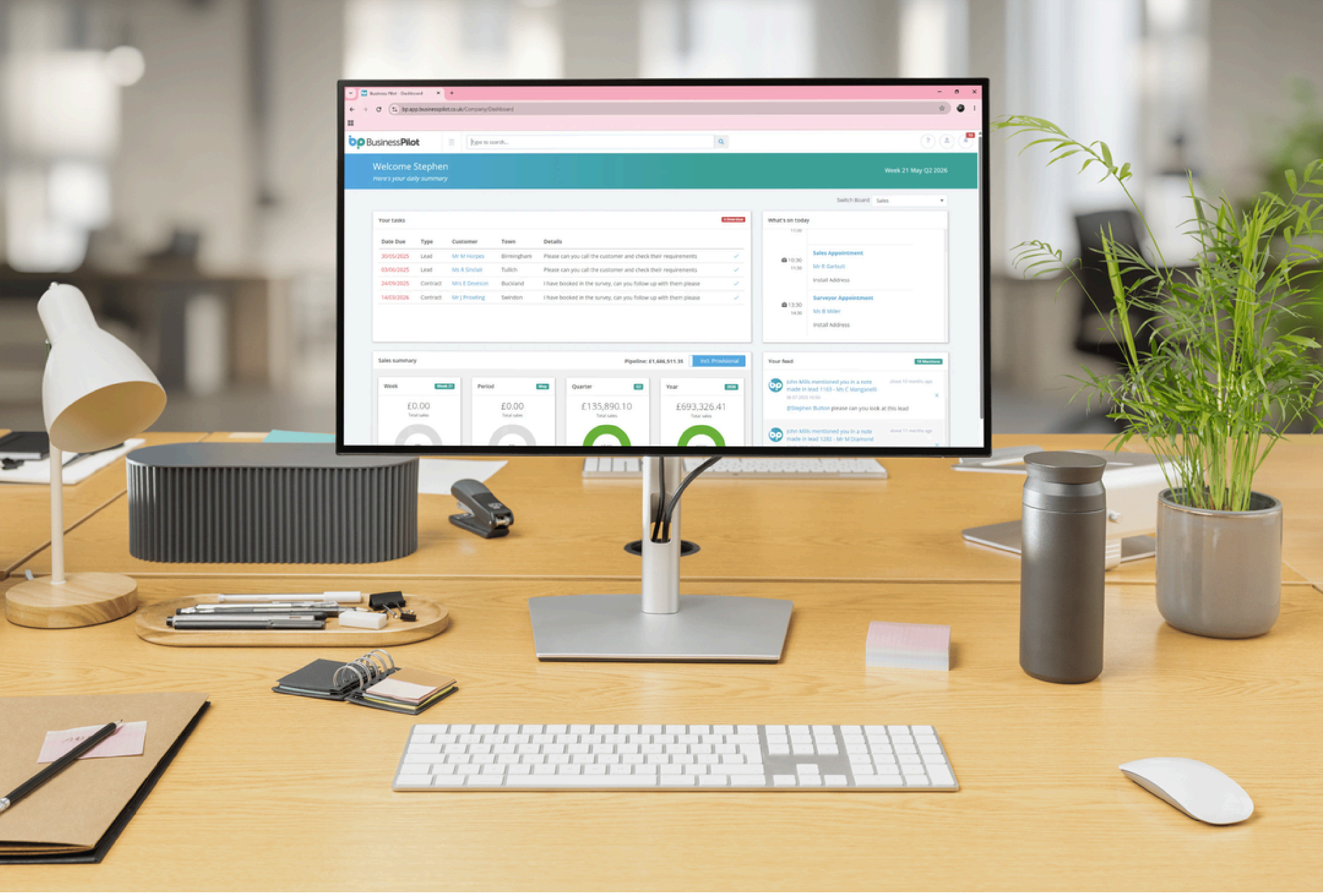

BusinessPilot

Knowledge Base Summary

Complete Guide - All Categories

Generated: 16th April 2026

How to use this guide

This document is a complete index of every article in the Business Pilot Knowledge Base, organised by category. Use it to quickly find the right article for whatever you're working on.

To find what you need

Search this document by keyword (Ctrl+F on Windows, Cmd+F on Mac), or browse by category using the section headers. Each article title is a clickable link that takes you straight to the full article in our online Knowledge Base.

A note on this document

This is a snapshot of our Knowledge Base at the time it was generated. We're adding and updating articles regularly, so if you can't find what you're looking for here, search directly at Knowledge Base for the most current content.

Need more help?

If an article doesn't fully answer your question, our support team is happy to help. Contact us through our Help Centre.

SALES CATEGORY

The Sales category covers the complete sales lifecycle in Business Pilot, from initial enquiry capture and contact management through lead tracking, pipeline management, appointments, quoting, e-signatures, and reporting. It includes guides for managing documents, email communication, diary scheduling, user administration, and day-to-day tasks.

Sub-Topic	Articles	Description
E-Signatures & Documents	10	Articles covering BPsign e-signature feature, document uploads, image management, and document templates.
Leads & Pipeline Management	19	Articles on creating, editing, and progressing leads through customisable sales pipelines, including pipeline setup, status management, lead sources, product types, and value tracking.
Appointments & Diary	9	Articles on booking, rescheduling, and managing sales and survey appointments through the Business Pilot diary system.
Contacts & Customers	10	Articles on creating, searching, managing, and organising customer and supplier contact records in Business Pilot.
Enquiries	9	Articles on managing inbound web enquiries, including converting them to contacts, editing, archiving, deleting, and exporting enquiry data.
Email & Communication	9	Articles on sending emails, creating templates, using the chat function, configuring email settings, and making calls from within Business Pilot.
Reports & Exports	5	Articles on running sales reports, invoice reports, and dashboard views with export options to PDF and Excel.
Admin, Users & Setup	7	Articles on user management, roles and permissions, licence allocation, document type configuration, and contacting support.
Tasks, Notes & General	5	Articles on creating tasks, using search, adding notes, and managing holding deposits in Business Pilot.

E SIGNATURES & DOCUMENTS

Articles covering BPsign e-signature feature, document uploads, image management, and document templates.

How do I use BPsign?

Comprehensive guide to BPsign e-signature feature, covering how to send PDF documents to customers for electronic signing directly from a Lead or Contract.

- Two methods: "Create & Email Link" or "Create Link" for copyable URL
- Signer name pre-populates from Lead/Contract
- Signed documents auto-saved back with date stamp
- Activity Logs record all signature actions
- Use {Signature Link} placeholder in email templates

How To Export Notes to Excel or PDF (Contact, Lead, Contract)

Explains how to export activity notes from Contacts, Leads, or Contracts to Excel or PDF format.

- Navigate to Activity tab and select Notes
- Choose Export to Excel or PDF
- Select Enable Editing for editable spreadsheet

How To Update Details of The Images And Documents

Shows how to edit the metadata and details of images and documents attached to a Lead or Contract.

- Navigate to Documents tab within a Lead or Contract
- Use the blue edit button to update details
- Allows renaming and re-categorising uploaded files

How To Add & Delete a Document

Explains how to upload new documents and remove existing ones from Lead or Contract records

- Upload documents through the Documents tab
- Supports various file formats
- Delete using the remove option beside each file

How to Add and Delete an Image

Covers adding and removing images within Lead or Contract records.

- Images uploaded through the Documents tab
- Delete option available next to each image
- Useful for site photos and product images

E SIGNATURES & DOCUMENTS

How To Download a Document Template

Instructions for downloading pre-configured document templates from Business Pilot.

- Access templates from within the system
- Download for customisation or offline use

How To Choose One Category for a Batch Upload of Documents & Images

Shows how to assign a single category when uploading multiple documents or images at once.

- Select a category before batch upload
- All files tagged with chosen category
- Saves time vs individual categorisation

How To Create a Document Template and Add It To Business Pilot

Guide to creating custom document templates and uploading them into Business Pilot for reuse across leads and contracts.

- Create templates in Word or other editors then upload
- Templates become available system-wide for all users
- Useful for standardising quotes, proposals, and contracts

How To Upload a Signed Contract

Explains how to upload a physically signed contract document to the relevant Lead or Contract record.

- Navigate to the Documents tab and upload the signed file
- Document is stored against the record for future reference
- Keeps a digital copy of the signed agreement

How To Upload a Quote

Covers uploading a quotation document to a Lead record in Business Pilot.

- Upload quote files to the Documents tab of a Lead
- Keeps all quotation documents linked to the relevant opportunity
- Supports PDF and other common file formats

LEADS & PIPELINE MANAGEMENT

Articles on creating, editing, and progressing leads through customisable sales pipelines, including pipeline setup, status management, lead sources, product types, and value tracking.

How To Add a Lead

Step-by-step guide to creating a new lead record in Business Pilot.

- Add leads from main menu or within a Contact
- Enter customer details, product interests, and lead source
- Assign a salesperson and set initial pipeline status

How To Copy a Lead

Shows how to duplicate an existing lead to create a new one with similar details.

- Useful for customers with multiple projects or repeat enquiries
- Copies key details from the original lead

How To Move a Lead to a Different Contact's Records

Explains how to reassign a lead from one contact to another.

- Useful when a lead was attached to the wrong contact
- Moves lead and associated data to the correct record

How to Move a Lead Back to Prospect

Covers reverting a lead back to prospect status if it was advanced too early in the pipeline.

- Moves the lead back to an earlier pipeline stage
- Useful for leads that need further qualification
- Retains all associated data and notes

How to Mark a Lead as Sold

Guide to marking a lead as won/sold in the sales pipeline.

- Updates the lead status to Sold
- Triggers the contract conversion workflow
- Records the sale value and date

LEADS & PIPELINE MANAGEMENT

How To Convert a Lead To a Contract

Walks through converting a won lead into a live contract, including invoice setup and supplier allocation.

- Mark lead as Sold then click the link to create Contract
- Verify all details are complete before conversion
- Set up invoices, payments, and provisional suppliers
- Documents carry over automatically

How To Add a New or Amend a Pipeline

Covers creating new sales pipelines and modifying existing ones to match your workflow.

