

Lawn Service IQ

Office App Instruction Manual

The complete beginner's guide — every page, every button, explained step by step.

For the person running the office: scheduling, billing,
customers, crews, snow, and money.

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The Office App — Start Here

This manual assumes nothing. If you can browse Facebook, you can run this program. Every section below shows you a real screenshot of the page and walks you through it.

Brand new to this? Read this paragraph and nothing else for now.

This program is your office. It keeps your customer list, decides which crew goes where each day, sends the bills, and tracks the money. You put customers in. You tell it what work each crew does. It remembers everything, bills everyone, and tells you who's making money. That's the whole idea — every page you'll see is just a piece of that.

Your first 30 minutes — the fastest path to a working company:

1. Finish the setup wizard (Section 1) — company name, your sign-in.
2. Add ONE real customer: + **Quick Add** → **New Client**, then open them and **Add property**.
3. Add ONE employee: **Employees** → **New Employee**, give them a login, role **Crew**.
4. Put a job on the board: **Dispatch Board** → drag a job onto a crew column.
5. Done. You just ran the core loop — everything else is a variation of that.

1. Getting Started — From Download to a Working Office

1.1 — Download and install

Steps:

1. Download **LawnServiceIQ-Setup.exe** from your welcome email or the downloads page.
2. Double-click it. Windows may show a blue "Windows protected your PC" box — click **More info**, then **Run anyway**. (This appears because the app is new — it's safe.)
3. Follow the installer — Next, Next, Install. Done.
4. A **Lawn Service IQ** icon appears on your desktop and in the Start Menu. Right-click it → **Pin to taskbar** so it's always one click away.
5. If you bought a license, enter your **activation code** when it asks — it arrives by email right after purchase. The app only asks once.

1.2 — First launch: nobody signs in yet — you CREATE the company

This part surprises everyone, so read it: there is no login to guess. A brand-new install has no company and no users — so the first time you open the app it skips the login page entirely and walks you through creating everything. Here's exactly what happens:

The setup wizard (runs once, ever):

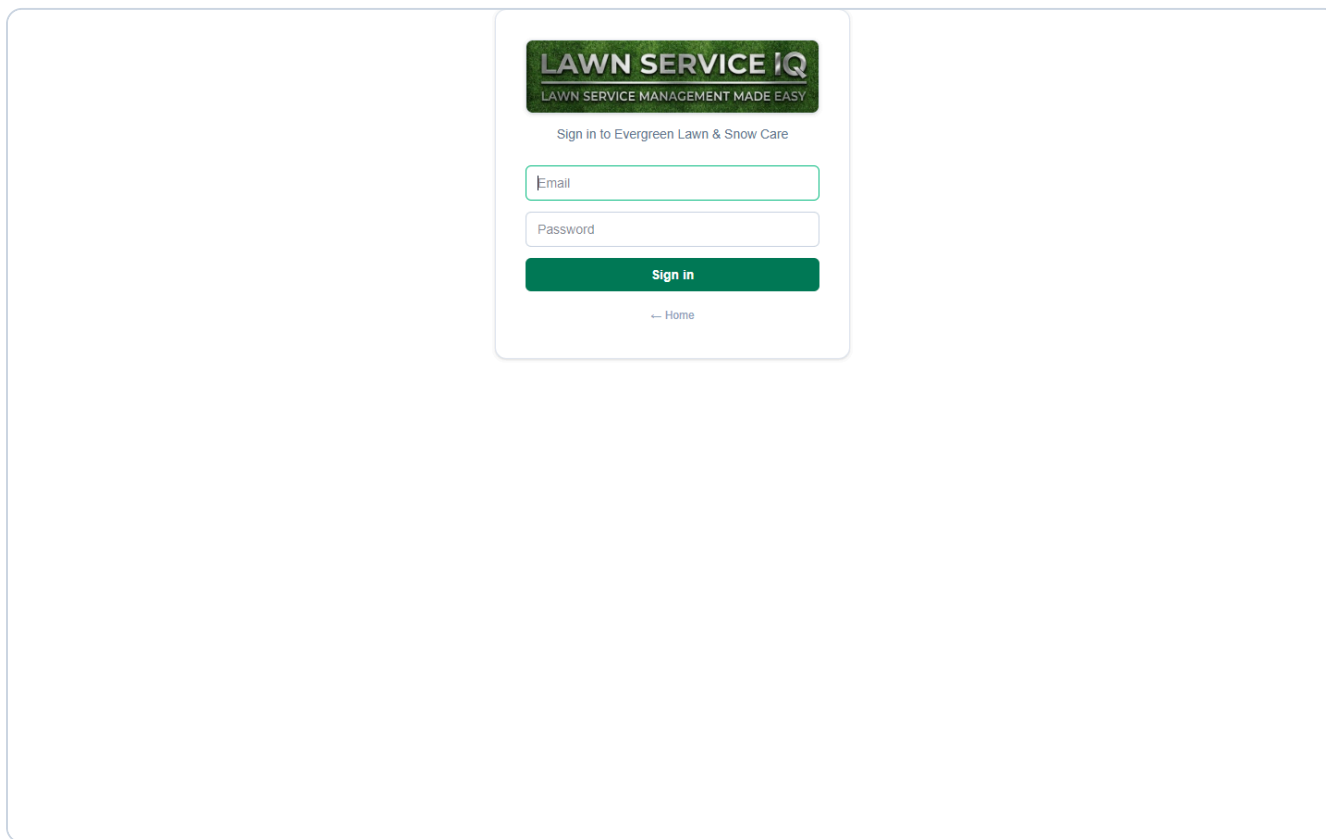
1. **"Where should your data live?"** — two choices:
 - **On this computer** — everything stored locally, works with no internet. Crew phones sync when they're on your office WiFi (morning and evening at the yard).
 - **Online — cloud (recommended)** — your data lives on our servers; everyone signs in from any device, anywhere. If you pick this, it hands you off to `lawnserviceiq.com/setup` — same wizard, just in a browser.
2. **Your company** — type your company name, add your logo if you have one (it shows on invoices and the sign-in screen).
3. **Your sign-in** — YOUR name, email, and a password you invent. This creates the **owner account** — the first and most powerful login. Write the password down.
4. **Finish** — pick your timezone. There's also a **"share on office WiFi"** option — turn it on if other office computers need the app (explained in 1.4).

After this, the login page knows you. The email and password you just invented ARE the sign-in. Second launch onward you land on the normal sign-in screen like everyone else.

1.3 — Signing in (every day after setup)

Steps:

1. Double-click the **Lawn Service IQ** icon. It opens in its own window — no address bar, no tabs.
2. Type your **email** and **password** → **Sign in**.
3. You're in. The app remembers you — tomorrow it skips this screen.



The sign-in screen. Your credentials come from the setup wizard — there's no default password.

