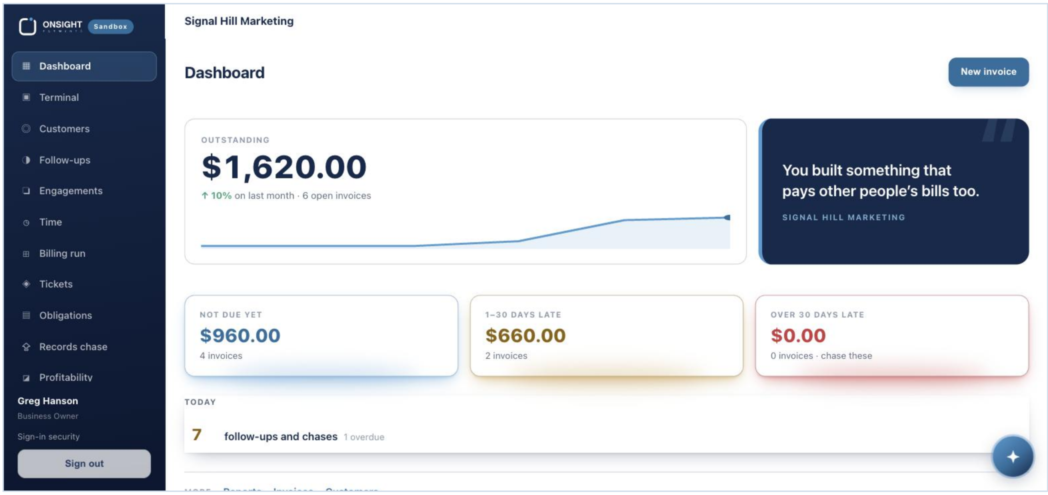
Marketing agency

How to run the business through OnSight, from the first call to the month-end number.

EDITION	Business services
READ FROM	the Signal Hill Marketing demo on September 6, 2026
YOUR WORDS	a campaign · a specialist · the schedule
SCREENS	real, from your trade's demo

This guide is for the owner. Every page says who else it is for at the top, so a specialist can skip straight to the pages about the campaign and the office to the pages about the bill. Each task ends with what you will see when it worked.



What you see when you sign in: today's money, what is booked, and what is waiting on you.

The seven pages

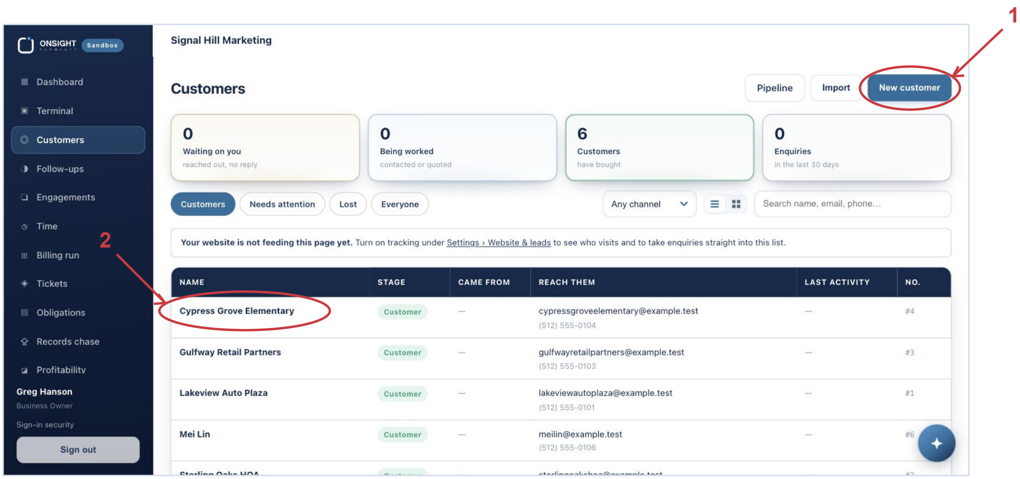
1 The call, and the customer it becomes
2 The campaign, and the hours on it
3 The quote, and the bill it turns into
4 The money: the terminal, the pay link, and the day's close
5 The numbers, and the settings that shape them
6 What only your trade has

FOR THE OFFICE, THEN EVERYONE · ABOUT 3 MIN

01 · TAKING THE CALL

The call, and the customer it becomes

The phone rings. Everything that follows hangs off one customer record, so the record is made first and the work is attached to it.



