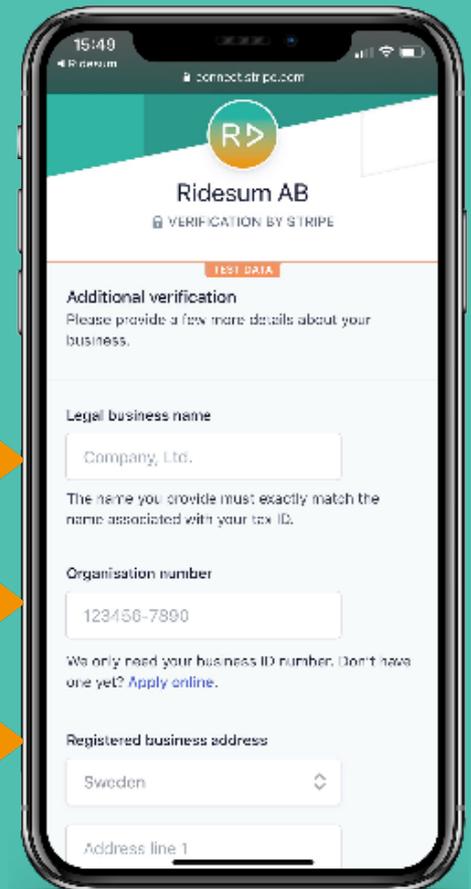
2. Fill in legal business name

3. Fill in organisation number

4. Fill in registered business address
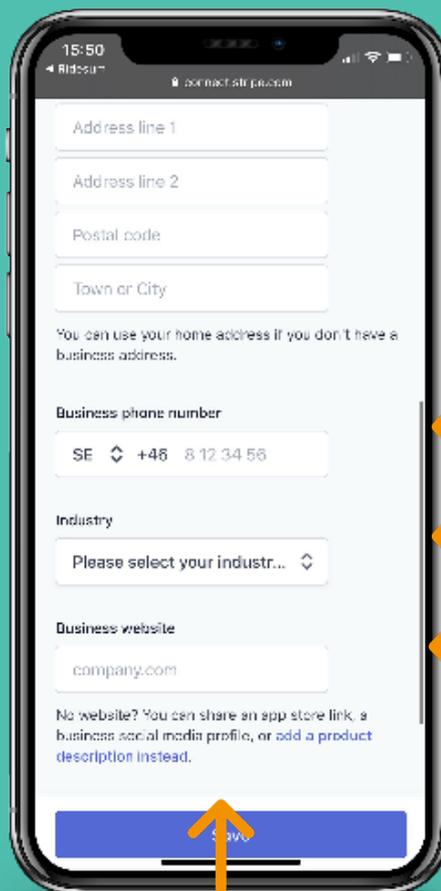
5. Fill in business phone number

6. Select industry

Most of our clients picks education (Other)

7. Fill in your business' website

Facebook page works as well if you don't have a

website
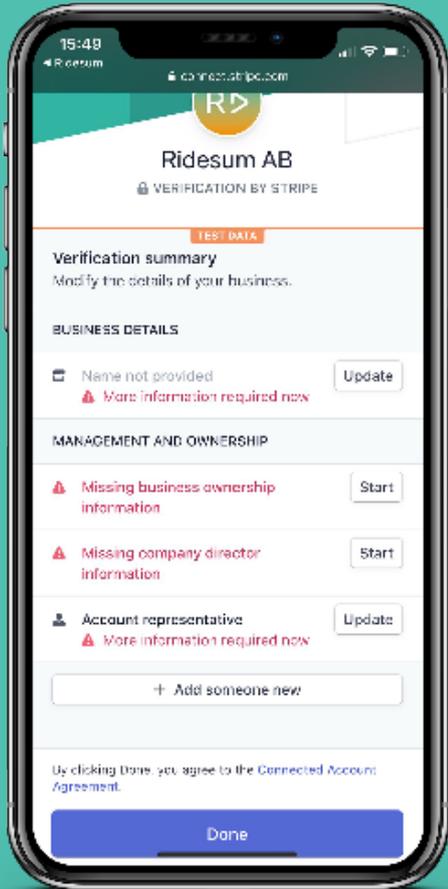
8. Under "Managment & Ownership" -
Click on "Start"

9. Choose "Add someone new"
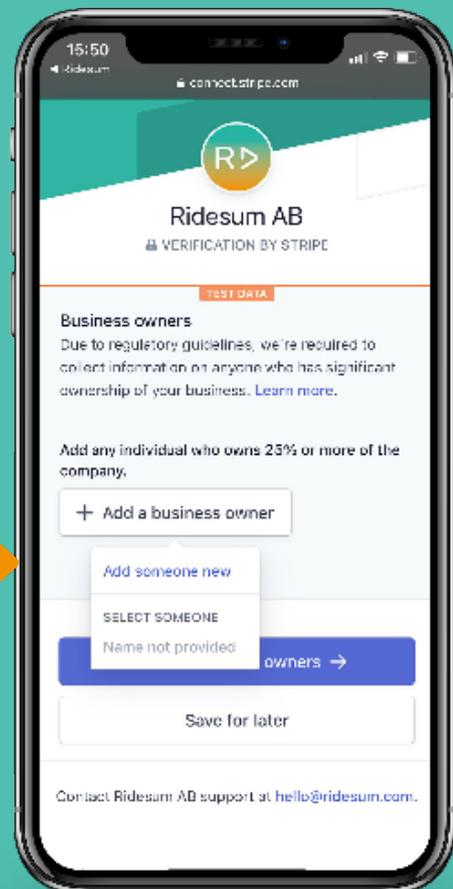
10. Fill in legal name of the person

11. Fill in the person's email address

12. Click on "Add"
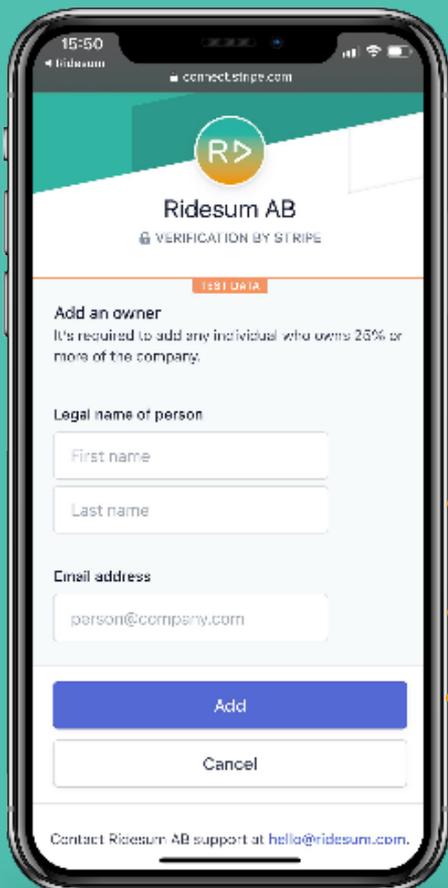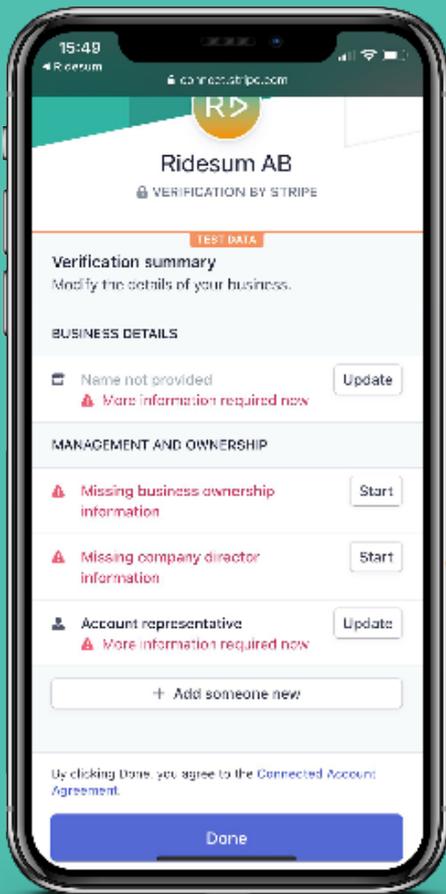
13. By "Company director information" -
Click on "Start"

OBS! This one only needs to be filled out if
your company has a board! Otherwise jump to
nr 18!