1.4 — Giving your office workers their own logins (the five-person office)

Nobody shares the owner's password — every person who touches the program gets their own account, made by the owner in about 30 seconds each:

Steps (repeat for each person):

1. Sign in as the owner → sidebar → **Employees**.
2. Click + **Quick Add** → **New Employee**, or find their name if they're already listed.
3. On their row, click "**no login — give one**".
4. Set their **email** and a temporary password (they can change it later).
5. Pick their **role** — this controls what they can see:
 - **Owner** — everything, including Settings and billing. Keep this to yourself and maybe one trusted manager.
 - **Dispatcher** — the full office screens (clients, dispatch, billing, reports). This is the normal office-worker role.
 - **Estimator** — field app plus the ability to write quotes on site.
 - **Crew** — field app only. They can never see office screens, prices beyond their jobs, or exports.
6. Hand them their email + temp password. Done.

Where does each worker sign in?

- **Cloud install** — any browser, anywhere: they go to `lawnserviceiq.com/login` and sign in. Nothing to install for office staff.
- **Standalone install** — the app lives on the main computer. Other office computers connect to it over your office WiFi (that's the "share on office WiFi" switch from setup) — they open a browser, go to the address the app shows, and sign in with their own account.
- **Field crew** — the phone app, per the Crew Manual.

What each person sees depends on their role. A dispatcher signing in lands on My Day. A crew member signing in lands on the field app. Same login screen — the app routes them automatically. If someone can't see a page, their role is why.

Important for standalone installs: if the main computer is off or asleep, nobody else can connect — the app lives there. Offices with multiple simultaneous office staff should strongly consider the cloud option instead.

1.5 — The layout (learn this once, use it everywhere)

Every page in the office app has the same three parts:

- **Dark green sidebar (left)** — your menu. Every page lives here, organized in groups: CRM, Scheduling, Accounting, and more. Click a name to go there.

- **Top bar** — shows the page title, a **Report a problem** link, the green + **Quick Add** button, and **Sign out**.
- **Main area** — the actual work: lists, forms, cards.

The most important button in the whole app: the green + **Quick Add** in the top-right corner. It lets you add a customer, job, estimate, or expense from ANY page without hunting through menus.

2. My Day — Your Daily Command Center

Sidebar → My Day. This is where you start every morning. It shows every open ticket and task, grouped by who's responsible for it — your office staff each get a column, so you can see at a glance who owes what.

What this feature actually does: Most lawn software dumps you on a calendar and makes you hunt for what needs attention. My Day flips it — it collects everything pending (unanswered customer messages, overdue follow-ups, field reports, callbacks owed) and sorts it by person. It's the difference between "we forgot to call her back" and "her name is staring at you until it's done." Offices that run on sticky notes lose customers to slow follow-up; this page is the fix.

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Report a problem + Quick Add Sign out

My Day

Every open ticket, grouped by who's responsible. Until login exists, everyone's day is shown — click a section to focus on one person.

From the field (1)

Crew → Office 8:40 PM
Estimate EST-1005 for Bishop, Sarah — \$656.10 sent for approval. Open Estimates to review. Mark read

Message the field

All crews e.g. Bring the extra trimmer tomorrow... Send

Jessica Dengler 3

Pete Alvarez 1

Ray Jimenez 1

Call Mrs. Henderson — mow height complaint Done
Called about last Friday's cut — says it was scalped near the front walk.
Wants us to raise the deck to 3.5" going forward.
Also mentioned the gate latch was left open — reminded crew about the gate code tag on file.
Henderson, Martha 412 Elm St 2d overdue Open

Event Mulch delivery — check pile location Done
Driver dumping 6 yds at 15 Summit Ct Thursday AM.
Verify it lands on the tarp by the garage, not the grass.
Wagner, Tom 15 Summit Ct 1d overdue Open

Note Greenbriar HOA renewal — draft new terms Done
Contract up end of month.
Board wants ice melt added to the snow scope.
Price it with the 1" trigger and send estimate for approval.
Greenbriar HOA 1 Greenbriar Plow today Inprogress

My Day — every open task grouped by person. Click "Done" on anything finished.

What you're looking at:

- **From the field** — messages your crews sent in. In the picture, a crew sent an estimate for approval. Click **Mark read** once you've handled it.
- **Message the field** — type a note, pick "All crews" or one crew, hit **Send**. They see it on their phones.
- **The columns** — each person on your team gets a column of their open items: calls to return, notes to handle, events coming up. Click **Done** when it's handled.

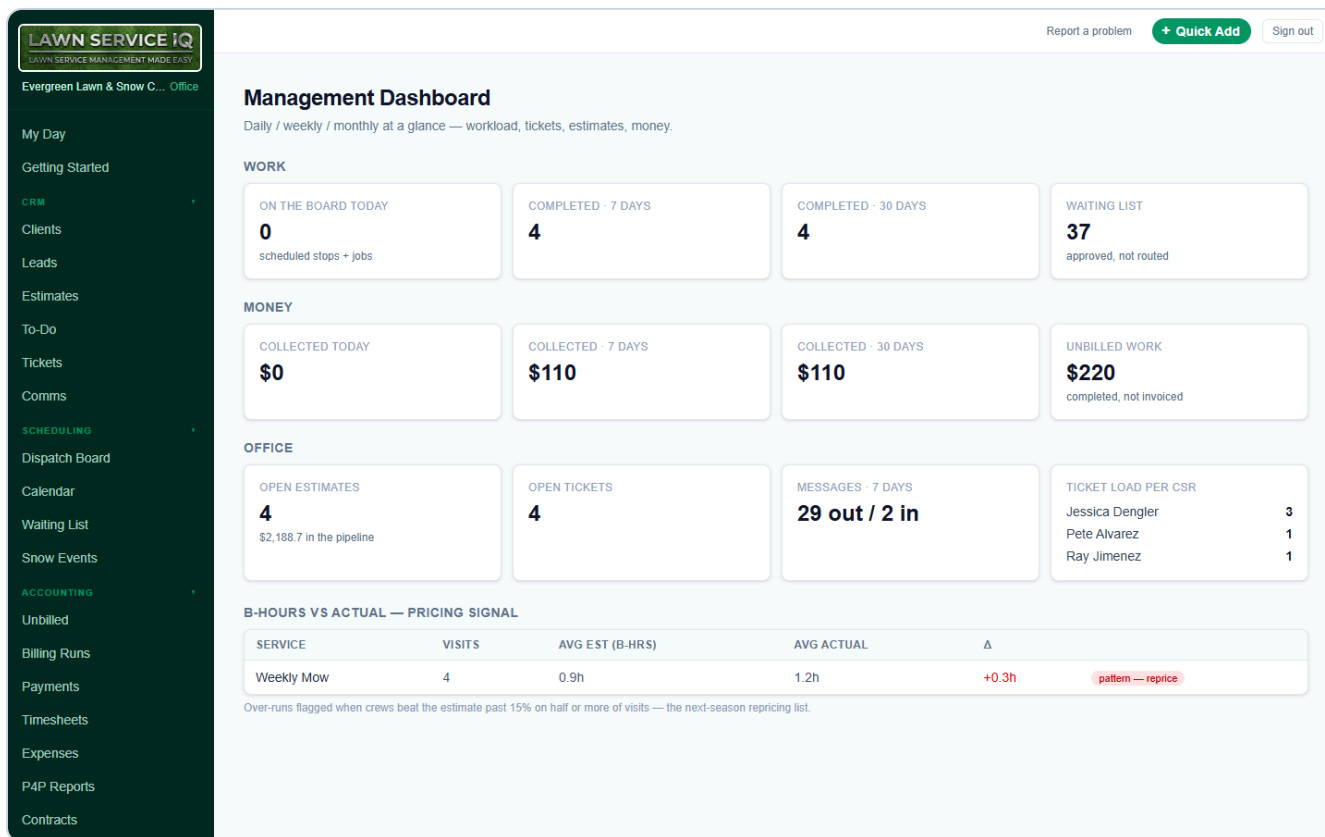
Daily habit:

