

CUSTOMER GUIDE

The Technical Hub & Accounts

Your orders, quotes, documents and live jobs in one place
— and the figures the money side needs, without the
quarterly scramble.

PART 1 The Technical Hub

PART 2 Accounts

The Technical Hub

A private workbench attached to your account, free with any House of Canopies account.

01

What the Hub is

Most of the awkward parts of buying a canopy have nothing to do with the canopy. It is finding the datasheet you downloaded three weeks ago. It is remembering which width you specified for the rear entrance. It is the colleague who needs the drawing while you are on site.

The Technical Hub is our answer to that. It is a private workbench attached to your account that holds your orders, your saved quotes, the products you are interested in, and the documents that go with them — plus **Projects**, which keep everything for one job in a single place and let you share it with the people working on it.

It is not an extra you pay for. Everything in this guide comes with a standard free account.

Where to find it. Technical Hub sits at the top right of every page. On a phone it is at the top of the Menu.

02

Getting an account

Registration takes about a minute: your name, an email address, a phone number if you would like us to be able to call you, and a password of at least eight characters.

01 Go to the registration page

From **Technical Hub** at the top of any page — if you are not signed in it takes you to sign in, with a link to register.

02 Enter your details

Name, email and a password. The form shows the password rules as you type.

03 Start using it

Your account works straight away. We send a welcome email with a button to confirm your address — until you press it, a slim reminder shows at the top of the site, but nothing is blocked.

If you tick the newsletter box, that needs confirming separately — watch for its own email with a confirmation link. It is deliberate: it means we hold a proper record of your consent.

03

Finding your way around

The Hub does not scroll down like an ordinary page. It scrolls **sideways**, as a row of full-screen panels — a workbench rather than a list. There are eleven: a home screen, then ten sections.

You can move between them however suits you:

- Scroll sideways, or swipe on a touchscreen
- Use the arrows at either edge of the screen
- Click a shortcut on the home screen — each one shows a live count of what is in that section
- Open **Menu**, top right, for a numbered list of every section plus the tools

The counter in the top-left corner tells you where you are — **04 / 11 Saved Projects**, and so on.

REARRANGING

Drag any card to move it within its section. The order is saved to your account, so it is still there next time you sign in — including on a different computer.

CARD SIZE

The slider along the bottom edge changes how big the cards are, so you can fit more on screen or make them easier to read. It remembers your setting on that device.

04

Projects

If you only use one part of the Hub, make it this one. A **Project** is a named folder for a single job that holds its products and quotes together, along with the details you would otherwise keep in a spreadsheet.

Against each project you can record a client, a site address, a status, a target date and notes. The status runs through **Draft**, **Active**, **On hold**, **Won**, **Lost**, **Complete** and **Archived**, so your project list doubles as a view of what is actually live.

01 Create the project

From **Add project** on the Hub's Saved Projects panel, or **New project** on the Projects page. Give it a working name — you can rename it whenever you like.

02 Add products and quotes

Add products takes you into the range in a mode that drops what you choose straight back into the project. Saved quotes can go in too.

03 Note each line

Quantity, the size or variant, and where it goes — "rear entrance, plot 14". That location note is the bit people tell us saves the most time later.

04 Order when you are ready

Open a line to go to the product, then add it to your basket and check out as normal. Put the project's name or PO number in the PO box at checkout and Accounts will total the job for you.

To archive a project, set its status to Archived — it moves to the Archived tab on the Projects page rather than disappearing.

05

Working with your team

A project can be shared so everyone works from the same list rather than three versions of an email attachment. Invite someone by email address from the **People** panel on the project, and choose what they can do:

ROLE	CAN VIEW	CAN EDIT	CAN INVITE OTHERS
Viewer	Yes	No	No
Editor	Yes	Yes	No
Co-owner	Yes	Yes	Yes

The invitation appears on their own Hub, under Saved Projects, the next time they sign in — they accept or decline it there. We do not email it, so it is worth a quick word to say it is coming. If they do not have an account yet, they need to register with the address you invited; that is what connects the invitation to them.

IF YOU ARE A VIEWER

You can read everything but not change the project. If you need your own working version, use **Clone to my projects** to take a copy you control.

CHANGING YOUR MIND

The owner or a co-owner can change someone's role or remove their access at any time, and invite them again later. Only the owner can delete a project.

06

Documents

Five sections of the Hub hold paperwork: **Datasheets**, **Certificates**, **Installation Guides**, **Technical Drawings** and **CAD / DWG**. Between them they cover the specification, the test and compliance evidence, the fitting instructions and the files your architect or designer will want.