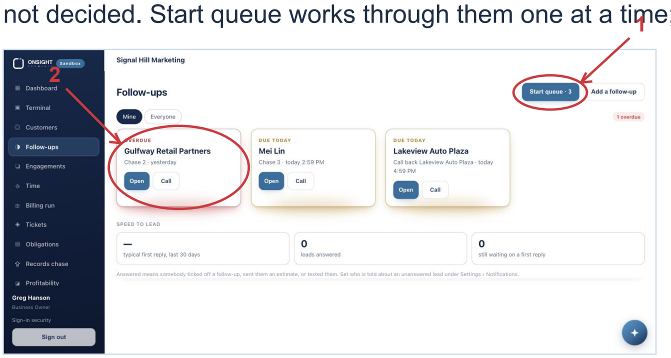
Customers. 1 New customer. 2 A customer on the list; open one to add the address and to create the campaign. The tiles across the top are who is waiting on you, being worked, and already bought.

1. **New customer** opens the record. Name, phone, email and where the bill goes. If they are already on the list, the search at the right finds them.
2. **Add their address** so the crew has somewhere to go.
3. **Create campaign** from the customer's page, or book it straight onto the schedule on the next page.

You will know it worked when the customer shows a stage of Customer and the address appears on their page with a map.

Who has not been answered

Follow-ups is the list of people waiting on you: a new enquiry nobody has called back, a quote that was opened and not decided. Start queue works through them one at a time; the tile at the bottom says how fast you usually answer.



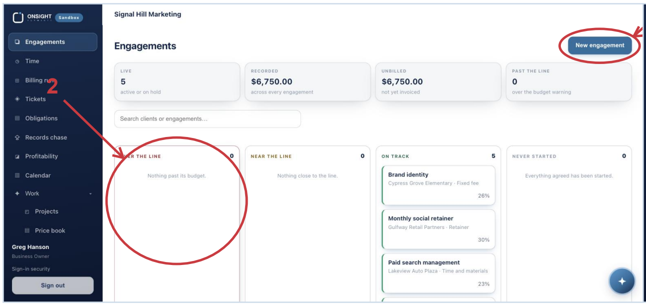
Follow-ups. 1 Start queue. 2 The first follow-up in the queue; an overdue one is outlined in red, due today is amber.

FOR THE OFFICE AND THE SPECIALIST · ABOUT 4 MIN

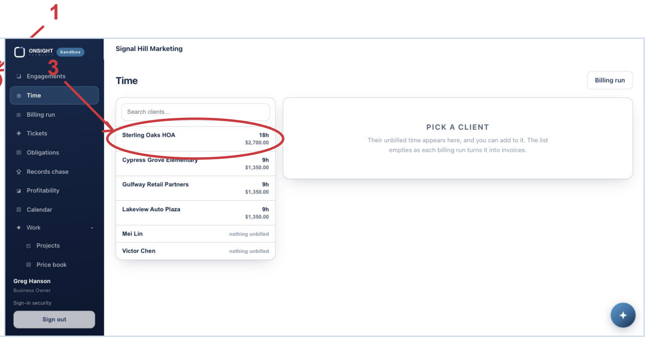
02 · THE WORK

The campaign, and the hours on it

A campaign is the work you agreed to do for a client and how it is billed: a fixed fee, the hours, or a monthly retainer. Time is recorded against it without a visit, and the board says which ones are running over before the bill goes out.



Campaigns. 1 New campaign. 2 Over the line: the ones past their budget, with the overrun said in money.