14. If it is the same person as the business
    owner you can just pick that person
    directly from the list when you click on
    "Add a new person"

15. If not, add someone new and fill in the legal
    first and last name of the person

16. Add the person's email address

17. Click on "Add"
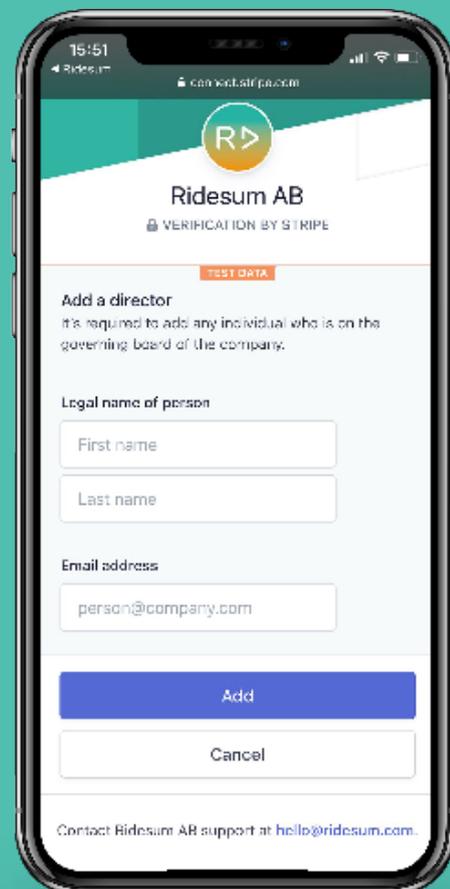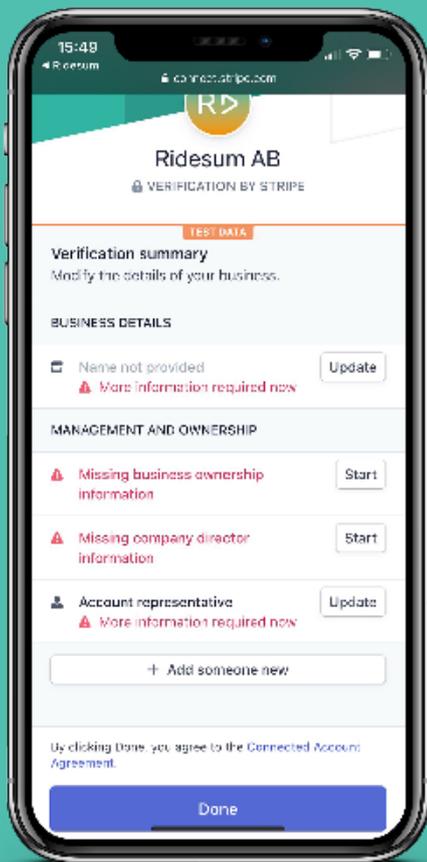
18. By "Account Representative - Click on "Update"

19. Fill in the person's legal name

20 Fill in the person's email address

21. Fill in the person's job title
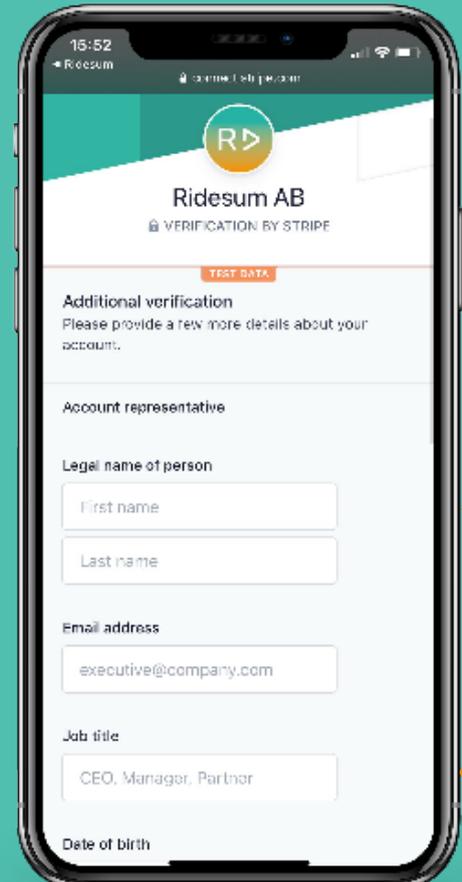
22. Fill in the person's date of birth

23. Fill in the person's home address

24. Fill in the person's phone number

25. Pick "Yes" person is an executive or a senior manager

26. Click "Done"
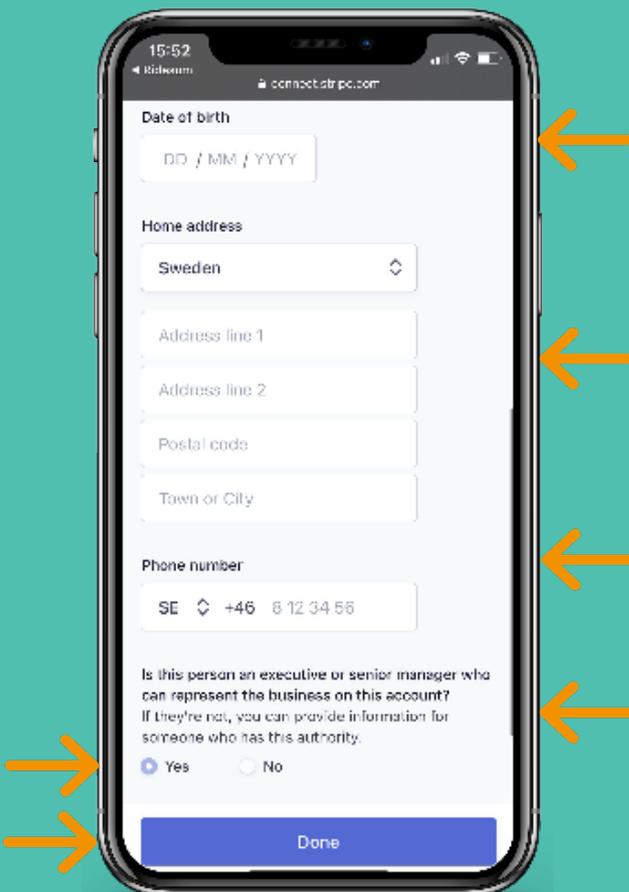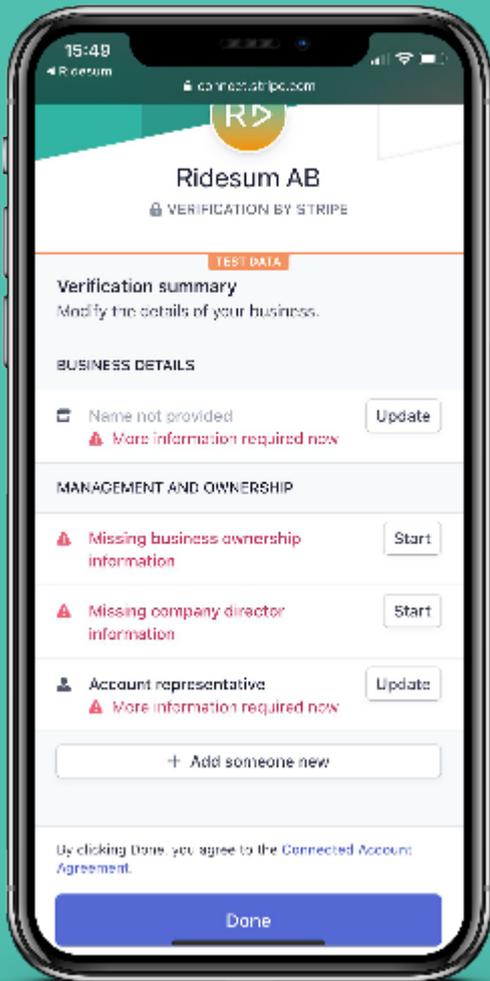
27. Click "Done" at the bottom

