DealerCycle

Dealer Operating Manual

Feed ordering, invoicing & payments — run your whole cycle from your phone.

A complete, step-by-step guide for dealers
Version 3.5 · July 2026

dealercycle.app/admin

What's inside

NOTE **New in Version 3.5:** two big additions. **Autopay** (Section 9) — a customer signs up once and DealerCycle automatically drafts their bank each cycle, so the money's in before your mill's ACH pulls; no more chasing checks. And **mid-cycle pickups** (Section 10) — log feed a customer grabbed between cycles and it rolls onto their next invoice automatically. Customers also now link their bank **instantly** when paying by ACH. Sections marked NEW cover them; everything else from 3.3–3.4 (plan tiers, sell-at/below-SRP pricing, true net margin, inventory-first mill orders, the driver route sheet, pending invoices) is still here.

1 Welcome — DealerCycle runs the cycle for you

Here's the whole idea: once it's set up, DealerCycle runs your feed cycle on its own. On your schedule it opens ordering and sends every customer their private link, closes the window, sends one consolidated order to your mill, and emails each customer their invoice — with no taps from you. You set it up once; after that it runs in the background while you do everything else.

What DealerCycle does every cycle — automatically

1 Window opens	2 They order	3 Window closes	4 Invoices	5 Payments
Customers get their private order link	Tap the link, enter bags, submit	One mill order goes to your mill	Generated & emailed in one step	Autopay drafts, or mark paid

The few things only you do

Automation handles the cycle itself. A couple of things still touch the real world: recording a check, cash, or Venmo payment when it lands in your hand (or let **autopay** collect it for you — Section 9), and the occasional exception — adding a customer mid-cycle, logging a mid-cycle pickup, or issuing a credit when the mill is out of an item. Each takes seconds.

TIP If you read nothing else, read Section 3 (set it up once) and Section 4 (turn on automation). After that the system carries the cycle and you just record payments as they come in — or set up autopay so even that runs itself.

NOTE You're never on your own: the first time you sign in a setup wizard walks you through getting started, each tab shows a one-time intro card, and a built-in help assistant is always a tap away. You can replay the walkthrough anytime from Setup.

2 Your plan — Dealer, Store & Distributor

DealerCycle comes in three plans. They all run the same core cycle — the difference is how much of a feed business you're running.

- **Dealer — $30/mo.** One mill (Umbarger). Everything you need to run the cycle: customers, pricing, order links, invoicing, payment tracking, online payments, and autopay.
- **Store — $60/mo.** Everything in Dealer, plus multiple mills & brands, your own custom feed items, inventory, on-farm delivery with the driver route sheet, and team logins.
- **Distributor — $99/mo.** Everything in Store, built for multi-location operations (multiple locations coming soon).

What's included	Dealer $30/mo	Store $60/mo	Distributor $99/mo
Order cycle, order links, invoicing & payment tracking	✓	✓	✓
Customers, pricing & your one mill (Umbarger)	✓	✓	✓
Online payments — free bank (ACH) or pay-by-card	✓	✓	✓
Autopay — automatic bank drafts each cycle	✓	✓	✓
Multiple mills, brands & custom feed items	—	✓	✓
Inventory tracking (bags on hand, receive, counter sales)	—	✓	✓
On-farm delivery + textable driver route sheet	—	✓	✓
Team logins (more than one person at your store)	—	✓	✓
Multiple locations	—	—	soon

NOTE Your first 6 months run at an intro rate of $59.99/mo. Sections in this manual marked **STORE** are Store/ Distributor features — on the Dealer plan those tabs are simply hidden, and if you tap into one you'll see a short note on how to unlock it.

NOTE Your plan is set by DealerCycle, not from inside your account — so a price can never change on you by accident. Want to move up a tier? Just ask and we'll switch it on.

3 Getting set up — your first 30 minutes

Do these once, in order, and your account is ready for real customers. None of it requires any technical skill — you're filling in your own business details and your prices. Set aside about half an hour.

Your main feed company — Umbarger or your own

On the set-up screen you pick your **main feed company**. Choose **Umbarger** and its full catalog and weekly prices come built in and update themselves. Choose **Another mill** and DealerCycle creates your first mill under your **own** name with a blank catalog you fill in yourself (Section 18) — nothing Umbarger is included. Either way you can add more mills later on the Store plan.