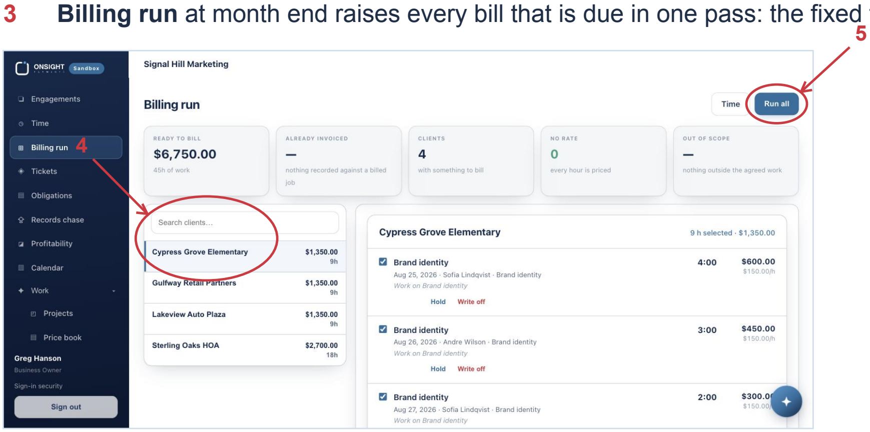


Time. 3 A client's unbilled hours and what they are worth; open the client to add to them.

1 **New campaign** picks the client, the kind of billing and the rate card. A retainer sets the monthly amount and what it covers.

2 **Record time** from the campaign or from Time. A running timer or a typed entry; each one names the person and the work.

3 **Billing run** at month end raises every bill that is due in one pass: the fixed fees, the hours, and the retainers.



The billing run. 4 Ready to bill: the hours priced and waiting. 5 Run all raises every bill in order. Bill and send, under a client's entries, does one client on its own.

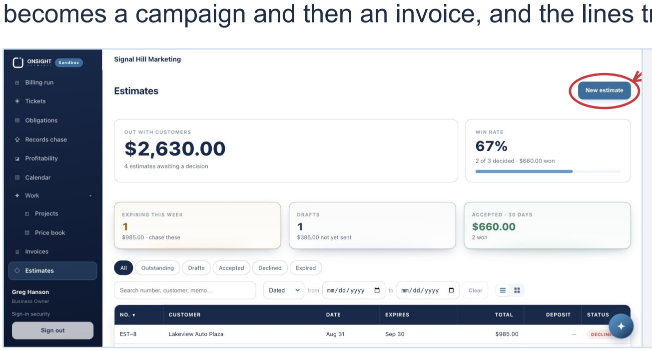
You will know it worked when the campaign reads Running with hours on it, and the billing run lists it with the amount it will raise.

FOR THE OFFICE · ABOUT 4 MIN

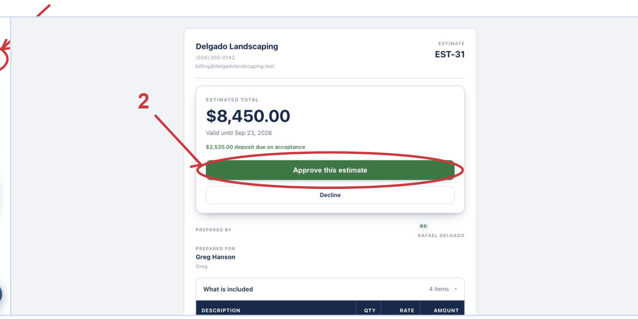
03 · ESTIMATES AND INVOICES

The quote, and the bill it turns into

An estimate goes out as a link the customer can approve from their phone with no account. When they say yes, it becomes a campaign and then an invoice, and the lines travel with it.

