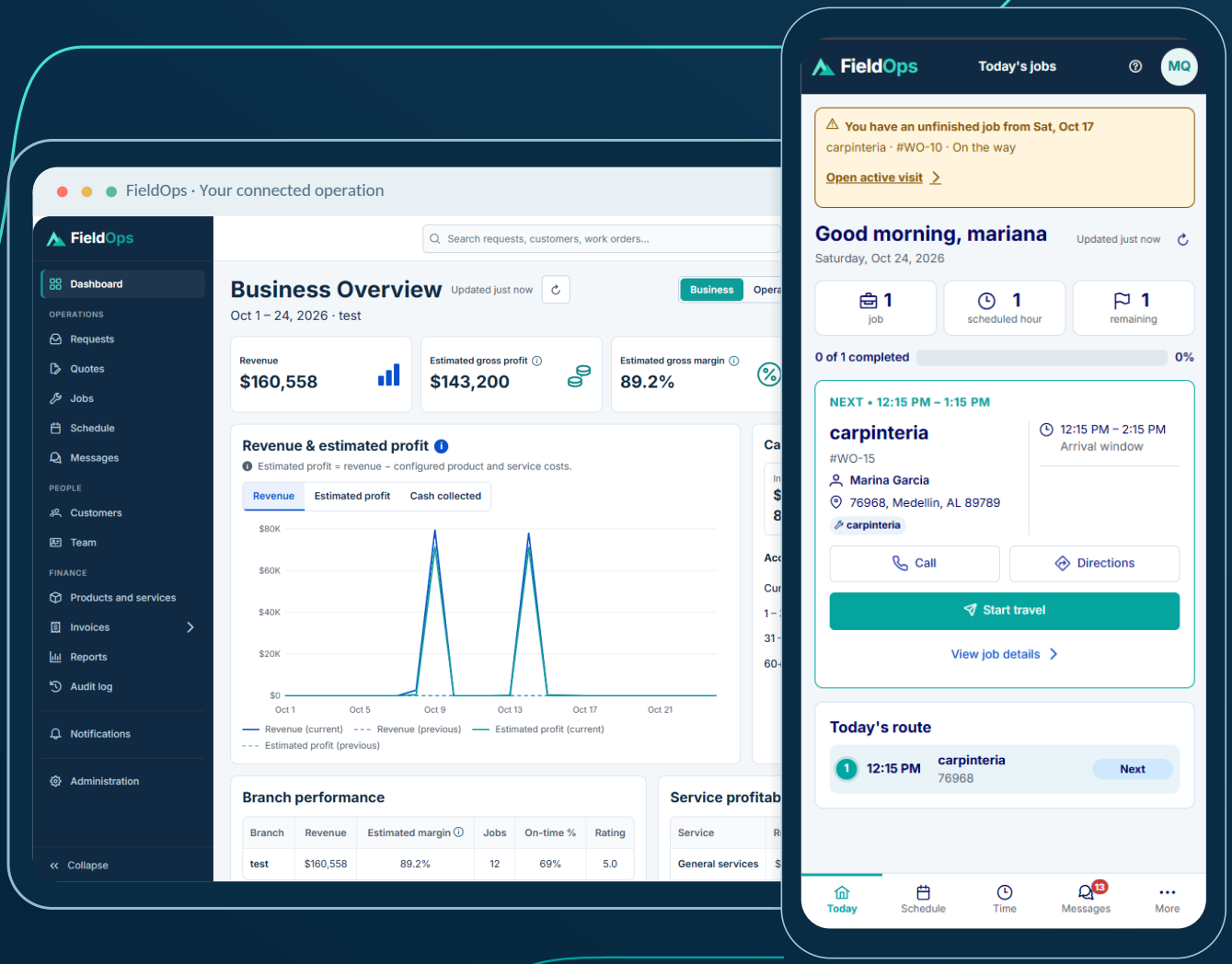
FieldOps

USER MANUAL

# User Guide

## Your operation, step by step.

Quick start · Roles · Workflows




English edition · October 2026

FieldOps

00 / ABOUT THE PROJECT

# Software as a complete product

The motivation, technical objectives and thinking behind FieldOps.

## MOTIVATION

FieldOps began as a portfolio project inspired by a real operational challenge: connecting customer requests, office coordination and field work in one coherent experience. Its purpose is to demonstrate how thoughtful design and solid engineering can turn a complex process into a usable product.

## TECHNICAL OBJECTIVES

### A coherent user experience

Build a modular Angular interface with reusable UI patterns, consistent styling and multilingual support.

### Clear architecture and data boundaries

Structure the .NET API with Clean Architecture and domain modeling, backed by PostgreSQL, organization isolation and role-based access.

### Quality throughout delivery

Connect specifications, code review, automated checks, continuous integration and traceable changes in an AI-assisted development workflow.

**A note from the author**

I designed and built FieldOps to show how I approach software beyond individual features: understanding a problem, modeling its workflows, making architectural decisions and caring about the details. It brings together my technical skills, methodology and interest in design, from the first specification to implementation and documentation.

**Juan David · Creator of FieldOps**

00 / GUIDE NAVIGATION

# Open the chapter you need

Select a chapter below, use PDF bookmarks or follow the Contents and Next links on each page.

**Create your organization** 04
Registration and first workspace

**Getting started** 11
Roles and the service journey

**Prepare your company** 13
Settings, customers and team

**Requests and quotes** 21
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**Troubleshooting** 67
Common blockers and support

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Key concepts and status changes

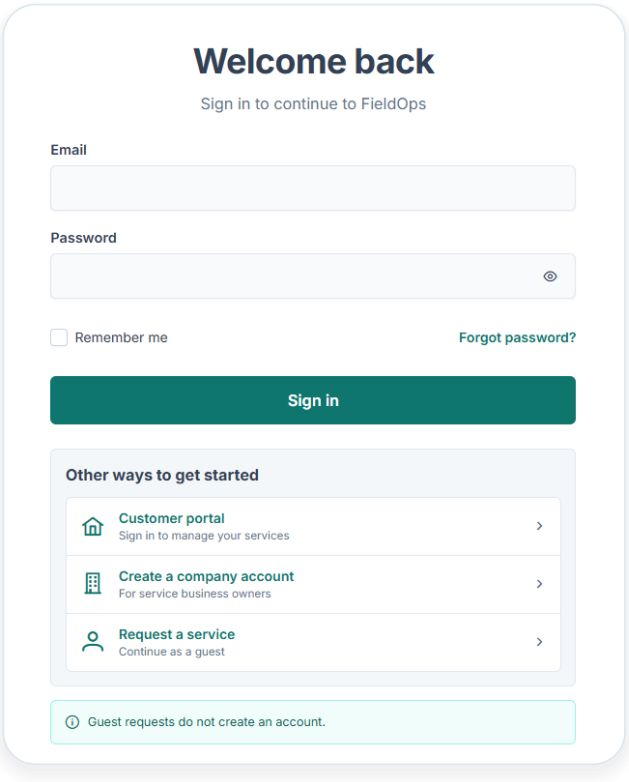
**Screens and reference workflows**

Screens use demo data. Workflows without a supplied capture use clearly labeled reference diagrams. Three Spanish interface screens were adapted into English.

01 / CREATE YOUR ORGANIZATION

# Start your company account

Create the organization before configuring your team or recording service work.




Demo screen · original interface

1 **Open the FieldOps sign-in page**

Under Other ways to get started, locate Create a company account.

2 **Choose the business-owner route**

Select Create a company account to begin setting up a new organization.

3 **Follow the four setup steps**

Complete Company & branch, Business settings, Owner account and Review. Check your information before creating the workspace.

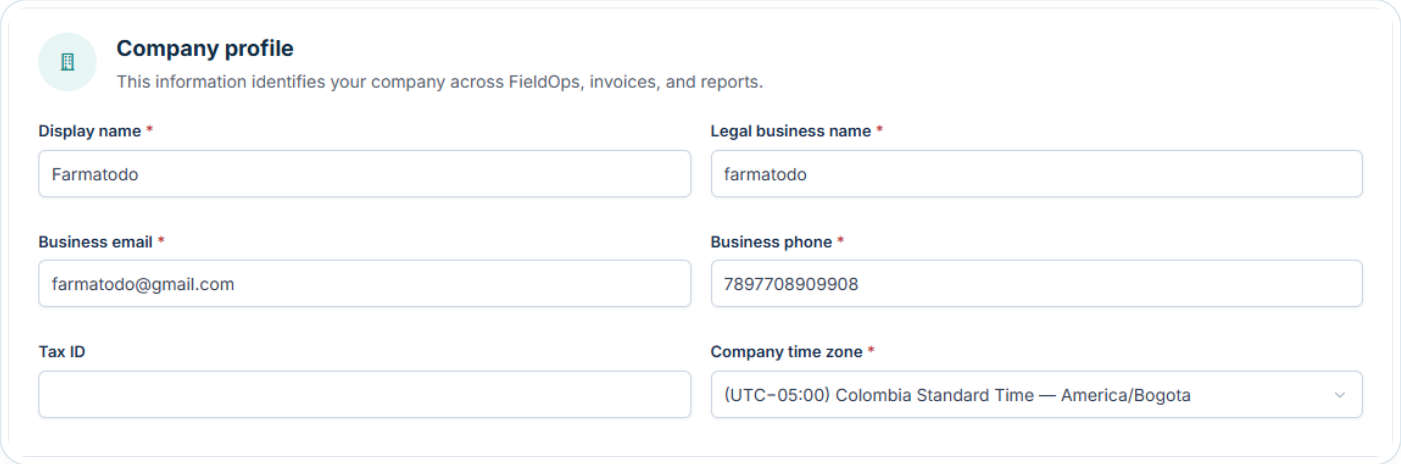
### Choose the right access route

Customer portal is for customers managing their services. Request a service submits a guest request and does not create a company account.

01 / CREATE YOUR ORGANIZATION

# Create your organization

Step 1 of 4: identify the company that will own the workspace.




Demo screen · original interface

### 1 Enter the company identity

Complete Display name and Legal business name. These identify the company across FieldOps, invoices and reports.

### 2 Add business contact details

Complete Business email and Business phone. Add Tax ID when applicable; it is not marked as required in this form.

### 3 Choose the company time zone

Select Company time zone. Then continue through the First branch section on the same setup step.

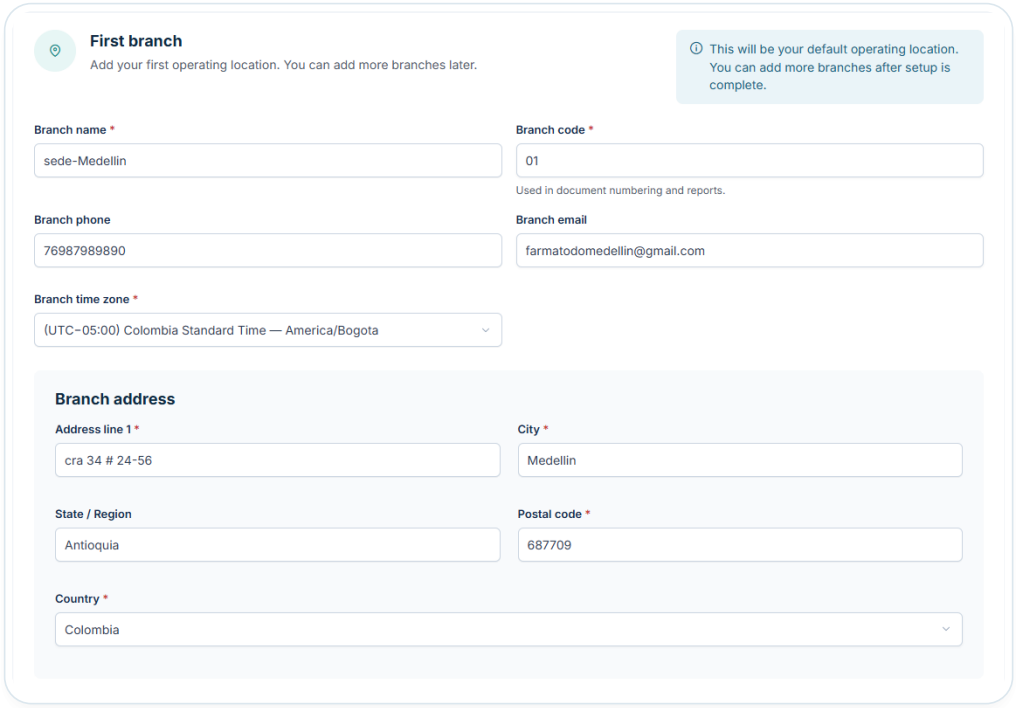
### Required fields and later changes

Fields marked with an asterisk are required. The setup screen indicates that company and first-location details can be changed later.

01 / CREATE YOUR ORGANIZATION

# Add your first branch

Step 1 of 4, continued: define your default operating location.




Demo screen · original interface

## 1 Identify the operating location

Enter Branch name and Branch code. The code is used in document numbering and reports. Add Branch phone and Branch email when needed.

## 2 Set the branch time zone

Choose Branch time zone for scheduling at this location. The example uses America/Bogota.

## 3 Complete the branch address

Enter Address line 1, City, Postal code and Country; add State / Region where applicable. Continue after the required fields are complete.

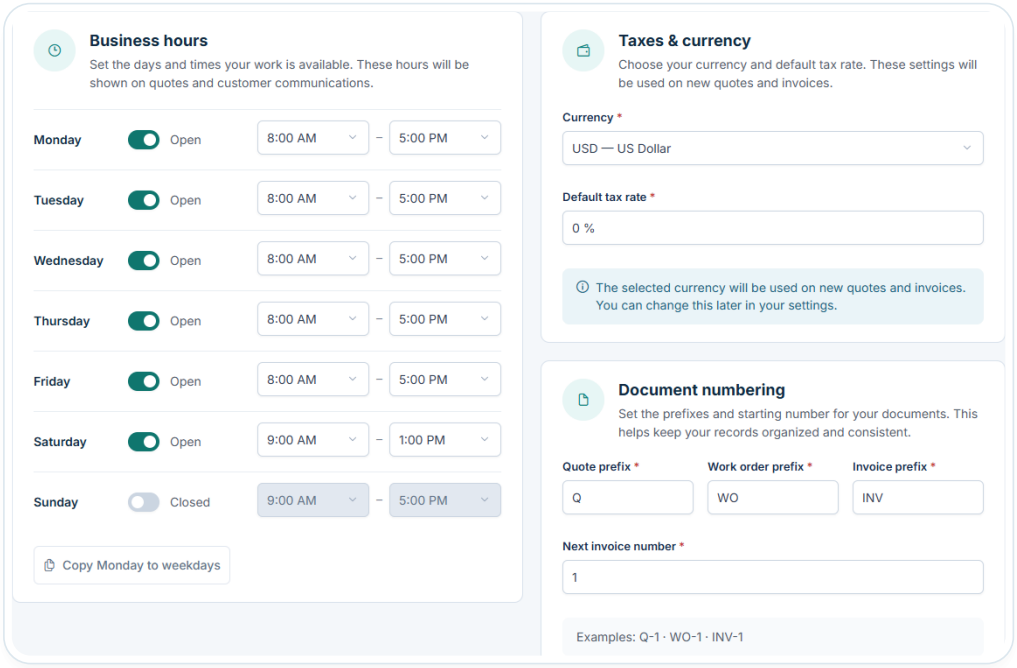
### The first branch is created during registration

This becomes the default operating location. More branches can be added after setup. Branch contact and address details are separate from the company profile.

01 / CREATE YOUR ORGANIZATION

# Set business defaults

Step 2 of 4: choose operating hours, financial defaults and document numbering.




Demo screen · original interface

## 1 Set Business hours

Use the daily Open / Closed switches and time selectors. Copy Monday to weekdays reuses Monday's schedule for the other weekdays.

## 2 Review Taxes & currency

Choose Currency and Default tax rate. These settings are used on new quotes and invoices; select values appropriate to your company.

## 3 Set Document numbering

Review Quote prefix, Work order prefix, Invoice prefix and Next invoice number. Select Continue to move to Owner account; Back returns to the previous step.