3.1 Accept the terms & sign in

The first time you open DealerCycle you'll be asked to accept a short pilot Terms of Service (one checkbox) before the setup wizard begins. Then you sign in with a one-tap email link — no password to remember. Type your email, tap **Send my sign-in link**, open the email, and tap the link. You stay signed in on that device.

> **NOTE** Didn't get the link? Use the email your account was set up with, check spam, and request a fresh one. Each link works once and expires in 15 minutes. Your sign-in link is personal — don't forward it.

> **IMPORTANT** **You start in Test mode.** Every new dealer begins in test mode: while you set up and explore, every email is **captured for preview and nothing is actually sent** to customers or the mill. You'll see a " Test mode is ON" banner on your dashboard. When your setup looks right, tell us and we'll switch you to live sending — nothing goes out to real customers until then.

3.2 Put DealerCycle on your phone's home screen

DealerCycle installs like an app — no app store, no download. **iPhone (Safari):** open dealercycle.app/admin, tap Share, then **Add to Home Screen**. **Android (Chrome):** open the same page, tap the ⋮ menu, then **Add to Home screen** / **Install app**. Tap the green icon to open full-screen.

3.3 Fill in your business & pricing

Open **Setup** and enter your dealership name, address, phone, logo, and schedule (open / close / mill / invoice days and times) and timezone. Then open **Pricing** and choose how you price — see Section 14, which now covers **three** ways to price, including selling at or below the mill's SRP. Add your customers on the **Customers** tab (or import a whole list — Section 13).

> **TIP** A built-in wizard walks you through this the first time. You can replay it anytime from Setup, and the help assistant is always a tap away.

4 Automation — turn it on once, it runs the cycle

Automation is what makes DealerCycle run the cycle for you. With it on, the system opens ordering, sends links, closes the window, emails your mill order, and generates and sends invoices — each on the day and time you set, with no taps from you.

- Go to **Setup** and confirm your schedule (open / close / mill / invoice days and times) and timezone.
- Turn **Automation** on. It starts in **review** mode, which pauses at each step for your OK — a safe way to watch it run its first cycle. Switch to full automation once you trust it.

NOTE Running on full automation? You can skip to Section 7 (payments) — and if you set up autopay (Section 9), even that runs itself. While you're still in Test mode, every "send" is captured to the Outbox instead of going out, so you can watch a whole cycle safely before going live.

5 What happens each cycle — and how to check in

Your **Dashboard** is mission control for the current cycle. It shows this cycle's orders three ways — by product, by customer, and the consolidated mill order — plus the buttons that email links and generate invoices.

Every mill on one dashboard

If you run more than one mill, the dashboard pulls orders from **all** of your open cycles into one view, so you see every customer's order in one place no matter which mill it's for. Each order shows a small tag for the mill it belongs to.

See what comes from your own shelf

For dealers who carry stock, the dashboard shows how much of the cycle is covered by feed you already have on hand. A banner reads, for example, " 62 of 72 bags pulled from your inventory this cycle — only 10 left to order from your mills," and the product table has **From stock** and **To order** columns. In the by-customer view, each line is tagged "from stock" or "to order from mill" right after the product. (See Section 17.)

NOTE Made a test order, or a customer cancels? Open the customer's order in the by-customer view and tap **Remove this order**. It drops off the cycle, dashboard and invoicing right away — and it's reversible if you need it back.

TIP The **Cycle check** tab is your safeguard — it flags anyone who ordered but wasn't invoiced, and anything still unpaid.

6 Helping your customers order

Each customer has their own private order link. They open it on their phone, tap + / – to set how many bags of each feed, tap **Review**, then **Place order**. They can add it to their home screen and, each cycle, reorder in one tap.

Same as last time

Returning customers see a **Same as last time** button that fills their previous order in one tap — they just adjust and submit.

Order alerts

Customers can turn on order alerts to get an app-style notification when their invoice is ready or their feed is in.

NOTE A customer's confirmation shows what happens next — when their invoice arrives and where/when to pick up (or their delivery day if they chose on-farm delivery). If autopay is on for them, they'll also see a one-tap prompt to set it up.

7 Payments — the one step that needs you

When a check, cash, or Venmo payment lands in your hand, record it on the **Payments** tab: tap the toggle to mark the invoice paid and note how they paid. Prepare reminders for anyone still unpaid, or export a CSV. (Or skip the chasing entirely with autopay — Section 9.)

Late fee on overdue invoices

Turn on a late fee in Setup and DealerCycle can add it to overdue invoices, so slow-pays carry their own charge.