These sections follow your saved products. They show the paperwork for products you have saved — not the whole range, and not everything you have merely looked at. Save a product and its documents appear here automatically. Pulling in documents for everything you had ever browsed made the sections useless within a week, so we did not.

To see every document of one kind across the whole range, use **Browse all** on any of those sections. Each product gets one card with all its files, sizes included.

Where a product comes in several sizes, its card may hold several files — "Datasheet · 4 sizes". That is one product, not duplicates.

07

Orders and quotes

ORDER HISTORY

Every order you have placed is listed, newest first, with its status, delivery, PO number and total. Search by order number, product or PO, narrow by date or status, or re-sort the list.

The **Delivery** column tells you what you most want to know. Before dispatch it shows the date your order is expected by, worked out from the lead time you were given at checkout. Once it has gone, it shows the courier and tracking number instead. Open an order for the full breakdown — every line with its size and options, the delivery address, and the VAT split.

Ordered before you registered? Orders placed as a guest appear in your history automatically, as long as you used the same email address.

SAVED QUOTES

Every canopy we make is made to measure, so for anything bespoke, bulk or out of the ordinary, use the quote form and choose **Save to my Tech Hub**. Our team prices it and it lands in your Saved Quotes, where you can come back to it without re-keying sizes, or add it to a project.

*A quote appears in your Hub once our team has priced and released it, so there is a short gap between sending the request and seeing it there. If you chose **Email it to me** instead, it comes to your inbox and will not appear in the Hub.*

08

Accounts

Accounts turns your orders into the figures the money side needs: spend by job, VAT lined up to your own quarter, a VAT invoice for every order, and a read-only link for your accountant.

Open it from the **Accounts** shortcut on the Hub's home screen, or from **Menu**. It is its own page with a menu down the left — **Back to Hub** at the bottom takes you back.

Overview	This quarter's spend, the VAT you can reclaim, orders still to be dispatched, and anything that needs your attention.
Jobs	Every order with the same PO number, grouped as one job. Give it a name and a budget and it shows how it is tracking.
VAT	The two figures from us that go on your VAT return, quarter by quarter.
Documents	A VAT invoice for every order, and a quarter-end pack in one download.
Accountant	A private, read-only link for whoever does your books.

Accounts is covered in full in part two of this guide.

Tools

TOOL	WHAT IT DOES	ACCOUNT NEEDED
Ask anything	The search bar at the top of the site and the Hub. Describe what you need in plain English — glass canopy for a 1200mm door, anthracite to match my windows — and it answers with real products and prices.	No
Spec library	The whole range in one table: filter by material, sort any column, search a spec and export what you need.	No
New quote	In the Hub's Menu. Straight to the quote form, ready to save to your Hub.	To save it
Email preferences	In the Hub's Menu. Turn our marketing emails on or off. Order confirmations and dispatch emails always come.	Yes

Trade accounts

Everything above works on a standard free account. A trade account is about commercial terms rather than features: trade pricing and, once approved, 30 days' credit from the end of the month.

There are two routes in. If you register with an email address on a company domain we already recognise, trade pricing switches on as soon as you confirm your address. Otherwise, send the short enquiry on our trade page — and for credit terms, the application form there too — and we will take it from there.

Worth knowing

Prices ex or inc VAT	The Ex.VAT / Inc.VAT switch at the top of the screen changes every price on the site, including in the Hub. It stays as you set it on that device.
Light or dark	The Light / Dark switch beside it changes the whole site and the Hub. That is remembered on the device too.
Recent products	A passive record of what you have looked at over the last 30 days. Clear it whenever you like with Clear on that panel.
Removing things	Saved products and saved quotes have a small × to take them off your Hub. Removing a quote only hides it from your view; it does not cancel anything.
Getting back to the site	The Hub is a full-screen workspace with no site footer. Use the house icon in the strip along the top, Back to site in the Menu, or the House of Canopies logo.

Accounts

Everything you have bought from us, arranged the way your accountant wants it: spend by job, VAT figures that match your quarter, an invoice for every order, and a link that lets your accountant help themselves.

01

What Accounts is

If you run a business, the buying is the easy part. The chore is what comes after: which job that order was for, how much of it was VAT, where the invoice went, and the quarterly scramble to get the numbers to whoever does your books.

Accounts is the part of the Technical Hub that does that chore for you. It takes every order you have placed with us and arranges it the way the accounts side needs it — grouped by job, totalled by VAT quarter, with a proper VAT invoice for each order and a way to hand the whole lot to your accountant without emailing a single spreadsheet.