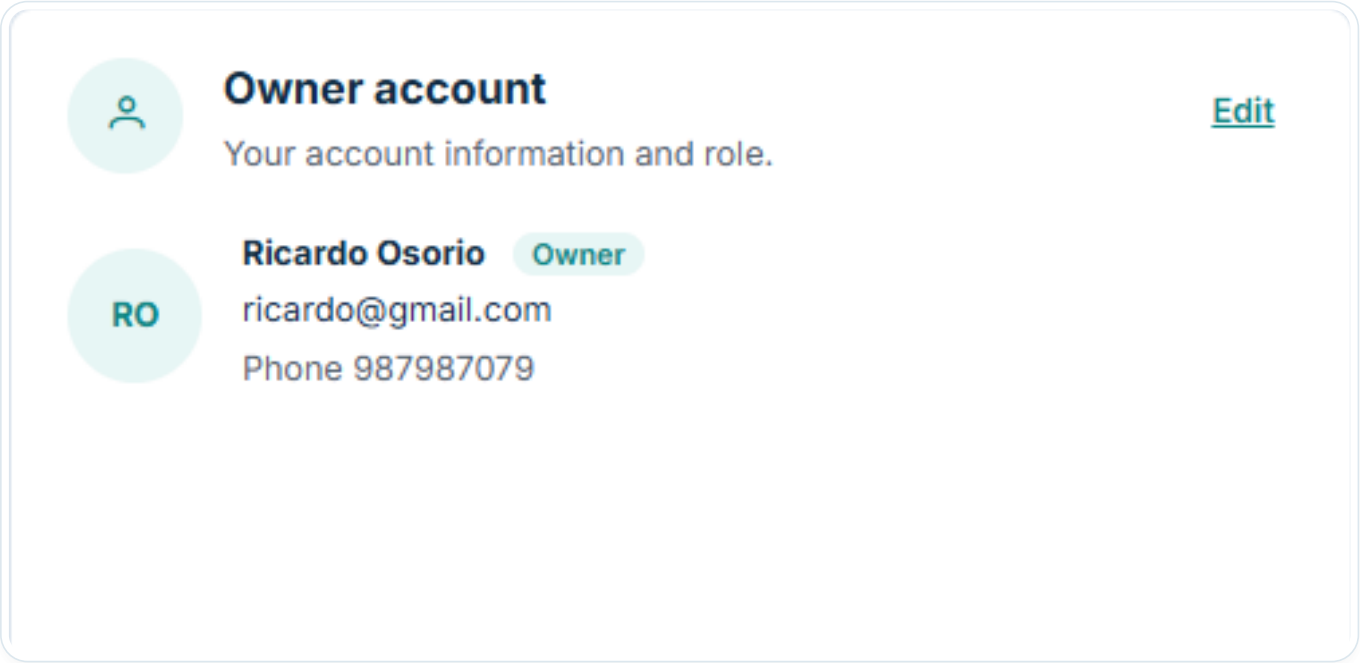
### The displayed amounts are examples

The demo uses USD, a 0% default tax rate and Q / WO / INV prefixes. Review these defaults rather than copying them automatically.

01 / CREATE YOUR ORGANIZATION

# Set up the Owner account

Step 3 of 4: establish the person responsible for managing the organization.




Demo screen · original interface

## 1 Complete the account step

In Owner account, complete the account details and credentials requested on screen. Use an email address you can access.

## 2 Continue to Review

Once the account step is complete, advance to the final review. The Owner account summary identifies the initial organization owner.

## 3 Check the owner identity

Review the name, email, phone and Owner role. Use Edit if the account details need correction before creation.

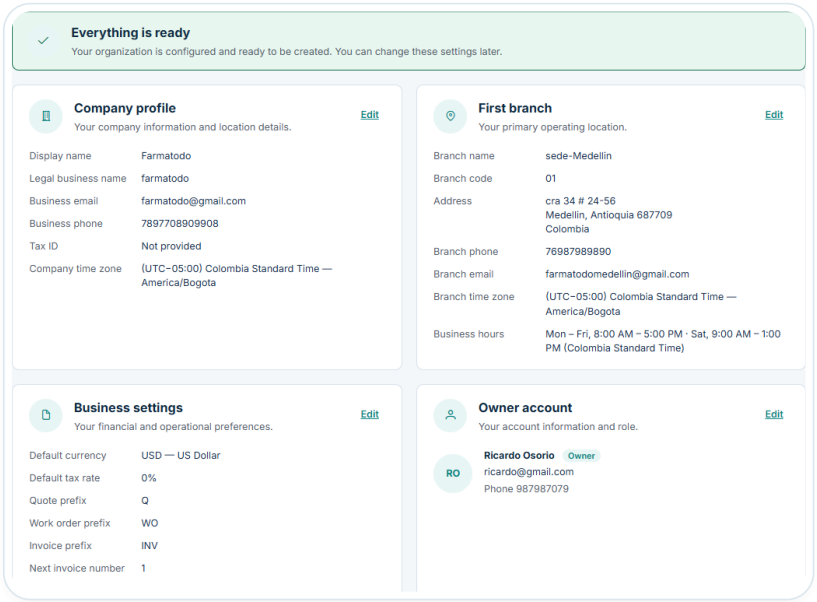
### About this illustration

The image is the Owner account excerpt from the final review, not the account-entry form. The example owner is Ricardo Osorio; use your own details.

01 / CREATE YOUR ORGANIZATION

# Review and create

Step 4 of 4: confirm the workspace details before submitting.




Demo screen · original interface

**Final action**

Create organization →

## 1 Review all four summaries

Check Company profile, First branch, Business settings and Owner account. Confirm contact details, time zones, currency, tax and document numbering.

## 2 Correct details with Edit

Each summary provides Edit to return to the relevant setup section. Return to Review after making your corrections.

## 3 Select Create organization

When the information is correct, select Create organization. The screen notes that creation may take a few seconds; wait for the result.

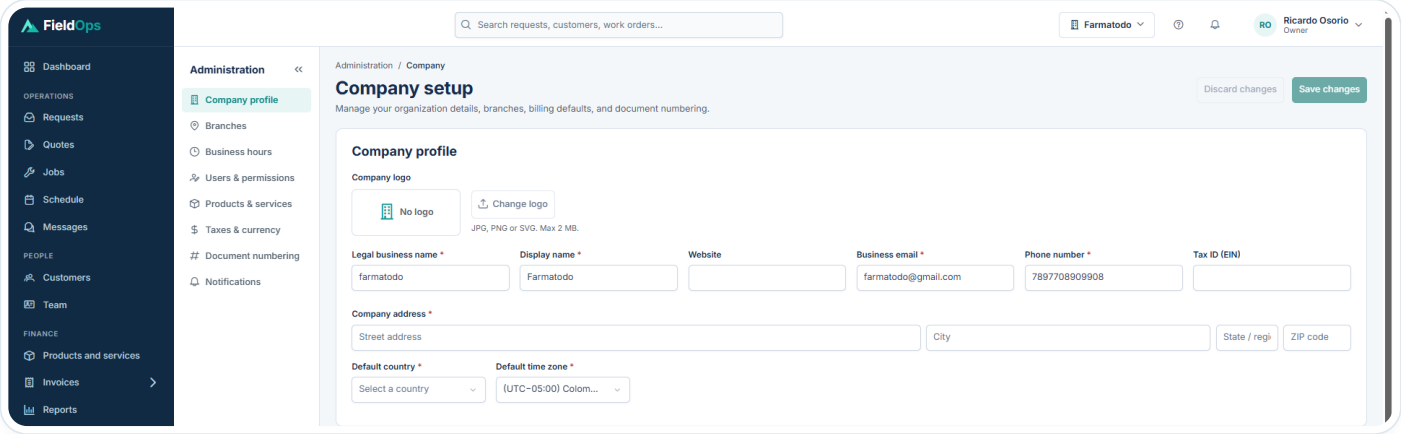
### Ready is not the same as created

Everything is ready appears before submission. The organization is created only after the final action succeeds.

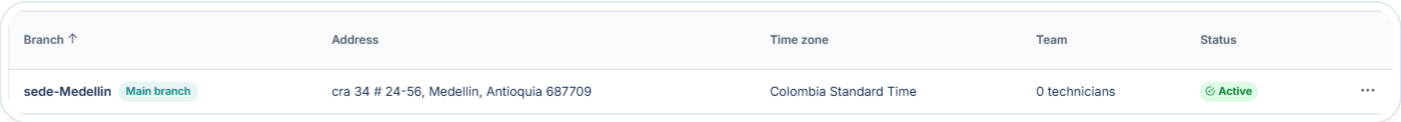
01 / CREATE YOUR ORGANIZATION

# Verify your new workspace

After creation, confirm the company, Owner account and first active branch.




Demo screen · original interface




First branch · Main branch · Active

## 1 Check the company and account

Confirm the organization name in the top bar and the Owner role beside the signed-in user. This example shows Farmatodo and Ricardo Osorio.

## 2 Verify the first branch

In Administration > Company setup, check the branch name, address, time zone and Active status. Main branch identifies the default location.

## 3 Finish configuration and invite the team

Review the remaining company details and use Save changes when updating them. Then configure the catalog and invite users with the appropriate roles and branch access.

### Your organization is the starting point

The workspace and first branch now exist. Complete any remaining company address or country fields as needed before saving changes; the branch address is already listed separately.

02 / GETTING STARTED

# Find your starting point

Your role determines your home page and available actions.

**Who can do this:** All users

REFERENCE WORKFLOW

01
**Office**
Dashboard or Overview

→

02
**Technician**
Today's jobs

→

03
**Customer**
Service portal

1. **Owner**
   Switch between Business and Operations. Use Administration to manage company settings, branches and access.
2. **Operations Manager and Dispatcher**
   Start on the operational dashboard and coordinate service according to your permissions.
3. **Accounting and Viewer**
   Start on Overview. Open the permitted areas from the sidebar. Viewer access is read-only.
4. **Technician**
   Use today's route. Only the primary technician performs the visit actions described in this guide.
5. **Customer**
   Use the customer portal to see the requests, visits, quotes and invoices associated with your account.

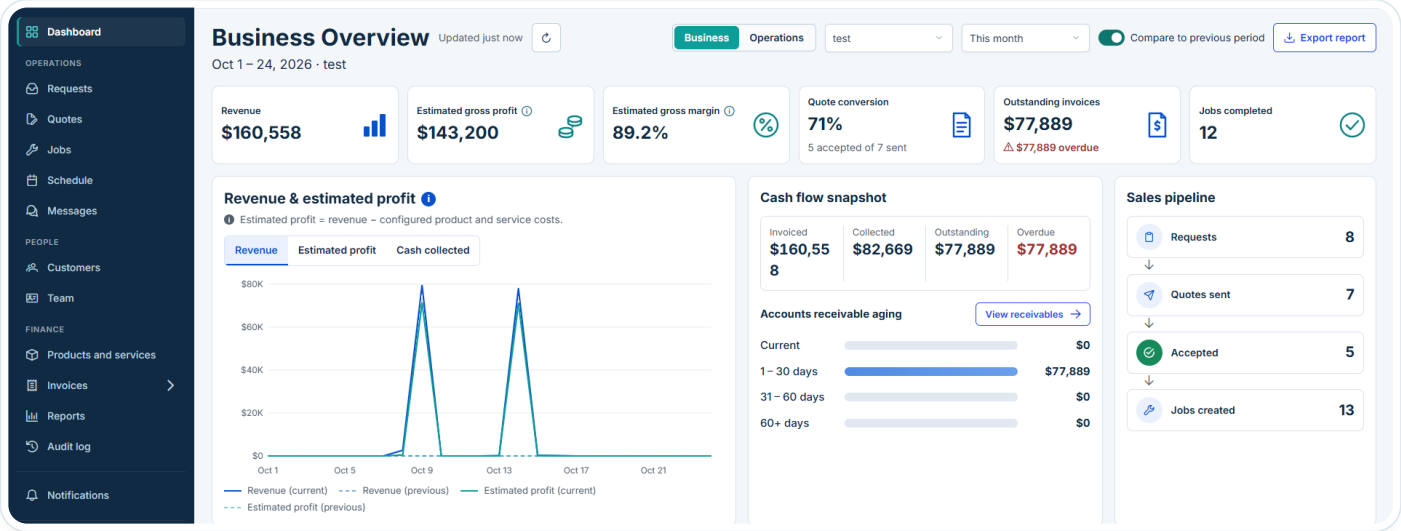
### How to use this edition

Instructions and interface labels are in English. Screens translated for this edition carry an adaptation caption. Customer names, addresses and other demo data may retain their original wording.

02 / GETTING STARTED

# From request to payment

Each area supports a stage of service. The areas you see depend on your role.




Demo screen · original interface

## 1 Requests and Quotes

Record the customer need, prepare a price and receive their decision.

## 2 Jobs and Schedule

Create a work order from the approved quote, then schedule visits and assign technicians.

## 3 Field work and Invoices

Complete and document the work. Review completion, send the invoice and record payment.

### Find your way

The sidebar groups Operations, People and Finance. Owner can switch between Business and Operations. The bell opens notifications; your name opens profile, settings and help.

03 / PREPARE YOUR COMPANY

# Set up your company

Review the details and defaults reused in new documents.

**Who can do this:** Owner edits; Viewer can view

REFERENCE WORKFLOW

01
**Company profile**
Identity and contact

→

02
**Defaults**
Currency and tax

→

03
**Documents**
Numbering and banking

1 **Open company settings**

Select Administration to open Company setup.

2 **Review Company profile**

Complete the legal business name, display name, contact details, tax ID, address and logo.

3 **Set Taxes & currency**

Choose the currency and default tax rate for the organization.

4 **Check Document numbering**

Review the prefixes and numbering used for quotes, work orders and invoices.

5 **Save your defaults**

Review Business hours and Bank transfer details as needed, then select Save changes.

### What happens next

The defaults apply to new documents. Manage branches and users in their own Administration sections.

03 / PREPARE YOUR COMPANY

# Organize your branches

Group work by service location while preserving its history.

**Who can do this:** Organization administration

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Identify** | | **Locate** | | **Bill** |
| Branch name and code | | Address and time zone | | Own or inherited settings |

1. **Open Branches**
   In Administration, open Branches and select Add branch.
2. **Enter branch details**
   Complete the name, code, contact phone and email.
3. **Define the service area**
   Set the time zone, address and service area ZIP codes.
4. **Review billing defaults**
   Use company billing settings inherits company tax, currency and document numbering.
5. **Create or update**
   Select Create branch. To make changes later, open the branch and select Update branch.
6. **Deactivate a closed location**
   Deactivate branch prevents new records at that location and preserves historical data.

**Check the time zone**

Visit times use the branch time zone. Your first branch is created when you register the organization.

03 / PREPARE YOUR COMPANY

# Invite and manage your team

Give each person the appropriate role and branch access.

**Who can do this:** Only Owner changes access; Viewer can view

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Invite** | | **Authorize** | | **Activate** |
| Email and name | | Role and branches | | Invitation accepted |

1. **Open Users & permissions**

   In Administration, select Invite user. Filter the list by role, branch or status when needed.

2. **Complete the invitation**

   Enter Email address, First name and Last name. Review the Permission matrix before choosing a Role.

3. **Define branch access**

   Choose All branches or specific branches and set Invitation expires in.

4. **Link an operational profile**

   For operational roles, review Link operational team profile after acceptance when offered.

5. **Send and maintain access**

   Select Send invitation. Pending invitations can be resent or revoked; use Edit access to change permissions.

6. **Suspend or reactivate**

   Use Suspend access or Reactivate from the row menu. Suspension preserves work records and audit history.

**Protect the last Owner**

The last Owner cannot be suspended or downgraded.

03 / PREPARE YOUR COMPANY

# Create customers and properties

A customer can have several locations where you provide service.

**Who can do this:** Owner and Dispatcher create and edit

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Customer** | | **Property** | | **Request** |
| Person or business | | Service location | | Specific service need |

## 1 Create the customer

Open Customers, select New customer and choose the customer type.

## 2 Add contact details

Enter the name or company name, email, mobile phone and preferred communication.

## 3 Add operational context

Review the address, instructions, branch, tags and internal note where applicable.

## 4 Check for duplicates

If Possible existing customer appears, review the match before using the existing record or creating another.

## 5 Save the customer

Select Create customer and open the new customer page.

## 6 Add service locations

In Properties, select Add property. Record the address, branch and instructions for each location.

### What happens next

The customer and properties can be selected when creating requests. A property is a location, not a separate customer.

03 / PREPARE YOUR COMPANY

# Keep customer records organized

Find, import, update and archive records without losing their history.

**Who can do this:** Owner imports; Owner and Dispatcher edit

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Find** | | **Maintain** | | **Archive** |
| Tabs and filters | | Details and properties | | History preserved |

## 1 Find the record

Use All customers, Leads, Active or Archived, together with search and filters.

## 2 Import customers

As Owner, select Import customers, download the CSV template and upload the completed file.

## 3 Review the import

Resolve row errors and check duplicate warnings before confirming.

## 4 Edit or archive

The row menu offers View, Edit, Archive and Reactivate. Select a customer name to open the record.

## 5 Maintain properties and notes

Add, edit, set a primary property or archive one from the property card. Use Internal notes for team-only context.

### Available customer tabs

The source help describes Overview and Activity as available. Some other customer tabs display Coming soon.

03 / PREPARE YOUR COMPANY

# Prepare products and services

Reuse catalog items and prices in quotes and planned materials.

**Who can do this:** Users with catalog editing access

REFERENCE WORKFLOW

01
**Classify**
Service or material

→

02
**Price**
Unit price and cost

→

03
**Activate**
Available for reuse

## 1 Add an item

Open Products and services and select Add item.

## 2 Classify it

Choose the Type and enter a name, description and category.

## 3 Enter price and cost

Set the unit price and unit cost. FieldOps calculates an estimated margin.