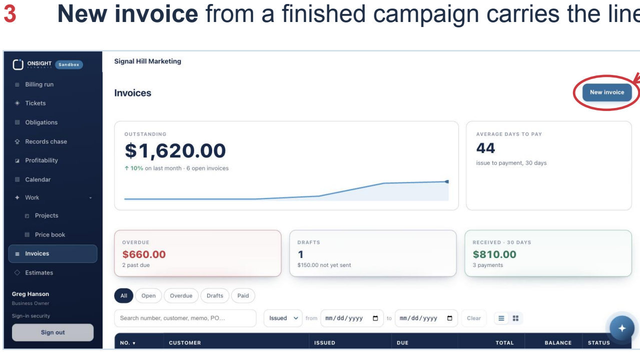


Estimates. 1 New estimate. The first tile is the money waiting on a decision.

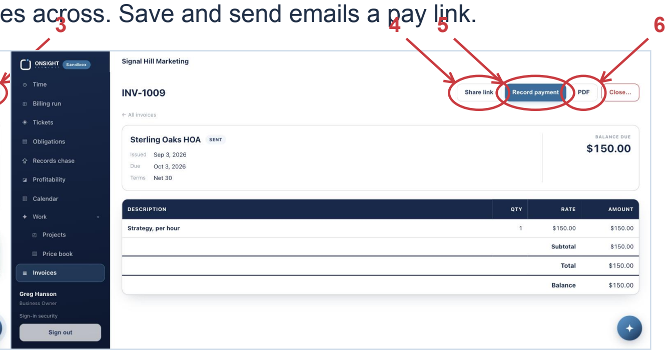


What the customer sees from the link. 2 Approve this estimate: one press, no account.

1. **New estimate** picks the customer, then lines. From the price book adds a job or an item at its price; Offer options makes a Good, Better, Best the customer chooses between.
2. **Save and send** emails the link. Expiring this week on the list is the pile to chase.
3. **New invoice** from a finished campaign carries the lines across. Save and send emails a pay link.



Invoices. 3 New invoice. Overdue is the red tile, and it is a filter.



One invoice. 4 Share link re-sends the pay link. 5 Record payment, for a check or cash. 6 PDF.

Getting it signed

An approval on an estimate is one thing; an agreement with terms on it is another. Documents sends one to be signed — an agreement, a change order, an authorization, a waiver — either as a link or on the tablet in front of them. Ten are supplied and every word is yours to change, or upload your own PDF and place the boxes where the names, dates and signatures go.

What comes back is sealed. The signed copy carries a certificate naming who signed, when, from what address and what they were shown before they signed, and a number that changes if a single word of it is altered afterwards. A change order signed before the extra work starts is the cheapest argument you will ever avoid.

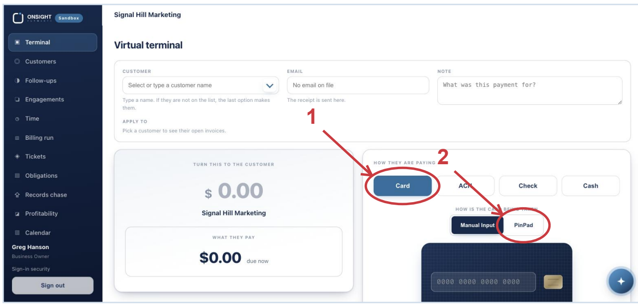
> You will know it worked when the estimate reads Accepted and the invoice it made reads Sent, with the customer's approval time on it.

FOR THE OFFICE, AND WHOEVER TAKES PAYMENT · ABOUT 5 MIN

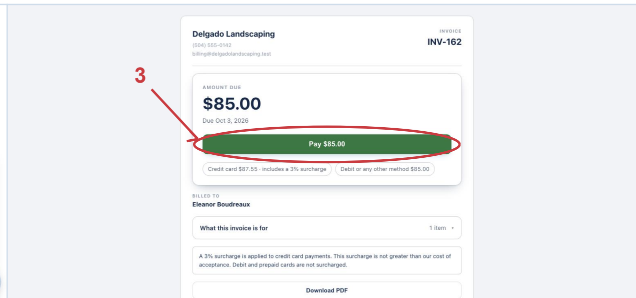
04 · TAKING IT, AND CLOSING THE DAY

The money

Three ways money comes in: the customer pays the link, you take a card on the terminal, or you record a check or cash. All three land in the same batch, and the batch is what your bank deposit will match.



