

For Service Providers

Boost your business!





Desktop User guide

Homepage

Home Page provides a comprehensive view of everything you need to manage your operations efficiently.

At a glance, you'll see how all the tools and data are interconnected, giving you a real-time picture of how things are working across the platform.

On the left side, you'll find the **Menu Bar**, where all the key features are easily accessible. This allows for seamless navigation between different areas of the platform.

- Connections
- Sales
- Leads
- Opportunities
- Purchasing / Asset Management

Search menu		
Menu 🏠 🛞 📢 💭 👘	<u>ê</u> s	
Connections Settings Leads Connections Services Inspections	Support Tickets	Invoices
Sales ∨		
Opportunities		
Roles & Permissions Users Opportunities Clients Projects		
Clients	I	
Projects	ક્રિ	
Schedule Groups Vendors Parts & Supplies	Equipment	
Inspections		
Support tickets		
Purchase Orders Supply Requests		
Ca Purchasing/ Asset management		
Vendors		
Parts & Supplies		C
Supply requests Subject tokets Subject tokets Subject CREATED DATE	PRIORITY	STATUS
Purchase order	Low	In progress
Equipment 11/14/2024	High	Completed
Time & Attendance		
Time logs No tickets There are no tickets assigned to you.	Medium	
Check materials 11/14/2024	Medium	in progress

At the top right corner, you'll see your **Profile**, the **Notification Bar**, and the **To-Do Tasks option**, helping you stay organized and up-to-date on important actions.







Profile: Directing attention to the top-right corner of the screen section, you have three main options to manage and view your account details:



1. My Profile: Here, you can view both your company's information and your personal user information. This is where you can update and maintain important details about yourself and your business within the platform.



2. Configurations: This is the section for advanced settings, particularly useful for administrators. If you have admin access, you can:

- Manage roles and permissions for each user in your organization.
- View all users in the system, add new users, and assign them to specific roles.
- Create and manage groups based on location or service type, helping streamline internal organization.
- Access various other settings, including managing documents and other administrative functions.







Reset X

NAME	USER COUNT	STATUS	ACTIONS
Manager	0	Active	
Sync Support	4	Active	:
OPS Mobile 1	0	Active	:
asdasd	1	Active	:

Sales: Leads & Opportunities

The Sales Stage is divided into two essential sections:

Leads and Opportunities.



Leads

Manage contacts that have the potential to become your clients.

You'll find multiple ways to source and qualify leads, such as:

Person
By Address
Source.

This helps you keep track of prospects and filter them based on relevant criteria.

Leads	Sea	rch leads	Q								+ New Le	ad 🔳
⊙ Inc	lustry			⊙ Status All	Reset ×							
ID (COMPAN	IY	INDUSTRY	ADDRESS		sc	URCE	OPPORTUNITIES	STATUS	CREATED DATE	CREATED BY	ACTIONS
10 5	Sparkle (Clean Services	Hospitality	456 Bright Cour Garland, Texas 7	t 75043	Pro	ophet Cleaning Event	1	Qualified	10/08/2024	Santiago Portillo	:
9 (Cleaners	of America	Residential Division	558 Dale Street Houston, Texas	77060	Pro	ospecting	2	Qualified	07/30/2024	Gilberto Barrera	:
					Update Le	d						
					1 Comp	iny information			_			
					Company *				1			
					Atlanta Air	ort						
					Industry Type	New industry	y .					
					Airport Te	ninal \$						
					Website							
					Website							
					Lead Source							
					Lead Sour	9						
					Country *							
					United Sta	es		¢				
					Address							
					ATL airpo	(ATL)						
					Apartment/Su	e/Building						
					Apartment	Suite/Building No						
					City							
					Atlanta							
					State							



Sales: Leads & Opportunities

Opportunities

Once a lead presents a potential business **opportunity**, it moves into the **Opportunities section**. This is where you can record key details, such as:

- Project name
- Company
- Estimated revenue
- Confidence level for closing the deal

This section helps you monitor and manage opportunities that could lead to sales or revenue for your company.