Two ways for customers to pay online

Every invoice can offer **Bank (ACH) — no added fee** and **Pay by card** (a small surcharge covers the processing fee, so it never comes out of your margin). Bank payments now use **instant verification** — the customer logs into their bank in a few taps instead of waiting on test deposits. Setting all this up is covered in Section 8.

8 Getting paid online (Collect Payments)

Open the **Collect Payments** tab to set up online payment. You'll see two ways to get paid:

- **Use your own pay link** — paste the link you already use (Venmo, a Stripe link, etc.) and it rides along on every invoice.
- **Built-in card & bank** — connect your own Stripe once, and customers pay by bank (free) or card (small surcharge) right from the invoice. Money goes to **your** account; DealerCycle never holds it.

Connect your Stripe

Choose **Card & ACH through DealerCycle** and tap **Connect with Stripe**. Have your EIN, business bank account & routing number, and a website or Facebook business page handy; the verification takes about five minutes. Once connected, card and bank turn on for your invoices — and autopay (Section 9) unlocks.

NOTE Card payments add a small surcharge that covers the processing fee, so the convenience never comes out of your margin. Bank (ACH) is always free to you and the customer.

9 Autopay — draft your customers automatically

Autopay collects from your customers for you. A customer signs up once; after that DealerCycle automatically drafts their bank each cycle, so the money is in your account before your mill's ACH pulls — no invoices to chase, no bank runs, no "I'll get you next time." It's available once you've connected your own Stripe (Section 8).

How a customer signs up (once)

On the **Customers** tab, tap **Text autopay** next to a customer to send them a private enrollment link (they also see a "Set up one-tap payment" prompt on their own order page). The page greets them **by name**, they log into their bank once to link it securely, add a **backup card**, and agree to a one-time authorization. Their bank and card are saved with Stripe — DealerCycle never sees the numbers.

How the draft runs (every cycle, on its own)

In **Collect Payments → Autopay**, turn autopay on and pick your **draft day** and time. On that day each cycle, DealerCycle drafts every enrolled customer for their finalized invoice. The **evening before**, you get a heads-up email — for example "drafting 14 customers for $6,240 tomorrow morning" — so it's automatic but never a surprise. When a bank draft clears (a few business days), the invoice marks itself paid.

TIP Set your draft day for **after** your order closes and the mill confirmation is in — so you're drafting final amounts with any credits applied — and leave enough runway before your mill's ACH for the bank transfer to clear (about four business days).

NOTE **If a bank draft bounces** (closed account, insufficient funds), DealerCycle automatically charges that customer's backup card — which clears faster — so the order never falls behind, and it alerts you either way. Only enrolled customers are drafted; everyone else keeps paying the usual way.

IMPORTANT Autopay needs your **own connected Stripe account** (Section 8). If you collect with your own pay link instead, autopay stays hidden until you connect Stripe. Bank drafts are free; a backup card is only ever charged if the bank draft fails.

10 Mid-cycle pickups — feed between cycles

Sometimes a customer gets feed **between** cycles — they under-ordered, or someone makes an extra run to the mill and grabs a few bags for folks who came up short. Log it as a **mid-cycle pickup** and it rolls onto that customer's next cycle invoice automatically, so they get one combined bill and nothing slips through the cracks.

Log a pickup

On the **Customers** tab, tap **Mid-cycle pickup** next to the customer. Your full feed list comes up just like the order form — tap + / – on as many different feeds as they got, watch the running total, and tap **Add pickup**. It's priced automatically, exactly the same way a normal order is. Something that isn't in your catalog can be typed in as a **custom item**. A purple badge on the customer's row shows what's pending, and you can remove a pickup any time before it's billed.

How it bills

The pickup waits, then merges onto that customer's next Umbarger cycle invoice — combined with anything they order that cycle, or on its own if they don't order at all. Either way it's billed exactly once.

IMPORTANT A mid-cycle pickup is **billing only**. Those bags were already bought on the run, so a pickup is **never** added to your next consolidated mill order and never changes your dashboard bag counts — it only shows up on the customer's invoice. So logging two extra bags for someone won't accidentally order two more from the mill.

11 On-farm delivery & the driver route sheet STORE

If you deliver feed to customers' farms, DealerCycle can collect delivery requests, add the charge to the invoice, and build the driver a route. It's off by default — turn it on only if you offer delivery.