28. Now you have finished the KYC

OBS!
To be able to invoice you still need to add an account in the app and make sure your organisation number and company name is filled out in your profile

1.4 Get started: Add bank account

1. Go to "Payments"
   First, go to Premium in the bottom menu
   Then, click on the square named "Payments"

2. Click on "Add account"
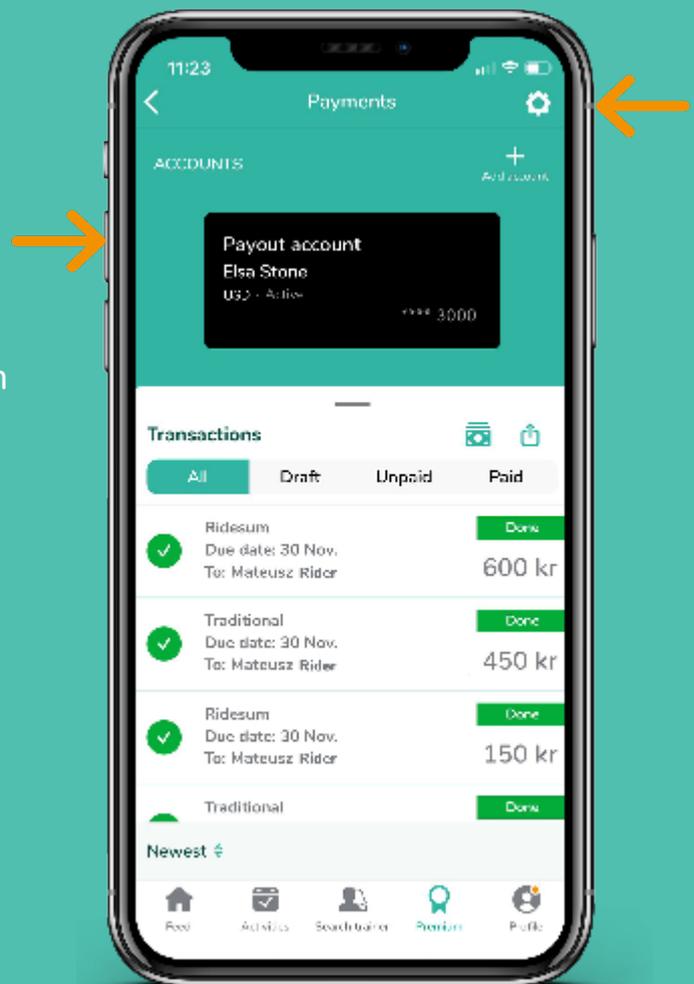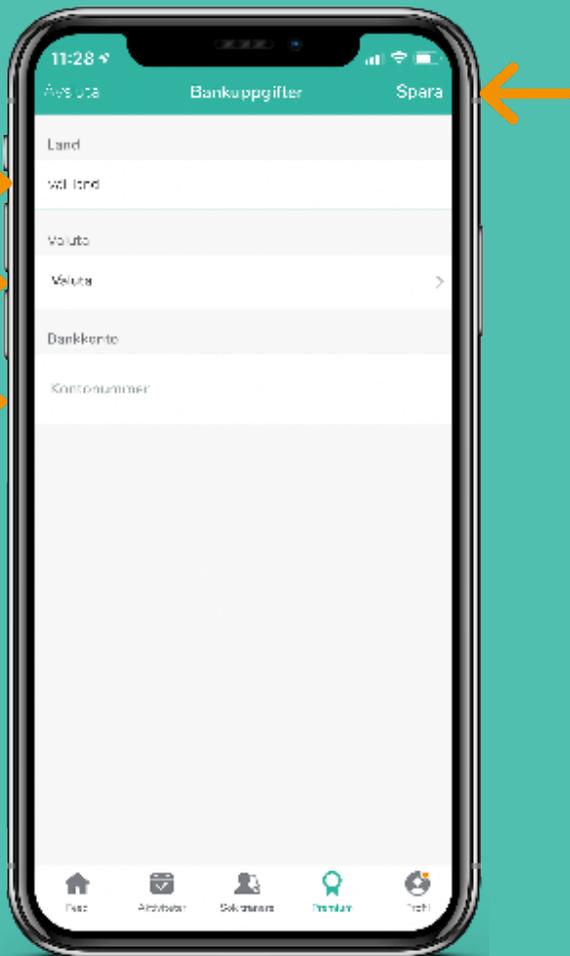
3. Add your bank account details

- Select country

- Select currency

- Add your IBAN bank account number

4. Click on "Save"

   placed in the top right corner
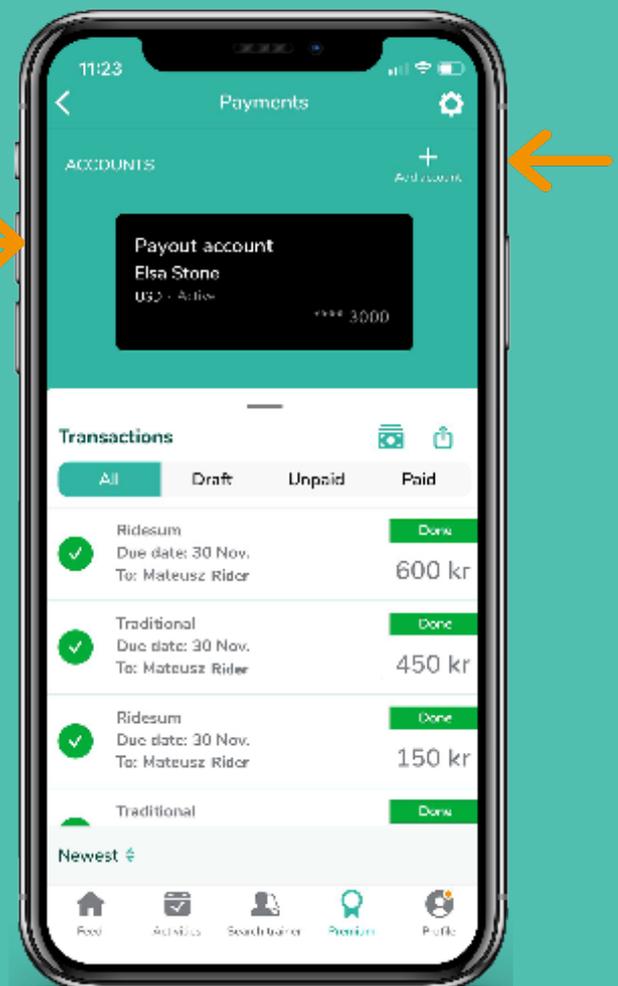
OBS!