The virtual terminal. 1 Card; ACH, check and cash sit beside it. 2 PinPad sends the amount to a paired reader. The left half is turned to the customer.

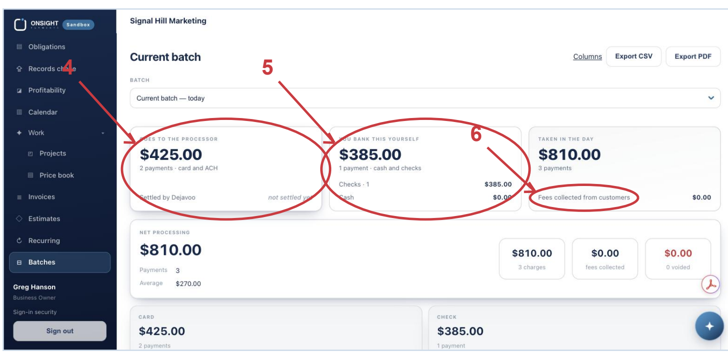


The pay link. 3 Pay: no login, and the card and debit prices are both shown where the program requires it.

1 **Card** on the terminal, then the number on the card face, or PinPad if a reader is paired. Turn this to the customer shows them the amount.

2 **Record payment** on an invoice for a check or cash. It is applied oldest-first if the customer has several.

3 **Batches** is the day's close. What goes to the processor settles with the gateway; checks and cash you bank yourself.



The current batch. 4 Going to the processor: card and ACH, settled overnight. 5 Checks and cash you bank yourself. 6 Fees collected from customers, counted apart from the sale. Void or refund is decided per row from whether the batch has settled.

How your money moves

- A card taken today sits in the open batch until the processor settles it, usually overnight.
- Once settled, a mistake is a refund; before that it is a void, and the screen only offers the right one.
- Reports › Transactions is every attempt, including declines and anything a fraud rule stopped, with the reason.
- Fees the customer paid under a surcharge or dual-pricing program are counted separately from the sale, so the deposit reconciles.

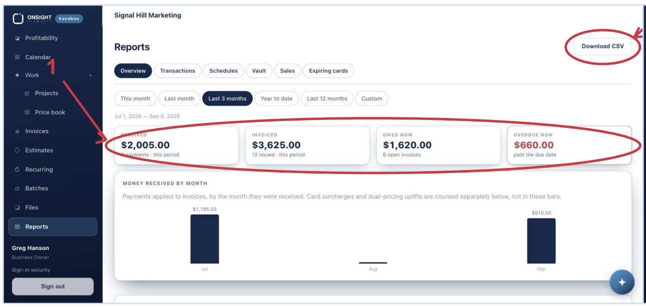
You will know it worked when the invoice reads Paid, the payment appears in today's batch, and the customer has a receipt.

FOR THE OWNER · ABOUT 3 MIN

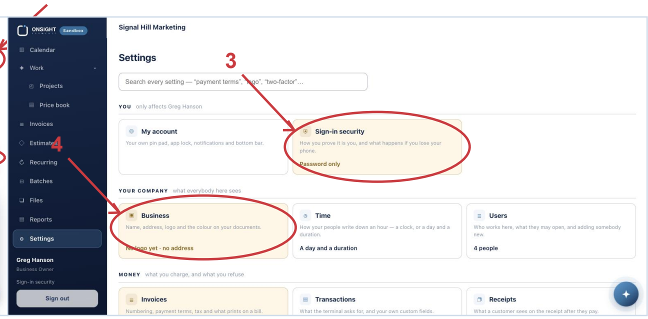
05 · REPORTS AND SETTINGS

The numbers, and the settings that shape them

Reports answers what came in, what is owed and what is late, over any period. Settings is where the defaults live: terms, tax, numbering, hours, who works here and what they may see.