Turn it on

In Setup, enable on-farm delivery and set your default delivery charge and delivery day. On their order, a customer can check **Deliver to my farm (+ your fee)**; the charge is added to their invoice as its own line and their confirmation shows the delivery day. A customer's **Delivery fee ($)** on the Customers tab overrides the default for that farm.

The Delivery routes tab

When ordering closes, customers who chose delivery are grouped by delivery day. Each stop shows the feed that customer gets, and each day has a "**Load for <day>**" summary. Tap **Open route in Maps** to navigate that day's stops (up to 10) in order.

Text the driver a route sheet

From the Delivery routes tab, tap **Driver route sheet → Text driver** to send whoever runs the truck a phone-friendly link. The sheet shows a **Load the truck** list (every feed and the total bag count, so they load right), then each stop grouped by day — name, tap-to-map address, tap-to-call phone, and that customer's feed. **No prices appear on it,** so it's safe to forward.

12 Out-of-stock credits

When the mill is out of an item a customer ordered, issue a credit so their invoice is right.

- Go to the **Payments** tab and scroll to **Customer credits**.
- Pick the customer, enter the amount, and a short reason (e.g. “Rolled Barley out of stock”).
- The credit applies to their invoice automatically.

13 Customers

The **Customers** tab is your roster. Add, edit, or import customers, copy or text each one's private order link, set them up on autopay, or log a mid-cycle pickup — all from the same row.

Cleaner addresses

Customer addresses use structured fields (street, city, state, ZIP) so delivery routing works, and an address suggester can auto-complete the street as you type.

Payment method & delivery fee on file

Each customer can carry a default payment method and a per-customer delivery fee that overrides your standard charge when they choose on-farm delivery.

Autopay & mid-cycle pickups from the row

Each customer row shows their autopay status and a **Text autopay** button to enroll them (Section 9), plus a **Mid-cycle pickup** button to log feed they got between cycles (Section 10).

Import a whole list at once

Download the CSV template (name, phone, email, street, city, state, ZIP, delivery fee, payment method), fill it in, and upload — or import straight from your phone's contacts.

14 Pricing — three ways to price your feed

Your mill maintains each feed's wholesale cost and suggested retail (SRP). You decide how to turn that into your customer price. Go to **Pricing**, pick a **Pricing basis**, and DealerCycle prices every feed for you. There are three ways to price:

Pricing basis	What it does	Use it when…
Markup % on cost	Starts at the mill's wholesale cost and adds your markup %.	You think in terms of margin over cost.
Sell at Umbarger SRP (exact)	The customer pays the mill's SRP exactly. Your profit is SRP – your cost.	The SRP is the real market price and you want to charge it as-is — common for show and specialty feeds.
% off Umbarger SRP	Starts at the SRP and takes your **discount %** off it. **0% = sell right at SRP; a higher % sells below it.**	You want to come in **under** the mill's suggested retail to stay competitive.

Selling below the SRP

To sell **under** the mill's suggested retail, choose **% off Umbarger SRP** and enter how far below you want to be in the **Discount off SRP (%)** box — for example, 5 sells everything 5% under SRP. Enter **0** to sell right at the SRP. DealerCycle never drops a price below your wholesale cost, so a discount can't accidentally put you underwater.

IMPORTANT If a discount would price a feed at or below what it costs you, DealerCycle shows a loud "⚠ AT COST" warning on that item so you can catch it before it goes out. Use the **Sell at SRP (exact)** basis for show feeds whose SRP is the true price.

Price each mill its own way

The basis you pick on the **Pricing** tab sets your **Umbarger** pricing (and the default for any mill you don't price separately). Every other mill you add carries its **own** basis, margin, and freight on the **Suppliers** tab — so you can, for example, sell **Umbarger below SRP** while pricing another mill at a **20% markup on cost**. Open the Suppliers tab, edit the mill, and set its **Pricing basis for this mill**. (See Section 18.)

True net margin — your real profit

For every feed the Pricing table shows the **wholesale cost**, **SRP**, your **base price**, the **all-in customer price**, and your **true net margin per bag** — which nets out both your product cost and your **actual freight cost**, not just the freight you charge. Set your **freight cost** (what you pay) and **freight markup** (what you add) separately, and the margin reflects reality.

NOTE Set a **target margin %** and DealerCycle flags any feed whose net margin falls below it — a mispriced item jumps out instead of quietly eating your profit. It's a visual flag only; it never changes a price on its own. Sales tax has its own panel in Setup → Sales tax.

15 Invoices

The **Invoices** tab lists every invoice, grouped by customer.