This is the account the money will be wired to when your customer pays you through the app

- You can always add more accounts and switch to a different one
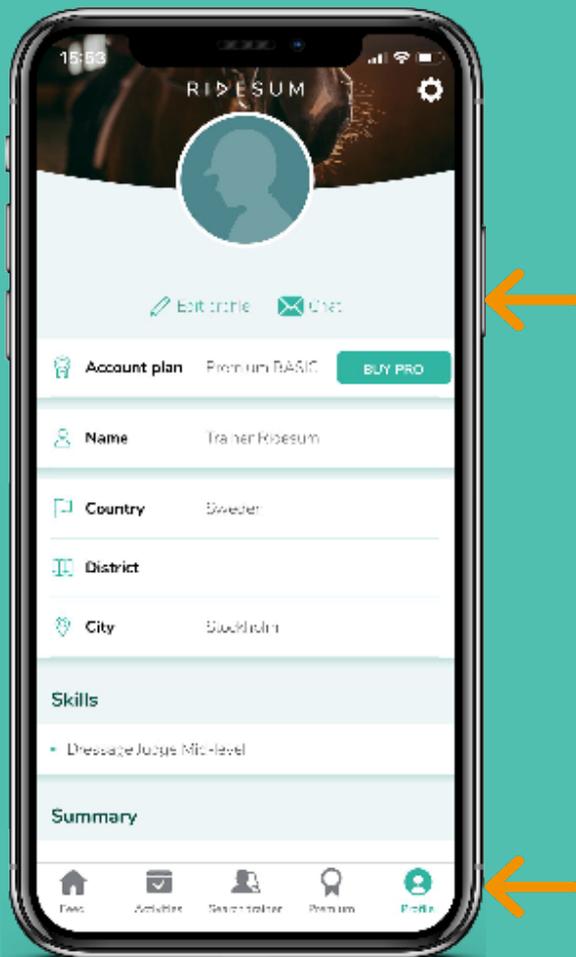
1. Go to "Profile"

   Click on "Profile" to the right in the bottom menu

2. Click on "Edit profile"

   Placed in the top, below your profile image

3. Scroll down until you reach "Org.nr" and "Company"

4. Fill in your company's name and organisation number in these fields

5. Click on "Save"

   You will find "Save" in the top right when you scroll back up to the top
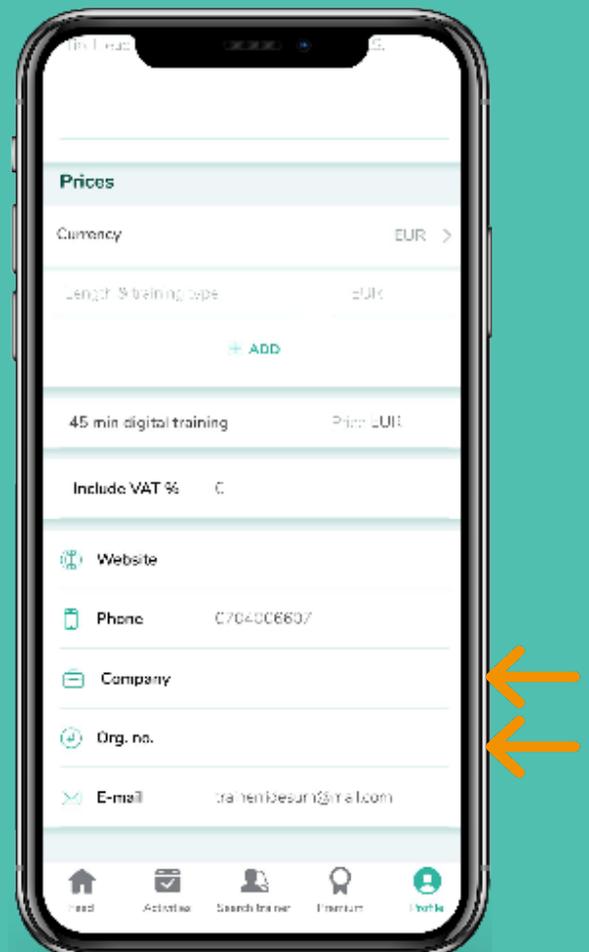
2.1 Invoicing: Create an invoice

1. Go to "Activities" in the bottom menu

2. Choose "Upcoming"

3. Go to the training you want to invoice

4. Click on "Create invoice"

OBS!
If you create an invoice for a training that already has been invoiced, it will be marked in red with
"activity already has an invoice"
when you open it.
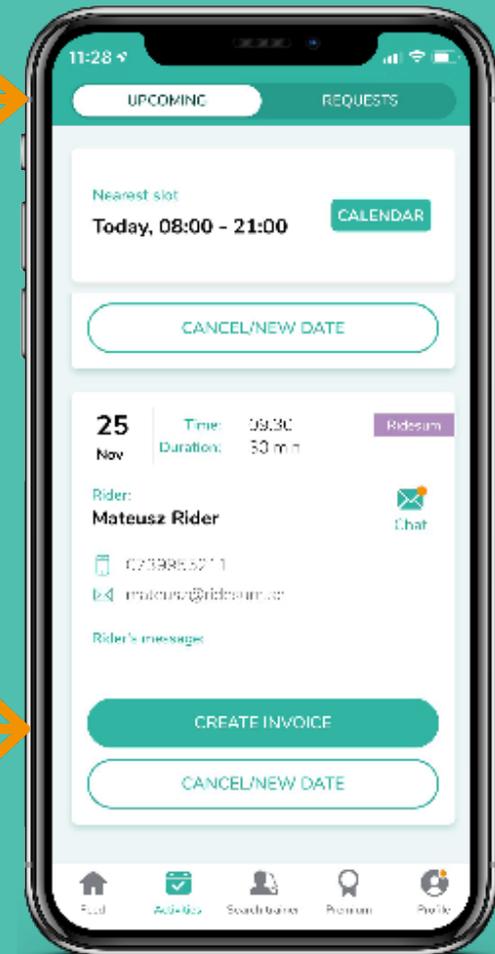
5. Set your price

6. Fill in the remaining information: VAT %, currency, and when payment is due

7. Choose if you want to add feedback that the rider can read

8. Make sure "Trigger payment" is marked

9. Click on "Save"
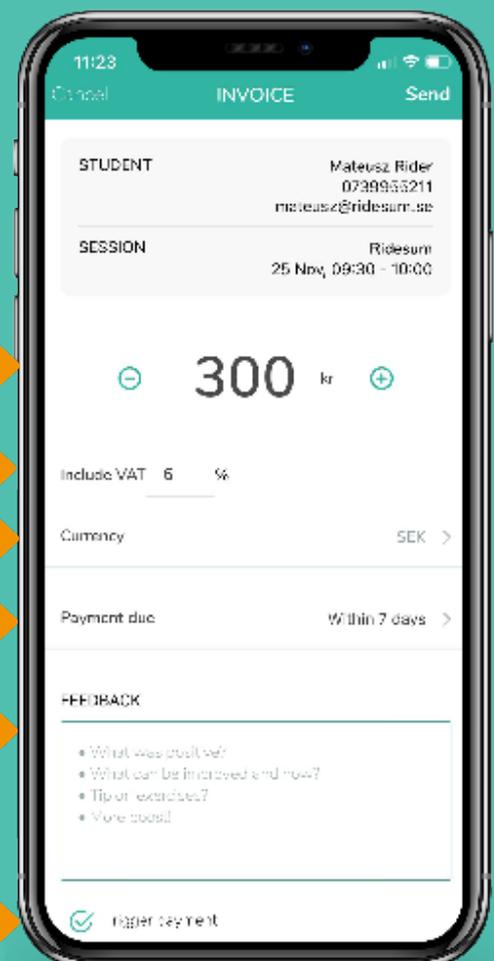
Create invoice via your drafts

1. Go to "Payments"

   Premium (bottom menu) -> Click on "Payments"