## 4 Review item options

Set Taxable and Active as needed, then save.

## 5 Organize or import

Use Manage categories to organize items and Import CSV to load multiple records.

### What happens next

Active items are available in quotes and when planning materials on a work order.

03 / PREPARE YOUR COMPANY

# Set skills and availability

Prepare the information your dispatch team uses when assigning visits.

**Who can do this:** Owner and Operations Manager edit; Dispatcher views

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Profile** | | **Skills** | | **Availability** |
| Operational details | | Level and primary skill | | Week and exceptions |

1. **Open a technician profile**

   In Team, select Add technician profile or use View in the technician row menu.

2. **Open Skills & availability**

   From the profile, select Edit skills or Edit availability.

3. **Define operational skills**

   Add skills, select their levels and use Set as primary for the main skill.

4. **Maintain the skill list**

   Manage skill list lets you add skills to the organization.

5. **Set weekly availability**

   Choose days, hours, breaks and capacity in Standard weekly availability. Copy Monday to other days if useful.

6. **Add exceptions and save**

   Use Add exception for a specific date, then select Save changes.

**Your team chooses the assignment**

FieldOps shows skills and availability; it does not assign technicians automatically. Use the actions on the profile.

03 / PREPARE YOUR COMPANY

# Invite a customer to the portal

The customer activates access from an email invitation.

**Who can do this:** Owner and Dispatcher

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Invite** | | **Activate** | | **Access** |
| Customer record | | Name and password | | Customer services |

## 1 Check the email

Open the customer in Customers and review Contact details.

## 2 Send the invitation

When Portal access shows Not invited, select Invite to portal.

## 3 Follow the status

Invitation sent shows the expiry date. Resend invitation sends a new link.

## 4 Wait for activation

The customer confirms their name and creates a password, or links an existing account using its current password.

## 5 Remove access if needed

Select Remove portal access and confirm. The customer is disconnected from the portal.

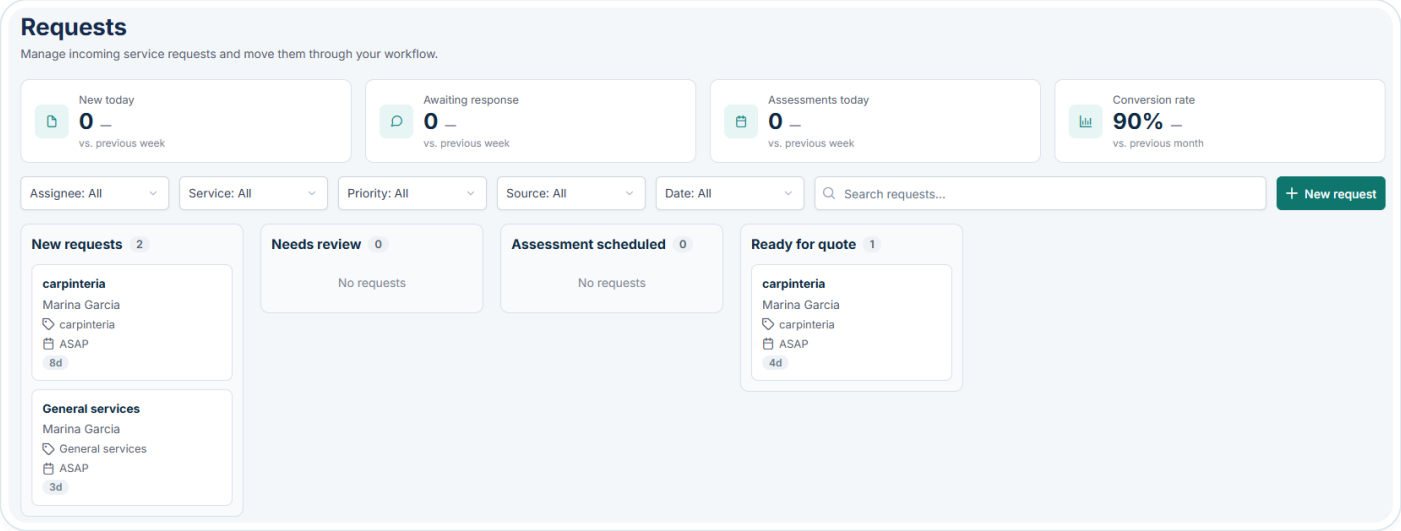
### What happens next

Portal access changes to Active and shows the activation date. FieldOps indicates when a contact cannot receive the invitation.

04 / REQUESTS AND QUOTES

# Organize incoming requests

Use the board to find each request and decide what should happen next.




Demo screen · original interface

## 1 Read the status columns

The board separates new requests, requests needing review, scheduled assessments and work ready for a quote.

## 2 Find the right request

Filter by assignee, service, priority, source or date, or use Search requests.

## 3 Open or create a record

Select a card to review the request. Select New request to record a new service need.

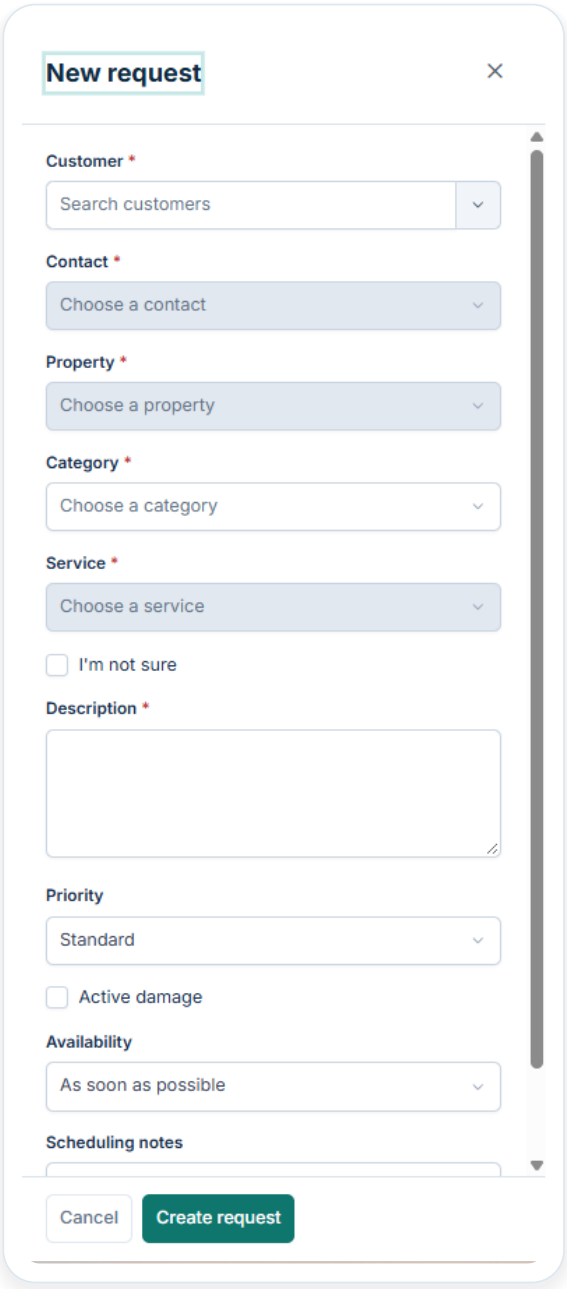
### Before you start

The customer and property must already exist in Customers before you create a request.

04 / REQUESTS AND QUOTES

# Create a service request

Record the customer, service location and work they need.




Demo screen · original interface

### 1 Choose who and where

Select Customer, Contact and Property. Create the customer and property first if they are missing.

### 2 Describe the service

Choose Category and Service, or select I'm not sure. Complete Description and review Priority.

### 3 Offer a suitable time

Choose Availability and add any Scheduling notes or preferred arrival details.

### 4 Review and create

Check the required fields, then select Create request. The record appears in New requests.

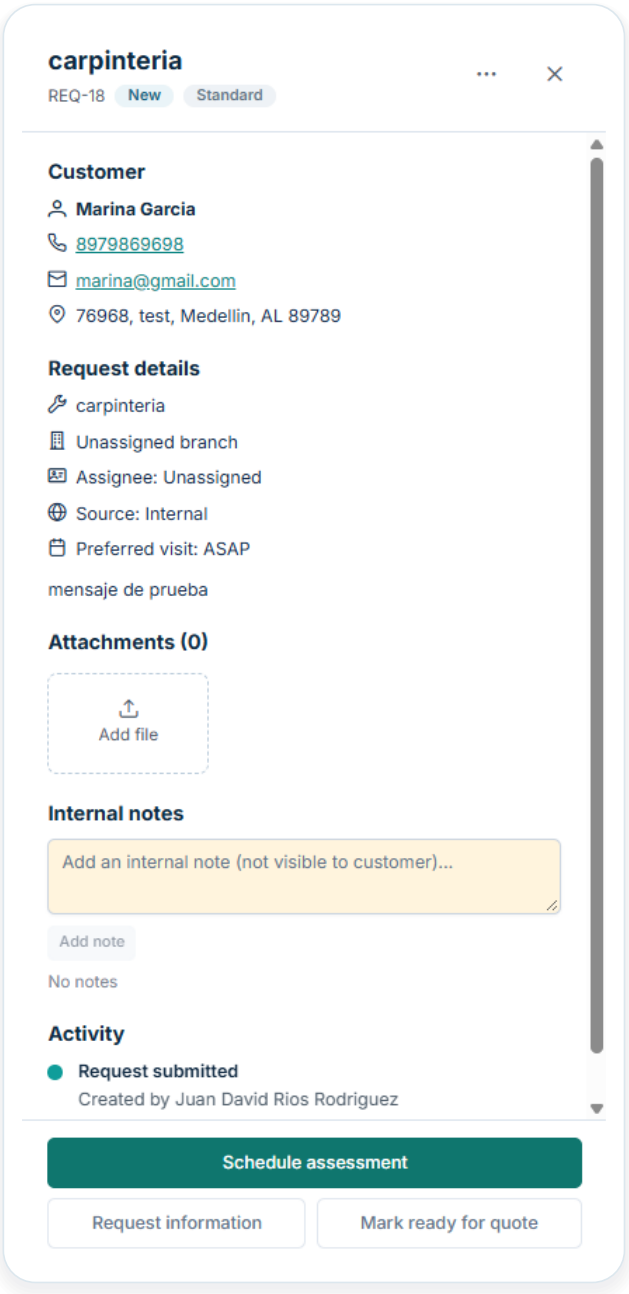
**Expected result**

The request is saved and ready for office review. This form is shown before completion.

04 / REQUESTS AND QUOTES

# Review the customer request

Open a board card to check the details and choose a next step.




Demo screen · original interface

### 1 Confirm the record

Check the title, reference and status. This example shows REQ-18 in New.

### 2 Read the context

Review customer, contact, property, service, availability, description, Attachments and Activity.

### 3 Keep team notes

Add an Internal note and save it with Add note. The customer cannot see internal notes.

### 4 Choose the next step

Use Schedule assessment for a site check, Mark ready for quote when you have enough detail, or Request information if something is missing.

**Keep examples separate**

Later screenshots show a different request. Use the reference number to identify the record you are editing.

04 / REQUESTS AND QUOTES

# Assess the site before quoting

An optional assessment helps you establish a diagnosis and scope.

**Who can do this:** Staff managing service requests

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Plan** | | **Assess** | | **Quote** |
| Date and technician | | Findings and photos | | Recommended scope |

1. **Open the request**

   From a New or Needs review request, select Schedule assessment.

2. **Find a time**

   Review customer availability and the technician calendar in Week, Day or Agenda view.

3. **Set the visit details**

   Choose a branch if requested, then Date, Arrival window, Estimated duration and Assigned technician.

4. **Explain the purpose**

   Add Purpose for assessment and Internal instructions. Review the customer message and Email option.

5. **Schedule the assessment**

   Select Schedule assessment. Request actions offer Reschedule and Cancel assessment.

6. **Record the findings**

   After the visit, select Complete assessment. Enter Diagnosis, Recommended scope and any supporting photos.

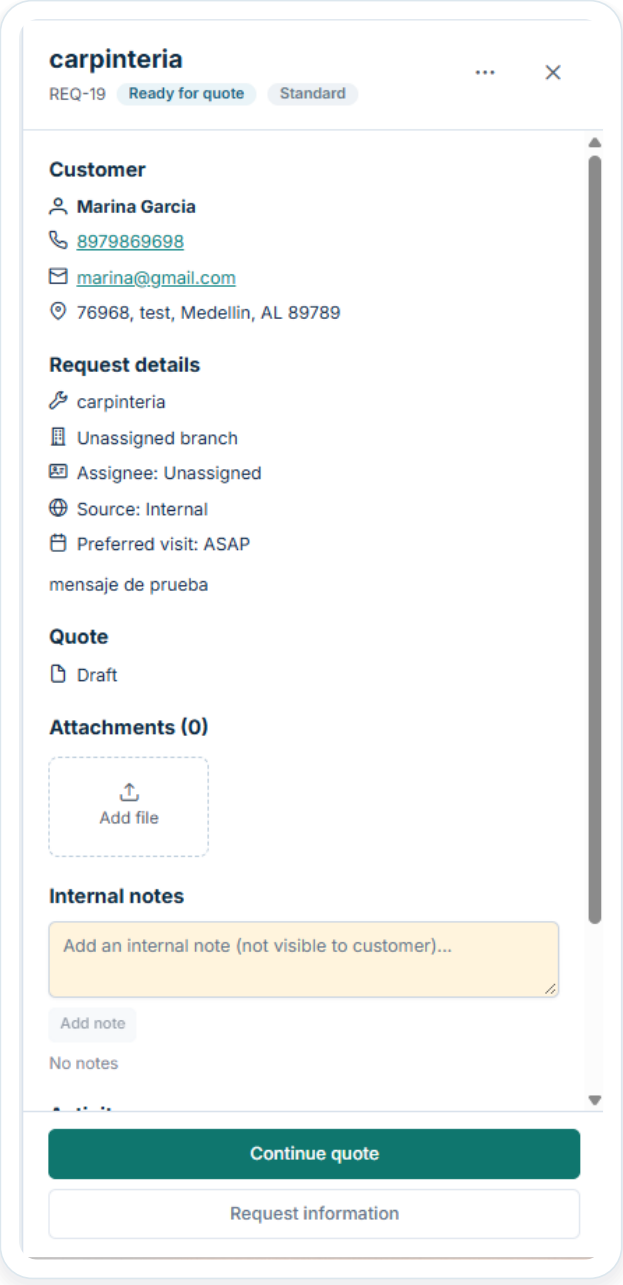
**An assessment is optional**

If you already have enough information, use Mark ready for quote. SMS is unavailable in this flow.

04 / REQUESTS AND QUOTES

# Start or continue a quote

A request ready for pricing may already have a saved draft.




Demo screen · original interface

### 1 Check Ready for quote

The status beside the reference confirms the request can move to pricing. This example is REQ-19.

### 2 Look for an existing draft

The Quote section displays Draft when someone has already started preparing a quote.

### 3 Open the quote editor

Select Continue quote to complete that draft. When no draft exists, the documented action is Create quote.

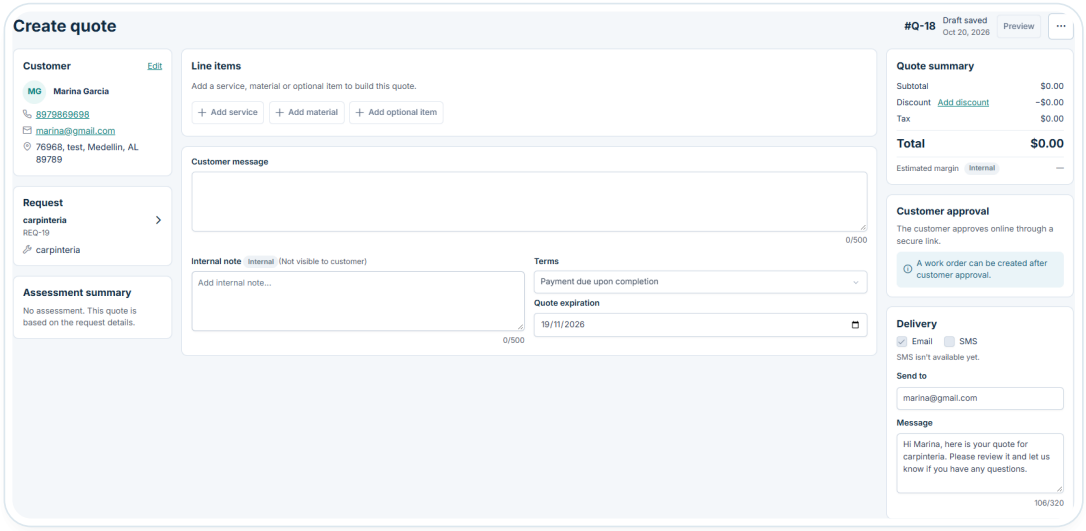
**Expected result**

The quote editor opens with the request context. Check scope, amounts and terms before sending.