Two things it is not. It is not a replacement for your bookkeeping — it only knows what you bought from **us**, so your return will include other suppliers too. And it is not something you have to keep up to date: every figure comes straight from your orders, so the only things you ever type in are a job's name, a budget if you want one, and when your VAT quarter ends.

Where to find it. Sign in, open the Technical Hub, and choose **Accounts** on the home screen or in the Menu. Accounts opens as its own page with a menu down the left, and **Back to Hub** at the bottom of that menu takes you back.

02

Finding your way around

The menu down the left has six screens. Each one answers a different question.

SCREEN	THE QUESTION IT ANSWERS
Overview	How am I doing this quarter, and is there anything I need to deal with?
Jobs	What has each job cost me, and how is it tracking against what I meant to spend?
VAT	What are the two numbers from House of Canopies that go on my VAT return?
Documents	Where is the invoice for that order — and can I have all of them at once?
Accountant	How do I let my accountant see all this without me being in the middle?
Settings	When does my VAT quarter end, and what name should my accountant see?

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EX VAT OR INC VAT

The **EX VAT / INC VAT** switch at the top right changes every figure on every screen. Most VAT-registered businesses think in ex-VAT numbers, so that is the default; it remembers whichever you last chose.

PERIODS

Jobs and Documents have a row of chips — **This quarter, Last quarter, This year, All time**. “Quarter” always means **your VAT quarter**, not the calendar one, once you have told us when it ends (see VAT).

03

The Overview

The Overview starts with a sentence rather than a table — “**You've spent £4,860 with us this quarter, 40% up on last, most of it on Leeds Road**” — because that is what you would say out loud if someone asked. Under it are the tiles:

This quarter	What you have spent with us in the current VAT quarter, and how it compares with the one before.
VAT to reclaim	The VAT on those orders. Because you paid it to us, you claim it back on your return — accountants call this input VAT . This tile is that number, for House of Canopies purchases only.
Open orders	Orders you have paid for that have not been dispatched yet, and what they add up to.
Trade credit	Trade accounts only — see Trade accounts.

Below the tiles, the chart shows your spend month by month for the last year — hover over any point, or tap it on a phone, for the exact figure. Next to it, **Needs your attention** is a short list of things that are true right now: how long until your VAT quarter closes, a job getting close to its budget, orders still on their way, and when your accountant last looked. Each line links to the screen that deals with it.

The list only ever shows things that are actually the case. If it is short, that is good news.

04

Jobs and budgets

This is the planning half. A **job** is simply every order you have placed under one PO number — so if you put a PO number on your orders, you already have jobs, without doing anything else.

The Jobs screen lists them biggest first, with what each has cost you and how many orders it took. Click one and it opens up: every line you bought for it, with a link to the invoice, and a place to give it a proper name and a budget.

01 Put a PO number on your orders

There is a box for it at checkout, labelled **PO number or job reference**. Use the same one for the same job — capitals and spaces do not matter, **Ir-0421** and **LR-0421** are the same job.

02 Give the job a name

Open it on the Jobs screen and type something you will recognise — “Leeds Road” beats “LR-0421” six months from now. The PO number stays underneath.

03 Set a budget if you want one

A number, ex VAT. From then on the job shows a bar of how much you have used, turns amber at 80%, and tells you if you go over.

THE FORECAST

While a quarter is still running, a job with a budget shows a line like “At this pace you'll finish the quarter around £6,900 — about £640 under budget”. It is a straight run rate: what you have spent so far, stretched over the whole quarter. An early warning, not a promise.

GETTING IT OUT

Job statement downloads that job's lines as a spreadsheet. **Export all jobs** gives you one row per job for the period. And once your accountant is set up, **Send to [name]** emails them the job directly — see Your accountant.

*Orders placed without a PO number gather under **No job** at the bottom of the list. They are still counted everywhere else; they just cannot carry a budget. Job names and budgets are yours alone — they change nothing on the orders themselves.*

05

VAT

A VAT return needs two numbers from every supplier: how much you bought from them before VAT, and how much VAT you paid them. The VAT screen gives you both, for the current quarter and the seven before it, and lets you download them as a spreadsheet.

Purchases (net)	What you bought from us before VAT — goods plus delivery. Your accountant adds this into total purchases on the return, which HMRC labels Box 7 .
VAT to reclaim	The VAT you paid us. It goes towards the VAT you claim back, which HMRC labels Box 4 .
Invoices	How many orders those figures are made of. Every one has a VAT invoice you can download — see Invoices and packs.

Tell us when your VAT quarter ends. Not every business's quarters end in March, June, September and December — HMRC puts you in one of three groups (a “stagger”), and yours might end in January or February instead. It is on your VAT registration certificate, or your accountant knows. Choose it once, on the VAT or Settings screen, and every quarter figure in Accounts lines up with your actual return. Until you do, we assume calendar quarters and say so.