2. Select "Draft" below "Transactions"

   Draft are your completed trainings that don't have a created invoice

3. Click on the training you want to invoice
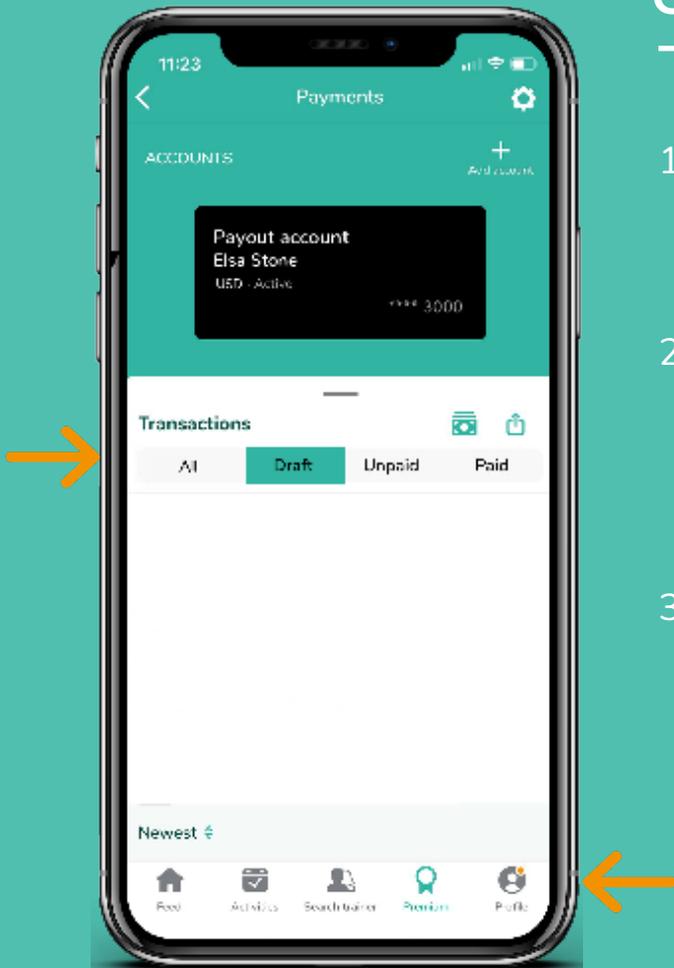
4. Click on "Create invoice"
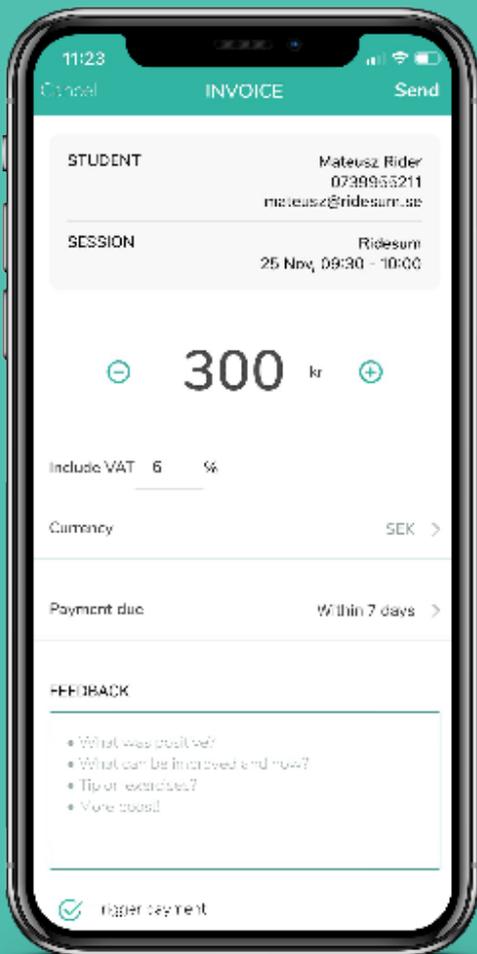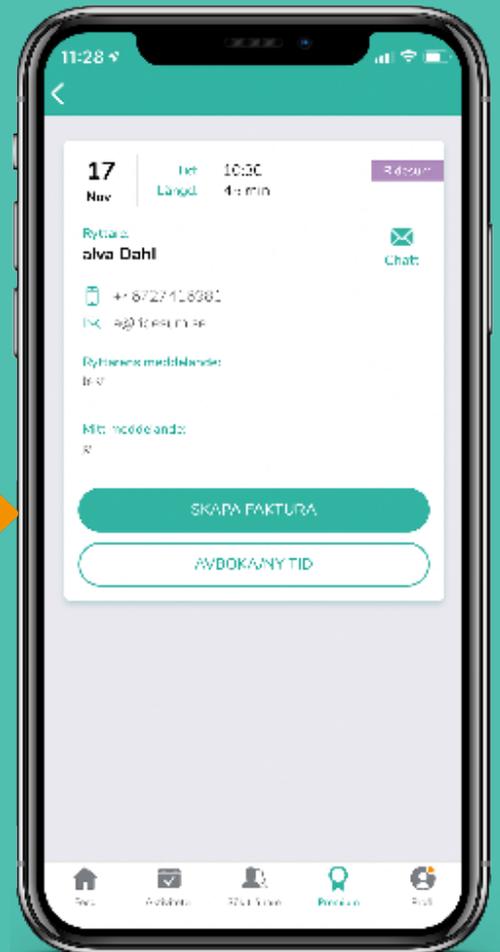
5. Fill in the information as described on the previous page (step 5 - 9)

During a digital Ridesum training you can choose if you want to invoice directly via your computer/ tablet

- Unlike the app, you can only change the price when invoicing this way

- The VAT % will be the VAT % you have stated in your profile settings in the app
- The payment time will be the same as you stated in your profile settings in the app

- If you want to specify these details on the invoice, you have to invoice via the app
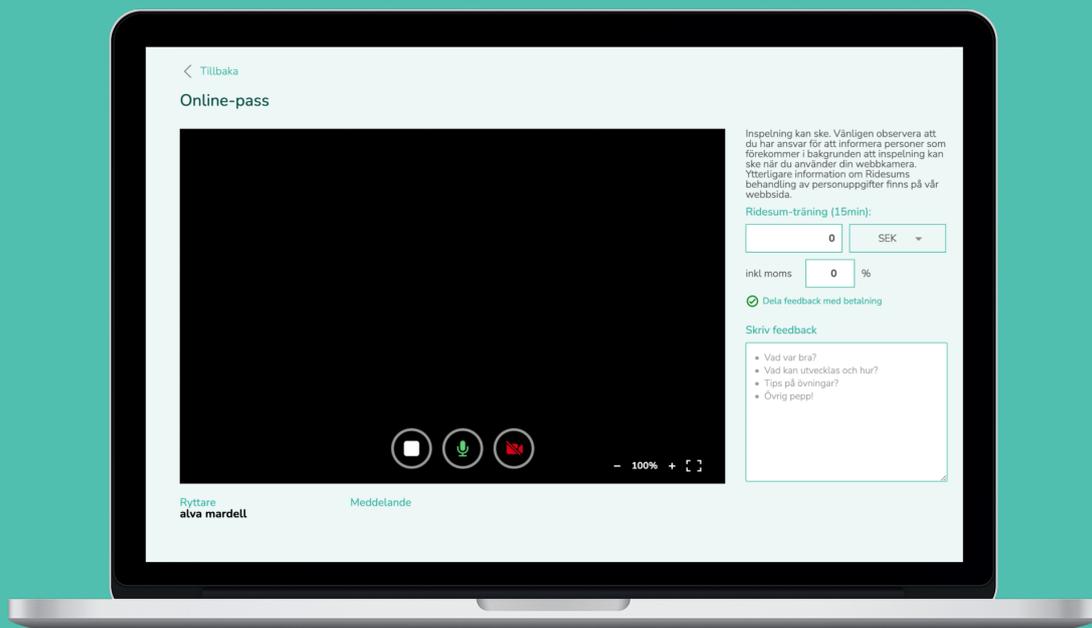
1. Go to "Payments"

   Premium (bottom menu) -> Click on "Payments"

2. Select "All" under "Transactions"

   Here the payment status of all your trainings

   will be listed

3. The label on the right indicates the status

   of the invoice

   - Waiting (Yellow)
   - Draft (Dark green)
   - Paid (Light green)