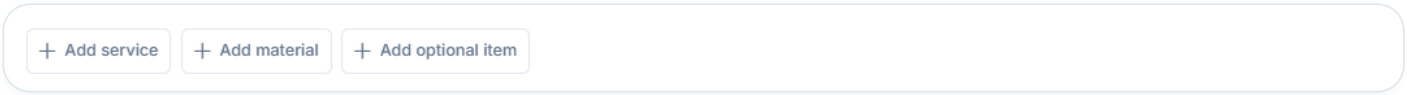
04 / REQUESTS AND QUOTES

# Prepare the scope and price

Add line items and review the conditions before requesting approval.




Demo screen · original interface




Line item controls

## 1 Add services and materials

Use Add service, Add material or Add optional item. Choose catalog items and adjust quantity, rate and tax.

## 2 Review terms and messages

Customer message is for the customer; Internal note is for your team. Review Terms and Quote expiration.

## 3 Check every amount

Use Add discount if needed. Verify subtotal, tax, discount and Total in Quote summary. Save draft lets you continue later.

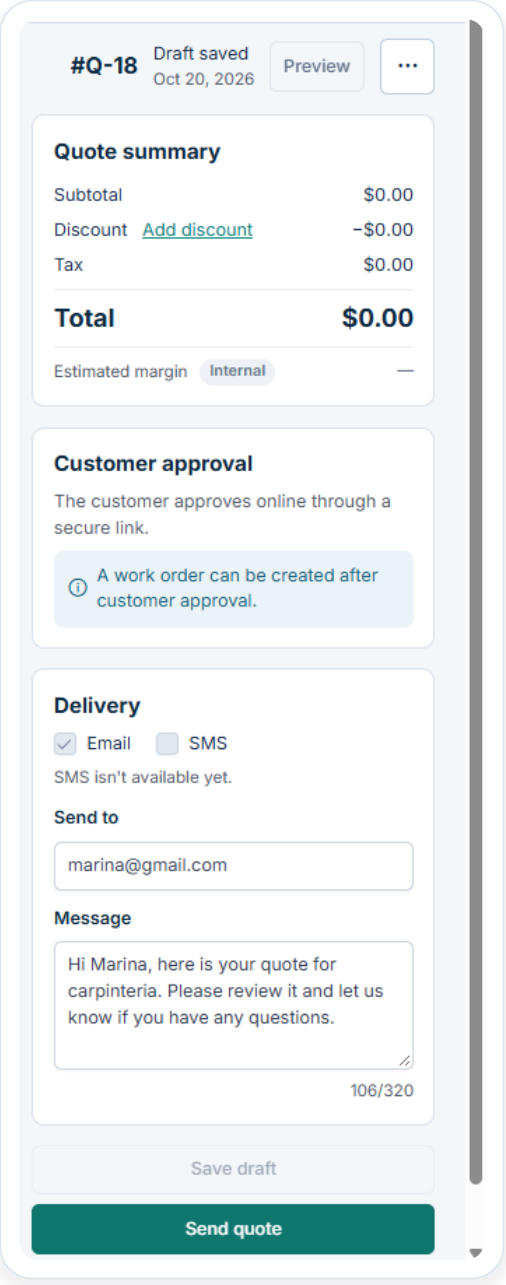
### This screenshot is an empty draft

It shows no priced line items and a $0.00 total. Complete the quote before sending it.

04 / REQUESTS AND QUOTES

# Send a quote by email

The customer receives a secure link to review the work and respond.




Demo screen · original interface

### 1 Validate Quote summary

Confirm the completed line items and amounts. The illustrated panel still shows an empty draft.

### 2 Check the recipient

Under Delivery, review Email and Send to. Correct the address if needed; SMS is unavailable.

### 3 Personalize the message

Explain what the customer should review and how they can respond.

### 4 Send and confirm

After completing the quote, select Send quote and confirm when prompted. Follow its status in Quotes.

### What happens next

The customer can approve, decline or ask a question through the link.

04 / REQUESTS AND QUOTES

# Follow responses and revisions

Each customer response is associated with a quote and its version.

**Who can do this:** Office staff

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Deliver** | | **Respond** | | **Revise** |
| Secure quote link | | Approve, decline or ask | | New version if needed |

1. **Review Customer response**

   Open the quote in Quotes. Check the response type, person, date and comment.

2. **Continue after approval**

   An Approved quote can become a job through Create work order.

3. **Revise when needed**

   For a question or declined proposal, select Revise quote, prepare a new version and send it again.

4. **Resend a missing email**

   Use Resend email if delivery failed. The previous link stops working.

5. **Keep the customer response authentic**

   Customers respond through their secure links. Staff cannot submit responses on their behalf in the documented app.

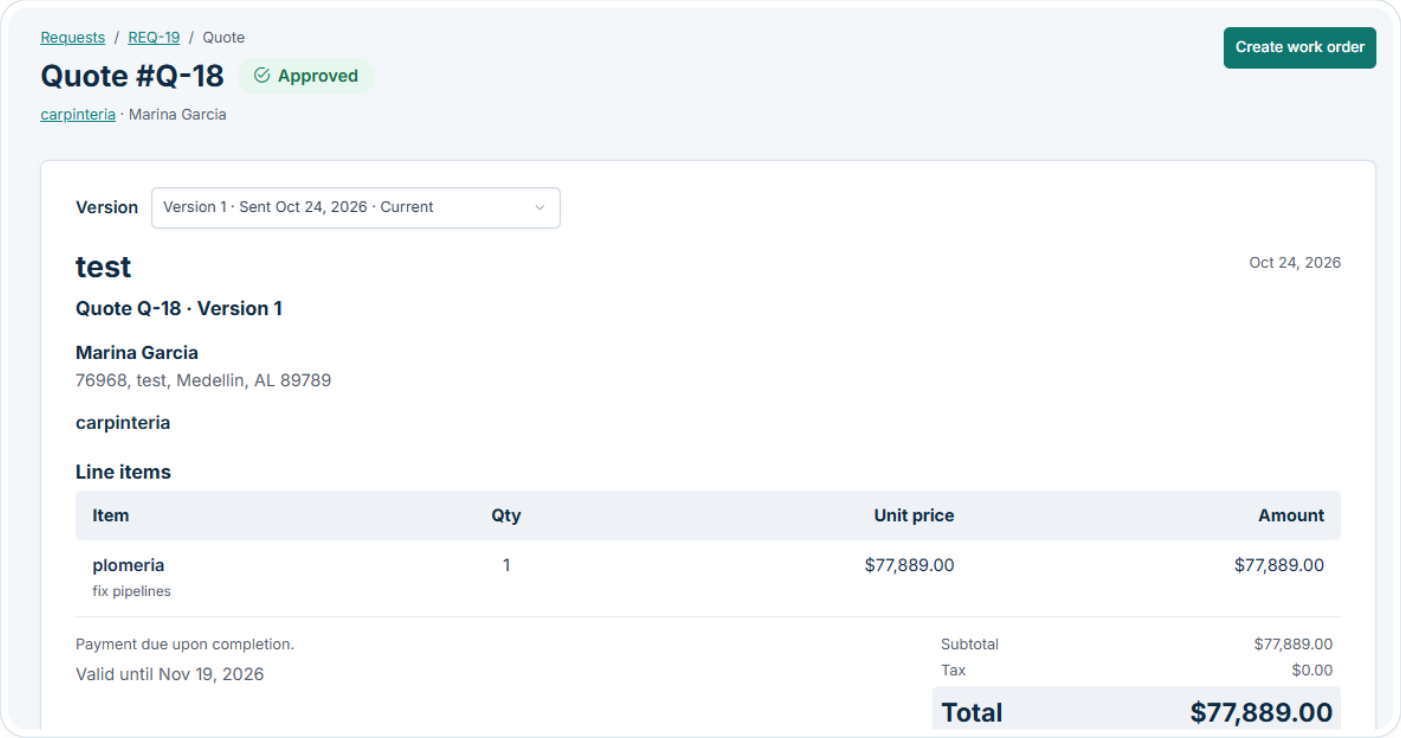
**A question is not approval**

If a response arrives through another channel, contact your organization support for help.

05 / WORK ORDERS

# Turn approval into a job

Open an approved quote in Quotes to prepare its work order.




Demo screen · original interface

### 1 Verify Approved

Check the quote reference, scope, line items and total.

### 2 Check Customer response

Confirm who approved, when they approved and the accepted amount.

### 3 Select Create work order

The work order preserves its link to the approved quote and prepares the work for execution.

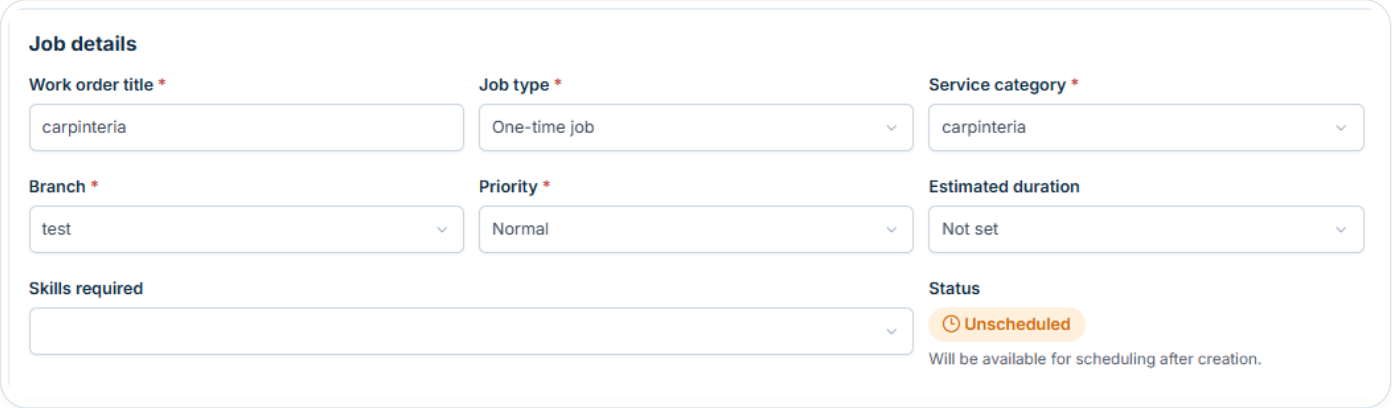
**Example in this section**

The illustrated office flow starts with approved quote Q-18 and continues to work order WO-15.

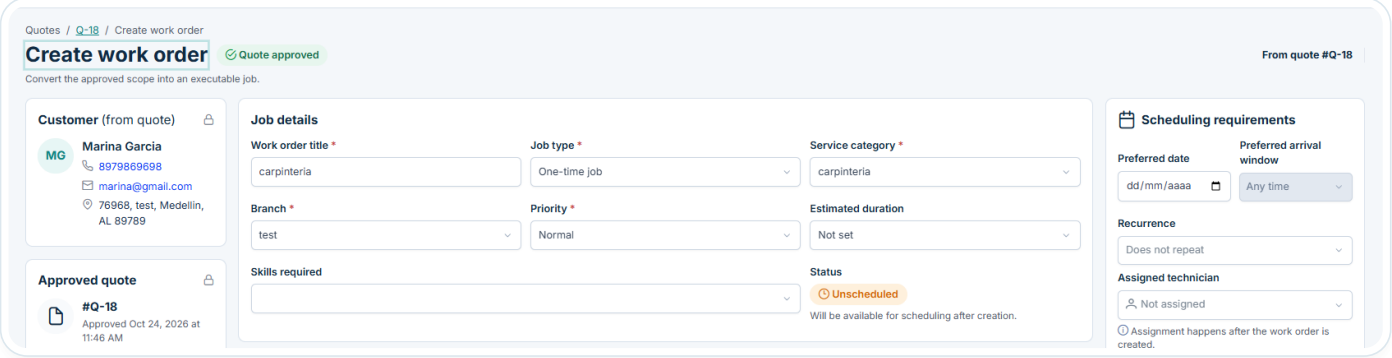
05 / WORK ORDERS

# Define the work order

The customer and approved quote remain linked to the job.




Demo screen · original interface




Work order context

## 1 Describe and classify the work

Review Work order title, Job type, Service category and the Branch responsible for delivery.

## 2 Estimate resources

Set Priority, Estimated duration and Skills required where applicable.

## 3 Set scheduling preferences

Review the preferred date, arrival window and Recurrence under Scheduling requirements.

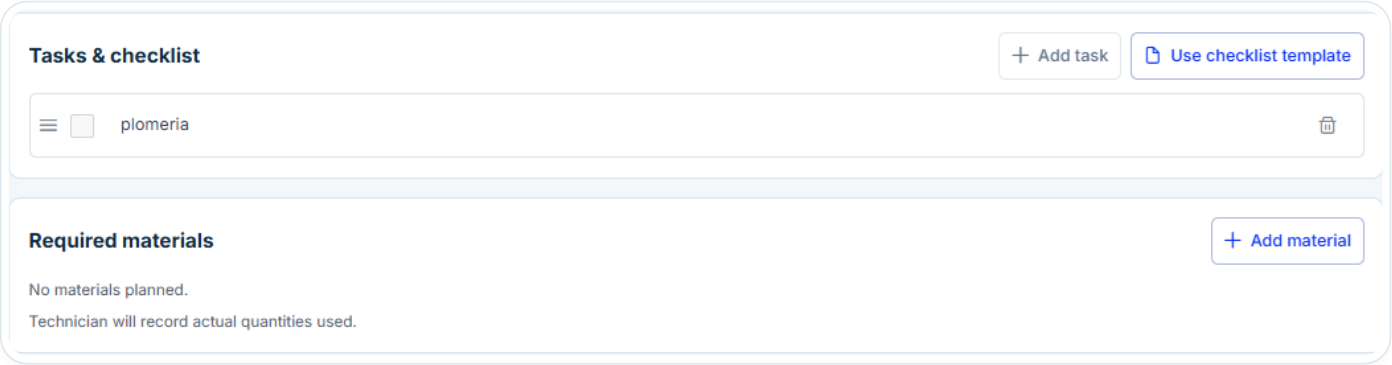
### Technicians are assigned later

The work order is created as Unscheduled. Choose technicians from Schedule after creating it.

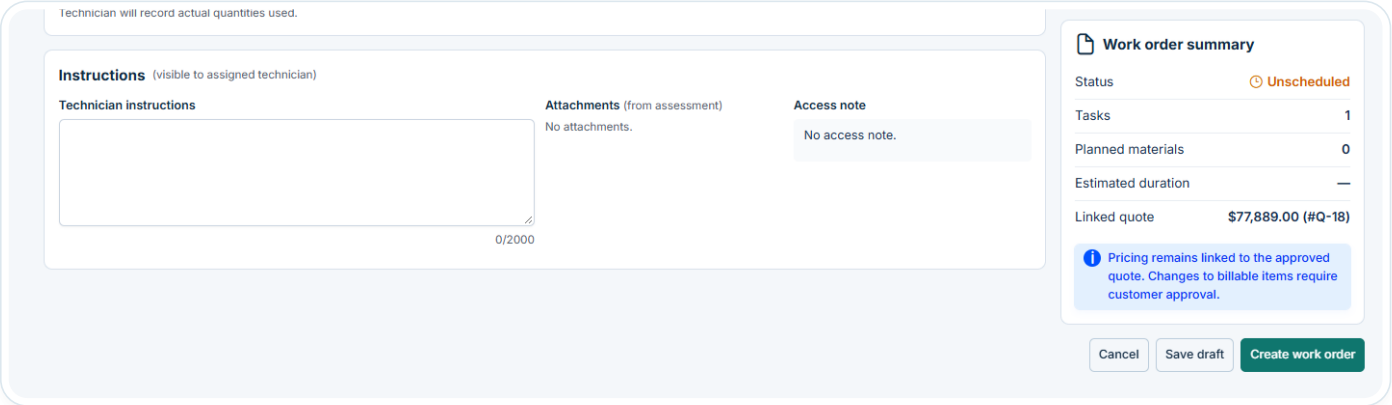
05 / WORK ORDERS

# Prepare the service work

Give the technician useful tasks, planned materials and instructions.




Demo screen · original interface




Materials, instructions and final action

## 1 Prepare Tasks & checklist

Review the tasks. Use Add task for another task or Use checklist template to load a saved list.

## 2 Add materials and instructions

Use Add material for planned materials. Complete Technician instructions and review access notes.

## 3 Create the work order

Review Work order summary and communication preferences, then select Create work order.