Reports. 1 Received, invoiced, owed and overdue for the period, then the month-by-month bars. 2 Download CSV.



Settings. Amber cards are things not set yet: 3 Sign-in security, still password only. 4 Business, with no logo or address.

- Transactions is the card log with declines and voids; Expiring cards is who to call before a recurring charge fails.
- Download CSV on any report gives your accountant the period as a file.
- Settings › Invoices sets terms, tax and the numbering; Settings › Users decides who sees the money and who only sees the work.
- Sign-in security turns on a second factor. Do it: an owner's login is the keys to the bank.

And what goes out

- Pay runs work out what each person is owed from the hours already recorded — by the hour, a salary, book hours produced, a percentage of what they sold, or a base with any of those on top.
- Overtime is worked out on the regular rate, which for flat rate or commission is not the posted rate.
- A period closes and stops moving, and will not close over an hour with no rate or a timer nobody stopped. Everyone sees their own; nobody sees anybody else's.

Who is licensed to do it

- Each person's licences and certificates, what each is good until, and the card itself, kept where only they and whoever manages licences can open it.
- Say which kinds of work expect which licence. Sending somebody without one warns you and names who could go instead — it does not stop the job.
- Everybody is told sixty days before something runs out, and so is the person whose licence it is, because they are the one who can book the course.

You will know it worked when Reports for last month shows Received within a few dollars of your bank deposits for the same month.

FOR THE OWNER · ABOUT 2 MIN

06 · MARKETING AGENCY

What your trade has

These appear on your rail because your trade is offered them. A trade that cannot use one never sees it.

The price list

Every service and item you charge for, at its price, so an estimate or a bill is picked from a list rather than typed. One search across all of it.

Engagements and the billing run

Work billed by fixed fee, time or retainer, hours recorded without a visit, and one run that raises every bill for the month.

Obligations

Every dated deadline you owe a client — a filing, a renewal, a report — on one axis with the money it carries, so nothing is found out from the client.

Records chase

What you are waiting on from the client, asked for once and chased until it arrives, with the portal as the place they drop it.

Tickets

A client's request, from the portal or the phone, with who has it and how long it has waited; closed tickets keep this month only and the history is a report.

Profitability

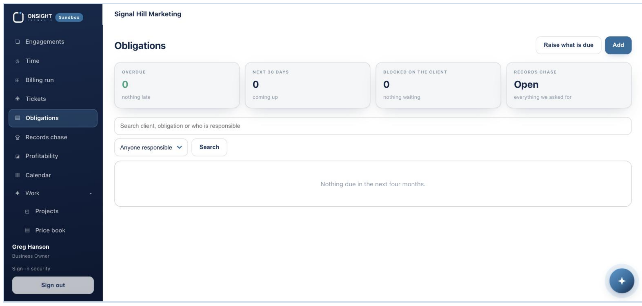
Each campaign and each client as hours in against money out, so the one that eats the practice is named.

Documents and signatures

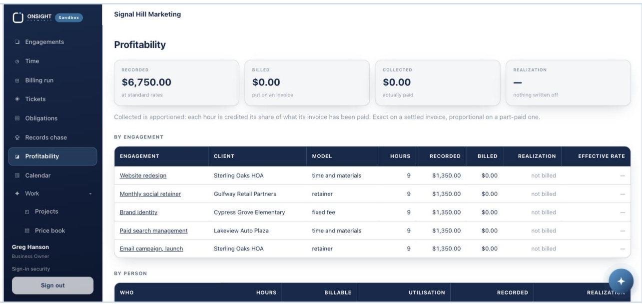
Agreements, change orders, authorizations and waivers sent to be signed by link or on the tablet, in your wording or your own uploaded PDF with the boxes placed on it, sealed with a certificate saying who signed from where and when.

The booking link

A page your customers book from, against your real calendar, with only the times exposed.



Obligations: every dated deadline, with the money on it.



Profitability: hours in against money out, by engagement and by client.