1. Open **My Day** first thing.
2. Read anything under **From the field** — mark it read when done.
3. Work down each column — anything red says "overdue"; do those first.

3. Dashboard — The Business at a Glance

Sidebar → **Dashboard**. One page that answers "how's the business doing right now?" without clicking anything.

What this feature actually does: Other software buries this in reports you have to run and wait on. Here it's live the moment you open it — how many stops went out today, how much money came in, how much work is done but not billed, and whether your crews are beating or busting their time estimates. The B-hours vs Actual signal is the one competitors don't have: it watches your estimated hours against real crew times and tells you when a service is underpriced. That's real profit protection, not a vanity chart.



The Management Dashboard — work, money, and office numbers on one screen.

Reading the numbers:

- **WORK row** — stops on the board today, jobs completed this week/month, and how much approved work is sitting on the waiting list.
- **MONEY row** — what you collected today / this week / this month, and **Unbilled work** (done but not invoiced — money you're owed and haven't asked for yet).
- **OFFICE row** — open estimates (your sales pipeline), open tickets, recent messages.
- **B-hours vs Actual** — the smart part: it compares estimated hours per service to what crews actually take. If "Weekly Mow" shows **+0.3h over**, your price is too low — the app flags it as a repricing signal.

4. Customers (CRM)

CRM just means "the customer list and everything attached to it."

4.1 Clients — Add and Manage Customers

Sidebar → CRM → Clients. This is your customer list. Each row shows the name, contact info, their properties, what plans they're on, and any tags (like "Gate code required" or "HOA — no work before 9am").

What this feature actually does: It's not just a Rolodex — each client record ties together their properties, service plans, price history, invoices, and warning tags. The tags are the quiet killer feature: "gate code on file," "no work before 9am," "dog in yard" — they print right on the crew's job so nobody jumps a fence into a rottweiler again. And because clients, properties, and plans are separate things, a landlord with 12 rentals stays ONE client with twelve addresses — not twelve duplicate customers.

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Export CSV

Clients

18 accounts · plans, tags, and properties at a glance

Search clients — name, email, phone, or address... Search

Bulk reprice: + % 5 Apply to checked touches every active plan on checked clients — changes are audited

CLIENT	CONTACT	PROPERTIES & PLANS	TAGS
☐ Aldana, Maria	aldana@example.com 614-555-0111	29 Ridgeline Blvd Mulch Install (per yd) · annual · \$475 · ≥1" · Weekly Mow · weekly · \$55 · ≥1"	
☐ Bishop, Sarah	bishop@example.com 614-555-0109	67 Pineneedle Pl Annuals Install (per flat) · annual · \$480 · ≥1" · Weekly Mow · weekly · \$55 · ≥1"	
☐ Crawford, Bill	crawford@example.com 614-555-0110	1508 Harvest Ln Hand Shoveling · ondemand · \$55 · ≥2" · Weekly Mow · weekly · \$55 · ≥1"	
☐ Delgado, Ana	delgado@example.com 614-555-0107	233 Oriole Way Weekly Mow · weekly · \$55 · ≥1"	Holiday restriction
☐ Fitzpatrick, Sean	fitzpatrick@example.com 614-555-0112	603 Cloverdale Ave Weekly Mow · weekly · \$55 · ≥1"	
☐ Greenbriar HOA	greenbriarhoa@example.com 614-555-0115	1 Greenbriar Pkwy Snow Plow — Commercial Lot · ondemand · \$250 · ≥1"	HOA — no work before 9am
☐ Henderson, Martha	henderson@example.com 614-555-0100	412 Elm St Weekly Mow · weekly · \$55 · ≥1"	Gate code required
☐ Holt, Denise	holt@example.com 614-555-0113	77 Brookstone Ct Mulch Install (per yd) · annual · \$380 · ≥1" · Weekly Mow · weekly · \$55 · ≥1"	
☐ Kim, Daniel	kim@example.com 614-555-0108	940 Laurel Dr Weekly Mow · weekly · \$55 · ≥1"	
☐ Moreno, Luis	moreno@example.com 614-555-0114	321 Ashford Way no plan yet	
☐ Nguyen, Lisa	nguyen@example.com	1207 Maple Ave	

The Clients page — every customer, their properties, plans, and warning tags.

To add a new customer:

1. Click the green + **Quick Add** button (top-right of any page).
2. Choose **New Client**.
3. Fill in name, email, phone. Click **Save**.
4. Now add their property: open the client, click **Add property**, type the address and lot size.
5. Add a service plan (e.g. "Weekly Mow — \$55") so the system knows what to route and bill.

To find a customer fast: use the search box at the top — type any part of the name, email, phone, or street address.

Bulk reprice: check the boxes next to several clients → choose +% or +\$ → type the amount → **Apply to checked**. Raises prices on every checked plan at once (for annual price increases). Every change is logged.

Import instead of typing: if you have a spreadsheet of customers, use **Sidebar** → **Import** to load a CSV instead of hand-entering.

4.2 Leads — People Who Aren't Customers Yet

Sidebar → **CRM** → **Leads**. Someone called asking for a quote but hasn't signed? That's a lead — track them here so nobody falls through the cracks.

What this feature actually does: The money difference between a good lawn business and a struggling one is follow-up speed. When someone calls for a quote, they're calling three companies — whoever gets a professional estimate in their hands first usually wins. Leads keeps a live list of every prospect so nobody forgets to call back, and it tracks the whole pipeline: who got quoted, who's warm, who's gone cold and needs a nudge.