Leads	Search leads	Q					+ New L	ead 🔒
⊙ Indu	stry ④ Created Date		⊙ Status All Reset X					
ID C	OMPANY	INDUSTRY	ADDRESS	SOURCE	OPPORTUNITIES	STATUS CREAT	TED DATE CREATED BY	ACTIONS
10 St	arkle Clean Services	Hospitality	456 Bright Court Garland, Texas 75043	Prophet Cleaning Event	1	Qualified 10/08/	2024 Santiago Portillo	:

Residential Division

558 Dale Street Houston, Texas 77060

Prospecting

Qualified

Gliberto Barrera

Update oppotunity

Lead	Opportunity name *	
Santiago's Cleaning Company	Cleaning Carpet	
Amount	Service class	
\$ 2500.00	One Time	\$
Service type	Stage *	
Carpet Cleaning	Closed Won	0
Description		
Carpet Cleaning		
max. 500 characters		į
Estimated close date *	Created by *	
11/15/2024	Jesus Quintanilla	

Opportunity conversion

Opportunity conversion

Select from existing client. Note: Uncheck to add new	client information
CLIENT INFORMATION	
Client name *	
Atlanta Airport	
Industry type *	
Airport Terminal	ŝ
Country *	
United States	0
Address *	
ATL airport (ATL)	
Apartment/Suite/Building	
Apartment/Suite/Building No	
City *	
Atlanta	
State *	
Georgia	c
Zip Code *	
30320	
Default payment term *	
Default payment term	ŝ







Cancel



Next



The Operations section becomes crucial once an opportunity is secured. It helps you manage all active projects in the database. This section includes several key options to streamline project management:

Ŷ	C Operations	~
	Clients	
	Projects	
	Services	
	Schedule	



Clients: This option shows the client associated with each project, allowing you to track who you are working for.

Clien	ts Search clients	Q			+ New client	٤
⊕ I	ndustry 🕒 Status 🛛 All Reset 🗙					
ID	CLIENT NAME	INDUSTRY	PROJECTS	CREATED DATE	CREATED BY	ACTION
10	Burgos Apartments	Apartment Complex	0	10/28/2024	Daniel Burgos	:
9	Santiago's Management Property LLC	Office Building	1	10/28/2024	Santiago Portillo	:
8	Summit Enterprises	Industrial	2	10/07/2024	Santiago Portillo	:



Projects: In this section, you'll find the specific projects you're managing.

Since a client can have multiple projects in different locations, it's essential to accurately input the **project name, address, and client name.**

Additionally, you can assign different groups responsible for various tasks, and these can be set as default options for future projects.

Projects	Search	Q					+ New p	roject 🔳
Olient								
ID PR	ROJECT NAME	ADDRESS	SERVICES	PROJECT TYPE	GROUP	CLIENT NAME		ACTIONS
30 Sp	arkle Clean Services	456 Bright Court Garland, Texas 75043	2	Offices	Default Group	Sparkle Clean Services	0	:
29 SL	.B San Felipe	5599 San Felipe Street Houston, Texas 77056	1	Office Building	Default Group	SLB Managements	0	:
28 Mi	iguel's headquarters	Cabanas El Potrero 00000 Cabañas	1	Bank	North Denver	Miguel's industries	0	:

Geofence: In this section, you'll find the specific projects you're managing.

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How to Set Up Geofencing in the **Desktop Platform**:

- Navigate to the Project Feature
- Log into your account and go to the Projects section on the main menu.
- Select the Desired Project
- Identify the project you want to set up a geofence for and click on its Project ID to open its details page.





2836 East Desert Broom Place





- Access the Geofence Configuration
- On the project details page, locate the blue icon in the top-right corner. This is the geofence setup option. Click it to proceed.