The VAT screen also shows how many days are left in the current quarter, and once your accountant is set up, **Send this quarter to [name]** emails them the figures in one click.

These figures are for what you bought from House of Canopies only. They exclude cancelled orders and anything not yet paid for.

Invoices and packs

Every order you have paid for has a **VAT invoice** on the Documents screen. It carries the things that make it a VAT invoice rather than a receipt: our VAT number, an invoice number (the same as the order reference), the date it counts from — the **tax point** — and the goods, delivery, VAT and total shown separately. It drops straight into your books.

Open one and you can print it or save it as a PDF. Or skip the one-at-a-time and use the **pack**.

THE PACK

Download pack gives you one zip file for the period you have chosen: a statement listing every invoice with its totals, your VAT summary, spend by job, and every invoice. That zip is what most accountants want at quarter end. It holds up to 100 invoices — narrow the period if you have more.

CANCELLED ORDERS

They stay on the list so you can find them, marked **Cancelled**, and their invoice says so. They are never counted in any total, statement or VAT figure — you were not charged, so there is nothing to reclaim.

*The **Order** link next to each invoice opens the order itself, with delivery address and tracking. The invoice is the money version; the order page is the everything-else version.*

Your accountant

Whoever does your books can have their own **read-only view** of your Accounts — statements, VAT figures, invoices and jobs — from a private link. They do not need a House of Canopies login, they cannot change anything, and you can switch it off whenever you like.

01 Invite them

On the Accountant screen, enter their name and email (the firm is optional), tick what they are allowed to see, and press **Send invite**. They get an email with their link. You see the link once too, in case you would rather send it yourself.

02 They help themselves

Their view has the same statements, VAT quarters, invoices and packs you have. Every visit is logged, so you can see when they last looked.

03 Send them things

Once they are set up, buttons appear around Accounts: **Send to [name]** on a job, **Send this quarter** on the VAT screen. Each one emails them a link that opens exactly the right page.

What they can see	You choose: statements, VAT figures, invoices, jobs — any or all. Change it any time with Update ; it applies to their next visit.
How long it lasts	Twelve months, unless you switch it off sooner. Re-send link starts the twelve months again.
Their latest email always works	For safety we never keep a copy of the link itself, so each time we email your accountant we issue a fresh one and the previous one stops. If an old bookmarked link says it is not active, they just need the most recent email — or you press Re-send link .
Switching it off	Revoke access. Their link stops working at once. You can invite them again later.
More than one person	Fine — a bookkeeper and an accountant, say. Each gets their own link and their own permissions.

What your accountant sees on the Accountant screen shows you their view exactly as they get it, so there is no guessing.

08

A routine that works

None of this needs daily attention. If you want a rhythm that keeps the accounts side quiet, this is the one we would suggest.

WHEN	WHAT	TAKES
Once	Set your VAT quarter end. Invite your accountant. Put a PO number on orders from now on.	Five minutes
When a job starts	Give it a name and, if you have one, a budget.	One minute
Now and then	Glance at the Overview. If Needs your attention is short, carry on.	Thirty seconds
Quarter end	VAT screen → Send this quarter to [name] . Or download the pack and forward it. That is our part of the return done.	One click
Year end	Documents → This year → Download pack .	One click

09

Trade accounts

Everything above works on a standard free account. If you have a trade account with us, Accounts marks it at the foot of the menu, and the Overview carries one extra tile: **Trade credit**.

For now that tile says **Coming soon**. We are connecting Accounts to our own accounting system so that trade customers can see their credit limit, their live balance and what is due when, in the same place as everything else. Nothing to set up on your side; it will appear when it is ready.

Worth knowing

What counts as spend	Orders you have paid for, whether or not they have been delivered yet. Cancelled orders and checkouts that were never completed are not spend and never appear in a total.
Ordered before you registered?	Orders placed as a guest are included automatically, as long as you used the same email address.
"Net"	Goods plus delivery, before VAT. Discounts are already taken off.
The name on your statements	By default it is your account name. If your accountant knows you as a company, set your trading name on the Settings screen and it appears on every statement, pack and email.
Nothing to save	Apart from job names, budgets and settings, there is no "save" anywhere — the figures are your orders, read fresh every time you open a screen.
Your data	Only you and the accountants you have invited can see any of it. An accountant's link is tied to them, logged when used, and dead the moment you revoke it.

Still stuck?

Call us. If a screen is unclear, we would rather hear about it than have you work around it — and we would rather spend two minutes on the phone than have you guess at a size.

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