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Website inquiries land here first — nothing becomes an account until a human accepts it. Spam stays out of your client list.

PENDING REVIEW (2)

Oakwood Office Park

phone

Oct 13

614-555-0164

Snow removal quote for 3 lots, 1" trigger.

Accept → client

Junk

Alicia Tran

website

Oct 13

atran@example.com · 614-555-0188 · 22 Foxboro Ct

Need weekly mowing + fall cleanup for ~0.4 acre lot.

Accept → client

Junk

PROCESSED

Jim Novak

jnovak@example.com

referral

→ Reyes, Carmen

TEST THE INTAKE — SIMULATES THE WEBSITE FORM

Name

Email

Phone

Address

Website

What are they asking for?

Submit lead

Leads — prospects who called, filled in a form, or got a door hanger.

The flow: Lead comes in → you send an estimate → they approve → the lead becomes a Client. Leads keeps score of who's warm, who you quoted, and who to follow up with.

4.3 Estimates — Quotes That Become Jobs

Sidebar → CRM → Estimates. The sales pipeline: quote it → send it → customer signs → it lands on the Waiting List ready to route.

What this feature actually does: Builds a professional proposal in under a minute — customer clicks a link, approves and signs right on their phone, no printing or scanning. Signed estimates jump straight to the Waiting List so sold work can't get forgotten. The pipeline numbers at the top ("\$2,189 in open quotes · 2 won · \$180 weighted") turn sales into math you can act on: if open quotes pile up, your prices or follow-up need work.

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Estimates

Quote → send → sign → it lands on the Waiting List ready to route.

\$2,189 in open quotes 2 won · \$1,175 \$180 weighted pipeline

#	STATUS	STAGE	CLIENT	DESCRIPTION	DATE	VALID	SALES PERSON	PROB. %	INCOME
1006	draft	Draft	Northside Dentistry 455 High St	Weekly Mow — commercial 1 line	10/13/2026	11/12/2026	Mike Torres	0%	\$397.6
1005	draft	Draft	Bishop, Sarah 67 Pineneedle Pl	Walked the front beds with you... 2 lines	10/13/2026	11/12/2026	Mike Torres	50%	\$656.1
1004	approved	Closed · Won	Osei, Kwame 56 Foxhill Ct	Thank you for requesting prici... 1 line	10/13/2026	10/08/2026	Jessica Dengler	100%	\$989.85
1003	sent	Estimate Sent to followed up call ticket	Nguyen, Lisa 1207 Maple Ave	Fall cleanup (B-hours priced) 1 line	10/13/2026	11/06/2026	Jessica Dengler	40%	\$450
1002	approved	Closed · Won	Moreno, Luis 321 Ashford Way	Spring Cleanup 1 line	10/13/2026	—	Jessica Dengler	100%	\$185
1001	draft	Draft	Wagner, Tom 15 Summit Ct	Mulch Install 2 lines	10/13/2026	11/12/2026	Jessica Dengler	40%	\$685

NEW ESTIMATE

Property

Service (optional)

Service name / title

Pick a property...

— custom line —

Bi-Weekly Lawn Mowing

Service description (printed on the proposal — scope, notes, disclaimers)

Bi-weekly lawn mowing, edging of walkways/driveways, and blowing clippings off all hard surfaces...

Quantity (e.g. 15 visits)

Rate (\$/unit — qty × rate = amount)

B-hours (auto-prices × \$75/hr)

Or flat amount (blank → rate matrix)

Discount (\$)

Sales person

0.00

0.00

Estimate name

Estimates — status (draft/sent/approved), the client, the price, and the odds it'll close.

To write an estimate:

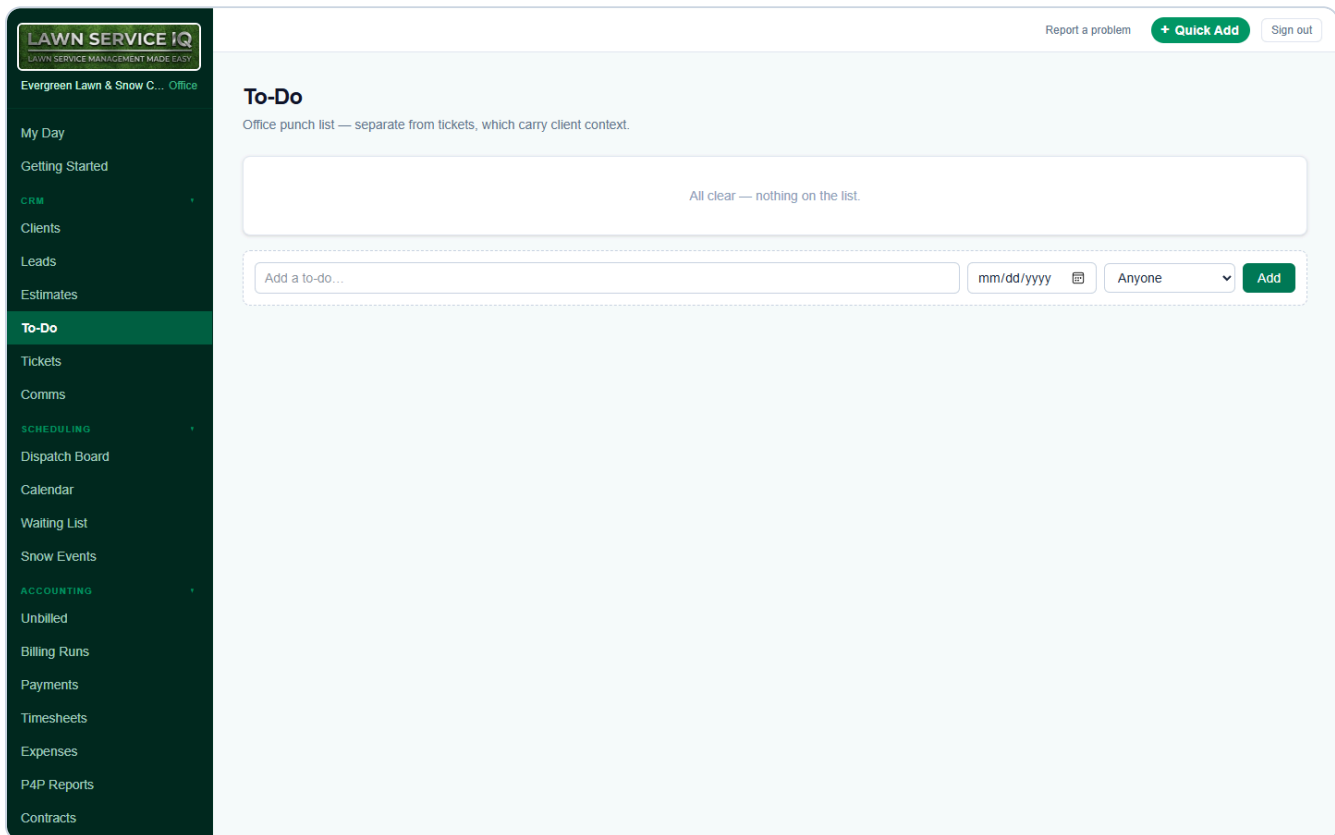
1. Scroll to **New Estimate** at the bottom (or use **+ Quick Add**).
2. Pick the **Property**, pick a **Service** (or a custom line).
3. Type the service description — this prints on the proposal the customer sees, so write it like you're talking to them.
4. Enter quantity and rate, OR enter **B-hours** (budgeted man-hours — the app prices it at your hourly rate automatically).
5. Save → then **Send**. The customer gets a link to approve/sign.

