



So you just started with FBO Director and want to know what to do next?

We put in some basic data but you need to check this to make sure everything looks right! Setup is logical and an easy process. Just follow the road map below to take off to success.

Start with these two videos:

Getting Started: <https://www.youtube.com/watch?v=t2ommd6CmHs>

FBO Director Overview: <https://www.youtube.com/watch?v=PTmxWZIRt3Y>

| Complete | Task  |
|----------|---|
|          | Verify location configuration and setup. (Configuration/Location)<br>- Watch this video: <a href="https://www.youtube.com/watch?v=8OXbVP3F13s">https://www.youtube.com/watch?v=8OXbVP3F13s</a><br>- Check your company name and address<br>- Add a logo<br>- Enter your Flight Bridge credentials<br>- Enter your notes for your invoice and receipts<br>- Select the method you will use for sales taxes (items or accounts)<br>- Check the format of the invoice numbering scheme |
|          | Create a chart of accounts (Configuration/Accounting/Chart of Accounts)<br>- Watch this video: <a href="https://www.youtube.com/watch?v=4tZ8NM-gqIA">https://www.youtube.com/watch?v=4tZ8NM-gqIA</a><br>- Decide if you are going to use the chart of accounts we provided or import a new chart of accounts  |
|          | Setup your payment types (Configuration/Accounting/Payment Types)<br>- Watch this video: <a href="https://www.youtube.com/watch?v=ifvkLuR5PFo">https://www.youtube.com/watch?v=ifvkLuR5PFo</a><br>- Watch this video: <a href="https://www.youtube.com/watch?v=uw6nGTf-K3c">https://www.youtube.com/watch?v=uw6nGTf-K3c</a><br>- a minimum map cash, check, accounts to the right accounts<br>- Add a payment type called “cc-offline”  |
|          | We like to setup FBO products, like Jet Fuel, ramp fees, and hangar, next because you can test an invoice<br>(Configuration/Products)<br>- Watch this video: <a href="https://www.youtube.com/watch?v=KzrHEncdMmg">https://www.youtube.com/watch?v=KzrHEncdMmg</a><br>- Don’t forget – services are things you do. Items are things you physically sell<br>- Map your account numbers to the products   |
|          | This is a great time to run a test invoice!!<br>Just go to Create Invoice on the main menu.<br>Type “Valued” for valued customer<br>Click “Add Item”<br>Choose one of the products you created by typing it in the name field.<br>This gives you a feel for how the invoice looks – we will add customers, taxes, fuel trucks, discounts next! Just click “Open” to leave the invoice open.   |
|          | Configure your taxes (Configuration/Accounting/Tax Names)<br>- Watch this video: <a href="https://www.youtube.com/watch?v=6oT9q0o-3s">https://www.youtube.com/watch?v=6oT9q0o-3s</a><br>- Consider whether your taxes are by item or by accounting<br>- FBO Director supports taxes by unit or taxes by percentage<br>- if you require tax on a tax support (Michigan, Ohio, California) please contact us  |



|  |   |
|--|---|
|  | <ul style="list-style-type: none"> <li>- We can handle exempting certain customers from taxes and will also provide support.</li> <li>- After you create the tax names, MAP your aviation fuel taxes to items either by account number or item name</li> <li>- do this for the other taxes</li> </ul>   |
|  | <p>Customers! It is time to customers and tail numbers</p> <ul style="list-style-type: none"> <li>- Go to (Customers/Manage Customers)</li> </ul> <p>Watch this video: <a href="https://www.youtube.com/watch?v=0qxTEic-pgU">https://www.youtube.com/watch?v=0qxTEic-pgU</a></p> <ul style="list-style-type: none"> <li>- Customers should have a unique name or customer code, “Essinta Labs” for example</li> <li>- Each customer can own multiple tail numbers</li> <li>- When you create an invoice you can look up information by customer name or by tail number!</li> <li>- tail numbers can be shared between customers</li> <li>- Email addresses can be stored for each customer</li> </ul>   |
|  | <p>Tail numbers</p> <ul style="list-style-type: none"> <li>- Click on (Customers/Tai. Numbers/Tail Numbers)</li> <li>- Watch this video: <a href="https://www.youtube.com/watch?v=ebi8pvOFLio">https://www.youtube.com/watch?v=ebi8pvOFLio</a></li> <li>- Tail Numbers can belong to one or more customers</li> <li>- Tail numbers are another way to look up a customer, store history, and report</li> </ul>  |
|  | <p>Discounts are huge and FBO Director has tons of support for your different discount methods.</p> <p>Watch this video: <a href="https://www.youtube.com/watch?v=d7ni6PZ-Hew">https://www.youtube.com/watch?v=d7ni6PZ-Hew</a></p> <ul style="list-style-type: none"> <li>- Adhoc discounts (Configuration/Discounting/Ad-Hoc Discounts)</li> <li>- Watch this video: <a href="https://www.youtube.com/watch?v=Pv3EHqEnb78">https://www.youtube.com/watch?v=Pv3EHqEnb78</a></li> <li>- are given on the fly and are a great tool for changing the price at the front counter</li> <li>- can be used to automate catering markups</li> </ul> <ul style="list-style-type: none"> <li>- Price Class Groups (Configuration/Discounting/Price Class Groups)</li> <li>- Watch this video: <a href="https://www.youtube.com/watch?v=lTO6Lnlxbr0">https://www.youtube.com/watch?v=lTO6Lnlxbr0</a></li> <li>- are you used for cost plus unit and percentages, retail minus unit and percentages, and for constant pricing</li> </ul> <ul style="list-style-type: none"> <li>- Tiered Quantity Discounts (Configuration/Discounting/Quantity Discount Tiers)</li> <li>- Watch this video: <a href="https://www.youtube.com/watch?v=YFwlwe4JwIA">https://www.youtube.com/watch?v=YFwlwe4JwIA</a></li> <li>- Can be used for a specific customer</li> <li>- you can have different tiers on the same products for different customers</li> <li>- At the advanced level you use Tiered Quantity Discounts for airline into plane pricing</li> </ul> |
|  | <p>Invoices and selling products</p> <ul style="list-style-type: none"> <li>- Watch this video: <a href="https://www.youtube.com/watch?v=ZgQAnvsfQIU">https://www.youtube.com/watch?v=ZgQAnvsfQIU</a></li> </ul>  |



There is a lot of other cool stuff you can do with FBO Director which this quick start guide does not dive into in detail.

Here is a quick list of other items to consider.

1. How to setup customer cards on file: <https://www.youtube.com/watch?v=0aRMKDrFLcM>
2. Setting up fuel equipment: <https://www.youtube.com/watch?v=Q2v4EDGWSIk>
3. Adding users and roles (security): <https://www.youtube.com/watch?v=6ar3AIAwBY0>
4. Closing out the day
  1. Run your fuel reconciliation report
  2. Sales by product report
  3. Closing report
  4. G/L report
  5. Batch report
5. Aviation credit cards
6. Periodic recurring items
7. Fuel management
8. Into plane setup
9. Emailing reports
10. Emailing invoices