4. Select "Unpaid" to see

   all unpaid invoices

5. Select "Paid" to see all

   paid invoices
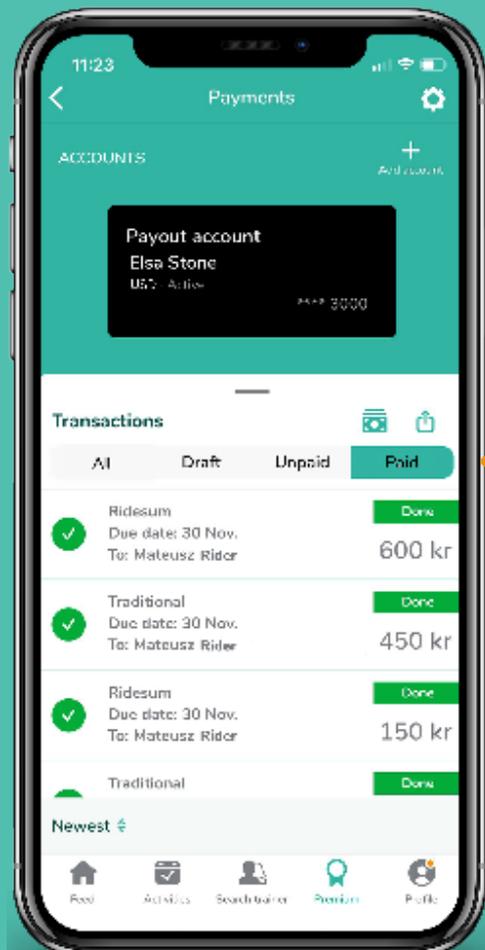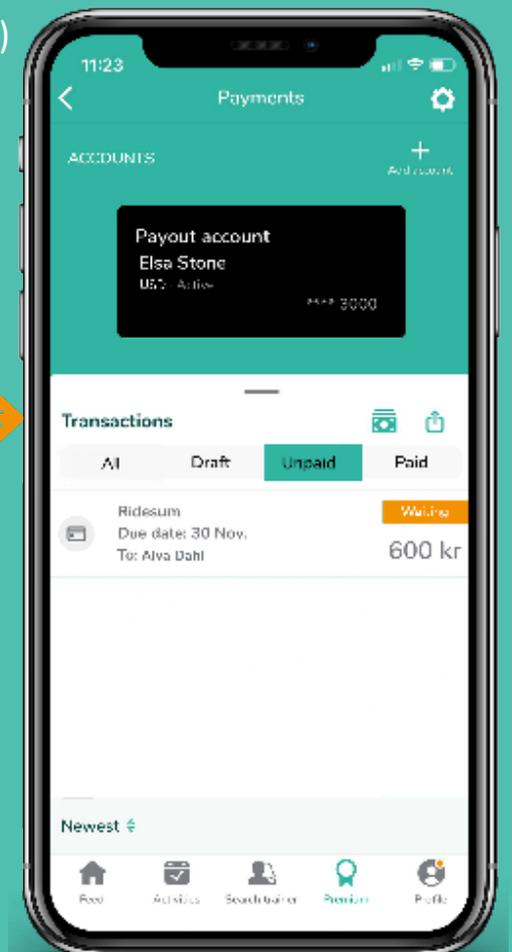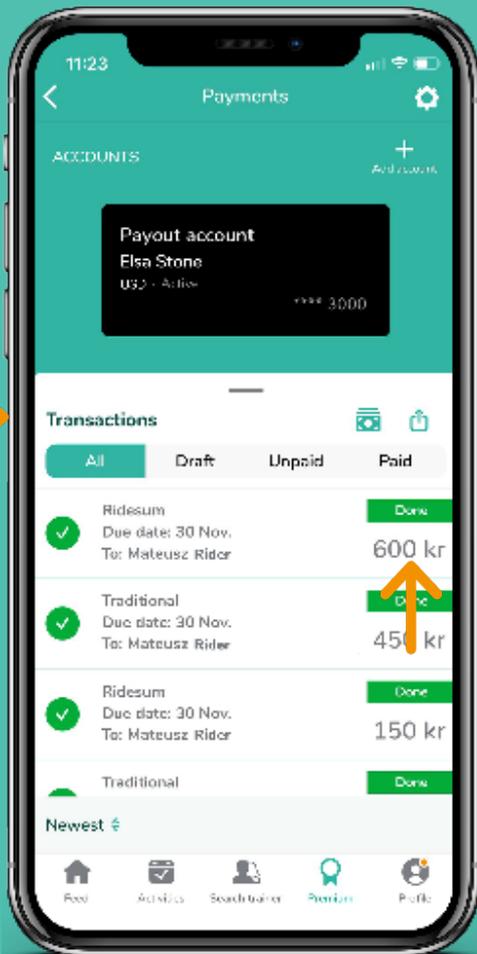
2.4 Invoicing: See invoice details
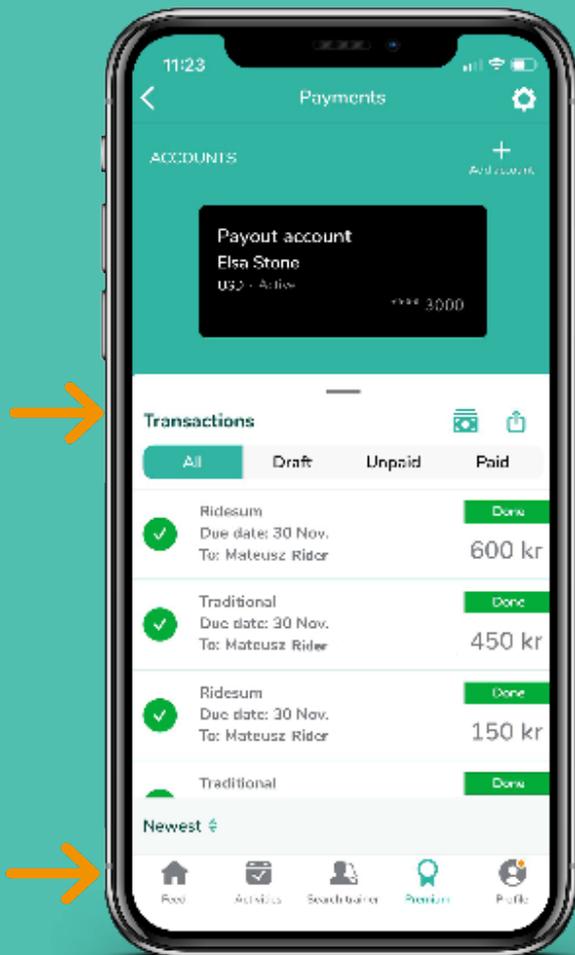
1. Go to "Payments"

   Premium (bottom menu) -> Click on "Payments"

2. Under "Transactions" -> "All"

   Click on the invoice you want to see in order to
   open it and see what it specifies

3. When you are checking the details on
   a "Paid" invoice it will look like this

4. When you are checking the details of an
   "unpaid" invoice it will look like this

3.1 Payments: Payment overview
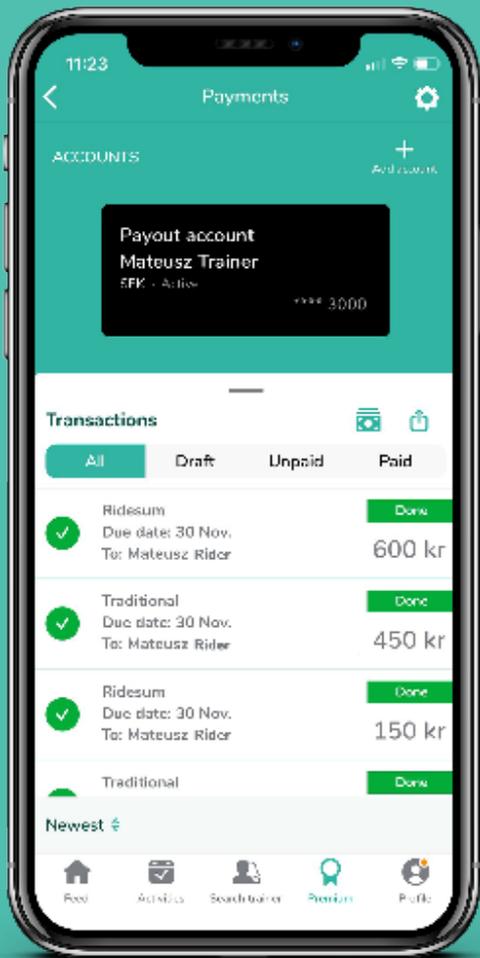
1. Go to "Payments"
   Premium (bottom menu) -> Click on
   "Payments"

2. Click on the "Bill-" icon in order to
   come to your payments

3. Here you will see all your payouts
   "Id:" is the reference number that will
   be shown
   on your account after a completed
   transaction.