- **View** / **PDF** opens any invoice to print or save.
- **Generate for whole cycle** creates any missing invoices for the current cycle in one tap — including any mid-cycle pickups that roll in (Section 10).
- **Resend** emails a customer's invoice again — handy if they say it never arrived.

> **TIP** Invoice numbers run in one clean sequence (26-066, 26-067…). Set the next number under Setup → Invoice numbering if you're continuing an existing sequence.

16 Order breakdown & pending invoices

The **Order breakdown** tab is your year-to-date scoreboard: total bags, revenue, net margin, and freight earned, broken out by product, by customer, and by cycle.

Pending invoices — your current cycle

Your invoiced totals come from invoices you've actually generated. But the orders sitting in your open cycle aren't invoiced yet — and if you carry stock, that feed is already committed off your shelf. So the breakdown shows a **Pending invoices · current cycle** panel: the orders in your open cycle, itemized by product, with pending revenue and margin. The headline "Total bags" reads, for example, "58 — 1 invoiced + 57 pending." Once you generate the invoices, those bags roll from pending into your invoiced totals.

> **NOTE** This lines the Order breakdown up with your Dashboard: what you see ordered on the dashboard shows as pending here, so the two views agree.

17 Inventory (optional) STORE

If you keep bags on hand, the **Inventory** tab tracks them — on hand, committed, and available — updating live as orders, counter sales, receipts and cancellations happen. Add an item's on-hand count, receive stock when a load arrives, record a quick over-the-counter sale, and adjust for shrink or a miscount.

The mill order pulls from your stock first

For inventory dealers, DealerCycle fills each cycle from your shelf first and only orders the **shortfall** from the mill. If customers order 72 bags and you have 62 on hand, your mill order is the 10-bag difference — not 72. The dashboard shows exactly what came from stock versus what's going to the mill (Section 5).

Costs stay current

When you import a mill's new price sheet, your inventory item costs update to match, so your margins reflect what you actually paid.

Get a heads-up before you run out

Set a **reorder point** (the on-hand count that means "restock") and a **reorder quantity**. When an item drops to or below its reorder point, DealerCycle flags it so you can restock before you're caught short.

18 Other mills, brands & custom feeds STORE

DealerCycle isn't just Umbarger. You can add any mill you order from — each runs as its own independent cycle with its own schedule, pricing, freight, and order email — and stock it with your own feed items.

Add a mill (supplier)

Go to the **Suppliers** tab → **+ Add Mill** / **Supplier**. Give it a name, the order email, its schedule, and its own **pricing basis**, margin, freight cost and freight charged. Each mill you add appears to customers as its own tab on the order page and runs on its own days. Its **ordering window** can be Always open, Auto (only shows during its window), or Closed.

> **NOTE** Each mill's **Pricing basis for this mill** is independent of Umbarger — % off SRP (0 = at SRP, higher = below), Sell at SRP (exact), or Markup % on cost. So you can sell Umbarger below retail and price another mill at, say, 20% over cost.

Add custom feed items

On any mill's card, tap **+ Add item**. Set the price one of two ways: **Cost + SRP** (your margin and that mill's freight apply, like Umbarger items) or a **flat price** (the exact amount the customer pays). Custom items are yours alone and are never touched by the weekly Umbarger price update.

Distributors that carry several brands

If you buy several brands through one distributor and they order on different days, add each brand as its own supplier: name it for the brand, set that brand's order day, and put the distributor's email as the order email on all of them. Each brand opens on its own day and its order routes to the distributor, labeled by brand.

19 People & access — add your team STORE

More than one person can run this location. Each teammate signs in with their own email — a one-tap link, no shared password — and gets full access to your dealer account.

- Go to **Setup → People & access**.
- Type the teammate's email and tap **Add person**.
- They get a sign-in link by email and open it on their own device.

Everyone added has full access — orders, customers, pricing, invoices, payments, settings. The account owner can't be removed by accident; anyone else has a Remove button (which also signs them out).

> **NOTE** This is for staff at the same dealer — everyone shares this location's customers and orders. It's different from setting up a brand-new dealer, which is a separate business with its own blank account.

20 The back office at a glance

Along the bottom of the screen on a phone (or the top on a computer) you'll find these tabs. On a phone they tuck into the Menu button. Tabs marked STORE appear on the Store and Distributor plans.