B-hours is the pro move: estimate "this will take my crew 1.5 man-hours," the app multiplies by your rate. When crews consistently beat or bust that number, the Dashboard tells you to reprice.

4.4 To-Do — Your Task List

Sidebar → **CRM** → **To-Do**. Simple shared task list — call Mrs. Smith back, order fertilizer, fix the trailer. Assign to a person, set a due date, check it off.

What this feature actually does: It's the office's shared brain. Sticky notes get lost, texts get buried — a To-Do entry stays on someone's column until it's done. Assign it to a person, give it a date, and it shows up on their My Day the moment they log in.



To-Do — the office's shared sticky note.

4.5 Tickets — Complaints & Follow-Ups

Sidebar → CRM → Tickets. A customer calls with a problem — make a ticket. It gets assigned to someone, tracked until it's done, and the customer thread stays attached so anyone can pick up the conversation.

What this feature actually does: Every complaint has an owner and a status — nobody can say "I thought you handled it." When a customer calls back angry, whoever answers sees the whole history: what was promised, who's handling it, where it stands. That's what turns a complaint into a saved account instead of a bad review.

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Office work items — notes, calls, and events assigned to people.

All (4)

Open (3)

In progress (1)

Done (0)

Cancelled (0)

SUBJECT	CLIENT / LOCATION	ASSIGNED TO	WHEN	STATUS
Call Call about EST-1003 — unanswered 7 days Estimate EST-1003 (\$450.00) was sent 7 days ago with no response. Auto-reminder email has gone out. ... Estimate follow-up	Nguyen, Lisa 1207 Maple Ave	Jessica Dengler	anytime	Open Set
Event Mulch delivery — check pile location Driver dumping 6 yds at 15 Summit Ct Thursday AM. ...	Wagner, Tom 15 Summit Ct	Pete Alvarez	Oct 14 0.5h budgeted	Open Set
Call Mrs. Henderson — mow height complaint Called about last Friday's cut — says it was scalped near the front walk. ... Account Issue	Henderson, Martha 412 Elm St	Jessica Dengler	Oct 13 anytime	Open Set

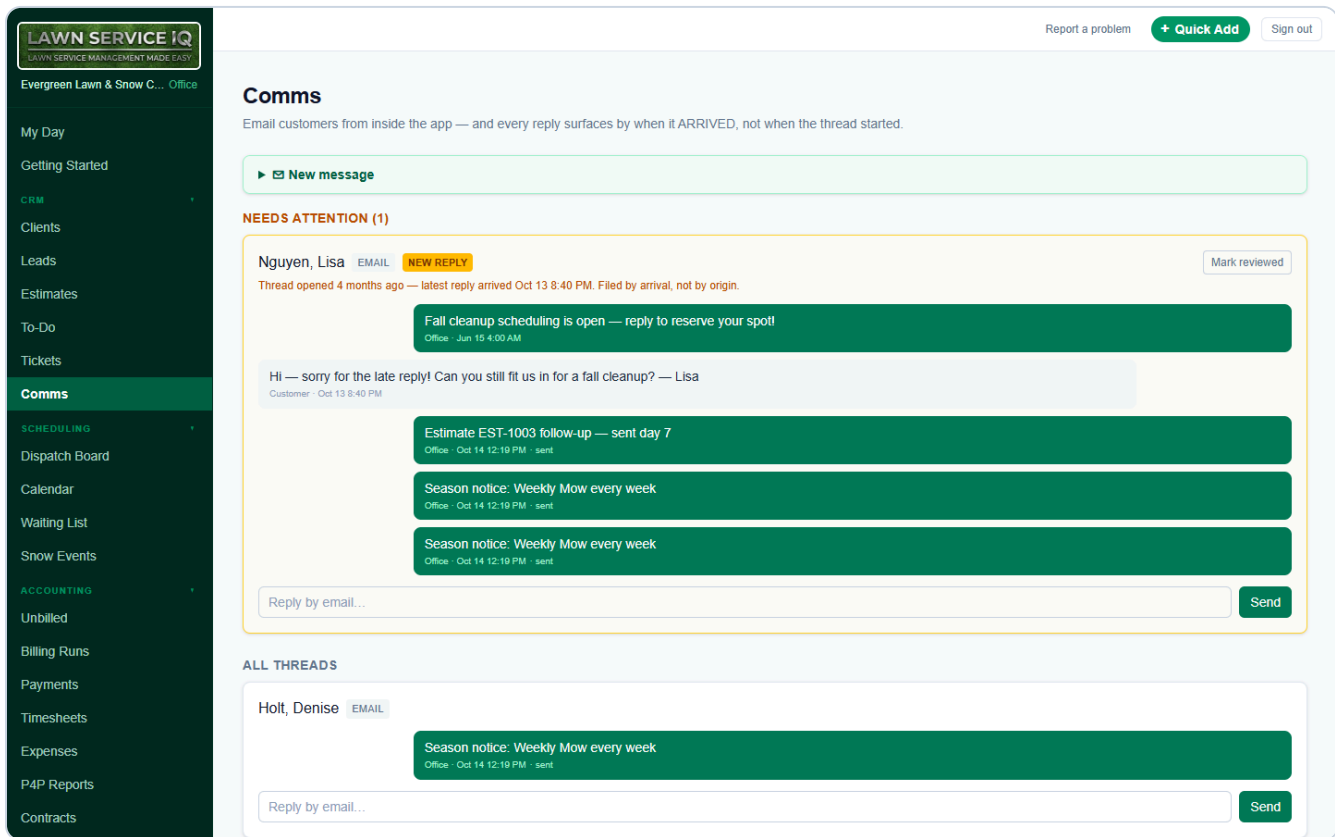
Tickets — every complaint or request, owned by a person, with a status.

The rule that saves businesses: if a customer complains and it isn't written down, it gets forgotten, and you lose the account. Ticket it every time — takes 20 seconds.