4. On "Successful" you will see all
   completed payouts

5. On "Unsuccessful" you will see all
   uncompleted payouts

6. By clicking on a payment you will
   get additional details on it sent to the
   e-mail you have registered with your
   your Ridesum-account
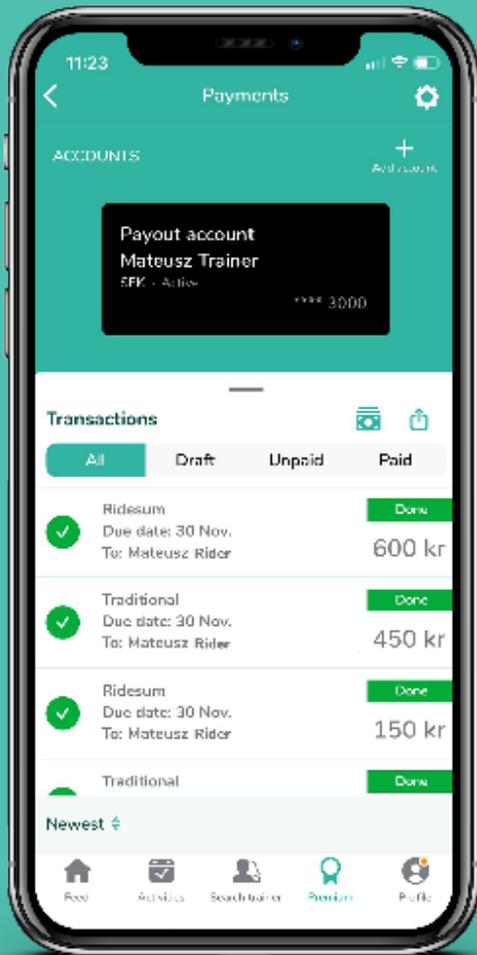
1. Go to "Payments"

Premium (bottom menu) -> Click on "Payments"

2. Click on the "Export-" icon placed

next to the "Bill-" icon

3. Select for which time period you want
to have your payment history
summarized in a document

4. Check that the e-mail on top is the
correct one, if you want to change it
you just type in a different e-mail
address

5. Click on "Send" in the top right corner
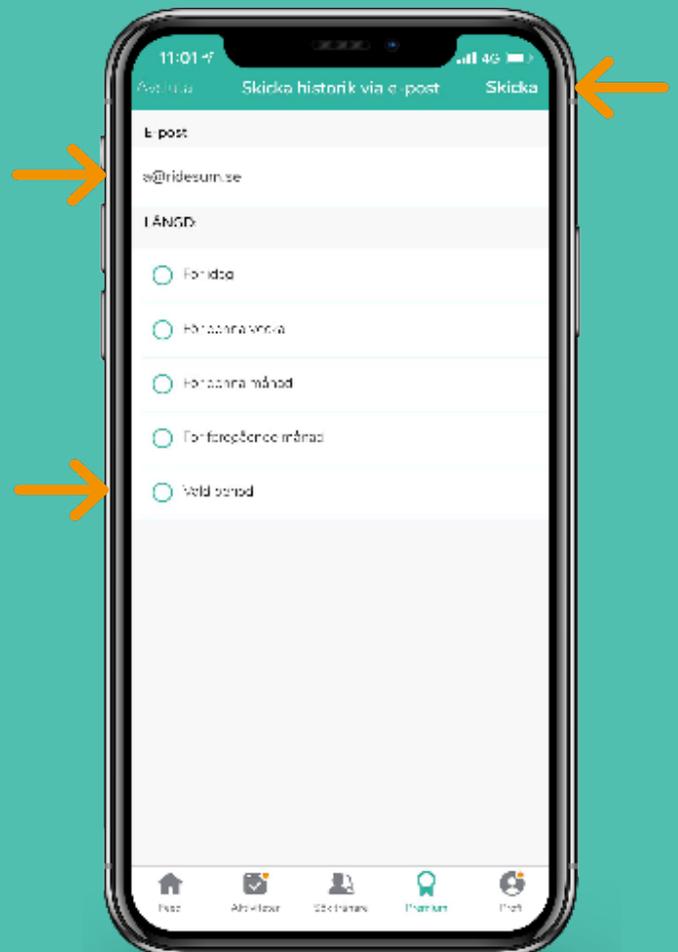
3.3 Payments: Mark an unpaid invoice as paid

1. Go to "Payments"

   Premium (bottom menu) -> Click on "Payments"

2. Select "Unpaid" under "Transactions"

3. Click on the invoice you want to adjust
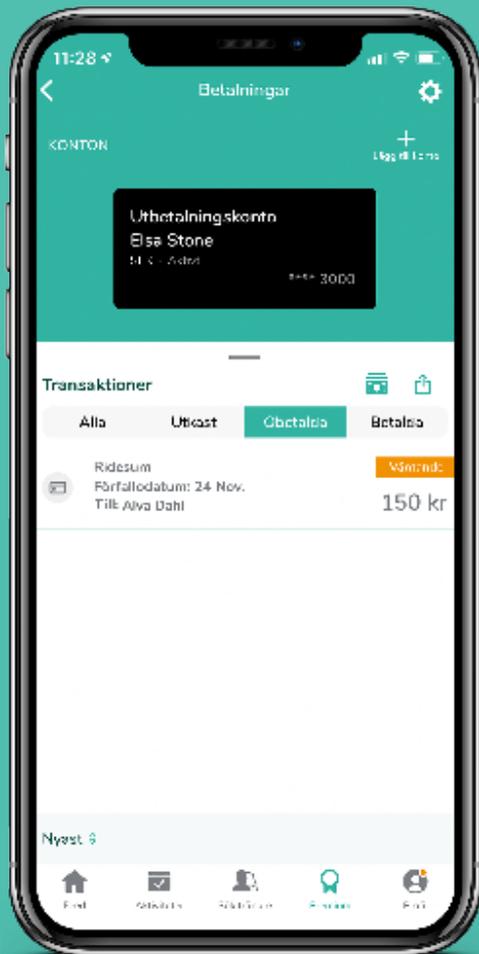
4. Click on "Mark as paid" at the bottom

5. The invoice will now be marked as paid

OBS!
You only do this when a rider has paid using another option than paying directly in the app. When the rider pays in the app, the invoice will always be marked as paid automatically.