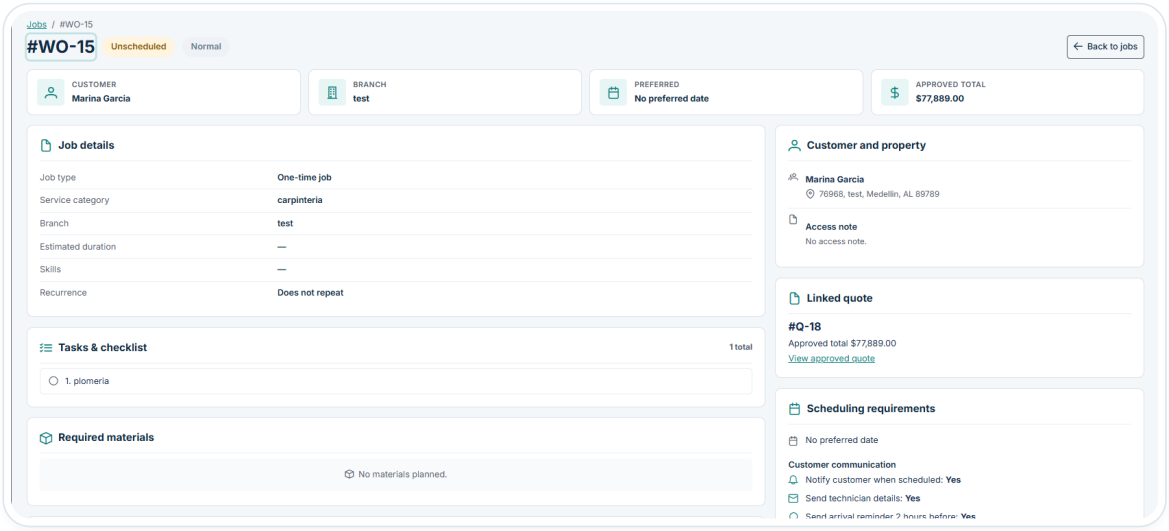
### Pricing stays linked to approval

The order screen warns that changes to billable scope require customer approval.

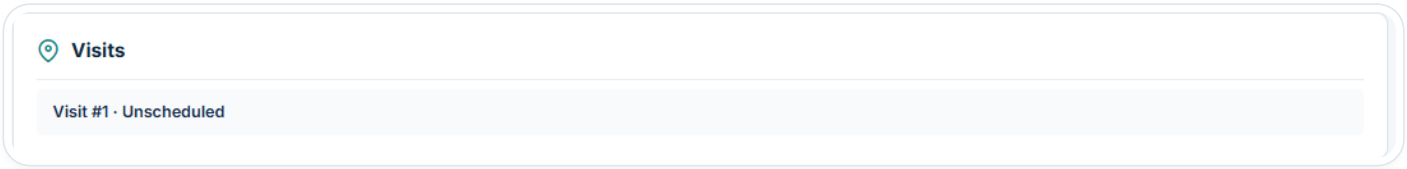
05 / WORK ORDERS

# Review the job and its visit

A job groups the scope; a visit defines when and who will deliver it.




Demo screen · original interface




First visit created with the job

## 1 Check the new reference

The example creates WO-15 with status Unscheduled. It still needs a date and time.

## 2 Verify the linked scope

Review customer, branch, tasks and Linked quote. This work order remains linked to Q-18.

## 3 Find Visits

The first visit already exists as Visit #1, Unscheduled. Open Schedule to plan it.

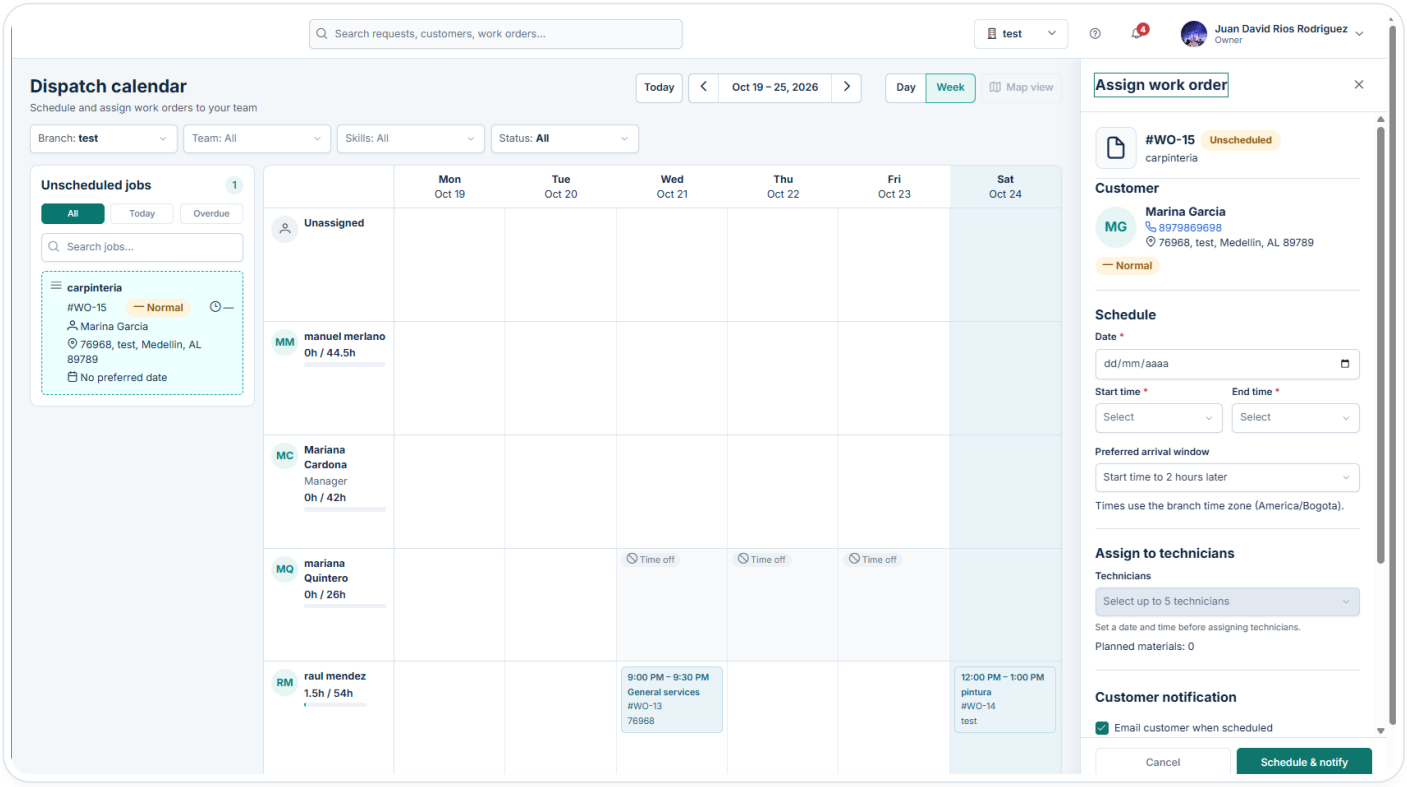
### Visits are created with the job

There is no documented manual Add visit control. Extra visits come from Recurrence; contact support for other visit needs.

06 / SCHEDULE AND ASSIGNMENT

# Find the unscheduled visit

Use the dispatch calendar to choose a time and coordinate the team.




Demo screen · original interface

## 1 Find Unscheduled jobs

Select the pending work order. Use All, Today, Overdue or Search jobs to locate it.

## 2 Review the calendar

Switch Day or Week, navigate dates and filter by Branch, Team, Skills or Status.

## 3 Open Assign work order

Confirm the customer and work order before setting time, technicians and notification options.

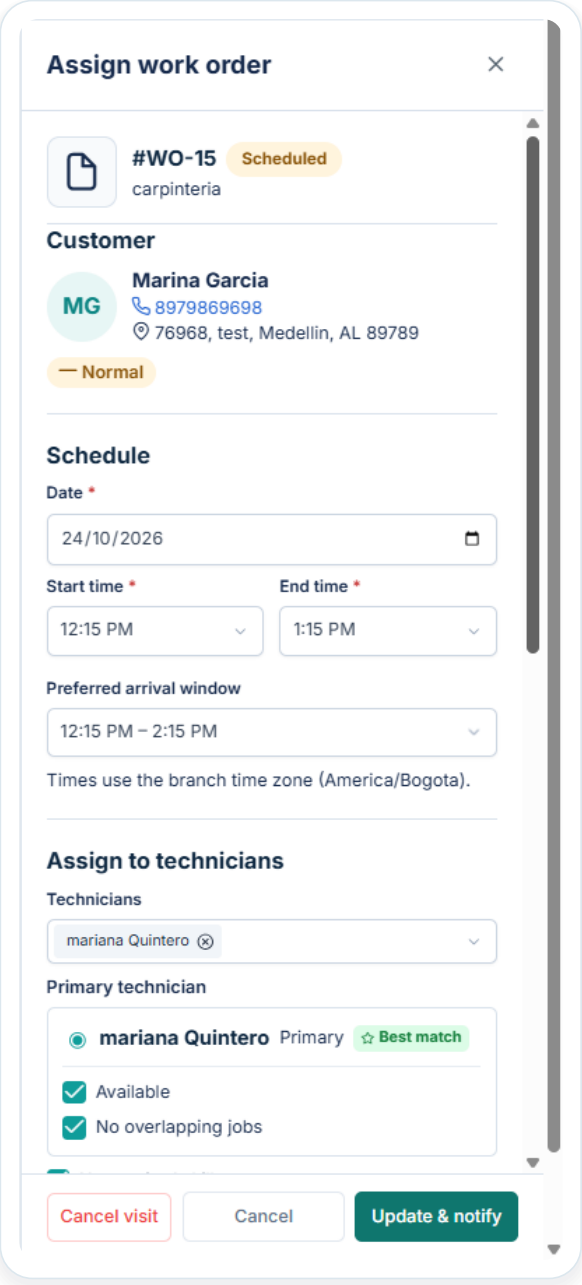
### Set the time first

The technician selector stays unavailable until the visit date and time are defined.

06 / SCHEDULE AND ASSIGNMENT

# Choose time and technicians

Review availability before saving the visit assignment.




Demo screen · original interface

### 1 Set the visit time

Complete Date, Start time and End time. Check Preferred arrival window.

### 2 Choose the team

Under Technicians, select up to five people and mark one as Primary technician.

### 3 Review availability

Check Available and No overlapping jobs. Review any conflict before entering the requested Justification.

### 4 Save the appropriate action

A new visit may show Schedule or Assign. An existing visit may show Update & notify.

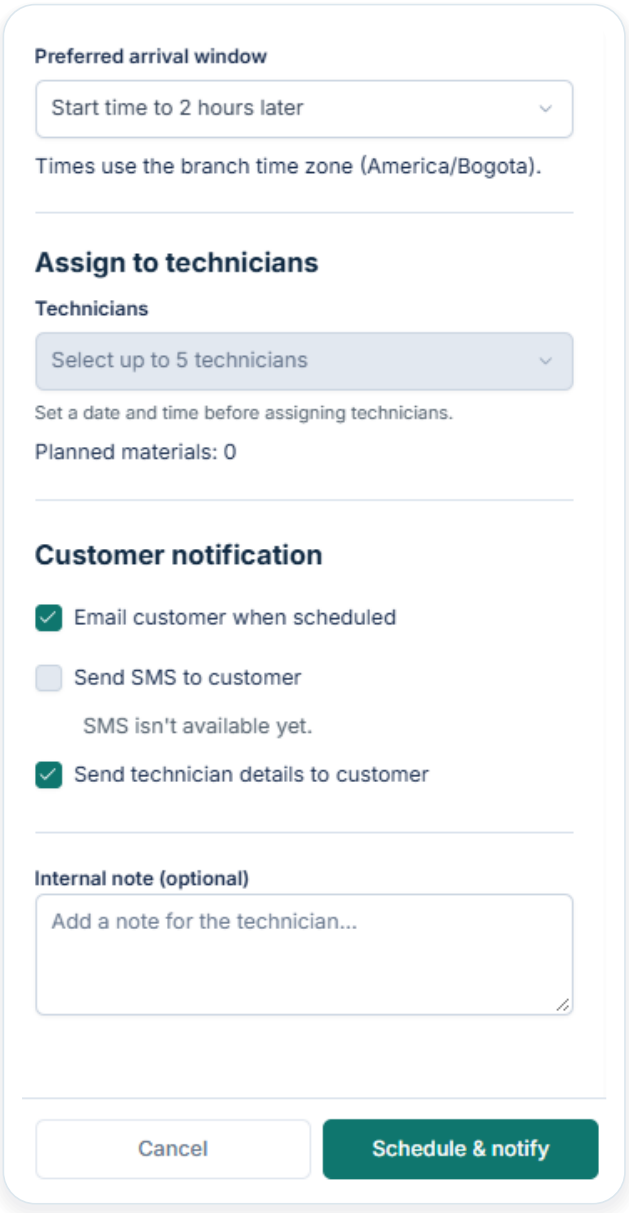
### Check the branch time zone

This branch uses America/Bogota. The scheduled example runs from 12:15 PM to 1:15 PM.

06 / SCHEDULE AND ASSIGNMENT

# Confirm notices and save

Review what the customer will receive before finalizing the plan.




Demo screen · original interface

### 1 Review the email option

Email customer when scheduled sends an email when the visit is scheduled.

### 2 Choose which details to share

Send technician details to customer includes technician information.

### 3 Add an internal note

Use Internal note for additional instructions to the technician.

### 4 Save the plan

Use Schedule & notify when offered. For an existing visit, Update & notify saves changes and sends the selected notice.

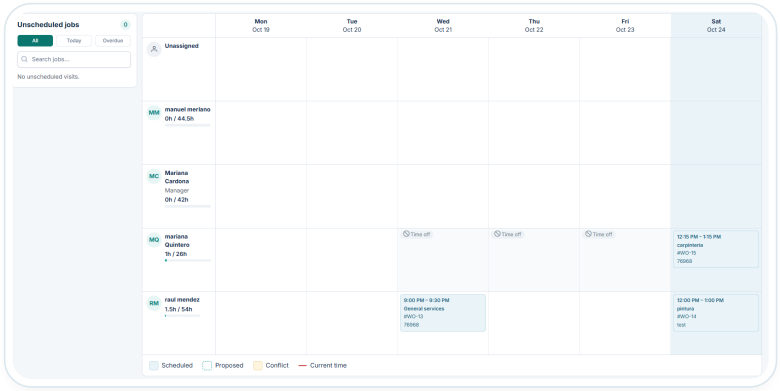
### SMS is unavailable

Send SMS to customer is disabled in the supplied screen. Check time and technician before saving.

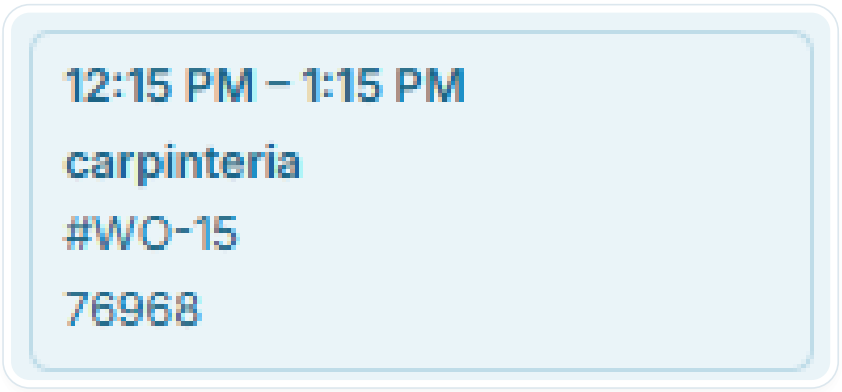
06 / SCHEDULE AND ASSIGNMENT

# Verify the scheduled visit

Check the work order in the correct day, time slot and technician row.




Demo screen · original interface




Visit card close-up

### 1 Confirm the day and technician

Find WO-15 in the Mariana Quintero row on the selected date.

### 2 Check the time

This example is Saturday, October 24, from 12:15 PM to 1:15 PM.

### 3 Review remaining work

A scheduled visit leaves Unscheduled jobs. The illustrated counter is now zero.

**If the plan needs to change**

Select the calendar visit, adjust the details and save from Assign work order.

06 / SCHEDULE AND ASSIGNMENT

# Change a scheduled visit

Adjust the date, time or team from the dispatch calendar.

**Who can do this:** Staff with scheduling permissions

REFERENCE WORKFLOW

01
**Open**
Visit on Schedule

→

02
**Adjust**
Time and technicians

→

03
**Update**
Calendar and notices

1. **Open the correct visit**
   In Schedule, select the visit card to open Assign work order.
2. **Change the time**
   Update Date, Start time and End time. Review the arrival window as well.
3. **Review the team**
   Check the assigned technicians and the Primary technician.
4. **Resolve conflicts**
   Review any conflict before entering the Justification requested by the application.
5. **Save the change**
   Select Update or Update & notify when a customer notification will be sent.
6. **Distinguish the cancel controls**
   Cancel closes the panel without saving. The supplied screen also shows Cancel visit; review its conditions before confirming.