←	Project ID: 40 Office 2 Updated by Santiago Portillo • 111 West Jones Avenue San Antonio, Alaska 78215, Un	Details						
	Services	Search	Q			[+ New service	e 🛃
	Inspections	 ↔ Service class ↔ Service class 	Service types 🕒 Tag	gs 🕒 Source	↔ Status Reset ×			
	Support tickets	ID NAME	SERVICE TYPE	SERVICE CLASS	SOURCE	TAG	STATUS	ACTION
	Invoices	74 General Cleaning	Janitorial	Recurring	Created	0 Tag(s)	Open C	:
	Users							
	Vendors	Showing 10 \$					< 1	/ 1 >

- Define the Geofence Area
- A map interface will appear. Use the tools provided to outline the geofence area.
- Shape the area to fit the desired work location.
- Adjust the boundaries as needed.
- Enable the Geofence Option
- Toggle the geofence feature to On to activate it for this project.
- Save Your Configuration
- Once you've finalized the geofence, click Save to apply the settings to your project.





Services: Within each project, the Services tool allows you to specify the type of service required. You can input project details, including the cost of the service and its frequency. **This ensures clarity in managing the services provided within each project.**

Also, every service can change based on the needs of the customer. So you are able to choose the service type given.

The service tags feature lets you organize with ease all the workflow of your teams.

Services	Search	Q					+ New servio	ce 😫
↔ Client	ts 🕂 Projects 🕒 Service	class 🕒 Service types 🕒 Tags	↔ Source↔ Statu	us Reset X				
ID	NAME	PROJECTS	SERVICE TYPE	SERVICE CLASS	SOURCE	TAG	STATUS	ACTION
7	New offices	Project ID: 26 New Offices for Summit 400 Summit Lake Drive Humble, 77339	Janitorial	One Time	Created	0 Tag(s)	Closed C	•
6	Cement	Project ID: 25 Extra Parking Spots 400 Summit Lake Drive Humble, 77339	Janitorial	One Time	Created	0 Tag(s)	Open C	:

Schedule: For recurring services, such as cleanings or inspections, the Schedule tool allows you to program tasks automatically. You can set the project, service frequency, and the service class, ensuring that specific users are assigned to handle the task consistently.

Sche	dule Search	Q				Ŀ
• C	Date 🕑 Client 🕑 Project 🕤	Service 🕑 User Reset 🗙				
ID	SERVICE	FREQUENCY	PROJECT	SERVICE CLASS	VIEW	ACTION
50	Service ID: 77 Sink Fix	Daily on 12/09/2024, never ends	Project ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Plumbing	View users	:
49	Service ID: 76 Sink Fix	Daily on 12/09/2024, never ends	Project ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Plumbing	View users	:
48	Service ID: 75 Window Cleaning	Daily on 12/09/2024, never ends	Project ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Janitorial	View users	:



Inspections: Allows you to schedule and track inspections for various services across both completed and in-progress projects. It helps ensure that all necessary checks are conducted at different stages.

	Ins	pections Templates					
	Inspecti	ions Search	Q			+	New inspection
	⊕ Stat	tus All Reset X					
	ID	INSPECTION	PROJECT	LAST UPDATE	TYPE	STATUS	ACTION
	102	Building General Inspection	Location ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Santiago Portillo 12/10/2024 03:55 PM	Created	In Progress	
	101	Hallway 2	Location ID: 40 Office 2 111 West Jones Avenue San Antonio, Alaska 78215	Daniel Burgos 12/10/2024 07:51 AM	Created	In Progress	
						STATUS	ACTION
						In Progress	:
\/	Vitk	nin this tool e	ach inspection can be c	ustomizer	4		View 💿
V	•••						Edit
M	/ith	n details spec	cific to the project or ser	vice being	3	In Progress	Mark as complete
ir	nspected.						Resume inspection
						In Progress	

Edit view

4	Inspection MI: M2 Building General Inspection Memory in Sambage Partille - Day 1014, 2024 2155 PM	Show details In Progress ~	_
	iearch Q	Add Inspection area Add Inspection Item Edit item	
	Area 1 Sewer vent Sewer vent terminal	I Inspection area • Area 1	
	Building Structure tem 1	: Inspection item * Sewer vent	
	Electrical Make sure all wires are well connected.	1 Details	
	Windows All windows must be aligned.	i Sewer vent te	ermina
1	Area 2		
	Construction Layout Item 4	i max. 500 charact	iers
	General tem 5	1	
		Canad	