- Access pipeline management from Admin settings
- Create pipelines with custom stages for different product lines
- Amend stage names and order on existing pipelines

How To Copy or Delete a Pipeline

Shows how to duplicate an existing pipeline or remove one that is no longer needed.

- Copy a pipeline to create a variation without starting from scratch
- Delete unused pipelines to keep the system tidy
- Exercise caution as deletion may affect linked leads

How To Create a Status

Guide to creating custom status labels for use within sales pipelines.

- Define new statuses to track lead progression
- Custom statuses tailor the system to your specific process

How To Add Time Flags to your Status Progression

Explains how to set time-based alerts on pipeline statuses so leads do not stall.

- Set time thresholds for each status stage
- Leads that exceed the time limit are flagged visually
- Helps managers identify bottlenecks in the sales process

LEADS & PIPELINE MANAGEMENT

How To Add a Sold Value (Net)

Shows how to record the net sold value on a lead record.

- Enter the agreed sale value at net
- Value feeds into sales reports and dashboards
- Can be amended if the sale value changes

How To Add the Quoted Value (Net)

Covers adding the quoted value to a lead for pipeline value tracking.

- Record the net quoted value on the lead
- Used for forecasting and pipeline reporting
- Separate from the final sold value

How To Manage Lead Sources

Guide to creating and managing the list of lead sources (e.g. website, referral, showroom).

- Add new lead sources from Admin settings
- Edit or deactivate existing sources
- Lead source data feeds marketing ROI reports

How To Manage Lead Sub Sources

Explains managing sub-sources for more granular lead origin tracking.

- Sub-sources sit beneath main sources for extra detail
- Useful for tracking specific campaigns or channels
- Manage from the Admin settings area

How To Manage Product Types

Covers creating and editing product type categories used across leads and contracts.

- Define product types relevant to your business
- Product types appear in lead and contract forms
- Can be edited or deactivated as product range changes

How To Manage Product Interests

Shows how to manage the product interest options that can be assigned to leads.

- Product interests help categorise what a customer is looking at
- Manage the list from Admin settings
- Useful for filtering and reporting on lead interests

LEADS & PIPELINE MANAGEMENT

How To Manage Sales Area

Guide to setting up and managing geographical sales areas for territory tracking.

- Define sales areas for territory management
- Assign leads to specific areas
- Filter reports by sales area

How To Add a Supplier Quote

Explains how to attach a supplier quote to a lead record for cost comparison.

- Upload or enter supplier quote details on the lead
- Helps compare costs when sourcing materials
- Supplier quotes carry over to the contract

How To Print a Lead Sheet

Shows how to generate a printable lead summary sheet for offline reference.

- Generate a formatted PDF/print view of the lead
- Includes key lead details and contact information
- Useful for sales reps attending site visits

APPOINTMENTS & DIARY

Articles on booking, rescheduling, and managing sales and survey appointments through the Business Pilot diary system.

How To Book a Sales Appointment

Shows how to schedule a sales demonstration appointment from within a lead record.

- Select Salesperson then click Book Demo Now
- Double-click desired date/time in the diary
- Appointments appear in red in the Diary
- Book Demo Now link turns green once confirmed

How To Book a Survey Appointment (Within a Lead)

Explains booking a technical survey appointment directly from a lead record.

- Similar process to sales appointments but for survey stage
- Assigns to a surveyor with its own colour coding

How To Book Multiple Sales and Surveyor Appointments in the Diary

Covers booking several appointments at once directly from the diary view.

- Book multiple appointments without navigating back to individual leads
- Useful for batch-scheduling a day's worth of visits

How To Move, Reschedule or Delete an Appointment in the Diary

Guide to changing or cancelling existing diary appointments.

- Move appointments by dragging or editing
- Reschedule to a new date/time
- Delete appointments no longer required

How To Set or Confirm a Provisional Appointment in the Diary

Shows how to create tentative appointments and later confirm them.

- Set provisional appointments when not fully confirmed
- Confirm once customer agrees
- Visual distinction between provisional and confirmed

APPOINTMENTS & DIARY

How To Move an Appointment in the Lead Page

Explains how to reschedule an appointment directly from the lead record page.

- Access the appointment from within the Lead view
- Change date/time without going to the full diary
- Updates reflect in both the lead and diary

How To Move an Appointment in the Diary Page

Shows how to drag or edit an appointment to a new slot within the diary view.

- Drag and drop appointments to new time slots
- Changes update automatically on the linked lead
- Quick way to reschedule without opening the lead

How to Make a Second Appointment

Covers booking a follow-up or second appointment for an existing lead.

- Add a second appointment when a follow-up visit is needed
- Both appointments tracked against the same lead
- Useful for multi-visit sales processes

How To Manage Your Personal Appointment Notifications

Explains how to configure which appointment notifications you receive.

- Set preferences for Sales, Surveyor, and Service alerts
- Choose notification types based on your role
- Customise to avoid notification overload

ENQUIRIES

Articles on managing inbound web enquiries, including converting them to contacts, editing, archiving, deleting, and exporting enquiry data.

How to Convert an Enquiry to a Contact

Walks through converting an inbound web enquiry into a full contact record with a lead.

- Review the enquiry details
- Click to convert to a Contact and Lead
- Enquiry data populates the new records automatically

How to Edit an Enquiry

Shows how to update or correct details on an existing enquiry before conversion.

- Open the enquiry and click edit
- Amend contact details or enquiry notes
- Save changes before converting to a contact

How to Use the Filters in the Enquiry Page

Explains the available filter options on the Enquiries list page.

- Filter by date range, status, or source
- Combine filters to narrow results
- Filters help manage high volumes of enquiries

How To Archive an Enquiry and Restore an Archived Enquiry

Covers archiving unwanted enquiries and restoring previously archived ones.

- Archive removes enquiries from the active list
- Archived enquiries can be restored at any time
- Keeps the enquiry list clean without permanent deletion

How To Delete an Enquiry

Explains how to permanently delete an enquiry that is not needed.

- Delete removes the enquiry permanently
- Use archive if you may need it later
- Deletion cannot be undone

ENQUIRIES

How To Export Your Enquiries to Excel or PDF

Shows how to export your enquiries list to Excel spreadsheet or PDF format.

- Export filtered or full enquiry lists
- Choose between Excel and PDF formats
- Useful for reporting and offline analysis

How to Export Your Enquiries to Excel

Detailed guide to exporting enquiries specifically to Excel format.

- Navigate to Enquiries and click Export to Excel
- Data includes all visible columns
- Enable Editing in Excel to modify the exported data

How to Export Your Enquiries to PDF

Detailed guide to exporting enquiries specifically to PDF format.

- Navigate to Enquiries and click Export to PDF
- Creates a read-only formatted document
- Useful for sharing enquiry data externally

How to Create a Contact from a Web Page Enquiry

Explains the process of creating a new contact directly from a website-generated enquiry.

- Web enquiries arrive via the integrated web form
- Click to create a contact from the enquiry
- Customer details auto-populate from the web form submission

EMAIL & COMMUNICATION

Articles on sending emails, creating templates, using the chat function, configuring email settings, and making calls from within Business Pilot

How To Create an Email Template

Guide to creating reusable email templates with merge fields for consistent communication.

- Create templates with customisable content and merge fields
- Templates available to all users for leads and contracts
- Use placeholders like {Customer Name} for personalisation

How To Send an Email with an External Attachment

Shows how to attach a file from your computer when sending an email through Business Pilot.

- Click the attachment icon when composing
- Browse and select a file from your device
- File is attached to the outgoing email

How To Send an Email with an Attachment from the System

Explains attaching a document already stored in Business Pilot when sending an email.

- Select from documents already uploaded to the lead or contract
- No need to download and re-attach
- System documents include quotes, contracts, and images

How To Send an Email

Basic guide to sending an email from within a lead or contact record using Business Pilot's email feature.

- Access the email function from within a record
- Select or create a template
- Emails are logged against the contact or lead

How To Use The Chat Function

Overview of the internal chat feature for team communication within Business Pilot.

- Send instant messages to other users
- Chat messages appear as in-app notifications
- Useful for quick internal queries about leads or jobs

EMAIL & COMMUNICATION

How To Add/Amend Email Notifications

Covers setting up and editing automated email notifications triggered by system events.

- Configure which events trigger email notifications
- Set recipients for each notification type
- Amend existing notifications as processes change

How To Set Up Your General Company Email

Instructions for configuring the main company email address used for outbound system emails.

- Set the company-wide From address
- Used for automated emails and notifications
- Configure SMTP or email service settings

How To Set Up Your User Email

Shows how individual users configure their personal email settings for sending from Business Pilot.

- Each user sets their own email address and signature
- Personal email used when sending from leads and contacts
- Configure individually in user profile settings

How To Make a Direct Call from a Contact or Lead Page

Explains how to initiate a phone call directly from a contact or lead record.

- Click the phone number to initiate a call
- Requires a compatible phone system or VoIP integration
- Call activity is logged against the record

REPORTS

Articles on running sales reports, invoice reports, and dashboard views with export options to PDF and Excel.

How to Run a Leads & Products Dashboard Report

Guide to running the leads and products dashboard report for pipeline visibility.

- Access from the Reports menu
- Shows lead volumes by product type and source
- Provides visual dashboard with charts and metrics

How to Run a Sales Report to PDF

Shows how to generate a sales performance report in PDF format.

- Select date range and filters
- Export to PDF for sharing or printing
- Includes sales totals and rep performance

How to Run a Sales Report to Excel

Explains generating a sales report in Excel format for further analysis.

- Select date range and filters
- Export to Excel for custom analysis
- Data can be sorted and filtered in the spreadsheet

How to Run a Sales Invoice Report to Excel

Covers running a report of sales invoices exported to Excel.

- Filter by date range and invoice status
- Export to Excel for accounting reconciliation
- Includes invoice numbers, amounts, and payment status

How to Run a Sales Invoice Report to PDF

Shows how to generate a sales invoice report as a PDF document.