4.6 Comms — Customer Messages

Sidebar → CRM → Comms. Every text/email thread with customers in one place — no more "did anyone answer her?" conversations.

What this feature actually does: Customer messages live here instead of on someone's personal phone. If your office person is out sick, anyone else can open the thread and continue the conversation like they were there the whole time. Nothing lives in a pocket — it all lives in the business.



Comms — customer conversations, threaded and searchable.

5. Scheduling

5.1 Dispatch Board — Drag-and-Drop Routes

Sidebar → Scheduling → Dispatch Board. The heart of the operation. Each column is a crew; each card is a job. Drag a card from the Waiting List onto a crew → it's routed. The crew sees it on their phone instantly.

What this feature actually does: This replaces the whiteboard, the printouts, and the 6 AM phone calls. You build the day's routes by dragging cards — each crew's column shows stops and budgeted hours so you can see who's overloaded before they leave the yard. Change a route mid-day? Crew phones update. Snow job? There's a dedicated column. This one board is the reason customers buy the program.

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Dispatch Board

Today — Thursday, October 15 · 0 stops across 0 crews · drag between columns to reschedule

S 11

M 12

T 13

W 14

T 15

F 16

S 17

Waiting List

35 waiting

Moreno, Luis

321 Ashford Way

Spring Cleanup

\$185

Waiting

Crawford, Bill

1508 Harvest Ln

Fertilization App

\$65

Waiting

Osei, Kwame

56 Foxhill Ct

Mulch Install (per yd)

\$285

Waiting

Greenbriar HOA

1 Greenbriar Pkwy

Fall Cleanup

\$450

Waiting

Henderson, Martha

412 Elm St

Fert Step (7-Step Program)

\$62

Waiting

Henderson, Martha

412 Elm St

Fert Step (7-Step Program)

\$62

Waiting

Henderson, Martha

412 Elm St

\$62

Waiting

Snow

2 waiting

Willow Creek Church

890 Sanctuary Dr

Ice Melt Application

\$85

Waiting

Nguyen, Lisa

1207 Maple Ave

Snow Plow — Driveway

\$65

Waiting

Crew 1 — Mow East

0 stops · 0.0/24 B-hrs

Crew 2 — Mow West

0 stops · 0.0/16 B-hrs

Dispatch Board — drag cards between columns. Crews see changes on their phones immediately.

To route a day:

1. Pick the day along the top (the week strip).
2. Drag job cards from **Waiting List** (yellow column) onto the crew you want doing them.
3. Order matters — top of the column is the first stop of their day.
4. Snow jobs live in their own **Snow** column (blue).

Crew column header shows the day's load: "0 stops · 0.0/24 B-hrs" means zero jobs and zero of the 24 budgeted hours filled. Fill the board until the hours look right for the day.

5.2 Calendar — The Big Picture

Sidebar → **Scheduling** → **Calendar**. Month view of everything scheduled — recurring mows, installs, cleanups, snow. Good for spotting dead days or overloaded weeks.

What this feature actually does: Where the Dispatch Board is today's work, the Calendar is the season. Spot the gaps where you could squeeze in another job, see weeks that are too thin to cover payroll, and watch the recurring schedule build itself once service plans are in place.

The screenshot shows the 'Calendar' view in the Lawn Service IQ software. The interface includes a sidebar on the left with navigation options like 'My Day', 'Getting Started', 'CRM', 'SCHEDULING', 'ACCOUNTING', and 'Contracts'. The main area displays a calendar for October 2026. The calendar grid shows days of the week (MON to SUN) and dates. Jobs are represented by colored bars: green for regular work (e.g., 'Crew: Henderson', 'Crew: Nguyen', 'Crew: Holt' on Tuesday the 13th) and purple for 'Client holiday restrictions' on Wednesday the 28th and Thursday the 29th. A 'Quick Add' button is visible in the top right corner.

Calendar — the whole month, every job.

5.3 Waiting List — Approved Work Waiting to Route

Sidebar → Scheduling → Waiting List. Every approved estimate and signed job that hasn't been put on a route yet. Think of it as your work backlog.

What this feature actually does: This is the leak-plugger. Without it, sold work sits in email threads until the customer calls asking "when are you coming?" — or worse, cancels. Everything approved lands here in one list so nothing sold ever goes unscheduled. Empty waiting list = you're caught up; growing list = you're selling faster than you're routing.

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Waiting List

4 weeks

Generate from plans

37 jobs waiting

\$7,182 unscheduled

Mulch — Black: 23 yd

Mulch — Red: 14 yd

Mulch — Playground: 12 yd

Step 1 — Crabgrass prev + fert

window: Apr 1–20

3 jobs · \$186

Batch to crew...

Route all 3

Henderson, Martha

412 Elm St

Fert Step (7-Step Program)

Apr 1–20

\$62.00

2d

Crew...

Route it

Reyes, Carmen

770 Meadowbrook Rd

Fert Step (7-Step Program)

Apr 1–20

\$62.00

2d

Crew...

Route it

Bishop, Sarah

67 Pineneedle Pl

Fert Step (7-Step Program)

Apr 1–20

\$62.00

2d

Crew...

Route it

Mulch — Black

window: Apr 14–May 2

4 jobs · \$2,185

Batch to crew...

Route all 4

Patterson, Greg

88 Birchwood Ln

Mulch Install (per yd) 6 yd

Apr 14–May 2

\$570.00

2d

Crew...

Route it

Nguyen, Lisa

1207 Maple Ave

Mulch Install (per yd) 4 yd

Apr 14–May 2

\$380.00

2d

Crew...

Route it

Wagner, Tom

15 Summit Ct

Mulch Install (per yd) 8 yd

Apr 14–May 2

\$760.00

2d

Crew...

Route it

Holt, Denise

77 Brookstone Ct

Mulch Install (per yd) 5 yd

Apr 14–May 2

\$475.00

2d

Crew...

Route it

Mulch — Red

window: Apr 14–May 2

3 jobs · \$1,330

Batch to crew...

Route all 3

Schmidt, Howard

301 Creekview Dr

Mulch Install (per yd) 7 yd

Apr 14–May 2

\$665.00

2d

Crew...

Route it

Kim, Daniel

940 Laurel Dr

Mulch Install (per yd) 4 yd

Apr 14–May 2

\$380.00

2d

Crew...

Route it

Waiting List — sold work that still needs a spot on the board.

5.4 Snow Events — Winter Dispatch

Sidebar → Scheduling → Snow Events. When it snows, you create a snow event — the app turns your plow/salt contracts into routes for that storm, tracks accumulation triggers, and logs who got plowed when (your legal proof if someone slips).

What this feature actually does: Snow is where the legal protection lives. Every plow and salt run gets timestamped proof — if someone slips in a lot three weeks later, you pull the record showing exactly when your crew serviced it. The trigger-depth system also means contracts fire automatically: 2-inch trigger hits, the app knows which properties to route. That's the difference between scrambling at 4 AM and already having the storm planned.