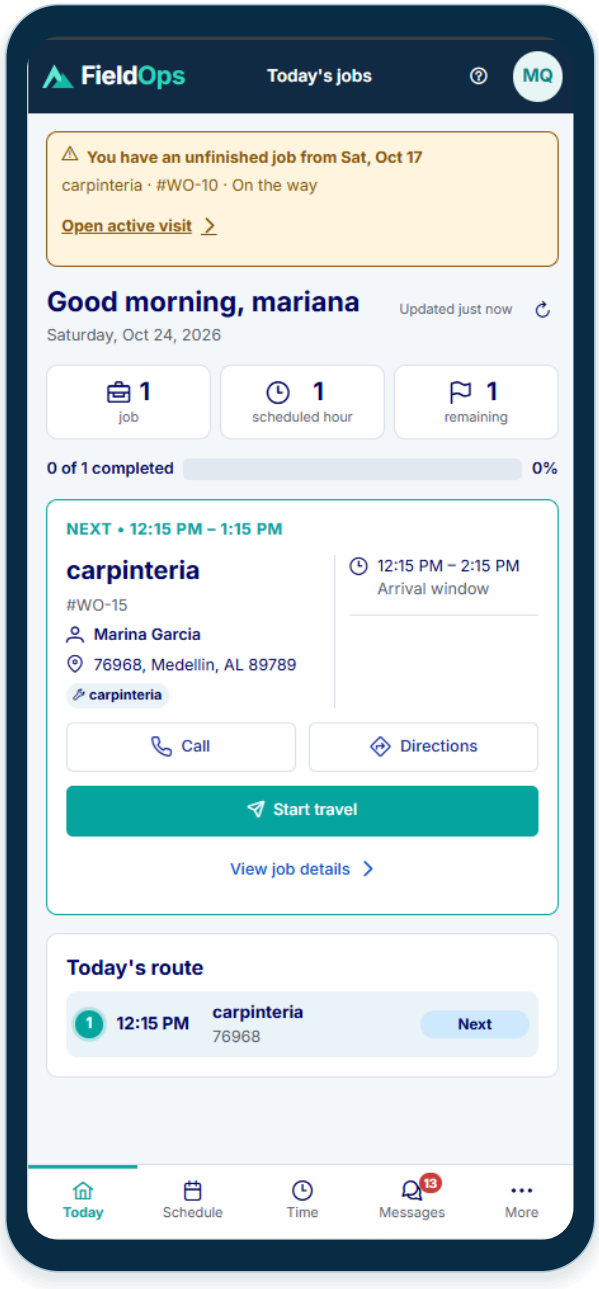
### Cancellation differs from the source help

The source help says cancellation requires support, while the newer screenshot shows Cancel visit. Its confirmation flow is not illustrated here; check the current app or ask an administrator.

07 / WORK IN THE FIELD

# Review today's route

Confirm where you are going and which visit needs attention next.




Demo screen · original interface

### 1 Read the summary

Check jobs, scheduled hours, remaining work and completion progress.

### 2 Review the next visit

Check reference, customer, address, category and arrival window. View job details opens its scope.

### 3 Prepare to travel

Call phones the customer; Directions opens maps. Select Start travel when you leave.

### 4 Resolve an active-visit warning

Open active visit opens earlier unfinished work. Check its reference before continuing your route.

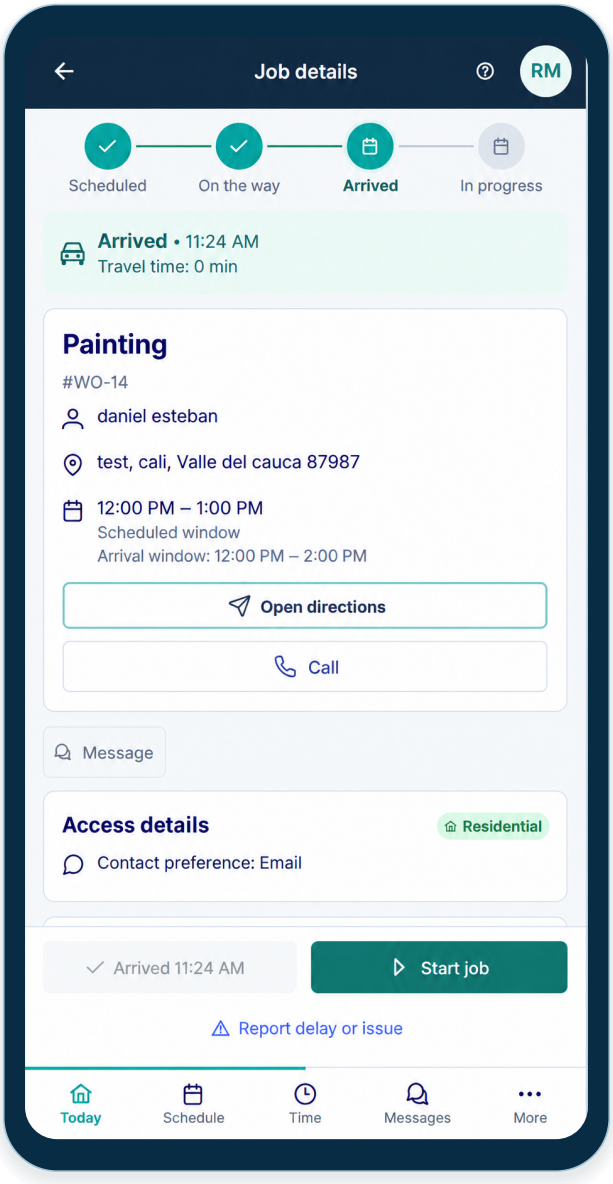
**Primary technician only**

Only the primary technician starts travel and performs the editable visit actions.

07 / WORK IN THE FIELD

# Arrive and start the job

Record arrival before starting labor time.




English adaptation · demo screen

### 1 Record travel and arrival

Start travel changes the visit to On the way. At the site, select I've arrived.

### 2 Review site details

Check the customer, scheduled window and Access details. Read instructions, scope, required skills and planned materials.

### 3 Select Start job

This button becomes available after arrival is recorded. Starting changes the visit to In progress and starts labor time.

### 4 Work in the visit tabs

Tasks, Materials and Photos are read-only before work begins. The primary technician can update them once the job starts.

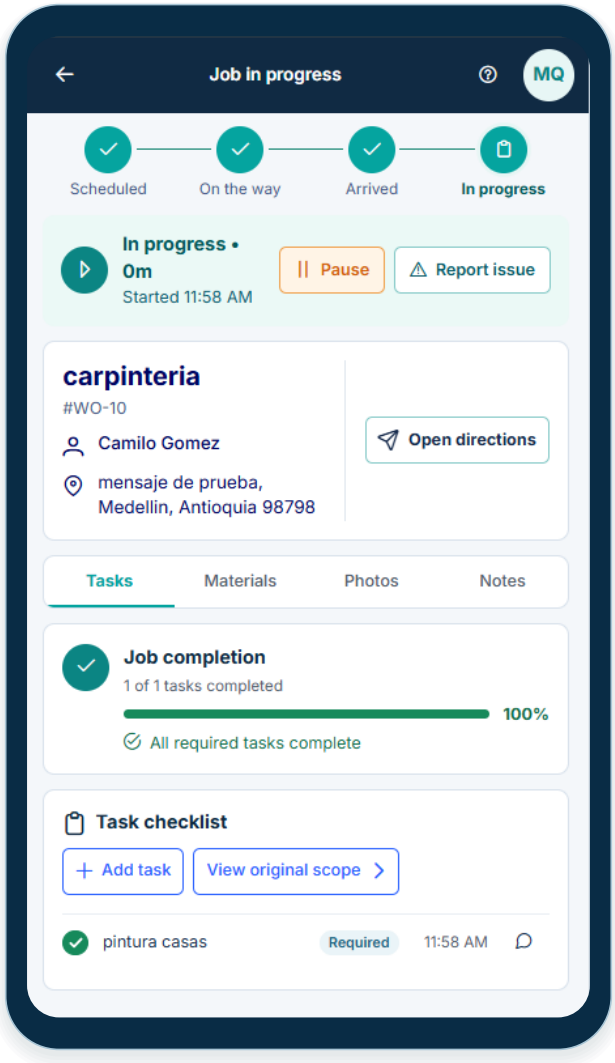
**Expected result**

The working view opens with tasks, materials, photos, notes and a time summary.

07 / WORK IN THE FIELD

# Complete the task checklist

Mark finished work and record any additional tasks needed.




Demo screen · original interface

### 1 Check the visit reference

Make sure the customer and work order match your visit. This example shows WO-10.

### 2 Finish required tasks

In Tasks, tick each completed item. Required tasks must be finished before completion review.

### 3 Add context when needed

The comment icon saves a task note. Add task creates another task; enter its name and confirm Add.

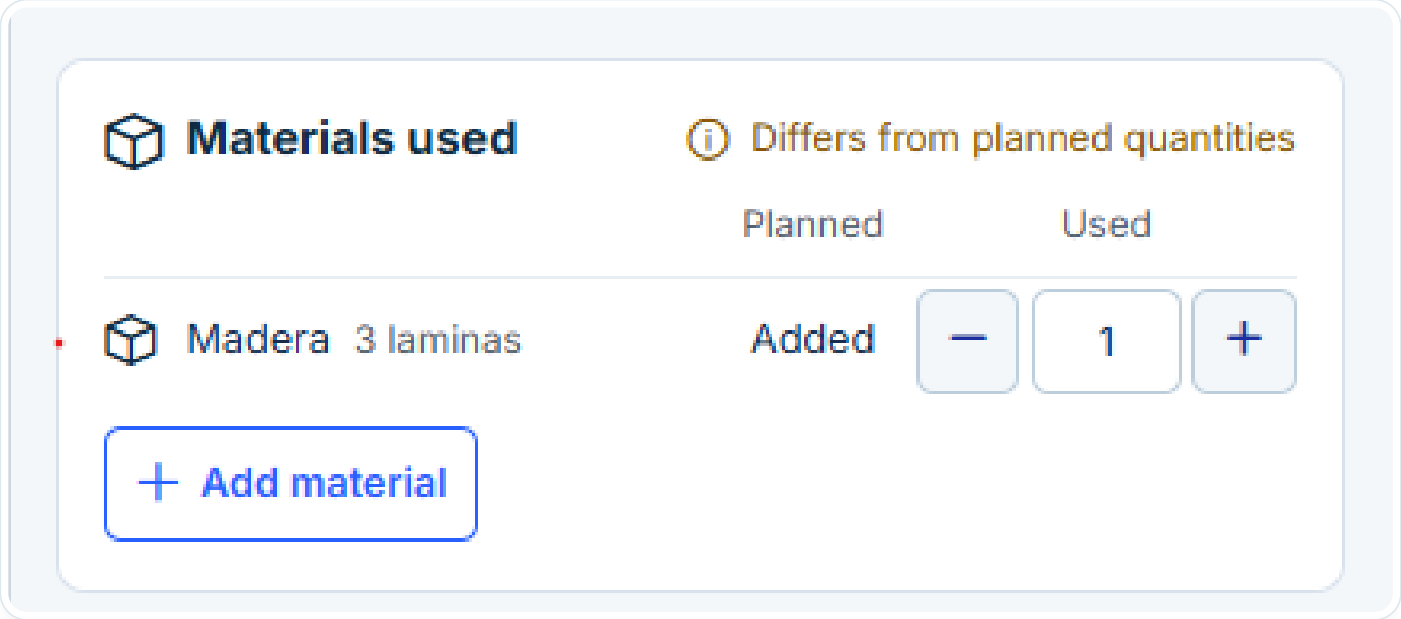
### How to recognize completion

Job completion shows 100% and All required tasks complete. Additional technicians have read-only access.

07 / WORK IN THE FIELD

# Record materials used

Compare planned quantities with the materials actually used.




Demo screen · original interface

1. **Open Materials**

   Under Materials used, compare Planned and Used for each item.

2. **Adjust the actual quantity**

   Use the minus and plus controls, or type the quantity used.

3. **Add extra materials**

   Select Add material, choose From catalog or Custom material, enter the quantity and confirm.

4. **Check the differences**

   Differs from planned quantities means the actual quantities differ. Review them before closing the work.

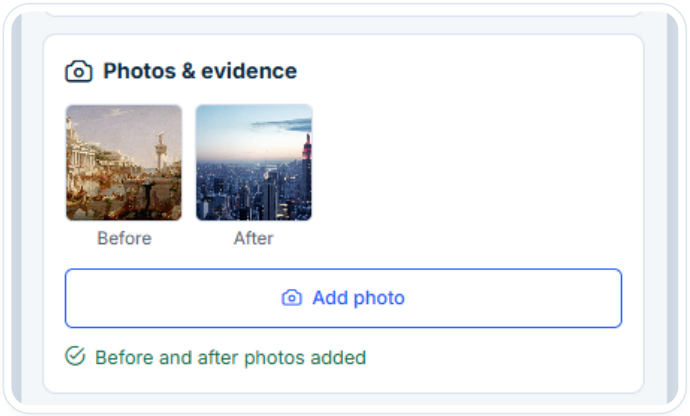
**Material usage does not automatically reprice the quote**

The office reviews actual work and the approved quote before invoicing.

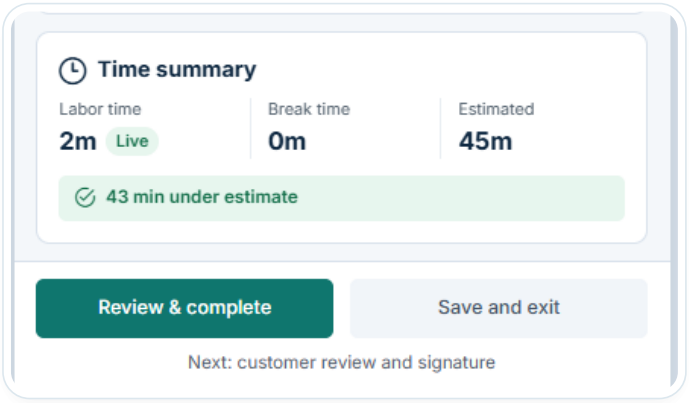
07 / WORK IN THE FIELD

# Add evidence and useful notes

Document the work for the office and the completion report.




Photos and evidence




Time summary and completion controls

## 1 Add before and after photos

Select Add photo in Photos & evidence. Choose Before or After and upload or capture a JPEG or PNG.

## 2 Review the evidence

Add at least one photo of each type. Open a photo to enlarge it; you can delete photos you added.

## 3 Write Technician notes

Notes are visible to the office and included in the completion report. They save when you leave the field; check Saved.

### Example completion note

The approved scope was completed. Materials used and before-and-after photographs were recorded. Use clear notes describing the actual service.

07 / WORK IN THE FIELD

# Manage time, breaks and help

Visit actions record work time as you progress through the service.

**Who can do this:** Primary technician

REFERENCE WORKFLOW

01
**Start**
Labor time begins

→

02
**Pause**
Separate work and breaks

→

03
**Review**
Check the saved total

## 1 Start work after arrival

Start job begins labor time after your arrival has been recorded.

## 2 Pause when work stops

Select Pause to stop labor time. Select Resume to continue.

## 3 Review Time summary

Check Labor time, Break time and Estimated duration. The completion summary retains the recorded work time.

## 4 Report a problem

Report issue or Report delay or issue opens the available options. The documented option is Call office.

## 5 Open your personal menu

More contains My profile, Account settings, Help & support and Sign out. The avatar also offers Sign out.

## 6 Return to your route

Select Today. The source help lists Schedule, Time, Messages and technician Notifications as Coming soon; there is no past-jobs page.

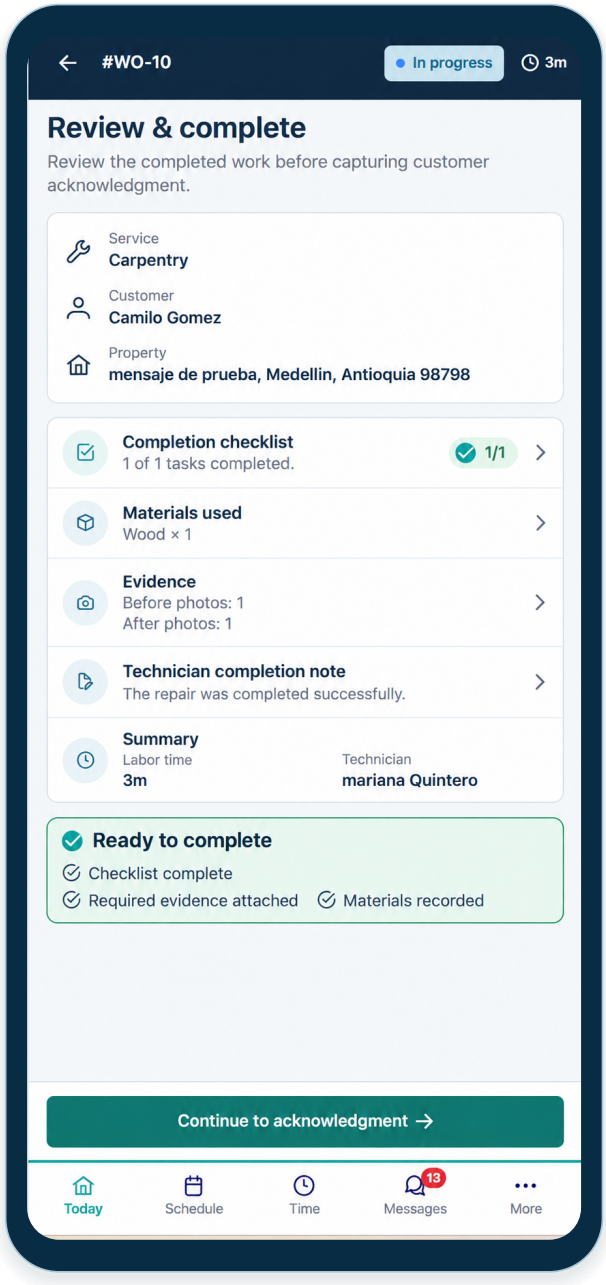
### Save before leaving

Save and exit lets you continue later. Manual time entries are unavailable; ask support if recorded time needs correction.

