



Service, Rental, and Financials: New Hire Orientation Manual

System Orientation & Onboarding Guide

Welcome to Texada

Your foundational orientation to the Texada operating ecosystems. Quick access to onboarding sequences, system troubleshooting, and direct training resources for new users.

Note: Please bookmark this orientation guide for quick operational access to help resources.

Accessing Texada: Log In Steps

To access the platform, please walk through the following system validation steps sequentially:

System Access Routine

- 1. Open Environment Portal:** Navigate directly to app.texadasoftware.com.
- 2. Identity Verification:** Enter your corporate email address and click the **"Login"** button
- 3. Workspace Selection:** Choose your active environment (**Play / Production**). Always use Play for onboarding testing.
- 4. Credential Entry:** Enter your designated system password and click **"Login"**.
- 5. Core Module Choice:** Select either **"Service, Rental, and Financials (Next)"** or **"(Classic)"** based on your designated workflow.
- 6. Final Authorization:** Confirm your selection by clicking **"Login"**.
- 7. Dashboard Navigation:** Upon success, the system will automatically redirect you to the main Dashboard Calendar.

First-time Login Tip: If you do not have your temporary credentials, check your automated welcome email or contact your local system administrator. Do not attempt consecutive invalid credentials.

System Security & Access Support

Log Out Procedure

To maintain system integrity and operational security, utilize the safe log out sequence:

1. Click your user profile name in the extreme top-right corner to open the **User Menu**.
2. Click the **"Log Out"** option.

Security Rule: Always log out when stepping away from your workstation.

Login Troubleshooting

If you encounter authentication road-blocks, execute these primary validation steps:

- **Operator Match:** Ensure your email matches your active *Operator Record* within the SRM Classic system.
- **Password Recovery:** Use the **"Forgot Password"** portal on the login window.
- **Access Permission:** Verify with IT that the "Access" box is fully enabled on your Operator profile.

Essential Troubleshooting

The "Common First Step"

Clearing your local browser cache is the foundational step when diagnosing technical errors, loading delays, or interface conflicts in any Texada software suite.

This clean slate ensures that your browser is serving the newest versions of system code and user-interface libraries without relying on stale, stored files.

IMPORTANT PRE-FLIGHT CHECK:

Ensure you are prepared to sign back into your accounts. Purging cookies and cache will sign you out of most active web apps. Please save all operational data before executing the browser clears below.

Browser Clearing Sequences

To achieve a standard system environment, locate your specific operational browser below and execute the clear instructions:

Google Chrome

- 1. Open Menu:** Click the three vertical dots (...) in the top-right corner.
- 2. Keyboard Shortcut:** Alternatively, press Ctrl+Shift+Del (Cmd+Shift+Del on macOS).
- 3. Time Window:** Choose **"All time"** in the range dropdown.
- 4. Items to Clear:** Check **"Cookies"** and **"Cached images and files"**.
- 5. Complete:** Click **"Clear data"**.

Mozilla Firefox

- 1. Open Menu:** Click the menu hamburger icon in the top-right corner.
- 2. Navigate Path:** Select **History** → **Clear recent history...**
- 3. Time Window:** Choose **"Everything"** to perform a complete system wipe.
- 4. Items to Clear:** Verify both **"Cookies"** and **"Cache" are selected**.
- 5. Complete:** Click **"OK"**.

Microsoft Edge

- 1. Open Menu:** Click the three horizontal dots in the top-right.
- 2. Navigate Path:** Choose **History** → **Clear browsing data**.
- 3. Time Window:** Choose **"All time"** in the duration menu.
- 4. Items to Clear:** Check **"Cookies"** and **"Cached images and files"**.
- 5. Complete:** Click **"Clear now"**.

Safari (MacOS)

- 1. Open Settings:** Click on **Safari** → **Settings** from the main menu bar.
- 2. Developer Mode:** Go to **Advanced** and check **"Show Develop menu in menu bar."**
- 3. Access Menu:** Locate the newly visible **Develop** menu option at the top.
- 4. Complete Action:** Click **"Empty Caches"** from the dropdown options.

Texada Web (Next) Onboarding Modules

This phase introduces you to the core web interface, contract routines, and field operational procedures. Review these targeted training videos to build your workflow competence:

Training Module	Learning Objectives	Action Links
Texada Web Orientation	Foundational look at the Web user interface, dashboards, and core navigation.	Watch Video
Rental Management	High-level mechanics of creating and processing rental agreements in the Next portal.	Watch Video
Delivery Tickets	Dispatch patterns, routing assignments, and field delivery ticket hand-offs.	Watch Video
Capturing Signatures	Best practices for collecting binding digital customer signatures for rental compliance.	Watch Video

Core Back-Office Training (SRM Classic)

Backend system architectures, customer databases, and standard operational processes:

Training Module	Learning Objectives	Action Links
Classic Introduction	Exploring structural navigation, backend layout, and menu hierarchies inside SRM Classic.	Watch Video
Adding Customers	Authorized workflow to input and validate corporate customer directories.	Watch Video
Contract Creation	Step-by-step master workflow to configure standard rental agreements in SRM Classic.	Watch Video
Rental Returns	Processing incoming machinery returns, logging operational hours, and contract closures.	Watch Video

Financials & Payments Modules

Comprehensive modules covering safe transactions, cashier reconciliations, and payment postings:

Counter Payments Systems

Account Payments

Learn how to efficiently post, apply, and allocate customer balance payments using the dedicated *Counter Payments* module.

[Watch Training](#)

Invoice Payments

A granular instructional guide focusing on individual invoice settlements processed from counter windows.

[Watch Training](#)

Your Go-To Support

When you face technical deadlocks, utilize these established escalation channels for resolution:

1. Knowledge Base

Your primary self-serve portal containing exhaustive documentation, module workflows, and quick-answer guides.

[Access Help Center](#)

2. Submit a Ticket

Direct escalation channel to report platform issues, seek expert assistance, or submit layout change requests.

[Create Ticket →](#)

Escalation Guideline: Always check the *Knowledge Base* first for visual answers. If an issue actively stops transactions or operations, flag your ticket as **"Urgent/Showstopper"**.