- Filter by date range and invoice status
- Export to PDF for review or sharing
- Formatted report with invoice details and totals

ADMIN, USERS & SETUP

Articles on user management, roles and permissions, licence allocation, document type configuration, and contacting support.

How To Add a New User

Step-by-step guide to creating a new user account in Business Pilot.

- Navigate to Admin and select Add User
- Enter user details, assign role and permissions
- New user receives login credentials via email

How To Understand User Roles and Permissions

Overview of the roles and permissions system controlling what each user can access.

- Roles define access levels (Admin, Sales, Operations, etc.)
- Permissions can be customised per role
- Important for data security and workflow control

How To Deactivate and Reassign a Licence to a New User

Explains how to free up a user licence and assign it to a different person.

- Deactivate the outgoing user's account
- Reassign their licence to a new user
- Existing data from the old user is preserved

How To Reallocate Open Tasks

Shows how to reassign open tasks from one user to another, typically when a team member leaves.

- Select tasks assigned to the departing user
- Bulk reassign to another team member
- Prevents tasks from being lost or forgotten

How To Manage Document Types

Guide to creating and managing document type categories for organising uploaded files.

- Define document types such as Quote, Contract, Survey Report
- Manage from Admin settings
- Types help categorise and filter documents

ADMIN, USERS & SETUP

How to Restrict Sales Representatives to View Only Their Leads

Explains how to configure permissions so sales reps can only see their own leads.

- Enable lead restriction in user permissions
- Sales reps only see leads assigned to them
- Managers retain full visibility across all leads

How To Contact Support

Information on how to reach the Business Pilot support team for help.

- Submit support tickets through the system
- Contact via phone or email
- Support hours and response time expectations

TASKS, NOTES & GENERAL

Articles on creating tasks, using search, adding notes, and managing holding deposits in Business Pilot.

How To Create a Task

Guide to creating tasks and assigning them to users for follow-up actions.

- Create tasks from leads, contracts, or the main menu
- Assign to yourself or other team members
- Set due dates and priority levels

How To Use The Search Bar

Overview of the global search functionality for finding contacts, leads, and contracts.

- Search across all record types from one search bar
- Results grouped by contacts, leads, and contracts
- Supports searching by name, reference, or address

How To Add a Permanent Note

Explains how to add a pinned note that stays visible at the top of a record.

- Permanent notes remain visible regardless of other activity
- Useful for critical information like access instructions
- Displayed prominently on the record page

How To Add and Edit a Note

Basic guide to adding activity notes and editing existing ones on any record.

- Add notes from the Activity tab
- Edit existing notes if corrections are needed
- Notes form part of the activity timeline

How to Take a Holding Deposit and Place the Contract on Hold

Shows how to record a holding deposit payment and put a contract into hold status.

- Record the deposit amount and payment method
- Contract moves to Hold status
- Useful when customers want to secure a slot before full commitment

OPERATIONS CATEGORY

The Operations category covers the day-to-day use of Business Pilot, from initial login and customer management through to contracts, scheduling, invoicing, service calls, and reporting. These how-to guides walk users through every core workflow in the system.

Sub-Topic	Articles	Description
Getting Started & Login	6	Guides for logging in on various devices, managing your password, and getting help from support
Contacts & Customer Management	9	How to search for, create, edit, and export customer and supplier contact records.
Leads & Pipeline Configuration	15	Managing lead values, pipeline stages, statuses, lead sources, product types, and converting leads to contracts.
Contracts & Job Management	13	Creating, editing, and managing contracts including fit dates, guarantees, hold status, and contract completion.
Schedule Board & Installation	11	Using and configuring the schedule board to plan, book, and manage installation jobs and fitting teams.
Diary & Appointments	9	Booking, managing, and rescheduling sales, survey, and service appointments as well as meetings and holidays.
Purchase Orders & Deliveries	7	Raising purchase orders, processing them, tracking deliveries, and exporting order data.
Invoicing & Payments	15	Creating and managing invoices, recording payments, raising credits, handling write-offs, and managing job costs.
Service Calls	6	Adding, processing, closing, and managing service call requests and appointments for after-sales support.

OPERATIONS CATEGORY

Sub-Topic	Articles	Description
Documents, Images & Templates	13	Uploading, managing, and organising documents and images, plus creating and using document templates and BPsign.
Email & Communication	11	Setting up email, creating templates, sending emails with attachments, using chat, and managing notifications.
Admin, Users & System Setup	10	Managing users, roles, permissions, licences, teams, contact and contract types, nominal codes, and targets.
Reports & MI Dashboards	6	Producing management information dashboards, exporting enquiries, and creating mailing lists from your data.
Mobile App (BP Installer App)	8	Downloading, setting up, and using the Business Pilot Installer mobile app for on-site job management.
Tasks, Notes & General	5	Creating tasks, adding notes, using the search bar, and general system features like Trustpilot integration and web-to-lead forms.

GETTING STARTED & LOGIN

Guides for logging in on various devices, managing your password, and getting help from support.

How to Log In on your Desktop

Step-by-step instructions for accessing Business Pilot from a desktop browser. Covers navigating to the login page and entering your credentials.

- Open your web browser and navigate to the Business Pilot login page
- Enter your registered email address and password
- Access the main dashboard after successful login

How to Log In on your Phone or Tablet

Explains how to access Business Pilot on mobile devices and tablets. Ensures you can manage your work on the go via a mobile browser.

- Open a mobile browser and go to the Business Pilot login URL
- Enter your credentials on the mobile-optimised login page
- Navigate the mobile-friendly interface once logged in

How To Change your Business Pilot Password

Walks through updating your password from within your Business Pilot account settings. Useful for routine security updates when you already know your current password.

- Navigate to your account or profile settings
- Enter your current password and then your new password
- Save changes to apply the new password immediately

How to Reset your Password

Covers the password reset process for users who have forgotten their login credentials. Uses the forgotten-password link on the login page to send a reset email.

- Click the forgotten password link on the login screen
- Enter your registered email to receive a reset link
- Follow the email link to set a new password

GETTING STARTED & LOGIN

How to Find an Answer to a Support Query or Report a Support Issue

Shows how to search the knowledge base for answers and how to raise a support ticket when you cannot find a solution. Helps users self-serve before escalating.

- Search the knowledge base using keywords related to your query
- Browse categories to find relevant how-to articles
- Submit a support ticket if the knowledge base does not resolve your issue

How To Contact Support

Provides the available channels for reaching Business Pilot support, including email and in-app options. Use this when you need direct assistance from the support team.

- Use the in-app support feature to raise a request
- Contact support via the designated email or phone channel
- Include relevant details such as screenshots and contract references to speed up resolution

CONTACTS & CUSTOMER MANAGEMENT

How to search for, create, edit, and export customer and supplier contact records.

How to Find a Customer by Their Surname

Demonstrates how to quickly locate a customer record by searching with their surname. Useful for fast lookups when you know the customer name.

- Use the contacts search bar and enter the customer surname
- Review the filtered results and select the correct record
- Access the full contact details from the search results

How to Find a Customer by Their Email Address

Shows how to search for a contact using their email address. Ideal when you have correspondence but are unsure of the customer name.

- Enter the email address into the contact search field
- The system returns matching contact records
- Click through to view the full contact and linked leads or contracts

How to Search a Customer Using a Phone Number

Explains how to look up a customer record by their phone number. Helpful when handling incoming calls and you need to pull up their details quickly.

- Enter the phone number in the search bar
- Results display contacts matching the number
- Open the contact to view associated leads and contracts

How to Find a Customer Using Their Postcode

Covers searching for customers by postcode, which is useful for area-based lookups or when other details are unavailable.

- Type the postcode into the search field
- Review all contacts at that postcode
- Select the correct customer to view their record

How to Search Contacts, Leads and Contracts by First Line of Address

Demonstrates how to search across contacts, leads, and contracts using the first line of an address. Provides a flexible way to find records when other identifiers are unknown.

- Enter the first line of the address in the search bar
- Results span contacts, leads, and contracts matching the address
- Use this method when you only have a street name or house number

CONTACTS & CUSTOMER MANAGEMENT

How to Edit a Contact

Walks through updating an existing contact record with new or corrected information. Covers editing names, addresses, phone numbers, and email addresses.

- Open the contact record you wish to edit
- Update the relevant fields such as name, address, or phone number
- Save changes to update the record across the system

How To Add a Supplier

Explains how to create a new supplier record in Business Pilot. Supplier records are used when raising purchase orders and tracking deliveries.

- Navigate to the supplier section and click Add Supplier
- Enter the supplier company name, contact details, and address
- Save the supplier so it is available for purchase orders

How To Add an Accounts Reference to a Contact

Shows how to attach an accounts reference number to a contact, linking the CRM record to your accounting system. Useful for Sage or other accounts integrations.

- Open the contact record and locate the accounts reference field
- Enter the reference number from your accounting software
- Save to ensure the reference is linked for future exports and invoicing

How To Export your Live or Archived Contact List to Excel or PDF

Covers exporting your contact database to Excel or PDF format. Allows you to create offline records or share contact lists with colleagues.

- Navigate to the contacts list and apply any required filters
- Choose between live or archived contacts
- Select Excel or PDF as the export format and download the file

LEADS AND PIPELINE CONFIGURATION

Managing lead values, pipeline stages, statuses, lead sources, product types, and converting leads to contracts.

How To Add a Sold Value (Net)

Explains how to record the net sold value on a lead or contract. This value feeds into reporting and revenue tracking.

- Open the lead or contract and locate the sold value field
- Enter the net sold value excluding VAT
- Save to update revenue figures and pipeline reporting

How To Add the Quoted Value (Net)

Shows how to enter the net quoted value on a lead. This helps track the potential revenue in your sales pipeline.

- Open the lead record and find the quoted value field
- Enter the net quoted amount excluding VAT
- The quoted value is used in pipeline and MI dashboard reports

How To Add a New or Amend an Pipeline

Covers creating a new pipeline or modifying an existing one to match your sales workflow. Pipelines define the stages a lead moves through from enquiry to sale.