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Snow Events

Log a snowfall → see who triggers → one click builds priced, routed work. Trigger and tiers come from each customer's plan.

Date

10/15/2026

Snowfall (inches)

2

Log event

Default trigger is 1' — deeper snow catches more plans.

No snow events yet — log the first one above and watch routes build themselves.

SNOW COVERAGE (5 PLANS)

PROPERTY	SERVICE	TIER\$	TRIGGER"	STORM B-HRS	MELT B-HRS	MELT\$	MELT OVERRIDE\$	
Crawford, Bill 1508 Harvest Ln ⚠ Walks & porch only — no plow on pavers	Hand Shoveling Crew 3 — Projects & Snow	1-3": \$55 · 3-6": \$83 · 6+": \$121	2	0.75	0.3	\$23	—	Save
Wagner, Tom 15 Summit Ct ⚠ No service under 3" — customer call-out	Snow Blowing Crew 3 — Projects & Snow	1-3": \$75 · 3-6": \$113 · 6+": \$165	3	1	0.4	\$30	—	Save
Greenbriar HOA 1 Greenbriar Pkwy ⚠ Plow lot + salt docks	Snow Plow — Commercial Lot Crew 3 — Projects & Snow	1-3": \$250 · 3-6": \$375 · 6+": \$550	1	3.5	1	\$75	—	Save
Northside Dentistry 455 High St	Snow Plow — Commercial Lot Crew 3 — Projects & Snow	1-3": \$250 · 3-6": \$375 · 6+": \$550	1	4	1.25	\$94	—	Save
Willow Creek Church 890 Sanctuary Dr ⚠ Plow driveway, then hand-shovel front walk	Snow Plow — Driveway Crew 3 — Projects & Snow	1-3": \$65 · 3-6": \$98 · 6+": \$143	1	0.9	0.5	\$38	—	Save

Snow Events — per-storm dispatch: trigger depth, routes, and timestamps for every lot.

6. Money (Accounting)

6.1 Unbilled — Work Done, Not Yet Invoiced

Sidebar → Accounting → Unbilled. Crews finished the work, but no invoice exists yet — money you're owed that hasn't been asked for. This is the "leak" page: if it stays full, you're doing free work.

What this feature actually does: In most businesses the slow death is work that gets done and never billed — a crew finishes a cleanup Friday and nobody remembers to invoice it. This page makes that impossible: every completed job that lacks an invoice sits here in plain sight until you bill it. One click sends invoices for ALL of it.

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Unbilled Bucket

Completed work waiting for the next billing run — grouped by client so one run makes one invoice per client.

0 completed jobs · 0 clients

\$0 queued

Run billing now → 0 invoices

Export CSV

COMPLETED	CLIENT / PROPERTY	SERVICE	CREW	AMOUNT
Bucket's empty — every completed job is invoiced.				

Unbilled — completed work waiting to be invoiced. Green button runs billing.

To bill everything at once:

1. Open **Unbilled**.
2. Click the green **Run billing now** button.
3. The app makes draft invoices for everything listed — check them under **Payments**.

6.2 Payments — Invoices and Collections

Sidebar → Accounting → Payments. Every invoice and every dollar against it. Outstanding total up top — that's the number to watch.

What this feature actually does: Full invoice lifecycle without opening QuickBooks: send, mark paid, void mistakes, push to QB with one click. The outstanding total at the top is your "money still owed" number — watch it daily. Customers pay you by email, card, or check — you mark it when it clears and the app keeps the books honest.

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Payments

Invoices and the money against them — record a payment when a check or card clears.

\$275 outstanding \$110 collected

INVOICE	CLIENT	LINES	TOTAL	STATUS	PAYMENTS
INV-1047	Fitzpatrick, Sean	▶ 1 line - adjust	\$55.00	Draft	—
INV-1046	Aldana, Maria	▶ 1 line - adjust	\$55.00	Draft	—
INV-1045	Schmidt, Howard	▶ 1 line - adjust	\$55.00	Draft	—
INV-1044	Patterson, Greg	▶ 1 line - adjust	\$55.00	Draft	—
INV-1043	Fitzpatrick, Sean	▶ 1 line - adjust	\$55.00	Sent QB ✓	—
INV-1042	Aldana, Maria	▶ 1 line	\$110.00	Paid	\$110 manual - succeeded

Payments — every invoice with Send / Paid / Void / QuickBooks buttons on the row.

The invoice lifecycle (learn this):

1. **Draft** → invoice exists, customer hasn't seen it. You can still edit.
2. **Send** → emails/texts the invoice to the customer. Status becomes **Sent**.
3. **Paid** → click it when a check or card payment clears. Records the payment.
4. **Void** → cancels an invoice made by mistake.
5. → **QB** → pushes the invoice to QuickBooks Online (once connected in Settings). A **QB ✓** badge means it's already in QuickBooks.

→ **QB only shows on unpaid invoices.** If you don't see the button, the invoice is already paid — push it before you mark Paid, and the payment syncs automatically too.

6.3 Timesheets — Crew Hours

Sidebar → **Accounting** → **Timesheets**. Crews clock in/out on their phones; the hours land here. Approve them for payroll.

What this feature actually does: No more paper timecards, no "I worked 8 hours" arguments — the crew app timestamps everything with real clock data and GPS. Hours land here automatically; you approve and payroll is already figured. If someone claims a shift they didn't work, the timesheet is the record.

Timesheets
Clocked hours for hourly staff — the non-P4P side of payroll.

0 clocked in now 0.0 hrs logged · \$0.00 hourly pay

EMPLOYEE	CLOCK IN	CLOCK OUT	HOURS	PAY
No clock entries yet — use the form below.				

Clock in as... (hourly staff only) Clock In

Timesheets — real clock-in data from the crew app, ready for payroll.

6.4 Expenses — What You Spent

Sidebar → Accounting → Expenses. Gas, materials, repairs — log it here and attach it to a job or just the company. Crews can also submit expenses from their phones with receipt photos.

What this feature actually does: Crews photograph a receipt on the job and it lands here with the job attached — so you finally know what each property actually costs to service, not what you think it costs. Attach to a job and it counts against that job's margin; leave it company-level and it's overhead. Either way it hits your reports.

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Expenses

7d

30d

90d

Receipts and job costs crews submit from the field. Last 30 days — \$0.00 total.

DATE	EMPLOYEE	AMOUNT	JOB	NOTE	RECEIPT
No expenses in the last 30 days — crew-submitted receipts will appear here.					

Expenses — every dollar out, categorized.

6.5 P4P Reports — Pay-for-Performance

Sidebar → Accounting → P4P Reports. Pay-for-performance: crews get paid by the job's budgeted hours, not clocked hours — fast work earns more per hour. This page computes the pay from completed stops automatically.