Resume inspection view

Building General Inspection Updated by Santiago Portillo • Dec 10th, 2024 3:55 PM		ails In Pro	ogress
Search Q			
Area 1			
Sewer vent Sewer vent terminal	Pass	Inspect item	
Building Structure Item 1	Outstanding	Inspect item	
Electrical Make sure all wires are well connected.	Fail	Inspect item	





×

\$

Submit

Cancel

All windows must be aligned.



Support Ticket: System is designed to handle various needs and issues that may arise during a project. It can be used when something is missing, tasks need urgent attention, or additional resources are required. This tool helps track and manage these concerns efficiently.

Support tickets	Search	Q					+ New ticket	٤
	Reset ×							
TICKET		UPDATE DATE	PROJECT	ТҮРЕ	DAYS OPEN	STATUS	SOURCE	ACTION
Ticket ID: 66 Vacuum		Created 12/10/2024 Updated 12/10/2024	Location ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Report an Issue	1	Open	Created	•
Ticket ID: 65 Need gloves		Created 12/02/2024 Updated 12/10/2024	Location ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	General	9	(In Progress)	Created	:
Ticket ID: 64 Great Work		Created 11/20/2024 Updated 11/20/2024	Location ID: 35 HTown 1001 9870 Gaylord Drive Houston, Texas 77024	General	20	Open	Created 7	:

Each **support ticket** is linked to a specific project, ensuring that all requests are tied to the relevant work. You can also attach files and notes to the tickets for further context, making it easier to address issues promptly and ensure nothing is overlooked.

You can assign a ticket to an specific person and is video supported in case of needing to attach a video.

Ticket Details	Share 🕝
ID: 66	2 2000-00-00 MAR
Vacuum	Open 🗸
Description:	
Vacuum is needed in the area.	
Created by Santiago Portillo Dec 10th, 2024 3:46 PM	
FILES	
Images (1)	
	A H A A



Invoices section is dedicated to handling payments for various project services, tools, or any other project-related expenses. Here, you can directly select a client and issue an invoice that includes:

- Detailed descriptions
- Amounts
- Quantities
- Applicable tax codes

Additionally, if the invoice relates to a recurring service or payment, you have the option to automate this process for regular payments, ensuring that billing remains consistent and timely.

Also with the addition of the feature above there is also **Time Logs Integration** which helps create an invoice with accuracy based on the hours worked or service provided.

I		D O O
Invoi	Ce I	D 63

'₹

USO					Pay	ments		
uSource Technolo 11710 North Freeway Houston Texas 77060	gies				Invo Payr Due	ice date: nent term: date:	Nov 18 Net 30 Dec 18	sth, 2024) Sth, 2024
CLIENT		PROJEC	т					
ID: 1 Mandalay Resort International Mandalay Bay 3950 Las Vegas, Nevada 89119, United States		ID: 2 shark r Shark Re Las Vega	eef aquarium eef Aquarium at M as, Nevada 89119,	andalay United	Bay 3950 States			
PRODUCT/SERVICE	DESCRIPTION	PO/WO	UNIT	QTY	RATE	TOTAL	COST	TAXABLE
Janitorial	ID: 1 Common areas 7x week		Per Service	1	\$4,500.00	\$4,500	0.00	
Janitorial	Porter Service Event 11.15.2024		Hourly	12	\$15.00	\$180.0	0	
Carpet Cleaning	ID: 7 Carpeted areas Lobby and Hallways		Per Service	1	\$8,500.00	\$8,500	0.00	
		Subt	otal				\$13,	,180.00

Tax code NV - Las Vegas	\$1,089.40
Total	\$14,269.40
Amount paid	\$0.00
Balance due	\$14,269.40



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Projects	Search	Q					+ New p	roject 😫
← Client								
ID PR	ROJECT NAME	ADDRESS	SERVICES	PROJECT TYPE	GROUP	CLIENT NAME		ACTIONS
30 Sp	parkle Clean Services	456 Bright Court Garland, Texas 75043	2	Offices	Default Group	Sparkle Clean Services	0	:
29 SL	.B San Felipe	5599 San Felipe Street Houston, Texas 77056	1	Office Building	Default Group	SLB Managements	0	:
28 Mi	guel's headquarters	Cabanas El Potrero 00000 Cabañas	1	Bank	North Denver	Miguel's industries	0	:

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The service tags feature lets you organize with ease all the workflow of your teams.