1. Automatic reminder will be sent two hours before the invoice is due.

1. Go to "Premium" in the bottom menu

2. Click on the square named "Sessions"

3. Here you have a complete overview of your trainings
   You can choose to see:
   - All trainings
   - Ridesum (digital trainings)
   - Traditional
   - Feedback (feedback on video)

4. You can also swipe to see previous weeks

5. Scroll all the way down to see statistics compared to your previous week. You can also see your booked hours compared to you available ones
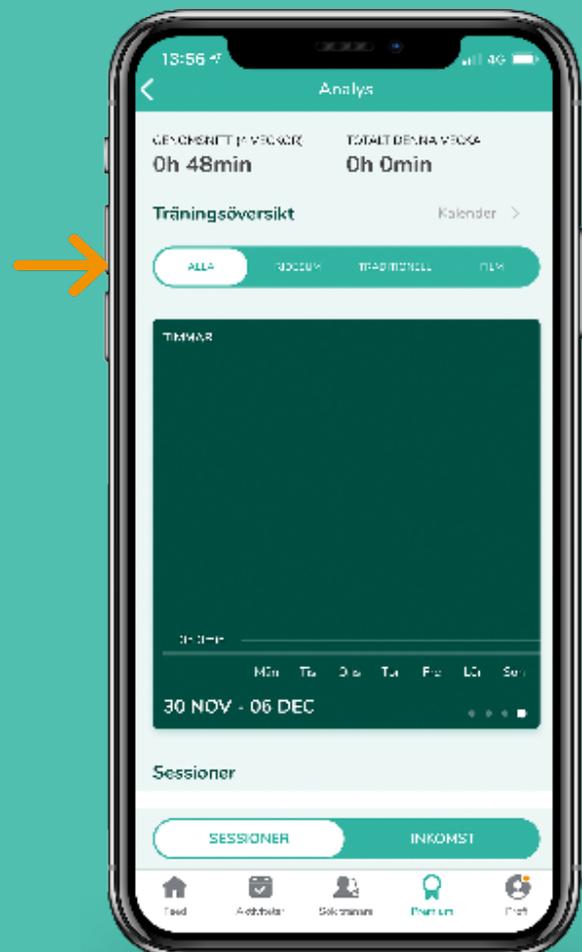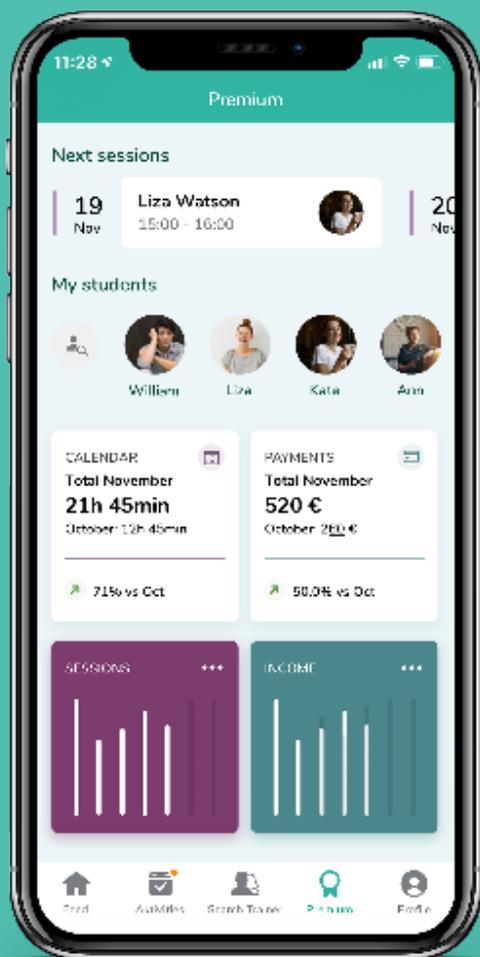
1. Go to "Premium" in the bottom menu

2. Clicka on the square named "Revenue"

3. Here you have a complete overview over
    your revenue
    You can choose if you want to see from
    the past:

- 7 days

- 14 days

- Month

- Year

4. At the top you can also see your average
    revenue per day and what you have earned
    during the current week
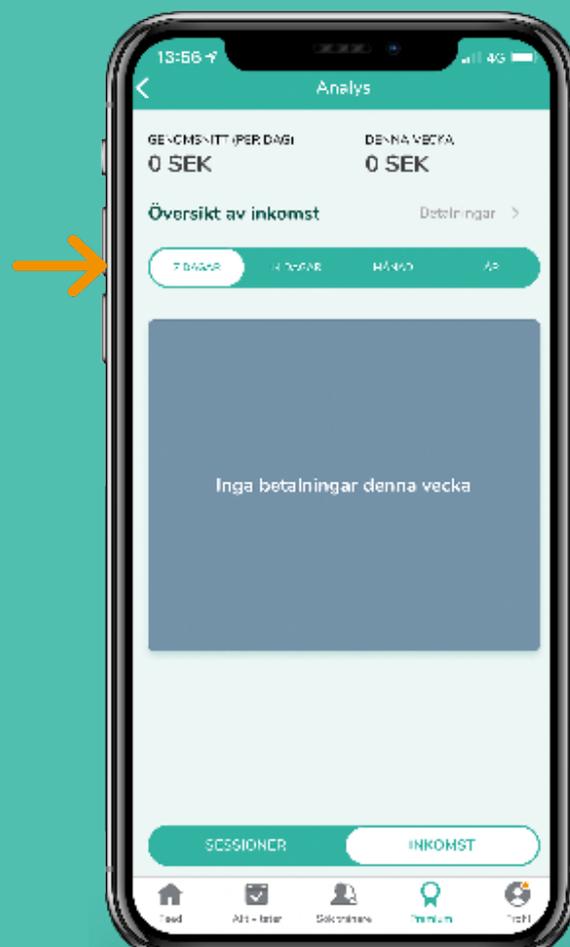
1. Go to "Premium" in bottom menu

2. Below "My students" click on the student you want to open to see more information

3. You can also search for your clients by clicking on the search-icon

4. Here you will see your student's information

5. Further down you will see feedback you previously have given

6. At the bottom you can see the total revenue you have earned from your client

Have more questions?

Contact us through email:
hello@ridesum.com
or write to us on Facebook
or Instagram.

We are happy to help!

Kind regards,
The Ridesum Team
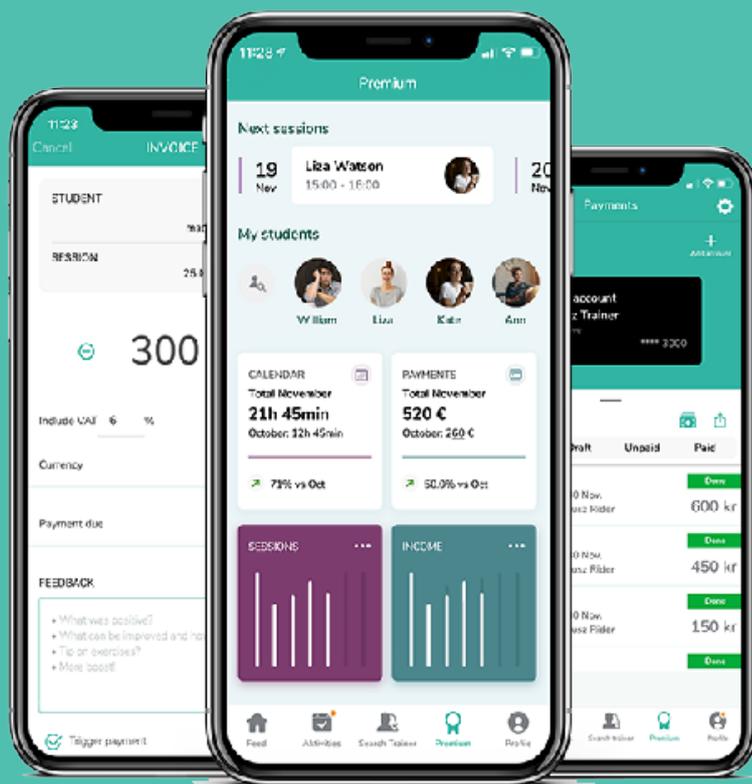
Tip!

Check out our social media and follow us to not miss the latest
equestrian news and take part of the inspiration!

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f Ridesum

📷 @ridesum

RIDESUM
Training anywhere, anytime