07 / WORK IN THE FIELD

# Review before completing

Check tasks, materials, evidence and time before requesting acknowledgment.




English adaptation · demo screen

### 1 Open Review & complete

The action becomes available after all required tasks and the required photos are complete.

### 2 Check the summary

Review Completion checklist, Materials used, before-and-after counts, the technician note and Labor time.

### 3 Correct anything missing

Return to the relevant section if a detail is wrong. Save and exit lets you continue later.

### 4 Continue to acknowledgment

When Ready to complete appears, select Continue to acknowledgment.

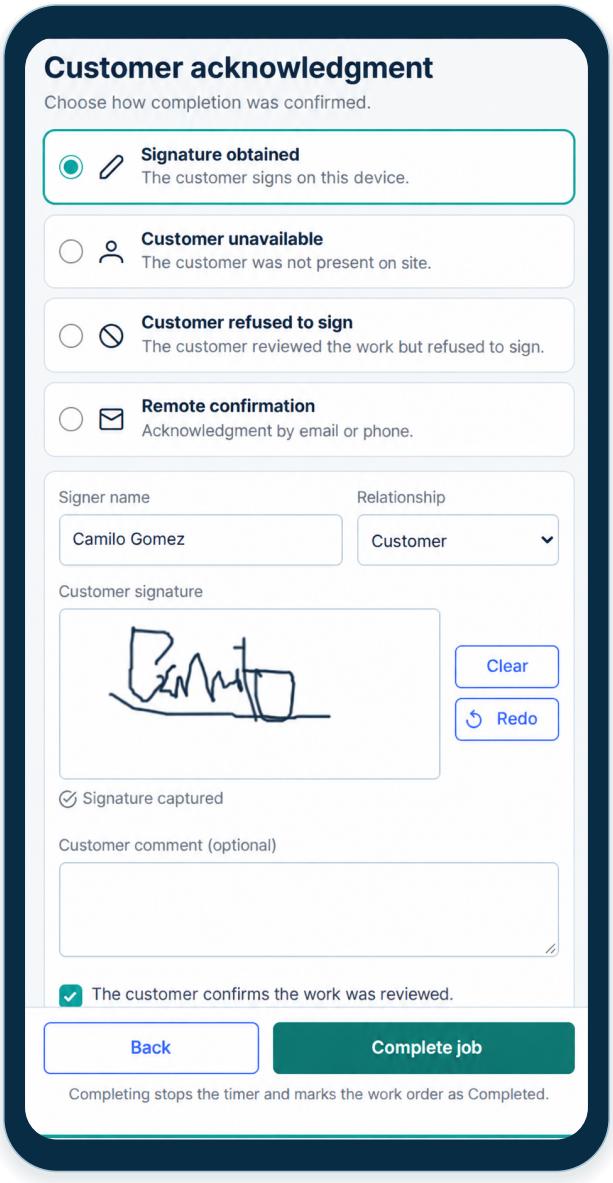
**Completion is still pending**

This screen is the final review, before customer acknowledgment and the Complete job action.

07 / WORK IN THE FIELD

# Record customer acknowledgment

Choose how the customer confirmed completion of the service.




English adaptation · demo screen

### 1 Choose the actual method

Select Signature obtained, Customer unavailable, Customer refused to sign or Remote confirmation.

### 2 Complete the requested details

For a signature, enter Signer name and Relationship, then let the person sign on the device.

### 3 Review the acknowledgment

Check the captured signature and optional comment. Use Clear or Redo if correction is needed.

### 4 Complete the job

Finish the fields for the chosen method, confirm the review when requested and select Complete job.

**A signature does not confirm payment**

It records service acknowledgment only. Payment is handled separately through billing. The displayed signature is a demo example.

07 / WORK IN THE FIELD

# Hand completed work to the office

Service acknowledgment, invoicing and payment are separate steps.

**Who can do this:** Technician and office staff

REFERENCE WORKFLOW

01 **Complete** — Technician closes work → 02 **Review** — Office checks completion → 03 **Invoice** — Prepare billing

1. **Record acknowledgment**

   Choose the actual method and complete the fields shown for it.

2. **Select Complete job**

   The screen explains that completing stops the timer and marks the work order as Completed.

3. **Verify the result**

   After saving, check that the app confirms completion. Completed is the expected state; no final confirmation screenshot was supplied.

4. **Open the office review**

   In Jobs, use Review completion from the completed job row menu.

5. **Continue in Needs review**

   The job opens in Invoices for comparison of the approved scope and the actual work before billing.

**Expected result**

The job is ready for office review. The signature acknowledges the service; an invoice and payment are handled afterward.

08 / INVOICES AND PAYMENTS

# Review work before invoicing

Compare approved and completed work, then generate a draft invoice.

**Who can do this:** Only Owner and Accounting review and generate

REFERENCE WORKFLOW

01
**Complete**
Visits and evidence

→

02
**Compare**
Quoted and actual work

→

03
**Draft**
Invoice not yet sent

1. **Open the review queue**
   In Invoices, open Needs review, or select Review and invoice on a completed job.
2. **Locate the job**
   Use the All, Variances or Ready views.
3. **Compare the line items**
   In Billing comparison, review Matches quote, Over quote, Under quote, Not in quote and Not tracked.
4. **Verify the evidence**
   Check Totals comparison, Completion verification, Work evidence and Audit trail. Add an Accounting note if useful.
5. **Check Invoice details**
   Review Issue date, Payment terms, due date, currency and the other displayed details.
6. **Generate the draft**
   Select Generate invoice. If variances exist, confirm Generate draft. Return to quote leaves the review without invoicing.

**Variances do not automatically reprice the work**

The source help states that the draft uses approved quote amounts. Generating a draft does not send it to the customer.

08 / INVOICES AND PAYMENTS

# Review and send the invoice

Check the document and recipient before emailing it to the customer.

**Who can do this:** Billing staff with editing permissions

REFERENCE WORKFLOW

01
**Drafts**
Prepared invoice

→

02
**Review**
Amounts and recipient

→

03
**Sent**
Email delivered

1 **Open the draft**

In Invoices, select Drafts and open the invoice.

2 **Verify the charges**

Check the customer, line items, quantities, total, issue date and due date.

3 **Inspect the document**

Download PDF lets you review or save the invoice before sending it.

4 **Check delivery details**

Review Recipient email, Payment terms and Message to customer in the send panel.

5 **Send and confirm**

Select Send invoice and confirm. The invoice changes to Sent and is emailed to the customer.

### Use the enabled options

The source help lists SMS, attachments and some payment or delivery options as unavailable in certain office panels.

08 / INVOICES AND PAYMENTS

# Record a payment received

Apply money received outside FieldOps to the correct invoice.

**Who can do this:** Authorized billing staff

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Receive** | | **Record** | | **Apply** |
| Outside FieldOps | | Amount and reference | | Balance updated |

## 1 Select the invoice

In Invoices, open the row menu and select Record payment.

## 2 Enter payment details

Complete Amount, Payment date and Payment method.

## 3 Add a reference

Reference number is required for external card, bank transfer and check payments. Enter Received by.

## 4 Review receipt and notes

Choose Send receipt if appropriate and add an Internal note if needed.

## 5 Save the external payment

Select Record external payment. Verify the updated balance and entry under Payments.

## 6 Confirm reported transfers

After money reaches the bank, record the payment with Bank transfer and the transfer reference. A customer report alone does not record payment.

**Recording does not charge a card**

This action documents money already received. Reporting a transfer does not establish that funds have arrived.

08 / INVOICES AND PAYMENTS

# Follow unpaid and overdue invoices

Locate outstanding balances and keep each document history intact.

**Who can do this:** Billing staff

REFERENCE WORKFLOW

01
**Due date**
Payment deadline

→

02
**Outstanding**
Balance remains

→

03
**Paid**
Payment recorded

1. **Open Overdue**
   In Invoices, select the overdue invoice view.
2. **Review the balance**
   Check due date, balance and latest activity. Use search and filters.
3. **Read Aging summary**
   Balances are grouped as Current, 1-30 days, 31-60 days and 60+ days.
4. **Open the invoice**
   Select View invoice. Recording full payment removes the invoice from the overdue list.
5. **Request a void if needed**
   Keep the invoice number and reason, then contact support. The source help does not document a self-service void action.

**The history is preserved**

Requesting a void does not itself delete or change an invoice. Confirm resolution with the responsible team.

09 / OVERSIGHT AND REPORTING

# Read your business dashboards

Separate daily operations, business results and the role-based welcome page.

**Who can do this:** Business view is reserved for Owner

REFERENCE WORKFLOW

01
**Operations**
Daily work and team

→

02
**Business**
Results and capacity

→

03
**Overview**
Role-based welcome

1. **Filter Operations**
   Choose Branch and Date. Use Filters for technician or service category.
2. **Review work needing attention**
   Check jobs, unassigned visits, delays, utilization and on-time performance, then review visits and availability.
3. **Open dispatch**
   Open dispatch board takes you to the calendar. Use refresh to reload current information.
4. **Open Business as Owner**
   Set branch and period. Compare to previous period adds the prior period comparison.
5. **Read revenue and capacity**
   Review revenue, estimated profit, cash flow, pipeline, branches and alerts. Export report downloads the report.
6. **Use Overview when it is your home**
   Accounting and Viewer see a welcome page with organization and role. Use the sidebar for permitted areas.

**Profit is an estimate**

Margin and profitability depend on the recorded data and still require appropriate accounting review.

09 / OVERSIGHT AND REPORTING

# Filter and export reports

Check the report scope before comparing periods or sharing results.

**Who can do this:** Report availability depends on role

REFERENCE WORKFLOW

01
**Choose**
Catalog and favorites

→

02
**Filter**
Dates and branch

→

03
**Export**
CSV or PDF

1 **Find a report**

In Reports, use the catalog, Search reports, Favorites or Recently viewed.

2 **Set the period**

Choose Date range and Branch. Enable Compare to previous period when offered.

3 **Apply filters**

Adjust report options and select Apply filters. Reset clears the filters.

4 **Read the results**

Review metrics, chart and table. Sort columns and change pages as needed.

5 **Save and export**

Use the star to mark a favorite. Export CSV and Download PDF download the results.

6 **Revisit export history**

Export history keeps a reference, not stored files. Open report runs the report again.

**Permissions vary by report**

Owner and Operations Manager can access all five documented types. Accounting sees profitability and aging; Dispatcher sees conversion, compliance and utilization. Invoice aging reflects today.

09 / OVERSIGHT AND REPORTING

# Follow changes and notifications

Use alerts to act and the audit log to understand what changed.

**Who can do this:** Audit: Owner, Operations Manager and Accounting

REFERENCE WORKFLOW

01
**Notice**
An event needs attention

→

02
**Context**
Related service record

→

03
**Audit**
Who changed what

1. **Open Audit log**
   Review Events today, Users active, High-impact changes and Access changes.
2. **Find an event**
   Filter by date, user, action, entity, branch and impact. Apply filters and sort the table.
3. **Inspect the event**
   View opens Before, After and metadata. Copy the event ID or export CSV when needed.
4. **Open notifications**
   Use the bell or View all notifications. Review All notifications, Unread and available filters.
5. **Act on a notification**
   Select it to mark it read and open the related record when one exists.
6. **Organize unread items**
   The menu marks items read or unread. Mark all as read clears unread items; Refresh loads new notifications.

**Audit records are read-only**

Events cannot be edited or deleted. Notification availability depends on the role and app version.

10 / YOUR ACCOUNT

# Update your profile and password

Manage personal details and account security from your account menu.

**Who can do this:** Organization staff, including technicians

REFERENCE WORKFLOW

01
**Profile**
Name, phone and photo

→

02
**Security**
Current and new password

→

03
**Save**
Details or access updated

## 1 Open My profile

Select your name at the top right. Technicians use More.

## 2 Edit personal details

Update First name, Last name and Phone. Change photo accepts JPG or PNG up to 5 MB; Remove photo deletes it.

## 3 Save the profile

Select Save changes. Email, organization and role are read-only; an administrator manages role access.

## 4 Open security settings

In Account settings, open Security. Technicians reach settings through More.

## 5 Enter your passwords

Complete Current password, New password and Confirm new password. Review Password requirements.

## 6 Update the password

Select Update password. Your current session remains active and other sessions are signed out.

### Customer portal accounts use a different route

To recover or change a portal password, use Forgot password? on the portal sign-in page.

11 / CUSTOMER PORTAL

# Activate or recover portal access

Your service company invites you to the portal by email.

**Who can do this:** Invited customer

REFERENCE WORKFLOW

01 **Invitation** — Activation link → 02 **Password** — Personal access → 03 **Portal** — Your services

## 1 Open the invitation

Follow the email link. Complete Last name if it is requested.

## 2 Create a password

Password and Confirm password must match. The source help specifies 12-128 characters and a value different from your email.

## 3 Link an existing account

Enter Current password and select Link my account. For new access, select Activate access.

## 4 Sign in

On Sign in to your portal, enter Email and Password. Use Remember me only on a personal device.

## 5 Recover your password

Select Forgot password? and Send reset link. Follow the email link, repeat the new password and select Reset password.

## 6 Return to sign-in

After Password updated, select Continue to sign in. A reset link is single-use and expires in 30 minutes.

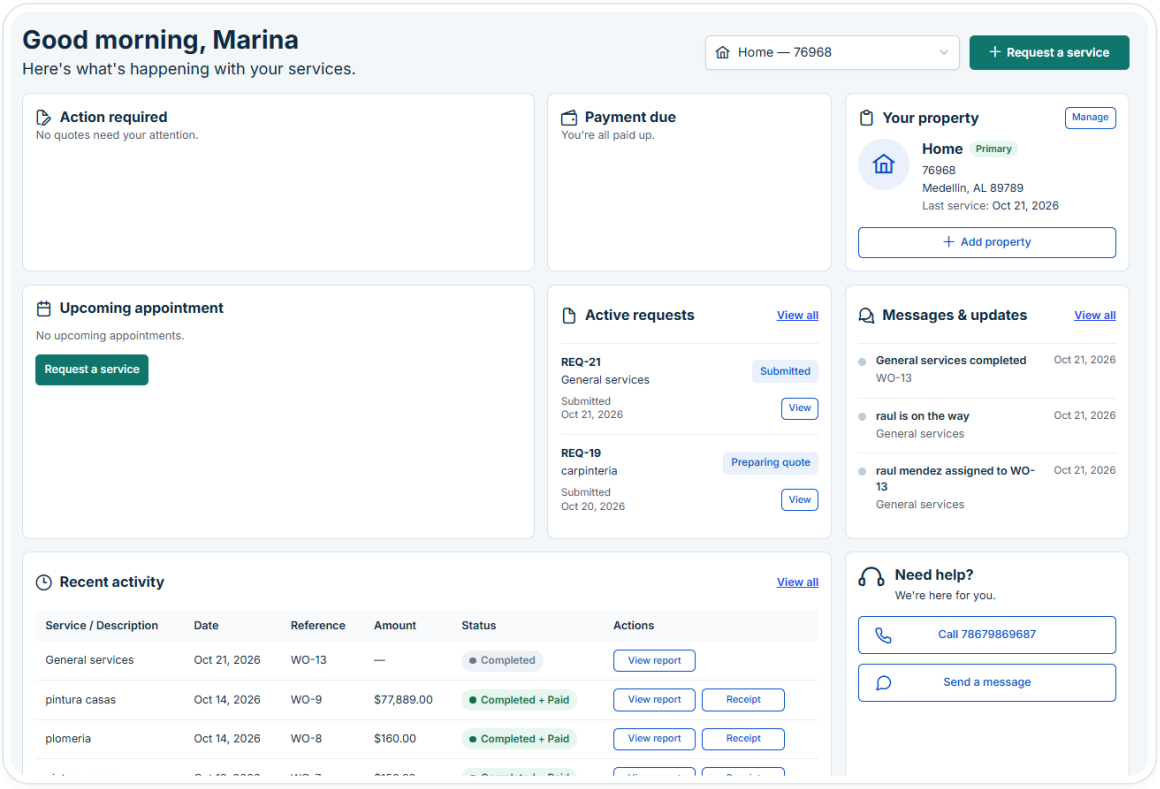
### If your invitation is unavailable

Ask your service company for a new link. You do not need to create a new account for each attempt.