- Navigate to pipeline settings in the admin area
- Add a new pipeline or select an existing one to edit
- Define or adjust the stages and their order
- Save to apply the pipeline to new and existing leads

How To Copy or Delete a Pipeline

Demonstrates how to duplicate an existing pipeline for reuse or remove a pipeline that is no longer needed. Copying saves time when setting up similar workflows.

- Select the pipeline you want to copy or delete
- Use the copy function to create a duplicate with the same stages
- Delete unused pipelines to keep your configuration tidy

LEADS AND PIPELINE CONFIGURATION

How To Create a Status

Walks through adding a new status to a pipeline progression. Statuses define where a lead or contract sits within a workflow stage.

- Go to the pipeline configuration and select the relevant pipeline
- Add a new status with a descriptive name
- Position the status in the correct order within the progression

How To Set an Automation to a Progression

Shows how to attach automated actions to a pipeline progression, such as sending emails or creating tasks when a lead reaches a particular status.

- Open the pipeline and select the status progression
- Choose the automation type such as email or task creation
- Configure the automation details and save

How To Add Time Flags to your Status Progression

Explains how to set time-based flags on pipeline statuses to highlight leads that have been sitting too long at a stage. Helps teams follow up on stale leads.

- Select the status within your pipeline progression
- Set a time threshold after which a flag is triggered
- Flagged leads become visually highlighted for follow-up action

How To Manage Lead Sources

Covers creating, editing, and organising lead sources such as web enquiry, phone call, or referral. Lead sources track where your enquiries originate.

- Navigate to the lead sources management area
- Add new sources or edit existing ones
- Assign lead sources to incoming enquiries for accurate reporting

How To Manage Lead Sub Sources

Shows how to set up and manage lead sub-sources for more granular tracking of where leads come from. Sub-sources sit beneath main lead sources.

- Open lead sub-source settings under the parent lead source
- Create sub-sources for detailed attribution such as specific campaigns
- Use sub-sources in reports for deeper marketing insight

LEADS AND PIPELINE CONFIGURATION

How To Reassign Lead Sources & Lead Sub-Sources

Explains how to bulk-reassign lead sources and sub-sources when restructuring your tracking categories. Prevents data loss when consolidating or renaming sources.

- Select the lead source or sub-source to reassign
- Choose the new source or sub-source to transfer leads to
- Confirm the reassignment to update all affected lead records

How To Manage Product Types

Covers adding and editing product types such as windows, doors, or conservatories. Product types categorise leads and contracts by the type of installation.

- Navigate to product type settings
- Add new product types or rename existing ones
- Product types appear on leads and contracts for filtering and reporting

How To Manage Product Interests

Shows how to configure product interests, which capture more specific detail about what a customer is interested in beyond the main product type.

- Open the product interests configuration
- Add or edit interests to reflect your product range
- Assign product interests to leads for better segmentation

How To Manage Sales Area

Explains how to define and manage sales areas so leads and contracts can be assigned to geographic regions. Useful for territory-based sales teams.

- Navigate to the sales area settings
- Create or edit sales areas to match your territories
- Assign sales areas to leads for geographic reporting

How To Deactivate A Product Type

Walks through deactivating a product type that is no longer offered. Deactivation hides it from new leads without deleting historical data.

- Open product type settings and find the type to deactivate
- Toggle the active status to deactivate it
- Historical records retain the product type but it will not appear for new entries

LEADS AND PIPELINE CONFIGURATION

How To Convert a Lead To a Contract

Demonstrates converting a qualified lead into a contract, which moves it from the sales pipeline into the contract and job management workflow.

- Open the lead you wish to convert
- Click the convert to contract option
- Confirm the details and the system creates a new contract record
- The lead status updates to reflect the conversion

CONTRACTS AND JOB MANAGEMENT

Creating, editing, and managing contracts including fit dates, guarantees, hold status, and contract completion.

How To Delete a Contract

Explains how to delete a contract record from Business Pilot. This is typically used for contracts created in error.

- Open the contract you wish to delete
- Select the delete option and confirm the action
- Deleted contracts are removed from active lists and reports

How To Add or Amend an Estimated Fit Date to a Contract

Shows how to set or change the estimated installation date on a contract. Fit dates help with scheduling and customer communication.

- Open the contract and locate the estimated fit date field
- Enter or amend the date as required
- Save to update the schedule and any linked notifications

How To Change the Contract Status e.g. Supply and Fit to Supply Only

Covers changing a contract type, for example from Supply and Fit to Supply Only. This adjusts how the job is tracked and invoiced.

- Open the contract and find the contract status or type field
- Select the new status such as Supply Only
- Save to update the contract and any related processes

How To Place and Reactivate a Contract on Hold

Demonstrates placing a contract on hold when work is paused and reactivating it when ready to proceed. Keeps your active contract list accurate.

- Open the contract and select the hold option
- The contract moves out of active workflow until reactivated
- Reactivate the contract to resume normal processing

How To Add a Guarantee Number to a Contract

Shows how to record a guarantee or warranty number against a completed contract. Ensures guarantee details are stored with the job for future reference.

- Open the contract and locate the guarantee number field
- Enter the guarantee reference number
- Save to attach the guarantee to the contract record

CONTRACTS AND JOB MANAGEMENT

How To Add Insurance Backed Guarantee and Self Certification Details

Explains how to add insurance-backed guarantee (IBG) and self-certification information to a contract. Important for compliance in the fenestration industry.

- Open the contract and navigate to the guarantee section
- Enter IBG details including provider and certificate number
- Add self-certification details where applicable
- Save to ensure compliance records are stored with the job

How to Mark a Contract as Completed

Walks through marking a contract as complete once all work and payments are finalised. Completed contracts move out of the active workflow.

- Open the contract and verify all tasks and payments are complete
- Click the complete contract option
- The contract is archived and reflected in completed reports

How to Change the Install Address

Shows how to update the installation address on a contract when it differs from the customer contact address. Ensures fitting teams go to the right location.

- Open the contract and locate the install address section
- Edit the address fields with the correct installation location
- Save to update the address across the schedule and job card

How to Raise an Addition to Contract

Explains how to add an addition or variation to an existing contract, covering extra work or changes requested by the customer after the original sale.

- Open the contract and select the option to raise an addition
- Enter the details and value of the additional work
- The addition is linked to the original contract for tracking and invoicing

How to Take a Holding Deposit and Place the Contract on Hold

Covers recording a holding deposit payment and placing the contract on hold simultaneously. Used when a customer wants to secure a contract but delay the start.

- Open the contract and record the holding deposit payment
- Place the contract on hold to pause workflow progression
- The deposit is logged against the contract for accounts purposes

CONTRACTS AND JOB MANAGEMENT

How To Change Your Main Job Card To Product Type or Product Interest

Shows how to switch the main job card display to show product type or product interest instead of the default view. Helps tailor the contract view to your workflow.

- Navigate to the job card settings
- Select whether to display product type or product interest
- Save to apply the change across your contract views

How to use Covid-19 Risk Assessment Feature

Explains the Covid-19 risk assessment feature built into the contract workflow. Allows teams to record pre-installation health and safety checks.

- Access the risk assessment from the contract page
- Complete the checklist before proceeding with installation
- The completed assessment is stored against the contract

How to Authorise a Customer to Receive a Customer Review

Shows how to flag a customer as authorised to receive a review request after their installation is complete. Drives post-job feedback collection.

- Open the contract and locate the review authorisation option
- Toggle the setting to authorise a review request
- The customer will receive a review invitation based on your automation settings

SCHEDULE BOARD AND INSTALLATION

Using and configuring the schedule board to plan, book, and manage installation jobs and fitting teams.

How To Understand Our Schedule Board

Provides an overview of the schedule board layout, colour coding, and key features. Essential reading before using the scheduling tools.

- Understand the board layout including teams, dates, and job slots
- Learn the meaning of different colours and status indicators
- Familiarise yourself with navigation and filtering options

How To Create and Manage the Schedule Boards

Covers creating new schedule boards and managing existing ones. Multiple boards can be set up for different departments or regions.

- Create a new schedule board from the settings area
- Configure the board with relevant teams and date ranges
- Manage multiple boards to separate different types of work

How To Schedule A Job

Walks through the process of scheduling a job onto the board. Covers selecting the team, date, and duration for the installation.

- Select the contract to be scheduled
- Choose the fitting team and date on the schedule board
- Confirm the booking to lock in the installation slot

How To Manually Schedule a Job

Shows how to manually place a job on the schedule board when the standard scheduling flow is not suitable. Gives full control over team and date selection.

- Open the schedule board and navigate to the desired date
- Drag or manually assign the job to a team slot
- Confirm the details and save the manual schedule entry

How To Confirm An Installation

Explains how to confirm a scheduled installation, updating the status on the schedule board. Confirmation signals that the job is ready to proceed.

- Locate the scheduled job on the board
- Click to confirm the installation
- The job status updates to confirmed and triggers any linked automations

SCHEDULE BOARD AND INSTALLATION

How To Move a Fit Day Booked and Lock in a Job in the Schedule

Covers moving an already booked fit day to a new date and locking the job in place on the schedule. Locking prevents accidental changes.

- Select the booked job on the schedule board
- Move it to the new date or team as required
- Lock the job to prevent further changes without authorisation

How To Add a New Team or Team Type to your Schedule Board

Shows how to add fitting teams or team types to the schedule board. Teams represent the crews available for installation work.

- Navigate to schedule board settings
- Add a new team with a name and team type
- The team appears on the board and can be assigned jobs

How To Manage your Schedule Settings and Reasons for Deletion

Covers configuring schedule settings and setting up reasons that must be provided when removing a job from the schedule. Ensures accountability for schedule changes.

- Access schedule settings from the admin area
- Configure deletion reasons that users must select when removing jobs
- Adjust general schedule preferences such as default views

How to Change the Colours within the Schedule Board

Explains how to customise the colour scheme of the schedule board to match your preferences or highlight specific job types.