Services	Search	Q					+ New servic	e 🛓
← Client	Projects Service c	lass (+) Service types (+) Tags	↔ Source	IS Reset X				
ID	NAME	PROJECTS	SERVICE TYPE	SERVICE CLASS	SOURCE	TAG	STATUS	ACTION
7	New offices	Project ID: 26 New Offices for Summit 400 Summit Lake Drive Humble, 77339	Janitorial	One Time	Created	0 Tag(s)	Closed C	:
6	Cement	Project ID: 25 Extra Parking Spots 400 Summit Lake Drive Humble, 77339	Janitorial	One Time	Created	0 Tag(s)	Open (*	* *



Schedule: For recurring services, such as cleanings or inspections, the Schedule tool allows you to program tasks automatically. You can set the project, service frequency, and the service class, ensuring that specific users are assigned to handle the task consistently.

Scheo	dule Search	Q				٤
⊕ D	ate 🛈 Client 🕑 Project 💓	Service 🕑 User Reset 🗙				
ID	SERVICE	FREQUENCY	PROJECT	SERVICE CLASS	VIEW	ACTION
50	Service ID: 77 Sink Fix	Daily on 12/09/2024, never ends	Project ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Plumbing	(View users)	:
49	Service ID: 76 Sink Fix	Daily on 12/09/2024, never ends	Project ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Plumbing	View users	:
48	Service ID: 75 Window Cleaning	Daily on 12/09/2024, never ends	Project ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Janitorial	View users	:

Inspections: Allows you to schedule and track inspections for various services across both completed and in-progress projects. It helps ensure that all necessary checks are conducted at different stages.

Ins	Inspections Templates									
Inspect	Inspection Q									
⊕ Sta	tus All Reset X									
ID	INSPECTION	PROJECT	LAST UPDATE	ТҮРЕ	STATUS	ACTION				
102	Building General Inspection	Location ID: 36 Mexican Restaurant 126 Williman Street Portland, Indiana 29403	Santiago Portillo 12/10/2024 03:55 PM	Created	In Progress	* *				
101	Hallway 2	Location ID: 40 Office 2 111 West Jones Avenue San Antonio, Alaska 78215	Daniel Burgos 12/10/2024 07:51 AM	Created	In Progress	• •				

Within this tool, each inspection can be customized with details specific to the project or service being inspected.

\	Inspection ID: 102 Building General Inspection Updated by Santiago Portillo * Dec 10th, 2024 3:55 PM		Show details	In Progress 🗸
S	earch Q	Add inspection area	Add inspectio	on item
	Area 1			:
	Sewer vent terminal			:
	Building Structure Item 1			:
	Electrical Make sure all wires are well connected.			:
	Windows All windows must be aligned.			:
	Area 2			:
	Construction Layout Item 4			:
	General Item 5			:



Purchasing / Asset Management

This section focuses on managing all vendor-related transactions and project resources. It covers **vendors**, **parts**, **supply requests**, **purchase orders**, and equipment management.

> Purchasing/ Asset management
> Vendors
> Parts & Supplies



Vendor: This section allows you to manage your recurring vendors for different supplies or machinery that are regularly needed. It helps streamline your ordering process with trusted suppliers.