11 / CUSTOMER PORTAL

# Your services in one place

Use Home to follow requests, appointments, updates and payments.




Demo screen · original interface

## 1 Request a service

Select Request a service and complete the steps. Submitting does not confirm a price or appointment.

## 2 Follow active requests

In Active requests, select View for details. Use Requests in the sidebar for the full list.

## 3 Read updates and next steps

Messages & updates shows service changes. Use Need help? to contact the company when offered.

### Use the property filter

Home also brings together the next appointment, recent activity and outstanding items. Use Property to focus on one service location.

11 / CUSTOMER PORTAL

# Manage properties and updates

Keep access information useful and follow changes to your services.

**Who can do this:** Customer

REFERENCE WORKFLOW

01
**Properties**
Service locations

→

02
**Updates**
Process notifications

→

03
**Activity**
Previous services

## 1 Open your properties

In Your property, select Manage. Use Add property to register another location.

## 2 Create or edit a property

Enter a name, address and access instructions. Later, Edit changes the name and access instructions.

## 3 Review updates

The bell or View all in Messages & updates opens the list.

## 4 Filter updates

Use All, Action required, Appointments, Billing, Unread only or Search updates. A related button opens the relevant record.

## 5 Open recent activity

Review date, reference, amount and status. Open a report, receipt or invoice where available.

## 6 Contact your service company

Use Need help? when available. Messages & updates is a notification list, not a chat.

### Existing addresses need company assistance

Contact the service company to correct an existing property address. Use Property to filter services by location.

11 / CUSTOMER PORTAL

# Request a service from the portal

Describe what you need and offer a preferred time for the visit.

**Who can do this:** Customer with active portal access

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Property** | | **Service** | | **Review** |
| Where help is needed | | Problem and urgency | | Submit the request |

## 1 Start the request

From Home or Requests, select Request a service.

## 2 Choose a location

Select an existing Property or use Add a new property.

## 3 Describe the need

Choose a type and service, or indicate you are unsure. Explain the problem and its urgency.

## 4 Attach useful information

Add JPG, PNG or PDF files up to 10 MB each.

## 5 Offer availability

Choose As soon as possible, Choose a date or I'm flexible. Specify morning, afternoon, evening or any time, with notes if useful.

## 6 Review and submit

In Review, use Edit to correct details, then select Submit request. Keep the request number.

**A request does not confirm a price or appointment**

The company reviews it and explains the next steps. If online requests are disabled, contact the company directly.

11 / CUSTOMER PORTAL

# Request service without signing in

The public request form lets you submit a service need as a guest.

**Who can do this:** Anyone with the company public request link

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Contact** | | **Service** | | **Reference** |
| How to reach you | | Location and need | | Request number |

## 1 Open the shared form

Use your service company public link. Contact the company if the form is unavailable.

## 2 Complete Contact

Enter first name, last name, email and mobile phone. Choose at least one enabled contact method.

## 3 Complete Property

Enter property type, address, city, state or region, postal code and access instructions.

## 4 Describe Service details

Choose a service, explain the problem, set urgency and attach useful files.

## 5 Offer availability

Indicate preferred dates or times and add scheduling notes.

## 6 Review and keep the reference

Check the details in Review, then select Submit request. Keep the number shown on Request received.

### For an actual emergency

If there is immediate danger, do not wait for a form response. Contact emergency services or the company through an appropriate channel.

11 / CUSTOMER PORTAL

# Track requests and appointments

See what you requested and when your service is planned.

**Who can do this:** Customer

REFERENCE WORKFLOW

01 **Requests** — Follow your service need → 02 **Upcoming** — Next appointments → 03 **Past** — Service history

1. **Open Requests**

   Review number, title, property, status and date. Use Property to filter by location.

2. **Read request details**

   Select View for service, urgency, description and availability. A related quote appears when available.

3. **Open Appointments**

   Upcoming shows future appointments; Past shows earlier visits.

4. **Review each visit**

   Check date, time, service, work order, technician, property and status. To be assigned means a technician is still needed.

5. **Check progress and documents**

   View opens arrival window and tracking. View report appears when a report is available.

**Your next appointment also appears on Home**

Review Upcoming appointment. The service company confirms the final schedule.

11 / CUSTOMER PORTAL

# Ask to reschedule an appointment

Your service company must confirm any requested change.

**Who can do this:** Customer, when rescheduling is available

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Request** | | **Review** | | **Confirm** |
| Preferred date and reason | | Service company checks | | Appointment updated |

1. **Open the appointment**

   Use Appointments or Upcoming appointment on Home.

2. **Select Request reschedule**

   This action appears while a change can still be requested.

3. **Propose a time**

   Complete Preferred date and Time window.

4. **Explain the reason**

   Enter Reason to help the company review your request.

5. **Send the request**

   Select Send request. Cancel closes without submitting. Reschedule requested appears with the proposed date.

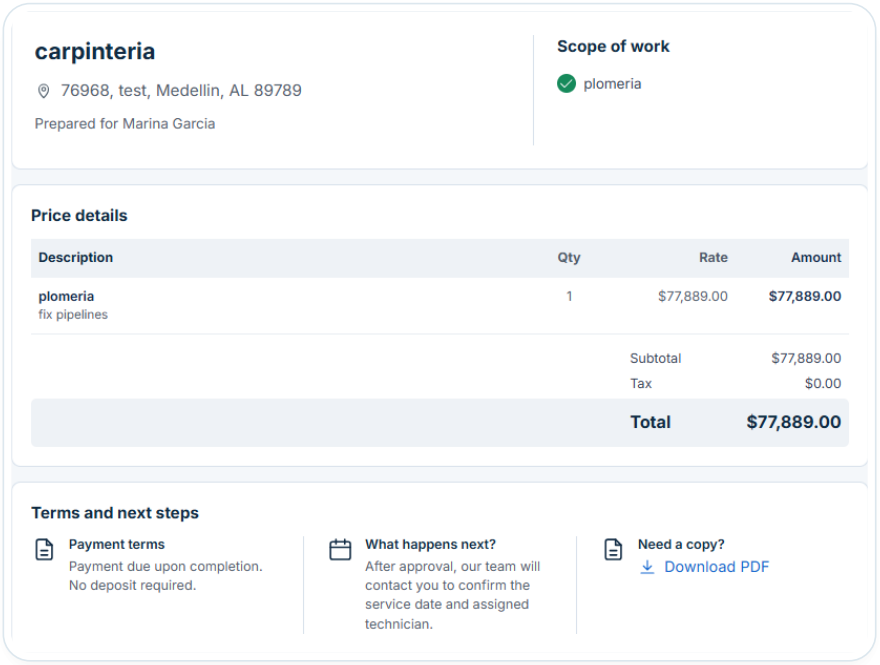
**The appointment does not change automatically**

Keep the confirmed time until the company accepts and communicates the change.

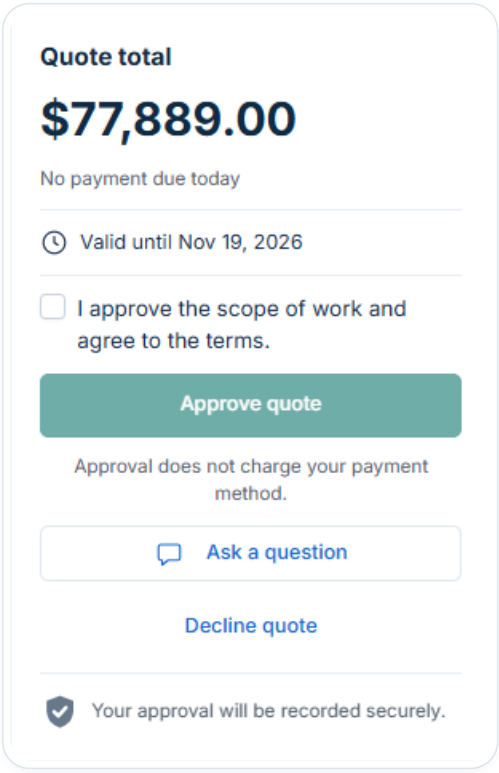
11 / CUSTOMER PORTAL

# Review and approve a quote

Open the email link or select the quote from your portal.




Service scope and terms




Customer response controls

## 1 Read the proposal

Review Scope of work, line items, total, Terms and Valid until. An expired or replaced quote cannot receive a response.

## 2 Confirm your agreement

Select I approve the scope of work and agree to the terms, then choose Approve quote.

## 3 Choose another response if needed

Ask a question sends a clarification. Decline quote rejects the proposal after confirmation.

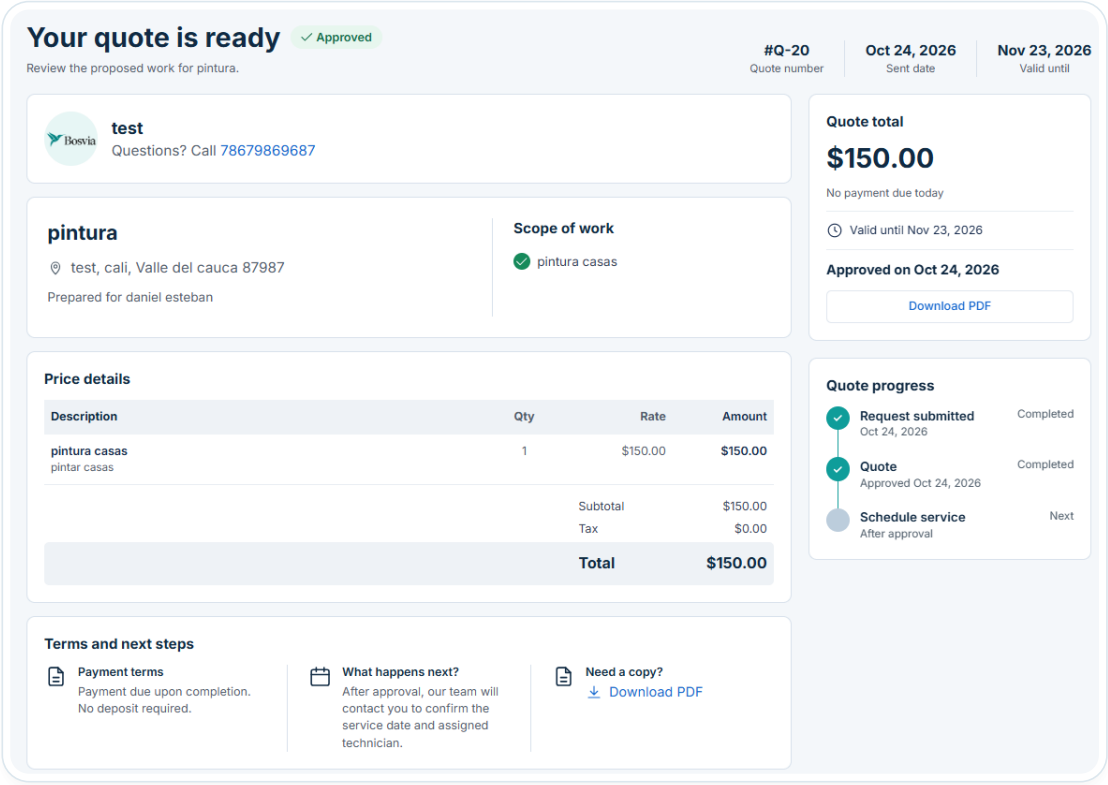
### Check optional items

If options are available, turn them on or off and review the updated total before approving.

11 / CUSTOMER PORTAL

# After a quote is approved

Review the accepted scope, amount and next steps.




Demo screen · original interface

## 1 Check Approved

The status confirms your approval was recorded. Review the approval date beside the total.

## 2 Review the amount and scope

Check Quote total and Scope of work. Approving a quote does not take a payment.

## 3 Save a copy and wait for confirmation

Download PDF saves the quote. The company confirms the service date and assigned technician.

### Separate demo examples

This approved quote illustrates the outcome. Its amount and service may differ from other screenshots in the guide.

11 / CUSTOMER PORTAL

# Ask about or decline a quote

Choose the response that matches your decision before work is approved.

**Who can do this:** Customer receiving a quote

REFERENCE WORKFLOW

01
**Question**
Clarify a detail

→

02
**Approval**
Accept the scope

→

03
**Decline**
Reject this proposal

## 1 Open a current quote

Use the email link or Quotes. Expired or replaced versions cannot receive responses.

## 2 Send a question

Select Ask a question, enter your Question and select Send question. The source help allows one question per quote.

## 3 Clarify with the company

A question leaves the quote open. You can approve once you understand the proposal.

## 4 Decline if appropriate

Select Decline quote, enter a Reason and confirm in Decline this quote?.

## 5 Check the resulting status

The list shows Question sent or Declined according to your response.

**Declining cannot be undone from the same proposal**

Contact the company if you change your mind or want to revisit an expired proposal.

11 / CUSTOMER PORTAL

# View and pay your invoices

Check the balance and choose a method enabled by your service company.

**Who can do this:** Customer with a sent invoice

REFERENCE WORKFLOW

| 01 | → | 02 | → | 03 |
|---|---|---|---|---|
| **Review** | | **Choose** | | **Confirm** |
| Amount and due date | | Enabled payment method | | Receipt and balance |

## 1 Open Invoices

Review Invoice, Service, Issued, Due, Total, Balance due and Status. Select View for details.

## 2 Read the status

Sent, Partially paid, Overdue and Paid describe invoice delivery and payment progress.

## 3 Choose card payment if enabled

In Pay invoice, select Credit or debit card. Disabled methods show a reason.

## 4 Complete the secure form

Enter Cardholder name and card details in the Stripe form displayed on the invoice.

## 5 Confirm the payment

Select Pay with the displayed amount. Keep the page open while it processes.

## 6 Check the result

Payment successful shows a receipt. Use Download receipt or Download invoice. If payment fails, choose Try payment again or another method.

**Payment methods depend on company settings**

The invoice may also offer bank transfer reporting. Use only the options enabled for that invoice.

11 / CUSTOMER PORTAL

# Report a bank transfer

Send money through your bank and help the company identify it.

**Who can do this:** Customer; Bank transfer enabled

REFERENCE WORKFLOW

01
**Transfer**
Through your bank

→

02
**Report**
From the invoice

→

03
**Confirm**
Company verifies receipt

1. **Open the invoice**
   In Pay invoice, choose Bank transfer (ACH) when available.
2. **Review banking details**
   Read Bank transfer instructions. Copy buttons help you use the correct details.
3. **Use the invoice reference**
   Include the invoice number in your transfer reference.
4. **Transfer, then report**
   After sending money through your bank, select I sent the transfer.
5. **Follow the status**
   The invoice shows Transfer reported. Use I have a question about this invoice when offered if you need help.

**Reporting does not mark the invoice as paid**

The company verifies receipt and records payment. The invoice stays open until then. The source help estimates 1-3 business days for a transfer.

12 / QUICK REFERENCE

# Resolve common blockers

Check the requirement for the step you are trying to finish.

**Who can do this:** All users

REFERENCE WORKFLOW

01
**Locate**
Screen and reference

→

02
**Check**
Status and permissions

→

03
**Ask**
Useful support details

1 **A section or action is missing**

Check your role and branch. Availability can depend on permissions, record status or whether the feature is enabled.

2 **I cannot start a job**

Record arrival first. Operational actions are performed by the primary technician.

3 **Review & complete is disabled**

Finish all required tasks and add at least one Before photo and one After photo.

4 **An email is missing or a link expired**

Ask for a new invitation or use Resend email for a quote. Keep the record reference.

5 **An invoice is still open after a transfer**

Reporting a transfer is not payment confirmation. The company must verify receipt and record the payment.

6 **I need more help**

Use Help & support or your company contact. Include the reference, the step attempted and the message shown.

### About the examples

Screens come from a demo and may show different services. Reference diagrams explain workflows; they are not app confirmation screens.

12 / QUICK REFERENCE

# Understand the key terms

Use these meanings to distinguish service progress from billing and payment.

| TERM OR STATE | MEANING |
| --- | --- |
| **Request** | A customer need, before price or delivery is confirmed. |
| **Assessment** | An optional site check used to define diagnosis and scope. |
| **Quote** | The proposed scope, price and terms sent for customer approval. |
| **Work order / Job** | Approved work prepared for delivery; pricing stays linked to the quote. |
| **Visit** | A scheduled occurrence with a time slot and assigned technicians. |
| **Primary technician** | The assigned person who performs editable visit actions. |
| **Required task** | A checklist item that must be completed before closing review. |
| **Before / After** | Photo categories; at least one of each is needed for review. |
| **Acknowledgment** | The customer confirmation of service, separate from payment. |
| **Needs review / Draft** | Completion awaiting office review / invoice not yet sent. |
| **Sent / Partially paid** | Invoice delivered / an outstanding balance remains. |
| **Transfer reported** | A customer reported a transfer; receipt is not yet confirmed. |
| **Paid / Overdue** | No outstanding balance / payment remains after the due date. |