- Open the schedule board colour settings
- Assign colours to different statuses or job types
- Save to apply the new colour scheme across the board

How to get to the Contract Page from the Schedule

Shows how to navigate directly from a scheduled job on the board to its full contract page. Saves time when you need contract details while reviewing the schedule.

- Click on a job entry in the schedule board
- Select the option to view the full contract
- The contract page opens with all associated details

SCHEDULE BOARD AND INSTALLATION

How to Assign a User to a Fitting Team

Walks through assigning individual users to a fitting team so they appear on the schedule board. Ensures the right personnel are linked to the right crew.

- Navigate to the fitting team management settings
- Select the team and add the user
- The user now appears under that team on the schedule board

DIARY AND APPOINTMENTS

Booking, managing, and rescheduling sales, survey, and service appointments as well as meetings and holidays.

How To Book Multiple Sales and Surveyor Appointments in the Diary

Explains how to book several sales or surveyor appointments at once in the diary. Saves time when scheduling a full day of appointments.

- Open the diary and select the date and user
- Add multiple appointment slots in a single session
- Each appointment is linked to the relevant lead or contract

How To Book a Survey Appointment (Within a Contract)

Shows how to schedule a survey appointment directly from within a contract record. Links the survey to the correct contract automatically.

- Open the contract and select the option to book a survey
- Choose the surveyor, date, and time
- The appointment appears in the diary linked to the contract

How To Set or Confirm a Provisional Appointment in the Diary

Covers creating a provisional appointment and then confirming it when the customer agrees. Provisional appointments are visually distinguished in the diary.

- Create a new appointment and mark it as provisional
- Contact the customer to confirm the date and time
- Update the appointment status to confirmed in the diary

How To Move, Reschedule or Delete an Appointment in the Diary

Demonstrates how to move an appointment to a new date or time, reschedule it, or delete it entirely from the diary.

- Click on the appointment in the diary to open its details
- Drag to move or use the edit option to reschedule
- Delete the appointment if it is no longer required

How To Set a Recurring Meeting in the Diary

Shows how to create a recurring meeting entry in the diary for regular team meetings or check-ins. Saves time by setting it once for multiple dates.

- Create a new meeting entry in the diary
- Set the recurrence pattern such as weekly or monthly
- The meeting automatically appears on all future scheduled dates

DIARY AND APPOINTMENTS

How To Book Holiday in the Diary

Explains how to record holiday or leave in the diary so that the user is shown as unavailable. Prevents appointments being booked during time off.

- Select the user and date range for the holiday
- Create the holiday entry in the diary
- The user is blocked from receiving appointments during that period

How To Add a New Team or Team Type to your Schedule Board

Shows how to add fitting teams or team types to the schedule board. Teams represent the crews available for installation work.

- Navigate to schedule board settings
- Add a new team with a name and team type
- The team appears on the board and can be assigned jobs

How To Manage Your Personal Appointment Notifications (Sales, Surveyors & Service)

Covers configuring personal notification preferences for appointment reminders. Choose how and when you receive alerts for sales, survey, and service appointments.

- Navigate to your personal notification settings
- Enable or disable notifications for each appointment type
- Set preferred notification timing and delivery method

How to Move an Appointment in the Lead Page

Shows how to reschedule an appointment directly from the lead page without navigating to the diary. Streamlines the process when working within a lead record.

- Open the lead and locate the appointment section
- Select the appointment and choose a new date or time
- Save to update the diary automatically

How to Move an Appointment in the Diary Page

Demonstrates moving an appointment within the diary page using drag-and-drop or editing. Useful for quick rescheduling directly on the diary view.

- Locate the appointment on the diary page
- Drag it to the new time slot or date
- Confirm the change to update the appointment

PURCHASE ORDERS & DELIVERIES

Raising purchase orders, processing them, tracking deliveries, and exporting order data.

How To Add a Purchase Order, Record a Delivery and Record a Supplier Invoice

End-to-end guide covering the full purchase order lifecycle from creation through delivery recording to supplier invoice entry. The core workflow for procurement.

- Create a purchase order against a contract and supplier
- Record the delivery when goods arrive
- Enter the supplier invoice to complete the procurement cycle
- All records are linked to the contract for cost tracking

How To Process a Purchase Order to PDF or Word

Shows how to export a purchase order as a PDF or Word document for printing or sending to suppliers outside the system.

- Open the purchase order you wish to export
- Select PDF or Word as the output format
- Download or print the generated document

How To Export a List of Purchase Orders to Excel or PDF

Covers exporting a filtered list of purchase orders to Excel or PDF. Useful for reporting, reconciliation, or sharing with your accounts team.

- Navigate to the purchase orders list and apply filters
- Choose Excel or PDF as the export format
- Download the file for offline use or sharing

How To Send a Purchase Order via Email Link

Explains how to send a purchase order directly to a supplier via an email link from within Business Pilot. Streamlines supplier communication.

- Open the purchase order and select the email option
- The system generates an email with a link to the PO
- The supplier can view and download the purchase order

How to Book in a Delivery

Shows how to book in an expected delivery against a purchase order. Booking in a delivery records when goods are due to arrive.

- Open the purchase order and select book delivery
- Enter the expected delivery date and details
- The delivery appears in the deliveries list for tracking

PURCHASE ORDERS & DELIVERIES

How to Confirm a Delivery

Covers confirming that a booked delivery has arrived. Confirmation updates the purchase order status and triggers any linked processes.

- Locate the delivery in the deliveries list
- Mark it as confirmed once goods have been received
- The purchase order and contract records are updated accordingly

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How To Export a List of Deliveries to Excel or PDF

Demonstrates exporting your deliveries list to Excel or PDF for reporting and record-keeping purposes.

- Navigate to the deliveries list and apply any filters
- Select Excel or PDF as the export format
- Download the exported file for offline review

INVOICING AND PAYMENTS

Creating and managing invoices, recording payments, raising credits, handling write-offs, and managing job costs.

How to Add, Edit and Delete an Invoice

Comprehensive guide to creating, modifying, and removing invoices within Business Pilot. Covers the full invoice lifecycle.

- Add a new invoice against a contract
- Edit invoice details such as amounts and dates
- Delete an invoice if raised in error

How To Add a Manual Invoice

Shows how to create a manual invoice outside the standard automated invoicing process. Useful for ad-hoc charges or adjustments.

- Navigate to invoicing and select add manual invoice
- Enter the invoice details including amount and description
- Save and assign the invoice to the relevant contract or contact

How To Add, Edit & Delete a Payment to an Invoice

Covers recording payments against invoices, editing payment details, and deleting incorrect payment entries. Essential for keeping accounts accurate.

- Open the invoice and add a payment with the amount and method
- Edit a payment if details such as date or amount need correcting
- Delete a payment entry if it was recorded in error

How To Change the Invoice Raised Date

Explains how to amend the raised date on an invoice after it has been created. Useful when an invoice needs to be backdated or corrected.

- Open the invoice and locate the raised date field
- Change the date to the correct value
- Save to update the invoice record and any linked reports

How To Raise a Credit Invoice

Shows how to raise a credit invoice to offset a previous charge. Credit invoices reduce the outstanding balance on a customer account.

- Navigate to invoicing and select raise credit invoice
- Enter the credit amount and reason
- The credit is applied against the customer account

INVOICING AND PAYMENTS

How To Raise a Credit Against an Invoice or an Account

Demonstrates raising a credit directly against a specific invoice or a customer account. Provides flexibility in how credits are allocated.

- Choose whether to credit a specific invoice or the overall account
- Enter the credit amount and reference details
- Save to apply the credit and update the balance

How To Use the Write Off Function

Covers writing off an outstanding balance that will not be collected. Write-offs close the balance without requiring payment.

- Open the invoice or account with the outstanding balance
- Select the write-off function and enter the amount
- Confirm to close the balance and record the write-off

How To Manage Invoice Types

Explains how to add, edit, or remove invoice types used to categorise invoices in Business Pilot. Helps organise invoicing for different work types.

- Navigate to invoice type settings
- Add new types or edit existing ones
- Invoice types are available when creating new invoices

How To Send the Customer a Receipt

Shows how to send a payment receipt to the customer after a payment has been recorded. Provides the customer with proof of payment.

- Open the invoice with the recorded payment
- Select the option to send a receipt
- The receipt is emailed to the customer contact address

How To Understand Credits

An overview guide explaining how credits work within Business Pilot, including credit invoices, account credits, and their impact on balances.

- Understand the difference between credit invoices and account credits
- Learn how credits affect outstanding balances
- See how credits appear in reports and exports

INVOICING AND PAYMENTS

How To Add A Job Cost

Explains how to record a job cost against a contract, tracking expenses incurred during the installation. Job costs feed into profitability reporting.

- Open the contract and navigate to the job costs section
- Add a new cost entry with the amount and description
- The cost is linked to the contract for margin tracking

How To Mark a Job Cost as a Credit (article 1)

Shows how to mark a job cost entry as a credit, reducing the total costs recorded against the contract. Used when a supplier issues a refund or correction.

- Open the job cost entry on the contract
- Mark the cost as a credit
- The contract cost total is reduced by the credit amount

How To Mark a Job Cost as a Credit (article 2)

An additional guide covering an alternative method for marking job costs as credits. Provides a different workflow for the same outcome.

- Access the job costs area from the contract page
- Use the alternative credit method described in this article
- Verify the credit is correctly reflected in the contract totals

How To Refrain a Job Cost Being Exported to Sage (article 1)

Explains how to prevent a specific job cost from being included in the Sage accounting export. Useful when a cost should remain internal only.

- Open the job cost entry on the contract
- Toggle the setting to exclude it from the Sage export
- The cost remains in Business Pilot but is not sent to Sage

How To Refrain a Job Cost Being Exported to Sage (article 2)

A supplementary guide showing an alternative approach to preventing job costs from exporting to Sage. Covers a different scenario or interface path.