Tab	What it's for
Dashboard	This cycle's orders across all your mills — by product, by customer, and the consolidated mill order. The buttons that email links and generate invoices live here.
Order breakdown	Year-to-date totals plus this cycle's pending invoices — by product, customer, and cycle.
Customers	Your roster. Add, edit, or import customers; copy or text each one's order link; set up autopay; or log a mid-cycle pickup.
Delivery routes	STORE Customers grouped by delivery day, each stop's feed, the truck load list, and the textable driver route sheet.
Pricing	Set your basis, margin, freight cost/markup and tax; the catalog is grouped by supplier with your true net margin per bag.
Suppliers	STORE Every mill you order from — each mill's schedule, pricing, window, order email, and custom feed items.
Invoices	Every invoice, grouped by customer. View, print, resend, or save as a PDF.
Payments	Your payment tracker — mark invoices paid, record how they paid, issue credits, and send reminders.
Collect Payments	Set up online payment — your own pay link, or built-in card & bank — and turn on autopay (automatic bank drafts).
Cycle check	Your safeguard — flags anyone who ordered but wasn't invoiced, and anything still unpaid.
Inventory	STORE Track bags on hand, receive stock, record counter sales; the mill order pulls from stock first.
Payables	Bills you owe your mills, tracked alongside what your customers owe you.
Billing	Your DealerCycle subscription and plan.
Outbox	A log of every email the system sent or prepared — confirmations, links, invoices, reminders. In Test mode, everything lands here.
Setup	Company info, logo, schedule, timezone, ordering window, sales tax, late fee, delivery, people & access, and the setup wizard.

21 Email & Outbox

The **Outbox** is a log of every message DealerCycle sent or prepared — order links, confirmations, invoices, reminders, and your mill orders.

- When you're live, it's your sent log; a "captured" or "failed" row can be retried.
- In **Test mode**, every message is **captured here and not sent** — open one and tap "Open in email" to send it yourself if you want to preview delivery.

> **NOTE** A young sending domain can be filtered by some inboxes at first. If a customer says an email never arrived, use **Resend** from Invoices, and remember SMS order links (texted from your own phone) always reach everyone.

22 Troubleshooting & FAQ

If…	Do this
A customer says the order link doesn't work	Re-copy it from the Customers tab — each link is unique to that customer. If they cleared their browser, just send it again.
An email didn't arrive	Check the Outbox for its status, confirm the address on the Customers tab, and tap Resend. If you're in Test mode, nothing sends — that's expected.
A customer wants to stop writing checks	Set them up on autopay — Customers → Text autopay. They link their bank once and it drafts automatically each cycle (Section 9).
A mid-cycle pickup didn't show on the mill order	That's on purpose. A pickup only bills the customer's next invoice — it's never added to the mill order, because those bags were already bought on the run.
A price looks wrong	Open Pricing and check your basis and margin. A "⚠ AT COST" flag means a discount would price that feed at or below your cost.
Orders aren't showing on the dashboard	The dashboard shows orders from every open cycle. If a mill's window is closed, its orders sit in that cycle until it reopens.
I need to remove a test or cancelled order	In the by-customer view on the dashboard, open the order and tap Remove this order. It's reversible.
I'm ready to go live (out of Test mode)	Tell us and we'll switch you to live sending. Until then, nothing goes to real customers.

23 Quick reference

To do this…	Go here
Open ordering / send links this cycle	Dashboard → Email order link to all customers
Send the mill order	Dashboard → Email mill order
Generate & send invoices	Dashboard or Invoices → Generate for whole cycle
Record a payment	Payments → toggle the invoice to paid
Set up a customer on autopay	Customers → Text autopay (turn autopay on under Collect Payments → Autopay)
Log a mid-cycle pickup	Customers → Mid-cycle pickup
Issue an out-of-stock credit	Payments → Customer credits → Issue credit
Change how you price (incl. below SRP)	Pricing → Pricing basis → % off Umbarger SRP + discount %
Sell at the SRP exactly	Pricing → Pricing basis → Sell at Umbarger SRP (exact)
Price another mill differently	Suppliers → edit the mill → Pricing basis for this mill
Add a customer / import a list	Customers → Add, or Import (CSV / contacts)
Text the driver a route sheet	Delivery routes → Driver route sheet → Text driver
Add another mill or a custom feed	Suppliers → + Add Mill, or a mill card → + Add item
Add a teammate	Setup → People & access → Add person
Go live (leave Test mode)	Ask DealerCycle to switch you to live sending

NOTE Questions? The in-app help assistant is always a tap away, and you can replay the setup walkthrough anytime from Setup.