M4 STREAMLINE

Complete User Guide

Introduction

M4 Streamline is a comprehensive business management platform designed for tradies and small businesses. This guide covers all features and how to use them effectively.

1. Dashboard

Overview: Your central hub showing key metrics, recent activity, and quick actions.

Key Features:

• Revenue & expense tracking

• Unpaid invoices summary

• Recent activity feed (last 7 days)

• Quick access to create quotes, invoices, and jobs

2. Clients

Managing Your Clients: Store all client information in one place.

• Add client: Click 'Add Client' button

• Required fields: Name, email, phone, address

• View client history: Click any client to see their quotes, invoices, and jobs

• Edit/Delete: Use the three-dot menu on each client card

3. Quotes

Creating Professional Quotes: Send detailed quotes to clients with deposit options.

• Create quote: Click 'New Quote' button

• Add line items: Click '+ Add Item' for each service/product

• Set deposit: Enter percentage (e.g., 30 for 30% deposit)

• Send quote: Email or SMS directly to client

• Track status: Pending, Accepted, Converted, or Declined

• Convert to invoice: Click three-dot menu → 'Convert to Invoice'

4. Invoices

Invoice Management: Create, track, and manage all your invoices.

• Create invoice: Click 'New Invoice' button

• Mark as paid: Click three-dot menu → 'Mark Paid' → Select date

• Filter invoices: Use tabs (All, Unpaid, Paid, Overdue)

• Download PDF: Three-dot menu → 'Download PDF'

• Email invoice: Three-dot menu → 'Email Invoice'

• Payment tracking: Record partial or full payments

5. Schedule

Job Scheduling: Organize and track your jobs.

• Create job: Click 'New Job' or schedule from a quote

• Set date and time for appointments

• Link to clients and quotes automatically

• Update status: Scheduled, In Progress, Completed

• Team assignments: Assign jobs to team members (Business accounts)

6. Analytics

Business Insights: Track performance and identify trends.

• Revenue & expense charts with time period filters

• Profit margin tracking

• Quote conversion rates

• Most profitable clients (clickable to view invoices)

• Actionable alerts: Overdue invoices, unpaid quotes

• Compare periods: This month vs last month, year-over-year

7. Expenses

Expense Tracking: Record and categorize all business expenses.

• Add expense: Click 'Add Expense' button

• Categories: Labour, Materials, Fuel, Equipment, Marketing, Insurance, Other

• Upload receipts: Attach photos/PDFs for record keeping

• Link to jobs: Associate expenses with specific jobs

• Filter and search by category, date, or amount

8. Cash Flow

Financial Planning: Understand your money flow and plan ahead.

• Cash available: Current balance overview

• Expected income: From unpaid invoices

• Expected expenses: Upcoming costs

• Runway calculation: Months of expenses covered

• Aging report: Invoices overdue by days

9. Budget

Spending Control: Set budgets and track spending by category.

• Set monthly budgets: Click 'Edit Budget'

• Category tracking: See spending vs budget for each category

• Progress bars: Visual indicators of budget usage

• Over-budget alerts: Warning when exceeding limits

• Historical tracking: Review past months' performance

10. Reports

Financial Reports: Generate reports for tax and accounting.

• Profit & Loss statement with customizable date ranges

• GST summary: GST collected and payable

• Expense breakdown by category

• Download PDF: Click 'Download PDF' for clean reports

• Date filters: This Month, Quarter, Year, All Time

11. Company Settings

Configure Your Business: Customize M4 Streamline for your needs.

Business Information:

• Business name, ABN, phone, email, address

• Bank details (appears on invoices)

• Upload custom logo for quotes and invoices

Email Settings (SendGrid):

• API key and from name configuration

• Send quotes and invoices via email

SMS Settings:

• Enable SMS notifications

• Notify on quote sent, invoice sent, payment received

Automated Reminders:

• Payment reminders: Email clients X days after invoice overdue

• Job reminders: SMS/email clients 2 days before scheduled jobs

• Customizable: Set number of days for payment reminders

• Automatic: Runs daily at 9 AM without manual intervention

12. Team Management (Business Accounts)

Manage Your Team: Add team members and track their work.

- Add team members: Name, role, contact details
- Assign jobs: Link jobs to specific team members
- Track expenses: See expenses per team member
- Performance tracking: Revenue generated per team member

Tips & Best Practices

✓ **Weekly Review:** Check dashboard every Monday for overdue invoices

✓ **Record Expenses Daily:** Upload receipts as soon as you get them

✓ **Use Deposits:** Always require deposits on large jobs (30-50%)

✓ **Follow Up:** Enable automated reminders to reduce manual chasing

✓ **Review Analytics Monthly:** Check trends and adjust pricing if needed

✓ **Budget Tracking:** Review budget vs actual spending weekly

✓ **Export Reports Quarterly:** Download P&L; for your accountant

Keyboard Shortcuts

Action	Shortcut
New Quote	Q
New Invoice	I
New Client	C
New Job	J
Search	/

Support & Feedback

For questions, feature requests, or bug reports, please contact support or use the feedback button in the app.

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