- Navigate to the job cost using the method described in this article
- Apply the exclusion flag to prevent Sage export
- Confirm the cost is excluded from the next export batch

SERVICE CALLS

Adding, processing, closing, and managing service call requests and appointments for after-sales support.

How To Add and Process a Service Call Request or Appointment

Walks through creating a new service call and processing it through the workflow. Covers both service requests and booking service appointments.

- Create a new service call from the contract or service area
- Enter the issue details and link it to the correct contract
- Book a service appointment and assign it to a team member
- Process the service call through to completion

How To Amend or Delete a Service Call Appointment or Request

Shows how to edit the details of a service call or delete one that was created in error. Keeps your service call list accurate.

- Open the service call and amend details as needed
- Reschedule the service appointment if the date changes
- Delete the service call if it was raised incorrectly

How To Close a Service Call

Explains how to close a service call once the issue has been resolved. Closing moves the service call out of the active list.

- Open the service call and verify the issue is resolved
- Select the close option and enter any closing notes
- The service call is archived and reflected in service reports

How To Reactivate a Closed Service Call

Covers reopening a previously closed service call when the issue recurs or was not fully resolved. Restores the call to the active list.

- Find the closed service call in the archive
- Select the reactivate option
- The service call returns to the active list for further action

How To Export a Service Call Request or Appointment to PDF

Shows how to export a service call or appointment as a PDF document. Useful for printing job sheets or sharing service details externally.

- Open the service call you wish to export
- Select the export to PDF option
- Download or print the generated PDF

SERVICE CALLS

How To Manage Service Call Route of Issues

Explains how to configure the route of issues categories used to classify service call types. Helps organise and report on common after-sales problems.

- Navigate to service call settings
- Add, edit, or remove issue route categories
- Categories are available when logging new service calls

DOCUMENTS, IMAGES & TEMPLATES

Uploading, managing, and organising documents and images, plus creating and using document templates and BPsign.

How do I use BPsign?

Introduces the BPsign electronic signature feature, allowing you to send documents for digital signing. Streamlines contract and agreement sign-off.

- Prepare the document and send it via BPsign
- The customer receives a link to sign electronically
- Signed documents are stored against the contract record

How To Add & Delete a Document

Covers uploading documents to a contact, lead, or contract record and removing documents that are no longer needed.

- Navigate to the record and open the documents tab
- Upload a document by selecting the file from your device
- Delete a document by selecting it and confirming removal

How to Add and Delete an Image

Shows how to upload images to a record, such as site photos, and how to remove them. Images provide visual context for jobs and contracts.

- Open the record and go to the images section
- Upload an image file from your device
- Delete images that are no longer relevant

How To Update Details of The Images And Documents

Explains how to edit the metadata of uploaded images and documents, such as renaming files or changing their category.

- Select the image or document you wish to update
- Edit the name, description, or category
- Save the changes to update the file details

How To Download a Document Template

Shows how to download a pre-built document template from Business Pilot for use in creating contracts, quotes, or other standard documents.

- Navigate to the document templates section
- Select the template you need
- Download it for editing or immediate use

DOCUMENTS, IMAGES & TEMPLATES

How To Choose One Category for a Batch Upload of Documents & Images

Explains how to assign a single category to multiple documents or images during a batch upload. Saves time when uploading several files at once.

- Start a batch upload of documents or images
- Select one category to apply to all files in the batch
- Upload to assign the category to every file simultaneously

How To Create a Document Template and Add It To Business Pilot

Walks through creating a custom document template and uploading it to Business Pilot. Templates support merge fields for auto-populating customer and contract data.

- Create a document in your preferred editor using supported merge fields
- Upload the template to Business Pilot
- The template becomes available for generating documents from records

How To Manage Document Types

Covers adding, editing, and organising document types used to categorise uploaded files. Document types help users find files quickly.

- Navigate to document type settings
- Add new types or rename existing ones
- Document types appear as categories when uploading files

How to Deactivate Document Types

Shows how to deactivate a document type that is no longer used. Deactivation hides it from the selection list without deleting existing records.

- Open the document types settings
- Select the type to deactivate and toggle its status
- Existing documents retain the type but it no longer appears for new uploads

How to Add Document Tags

Explains how to add tags to documents for easier searching and filtering. Tags provide additional metadata beyond document types.

- Open the document and locate the tags field
- Add one or more tags to describe the document
- Use tags to filter and search for documents across the system

DOCUMENTS, IMAGES & TEMPLATES

How to Delete a Document

A focused guide on removing a document from a record. Covers the deletion confirmation process to prevent accidental removal.

- Navigate to the document on the relevant record
- Select the delete option
- Confirm the deletion to permanently remove the file

How To Export Notes to Excel or PDF (Contact, Lead, Contract)

Shows how to export notes from a contact, lead, or contract record to Excel or PDF. Useful for creating offline records of communication history.

- Open the notes section on the relevant record
- Select export and choose Excel or PDF
- Download the file containing all notes for that record

How to Add a Document Type

A quick guide to adding a new document type to your system configuration. New types become available immediately for categorising uploads.

- Navigate to document type settings
- Click add and enter the new type name
- Save to make the type available across the system

EMAIL & COMMUNICATION

Setting up email, creating templates, sending emails with attachments, using chat, and managing notifications.

How To Create an Email Template

Walks through creating a reusable email template with merge fields. Templates save time when sending standard communications to customers.

- Navigate to email template settings and click create new
- Design the template with text and merge fields
- Save the template for use across the system

How To Send an Email

Shows how to send an email to a customer directly from a contact, lead, or contract record. Emails are logged against the record automatically.

- Open the record and select the email option
- Compose or select a template for the email
- Send the email and it is logged in the record notes

How To Send an Email with a External Attachment

Explains how to attach a file from your computer to an email sent through Business Pilot. Useful for sending quotes, plans, or other external files.

- Compose the email from within a record
- Click attach and select a file from your device
- Send the email with the attachment included

How To Send an Email with a Attachment from the System

Shows how to attach a document already stored in Business Pilot to an outgoing email. Avoids the need to download and re-upload files.

- Compose the email from within a record
- Select the option to attach a file from the system
- Choose the stored document and send the email

How To Use The Chat Function

Introduces the in-app chat feature for internal team communication. Chat messages are instant and do not require email.

- Access the chat function from the main navigation
- Send messages to individual users or groups
- Chat history is retained for reference

EMAIL & COMMUNICATION

How To Add / Amend Email Notifications

Covers setting up and modifying email notifications that trigger based on system events. Keeps your team informed of important updates automatically

- Navigate to the email notification settings
- Add a new notification rule or edit an existing one
- Choose the trigger event and recipient

How To Set Up Your General Company Email

Explains how to configure your company-wide email settings so that outgoing emails from Business Pilot use your company email address.

- Navigate to company email settings in the admin area
- Enter your company email address and SMTP details
- Test the configuration to ensure emails are sent correctly

How To Set Up Your User Email

Shows how individual users can set up their personal email address for sending emails through Business Pilot. Ensures emails come from the correct sender.

- Open your user profile or settings
- Enter your personal email address and SMTP details
- Test to confirm emails are sent from your address

How To Make A Direct Call From A Contact Or Lead Page

Demonstrates how to initiate a phone call directly from a contact or lead record using click-to-call functionality. Speeds up outbound calling.

- Open the contact or lead record
- Click the phone number to initiate a call
- The call is placed using your configured telephony setup

How To Edit an Email Template within Status Progression

Shows how to edit an email template that is linked to a pipeline status progression. Changes affect the automated email sent when a lead reaches that status.

- Navigate to the pipeline status progression settings
- Select the email template linked to the progression
- Edit the template content and save

EMAIL & COMMUNICATION

How To Disable BP Mail Notes

Explains how to turn off the automatic logging of BP Mail notes on records. Useful if you want to reduce note clutter from automated emails.

- Navigate to the mail settings area
- Toggle the BP Mail notes setting to disabled
- Automated email notes will no longer appear on records

ADMIN, USERS & SYSTEM SETUP

Managing users, roles, permissions, licences, teams, contact and contract types, nominal codes, and targets.

How To Add a New User

Walks through creating a new user account in Business Pilot. New users receive login credentials and can be assigned roles and permissions.

- Navigate to user management and click add new user
- Enter the user details including name, email, and role
- Save to create the account and send login details

How To Understand User Roles & Permissions

Provides an overview of the roles and permissions system in Business Pilot. Helps administrators understand what each role can access and do.

- Review the available user roles and their default permissions
- Understand how permissions control access to features and data
- Assign appropriate roles based on job function

How To Deactivate and Reassign a Licence to a New User

Shows how to deactivate a user who has left and reassign their licence to a new team member. Ensures no licences are wasted.

- Deactivate the departing user account
- Reassign their licence to the new user
- The new user can now log in with full access

How To Reallocate Open Tasks

Explains how to reassign open tasks from one user to another. Essential when a team member leaves or workload needs rebalancing.

- Navigate to the task reallocation tool
- Select the user whose tasks need reassigning
- Choose the new assignee and confirm the transfer

How To Manage Teams

Covers creating and managing teams within Business Pilot. Teams group users for scheduling, reporting, and workflow assignment purposes.

- Navigate to team management settings
- Create a new team or edit an existing one
- Add or remove users from teams as required

ADMIN, USERS & SYSTEM SETUP

How To Manage Contact Types

Shows how to add, edit, or remove contact types used to categorise contacts in the system. Contact types help segment your customer base.

- Navigate to contact type settings
- Add new types or edit existing ones
- Contact types are used when creating or editing contact records

How To Manage Contract Types

Explains how to configure contract types such as Supply and Fit or Supply Only. Contract types determine how jobs are processed and reported.

- Navigate to contract type settings
- Add or modify contract types to match your business offerings
- Contract types are assigned when creating or converting contracts

How To Manage Nominal Codes

Covers setting up and managing nominal codes used for accounting integration. Nominal codes map Business Pilot transactions to your accounting software categories.