Vendors Search Q Status Active Reset X								
ID VENDOR	TYPE	ADDRESS	CONTACT	EMAIL	STATUS	ACTION		
6 Cleaning Home Supplies	Supplier	Dallas Dallas, Texas 75201	Orlando Cuicar (417) 365-0378	cuicar@homeservice.com	Active	i		
5 Alex's test account	Contractor/ISP	12465 Tierra Laurel Drive El Paso, Texas 79938	Alex Melgar		Active	I		

Parts & Supplies: Here, you can save details on the recurring items you frequently purchase, such as cleaning supplies, project materials, and other essentials.

Parts and supplies Search		Q						+	New item
ITEM NAME	BRAND	SKU	CATEGORY	UNIT	QUANTITY	COST	SELLING PRICE	VENDOR	ACTION
ID: 7 Fabuloso	Fabuloso	9870635	Floor Care	GL	1	\$10.00	\$10.00	tom's janitorial Supplier	:
ID: 6 Desinfecting	CLOROX	1234567	Floor Care	GL	1	\$8.00	\$8.00	the home depot Supplier	:
ID: 5 Hard floors	Acme	64458547	Chemicals	CU	1	\$25.00	\$33.75	ridley's Supplier	:



Brand:	Fabuloso
SKU:	9870635
Vendor:	tom's janitorial
Description:	
Documents (1)	
Screen-Sho28-PM.png	Nov 11th, 2024 3:40 PM By Santiago Portillo

Supply request: This function helps you create and manage orders efficiently. Closely related to parts and supplies, it enables you to finalize the order to the vendor, including the specific quantities of what you need.

New Supply request						New Supply request				
1 B	ulk update				2 Additional information					
Client						Notes				
Select	t an option				0	Write a few sentences about items.				
Project										
Select	t an option				0		h			
						max. 500 characters				
Searc	Search Q Show preferred items only					Priority				
0.0	tegory (A) Vendor	Pacat X				Choose an option	¢			
0.04						Created by				
	ITEM	PREFERRED	IN STOCK	QTY REQUESTE D	UNIT C	Choose an option	0			
	o 9 5					Needed by *				
0	Hard floors Chemicals 1/CU				\$25.00	Needed by	(::-)			
0	4 Bloque 25×25 Floor Care 1/CU				\$5.00					

Purchase Order: This helps track purchases related to different projects. It is specifically for external purchases that require manual oversight to ensure they align with project needs.

uSource Technologies 11710 North Freeway Suite 200 Houston, Texas 77060 GENERAL INFORMATION			Oct 11th, 2024 11:34 AM
Ship to project		Choose vendor	
Choose project	0	Choose vendor	0
ITEMS			
DESCRIPT. QTY	UNIT	TOTAL	ACTION
	\$	\$0.00	€
			Add row
NOTES			

Equipment: This section helps you manage and track equipment used for various tasks. It includes machinery you own or rent from trusted vendors, making it easier to monitor and manage assets.

\$0.00

Total Cost

Equ	ipment	Search		Q				+ New item	٤
€	Status	All Reset X							
ID	NAME		SERIAL NUMBER	ТҮРЕ	PURCHASE DATE	WARRANTY EXPIRATION	STATUS	PROJECT NAME	ACTION
3	Ô	Advance Advance SC1500	AD85858585	Auto Scrubber / Ride on	11/06/2023		Active	Project ID: 19 Greenspoint unit 11710 North Freeway Houston, Texas 77060, United States	4 9 9
2	5	Minuteman Minuteman E14	MM45466878	Large Equipment	11/01/2023	11/01/2025	Under Maintenance	Project ID: 14 warehouse #4008 4008 Louetta Road Spring, Texas 77388, United States	*
1	28	Pro Team Super Coach Pro 10	CDX34334	Small tools	08/01/2023	11/01/2025	Active	Project ID: 6 south convention center Mandalay Bay Convention Center 3950 Las Vegas, Nevada 89119, United States	•

Time & Attendance

Time Logs: This section allows you to track employee and contractor hours by recording clock-ins and clock-outs. It offers a clear overview of the time logs, helping to manage workforce hours effectively.



By keeping a detailed record of work hours, this feature ensures transparency and aids in project management, payroll processing, and overall productivity analysis.