- Navigate to nominal code settings
- Add or edit codes to match your accounting chart of accounts
- Nominal codes are used in invoices and job costs for correct accounting export

How To Manage Targets

Shows how to set and manage sales or performance targets for users and teams. Targets feed into the MI dashboards for tracking against goals.

- Navigate to targets management
- Set targets by user, team, or company level
- Targets appear in dashboards and reports for performance tracking

How To Make Use of The Scheduling Role

Explains the scheduling role permission and how to assign it to users who manage the installation schedule. Restricts schedule access to authorised personnel.

- Understand what the scheduling role allows a user to do
- Assign the scheduling role to relevant team members
- Users with this role can manage the schedule board

REPORTS & MI DASHBOARDS

Producing management information dashboards, exporting enquiries, and creating mailing lists from your data.

How To Produce the Overall Direction Visual Dashboard in MI

Shows how to generate the Overall Direction dashboard, which provides a high-level visual overview of business performance across key metrics.

- Navigate to the MI section and select Overall Direction
- Set the date range and any filters
- Review the visual dashboard for trends in leads, sales, and revenue

How To Produce a People & Showrooms Dashboard Report in MI

Explains how to generate the People and Showrooms dashboard, which breaks down performance by individual sales people and showroom locations.

- Navigate to MI and select People and Showrooms
- Choose the reporting period and personnel or location filters
- Review performance metrics by person or showroom

How To Produce a Sales Dashboard Report in MI

Covers generating the Sales dashboard report, providing detailed metrics on sales activity, conversion rates, and revenue.

- Navigate to MI and select the Sales Dashboard
- Set the date range and apply relevant filters
- Analyse sales figures, conversion rates, and pipeline data

How to Export your Enquiries to Excel

Shows how to export your enquiries data to an Excel spreadsheet for further analysis or reporting outside Business Pilot.

- Navigate to the enquiries list and apply filters
- Select the Excel export option
- Download the spreadsheet for offline analysis

How to Export your Enquiries to PDF

Demonstrates exporting enquiries data to a PDF document for printing or formal reporting purposes.

- Navigate to the enquiries list and apply filters
- Select the PDF export option
- Download and print or share the PDF report

REPORTS & MI DASHBOARDS

How to Create a GDPR Compliant Mailing List from your Enquiries

Explains how to generate a mailing list from your enquiries that respects GDPR consent preferences. Only contacts who have opted in are included.

- Navigate to the enquiries export area
- Filter for contacts who have given marketing consent
- Export the GDPR-compliant list for use in email campaigns

MOBILE APP (BP INSTALLER APP)

Downloading, setting up, and using the Business Pilot Installer mobile app for on-site job management.

Business Pilot Installer APP Walkthrough

A comprehensive walkthrough of the Business Pilot Installer mobile app, covering its main features and navigation. Essential reading for new app users.

- Overview of the app home screen and navigation
- Key features including job viewing, notes, and image uploads
- How the app connects to the main Business Pilot system

How to Download our App on Android Devices

Step-by-step guide to downloading and installing the Business Pilot Installer app on Android phones and tablets from the Google Play Store.

- Open the Google Play Store on your Android device
- Search for the Business Pilot Installer app
- Install and open the app to begin setup

How to Download our App on Apple Devices

Step-by-step guide to downloading and installing the Business Pilot Installer app on iPhones and iPads from the Apple App Store.

- Open the App Store on your Apple device
- Search for the Business Pilot Installer app
- Install and open the app to begin setup

How to Complete a Job in the APP

Shows how fitting teams can mark a job as complete directly from the mobile app on site. Triggers the completion workflow in the main system.

- Open the assigned job in the app
- Complete the required checklist and sign-off steps
- Mark the job as complete to update the contract status

How to Add a New APP User

Explains how to create a new user account for the mobile Installer app. App users are typically fitting team members who need on-site access.

- Navigate to app user management in the admin area
- Add the new user with their name and login details
- The user can now log into the app on their device

MOBILE APP (BP INSTALLER APP)

How to Add an Image from the APP

Explains how to create a new user account for the mobile Installer app. App users are typically fitting team members who need on-site access.

- Navigate to app user management in the admin area
- Add the new user with their name and login details
- The user can now log into the app on their device

How to Add a Note from the APP

Explains how to add a note to a job from the mobile app while on site. Notes are synced to the main system for the office team to see.

- Open the job in the app and navigate to notes
- Type your note and save
- The note appears on the contract record in the main system

How to Make a Call from the APP

Shows how to make a phone call directly from the app using the customer contact number stored on the job. Eliminates the need to look up numbers manually.

- Open the job in the app
- Tap the phone number to initiate a call
- The call is placed using your device phone dialler

TASKS, NOTES & GENERAL

Creating tasks, adding notes, using the search bar, and general system features like Trustpilot integration and web-to-lead forms.

How To Create a Task

Walks through creating a task and assigning it to yourself or a colleague. Tasks help track to-do items and follow-up actions across leads and contracts.

- Click create task from a record or the main navigation
- Enter the task description, due date, and assignee
- The task appears in the assignee task list for action

How To Use The Search Bar

Explains how to use the global search bar to find contacts, leads, contracts, and other records quickly. The fastest way to navigate to any record.

- Click the search bar at the top of the screen
- Enter a name, reference, postcode, or other identifier
- Select the correct result to open the record

How To Add and Edit a Note

Shows how to add notes to contacts, leads, and contracts, and how to edit existing notes. Notes provide a record of all interactions and updates.

- Open the record and navigate to the notes section
- Add a new note with details of the interaction or update
- Edit an existing note to correct or add information

How to Add Your Trustpilot Reviews as a Widget

Explains how to display your Trustpilot review score as a widget within Business Pilot. Keeps your team motivated by showing live customer feedback.

- Obtain your Trustpilot widget code
- Add the widget through Business Pilot settings
- Your live Trustpilot score is displayed within the system

Integrating the web to lead form with your website

Covers integrating the Business Pilot web-to-lead form into your company website so that online enquiries automatically create leads in the system.

- Generate the web-to-lead form code from Business Pilot
- Embed the form on your website pages
- Online enquiries are automatically captured as new leads
- Leads include the source and customer details from the form submission

FINANCE CATEGORY

The Finance category covers invoicing, payments, job costing, purchase orders, financial reporting, MI dashboards, accounting integrations, and administrative setup within Business Pilot.

Sub-Topic	Articles	Description
Accounting Integrations	3	Connecting Business Pilot with external payment gateways and accounting packages such as Xero and Sage.
Invoicing & Credits	11	Creating, editing, and managing invoices, credit notes, payments, receipts, and write-offs.
Job Costs & Purchase Orders	5	Recording job costs, managing purchase orders, tracking deliveries, and handling supplier invoices.
Financial Reports	11	Running and exporting financial reports including aged debtors, banking, balance outstanding, sales, job costs, and orders on hand.
MI Dashboards	3	Producing management information dashboards for business performance, sales, and people and showroom metrics.
Admin & Setup	7	System configuration tasks including nominal codes, targets, user roles, contact references, support access, and email management.

ACCOUNTING INTEGRATIONS

Connecting Business Pilot with external payment gateways and accounting packages such as Xero and Sage.

How do I integrate Business Pilot with Blink Payment?

Guide to connecting the Blink Payment gateway with Business Pilot so you can take customer payments directly through the system.

- Set up Blink API credentials in Business Pilot settings
- Accept card payments linked directly to invoices
- Payment confirmations sync automatically with your records

How to integrate Xero Accounting with Business Pilot

- Link your Xero organisation to Business Pilot
- Map nominal codes to the Xero chart of accounts
- Invoices, payments, and credits sync across both platforms

How to import items into Sage accounting?

Explains how to export financial items from Business Pilot and import them into Sage accounting software.

- Export invoices and job costs in a Sage-compatible format
- Import the file into Sage to avoid double data entry
- Verify imported records match Business Pilot totals

INVOICING & CREDITS

Creating, editing, and managing invoices, credit notes, payments, receipts, and write-offs.

How to Add, Edit and Delete an Invoice

Covers the full lifecycle of an invoice in Business Pilot, from creation through editing to deletion.

- Create a new invoice against a contract or contact
- Edit invoice lines, amounts, and descriptions after creation
- Delete an invoice that is no longer required
- Understand the impact of changes on financial reports

How To Add a Manual Invoice

Shows how to raise a manual invoice for ad-hoc charges that sit outside the normal contract invoicing workflow.

- Create a standalone invoice not linked to a contract stage
- Enter custom line items, quantities, and VAT rates
- Assign the invoice to the correct contact and nominal code

How To Add, Edit & Delete a Payment to an Invoice

Explains how to record, amend, or remove payments against invoices to keep your accounts accurate.

- Record a full or partial payment against an outstanding invoice
- Edit payment details such as amount, date, or method
- Delete an incorrectly recorded payment
- View the remaining balance after each payment

How To Change the Invoice Raised Date

Describes how to adjust the raised date on an existing invoice when it needs to reflect a different accounting period.

- Open the invoice and locate the raised date field
- Select the correct date to match your accounting requirements
- Understand how date changes affect reporting periods

How To Raise a Credit Invoice

Walks through creating a credit invoice to reverse or reduce the value of a previously raised invoice.

- Raise a credit invoice against the original invoice
- Specify the credit amount and reason
- The credit updates the outstanding balance automatically

INVOICING & CREDITS

How To Raise a Credit Against an Invoice or an Account

Explains the two ways to apply a credit in Business Pilot, either against a specific invoice or against a customer account.

- Apply a credit directly to a single invoice to reduce the balance
- Apply a credit to the customer account for use against future invoices
- Track all credits in the finance ledger

How To Use the Write Off Function

Shows how to write off an outstanding balance when a debt is no longer recoverable.

- Select the invoice or balance to write off
- Record the reason for the write-off
- The outstanding amount is cleared from your aged debtors

How To Manage Invoice Types

Covers how to create and configure different invoice types so invoices are categorised correctly across your business.

- Add new invoice types to suit your business categories
- Edit or deactivate existing invoice types
- Assign invoice types when raising invoices for clearer reporting

How To Send the Customer a Receipt

Explains how to generate and email a payment receipt to a customer after recording their payment.

- Navigate to the payment record on the invoice
- Generate a receipt and preview before sending
- Email the receipt directly to the customer from Business Pilot

How To Understand Credits

Provides an overview of how the credit system works in Business Pilot and how credits interact with invoices and accounts.

- Understand the difference between invoice credits and account credits
- See how credits reduce outstanding balances
- Track credit history in the finance section

INVOICING & CREDITS

How To Send an Invoice via Email Link

Shows how to email a customer a secure link so they can view and pay their invoice online.

- Generate a shareable email link for the invoice
- Customer can view the invoice and make a payment online
- Track whether the email has been sent and opened

JOB COSTS & PURCHASE ORDERS

Recording job costs, managing purchase orders, tracking deliveries, and handling supplier invoices.

How To Add A Job Cost

Explains how to record a job cost against a contract to track expenditure on materials, labour, or other items.

- Add a job cost to the relevant contract
- Select the supplier, nominal code, and amount
- Job costs feed into profit and loss reporting for the contract

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How To Mark a Job Cost as a Credit

Shows how to flag an existing job cost as a credit when a supplier refund or adjustment is received.

- Locate the job cost that needs to be credited
- Mark it as a credit to reverse the original charge
- The contract profit figures update automatically

How To Refrain a Job Cost Being Exported to Sage

Describes how to prevent a specific job cost from being included in the Sage accounting export.

- Flag individual job costs to exclude them from the Sage export
- Useful for internal costs that should not appear in your accounting package
- The job cost remains visible in Business Pilot reporting

How To Add a Purchase Order, Record a Delivery and Record a Supplier Invoice

End-to-end guide covering the purchase order workflow from raising a PO through to recording the goods delivery and supplier invoice.

- Create a purchase order with line items and supplier details
- Record deliveries against the PO as goods arrive
- Log the supplier invoice to complete the procurement cycle
- Track outstanding POs and unmatched deliveries

How To Send a Purchase Order via Email Link

Shows how to email a purchase order directly to a supplier as a secure link from within Business Pilot.

- Generate an email link for the purchase order
- Supplier receives a link to view and confirm the order
- Keep a record of sent POs in the system

FINANCIAL REPORTS

Running and exporting financial reports including aged debtors, banking, balance outstanding, sales, job costs, and orders on hand.

How to Run an Aged Debtors Report to Excel

Shows how to generate an aged debtors report and export it to Excel for further analysis.

- Run the aged debtors report from the Finance section
- Export the results to an Excel spreadsheet
- Filter by date range, customer, or ageing period

How to Run an Aged Debtors Report to PDF

Shows how to generate an aged debtors report and export it as a PDF for printing or sharing.

- Run the aged debtors report from the Finance section
- Download the report as a formatted PDF
- Useful for credit control meetings and management reviews

How to Run a Banking Report to Excel

Explains how to produce a banking report and export it to Excel for reconciliation or analysis.

- Generate the banking report for a chosen date range
- Export to Excel for sorting, filtering, and reconciliation
- Includes payment method breakdowns

How to Run a Banking Report to PDF

Explains how to produce a banking report and download it as a PDF document.

- Generate the banking report for a chosen date range
- Download as a PDF for record-keeping or printing
- Review payment totals by method at a glance

How to Run a Balance Outstanding Report to Excel

Walks through running a balance outstanding report and exporting the data to Excel.

- View all outstanding balances across customers
- Export to Excel for detailed analysis and follow-up
- Filter by customer or date range

FINANCIAL REPORTS

How to Run a Balance Outstanding Report to PDF

Walks through running a balance outstanding report and downloading it as a PDF.

- View all outstanding balances across customers
- Download as a PDF for meetings or management review
- Provides a clear snapshot of money owed to the business

How to Run a Sales Report to Excel

Shows how to generate a sales report and export it to Excel for revenue analysis.

- Run the sales report from the Finance reporting area
- Export to Excel for pivot tables and trend analysis
- Filter by date range, salesperson, or product type

How to Run a Job Cost (By Contract Type) Report to Excel

Explains how to produce a job cost report grouped by contract type and export it to Excel.

- Break down job costs by contract type for comparison
- Export to Excel for further analysis and budgeting
- Identify which contract types are most or least profitable

How to Run a Job Cost (By Contract Type) Report to PDF

Explains how to produce a job cost report grouped by contract type and download it as a PDF.

- Break down job costs by contract type for comparison
- Download as a formatted PDF for management review
- Useful for monitoring profitability across different job types

How to Run an Orders On Hand Report to PDF

Shows how to generate an orders on hand report and download it as a PDF to review your pipeline.

- View all confirmed orders that have not yet been completed
- Download as a PDF for planning and scheduling meetings
- Includes order values and expected completion information

FINANCIAL REPORTS

How to Run an Orders on Hand Report to Excel

Shows how to generate an orders on hand report and export it to Excel for pipeline analysis.

- View all confirmed orders that have not yet been completed
- Export to Excel for sorting, filtering, and capacity planning
- Track total order values in your current pipeline

MI DASHBOARDS

Producing management information dashboards for business performance, sales, and people and showroom metrics.

How To Produce the Overall Direction Visual Dashboard in MI

Explains how to access and use the Overall Direction dashboard to get a high-level view of business performance.

- View key financial and operational metrics in one visual dashboard
- Track business direction with trend indicators
- Use the dashboard to support strategic decision-making

How To Produce a People & Showrooms Dashboard Report in MI

Shows how to generate the People and Showrooms MI dashboard to analyse performance by team member and showroom location.

- Compare performance across showrooms and individuals
- Review lead conversion rates and sales figures per location
- Identify top performers and areas needing improvement

How To Produce a Sales Dashboard Report in MI

Walks through producing the Sales MI dashboard to monitor sales targets, conversion rates, and revenue.

- View sales performance against set targets
- Monitor conversion rates from lead to contract
- Break down sales figures by period, team, or product

ADMIN & SETUP

System configuration tasks including nominal codes, targets, user roles, contact references, support access, and email management.

How To Manage Nominal Codes

Covers adding, editing, and organising nominal codes used to categorise financial transactions in Business Pilot.

- Add new nominal codes to match your chart of accounts
- Edit or deactivate codes that are no longer needed
- Nominal codes drive reporting and accounting integration accuracy

How To Manage Targets

Explains how to set and manage sales and performance targets within Business Pilot.

- Create targets for individuals, teams, or the business overall
- Set target values and time periods
- Targets feed into MI dashboards for performance tracking

How To Understand User Roles & Permissions

Provides an overview of how user roles and permissions control access to features and data across Business Pilot.

- Understand the different user roles available in the system
- Assign roles to control what each user can see and do
- Restrict access to sensitive financial data where needed
- Review and update permissions as your team changes

How To Add an Accounts Reference to a Contact

Shows how to add an accounts reference number to a contact record for use with your accounting software.

- Open the contact record and locate the accounts reference field
- Enter the reference used in your external accounting system
- Ensures exported data links correctly to the right account in Sage or Xero

How To Contact Support

Explains the different ways to reach Business Pilot support for help with technical or account queries.

- Submit a support ticket from within the Business Pilot system
- Access live chat or email support during business hours
- Include relevant details to speed up resolution

ADMIN & SETUP

How To Send an Email with a External Attachment

Shows how to attach a file from your computer to an email sent through Business Pilot.

- Compose an email from within Business Pilot
- Upload an external file from your device as an attachment
- Send the email with the attachment directly to the recipient

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How To Send an Email with a Attachment from the System

Shows how to attach a document already stored in Business Pilot to an outgoing email.

- Compose an email from within Business Pilot
- Select a system-stored document such as a quote, invoice, or contract
- Send the email with the attached document to the recipient

INTEGRATIONS CATEGORY

The Integrations category covers connecting Business Pilot with third-party services including payment gateways, accounting software, automation platforms, compliance portals, and web lead capture.

Sub-Topic	Articles	Description
Third-Party Integrations	6	Guides for connecting Business Pilot with external services and platforms.

THIRD-PARTY INTEGRATIONS

Guides for connecting Business Pilot with external services and platforms.

How do I integrate Business Pilot with Blink Payment?

Guide to connecting Blink Payment gateway with Business Pilot for taking customer payments directly through the system.

- Set up Blink API credentials in Business Pilot
- Accept card payments linked to invoices
- Payment confirmations sync automatically
- Supports online and in-person payment collection

How do I integrate Business Pilot with Zapier?

Explains connecting Business Pilot to Zapier to automate workflows with hundreds of third-party applications.

- Connect Business Pilot to 5000+ apps via Zapier
- Set up triggers and actions for automated workflows
- Examples include syncing leads from web forms and CRM updates
- Requires a Zapier account

How To Integrate With Tommy Trinder

Shows how to connect Business Pilot with Tommy Trinder for automated customer communications and review collection.

- Tommy Trinder sends automated SMS and email communications
- Integrates at key stages of the customer journey
- Helps collect customer reviews and feedback
- Configuration managed in Business Pilot admin settings

How To Integrate With Fensa

Guide to linking Business Pilot with the FENSA compliance portal for automatic registration of window and door installations.

- Automatically submit installation data to FENSA
- Reduces manual data entry for compliance certificates
- Covers window, door, and glazing installations
- Requires active FENSA membership

THIRD-PARTY INTEGRATIONS

How To Integrate With Xero

Comprehensive guide to connecting Xero accounting software with Business Pilot for automated financial sync.

- Sync invoices, payments, and credits to Xero
- Map Business Pilot nominal codes to Xero chart of accounts
- Reduces double entry between CRM and accounting
- Supports automatic reconciliation of payments

Integrating the web to lead form with your website

Technical guide to embedding the Business Pilot web-to-lead form on your company website.

- Copy the form embed code from Business Pilot
- Add to your website HTML or CMS
- Enquiries submitted via the form appear automatically in Business Pilot
- Customise form fields to match your requirements