What this feature actually does: This is the payroll system competitors don't have. Instead of paying for hours burned, you pay for work done — a 2-B-hour job pays the same whether it takes 90 minutes or 3 hours. Crews who hustle earn more; slackers can't milk the clock. It cuts labor cost bloat without you policing anyone — the math does it.

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Pay for Performance

Pool = job price x service %, split by weight x hours — never below each member's floor. High performers earn more; there's no pay ceiling.

Carlos Vega: \$15.11

Dan Kowalski: \$12.08

Mike Torres: \$15.71

Ray Jimenez: \$23.83

Sam Okafor: \$19.07

\$10.00 in deductions logged

PROGRAM SETTINGS

Labor billing rate (\$/hr charged to customers)

75

Guaranteed floor (\$/hr — pay-period average can't go below)

20

Save

SERVICE RATES — % OF LABOR REVENUE PAID TO CREW

Annuals Install (per flat)	36	%	Save	Bi-Weekly Mow	39	%	Save
Fall Cleanup	37	%	Save	Fertilization App	33	%	Save
Fert Step (7-Step Program)	33	%	Save	Hand Shoveling	45	%	Save
Ice Melt Application	35	%	Save	Monthly Weeding	39	%	Save
Mulch Install (per yd)	37	%	Save	Snow Blowing	45	%	Save
Snow Plow — Commercial Lot	45	%	Save	Snow Plow — Driveway	45	%	Save
Spring Cleanup	37	%	Save	Weekly Mow	39	%	Save

DATE	JOB	CREW	PRICE	POOL %	POOL	SHARES
Oct 12	Weekly Mow Aldana, Maria	Crew 1 — Mow East Σ weight 3.5	\$55	39%	\$21.45	Carlos \$7.55 · Dan \$6.04 · Mike \$7.85
Oct 12	Weekly Mow Fitzpatrick, Sean	Crew 2 — Mow West Σ weight 2.3	\$55	39%	\$21.45	Ray \$11.92 · Sam \$9.53
Oct 10	Weekly Mow Patterson, Greg	Crew 1 — Mow East Σ weight 3.5	\$55	39%	\$21.45	Carlos \$7.55 · Dan \$6.04 · Mike \$7.85
Oct 10	Weekly Mow Schmidt, Howard	Crew 2 — Mow West Σ weight 2.3	\$55	39%	\$21.45	Ray \$11.92 · Sam \$9.53

PENALTIES & DEDUCTIONS — ALL CREW MEMBERS

DEDUCTION LOG

P4P Reports — per-crew pay computed from budgeted hours vs. actual work done.

6.6 Contracts — Season Agreements

Sidebar → Accounting → Contracts. Season-long agreements (annual mow contracts, snow contracts with trigger depths). Signed contracts auto-generate the recurring work.

What this feature actually does: A signed contract becomes a self-running machine — the weekly mows, the snow triggers, the billing — all generated automatically until the term ends. No "did we schedule the Johnsons this week?" The contract IS the schedule.

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Service agreements as plan windows — seasonal work with start/end dates, renewals surfaced before they lapse.

2027 LMP renewals

0 of 17 customers generated

Override cover text (blank = setting)

Generate 2027 LMPs

Annuals install (per flat)

New customer-facing description...

Update all

City or ZIP...

all services

%

+% increase

RENEWALS DUE (16)

Holt, Denise 77 Brookstone Ct	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 1 — Mow East	\$55/wk	renew in 16d	Renew +1yr	Pause
Schmidt, Howard 301 Creekview Dr	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 1 — Mow East	\$55/wk	renew in 16d	Renew +1yr	Pause
Osei, Kwame 56 Foxhill Ct	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 2 — Mow West	\$55/wk	renew in 16d	Renew +1yr	Pause
Reyes, Carmen 770 Meadowbrook Rd	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 1 — Mow East	\$55/wk	renew in 16d	Renew +1yr	Pause
Wagner, Tom 15 Summit Ct	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 2 — Mow West	\$55/wk	renew in 16d	Renew +1yr	Pause
Patterson, Greg 88 Birchwood Ln	Annuals Install (per flat)	Annual	May 1, 2026 → Oct 31, 2026	—	\$480	renew in 16d	Renew +1yr	Pause
Bishop, Sarah 67 Pineneedle Pl	Annuals Install (per flat)	Annual	May 1, 2026 → Oct 31, 2026	—	\$480	renew in 16d	Renew +1yr	Pause
Delgado, Ana 233 Oriole Way	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 1 — Mow East	\$55/wk	renew in 16d	Renew +1yr	Pause
Kim, Daniel 940 Laurel Dr	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 2 — Mow West	\$55/wk	renew in 16d	Renew +1yr	Pause
Bishop, Sarah 67 Pineneedle Pl	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 1 — Mow East	\$55/wk	renew in 16d	Renew +1yr	Pause
Crawford, Bill	Weekly Mow	Weekly	Apr 1, 2026 → Oct 31, 2026	Crew 2 — Mow West	\$55/wk	renew in 16d	Renew +1yr	Pause

Contracts — the season agreements that drive recurring routes and winter triggers.

7. Employees & Crews

Sidebar → Employees. Everyone who works for you — office staff and field crews. This is where you create crew logins so they can use the crew app on their phones, set pay rules, and see who's assigned to which crew.

What this feature actually does: It separates people from access. A crew member gets a phone login that can only see their route — they can't see your prices, your other customers' info, or your books. A dispatcher sees the office but can't touch Settings. An owner sees everything. Pay rules live here too — hourly, salary, or P4P weight, so the payroll math is already right when timesheets come in.

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Employees & Crews

Who's on the team and which truck they're on. Crew changes show up on the Dispatch Board immediately.

CREWS

Crew 1 — Mow East

3 members · efficiency ×1.1

Carlos Vega P4P ×1.25

Dan Kowalski P4P ×1

★ Mike Torres P4P ×1.3 +\$1.5

Crew 2 — Mow West

2 members · efficiency ×0.95

★ Ray Jimenez P4P ×1.25 +\$1.5

Sam Okafor P4P ×1

Crew 3 — Projects & Snow

2 members · efficiency ×1

★ Pete Alvarez P4P ×1.2 +\$1.5

Luke Brennan P4P ×1

New crew name (e.g. Crew 5 — South Side)

Add crew

EMPLOYEES

NAME	PAY	PACKAGE	ESTIMATES	APP ACCESS	CREW
Carlos Vega crew · hired Apr 2023	P4P ×1.25	5 PTO days · 7 holidays \$550 yr-end bonus tier	☐	crew ✓	Save
Dan Kowalski field · hired May 2025	P4P ×1	3 PTO days \$550 yr-end bonus tier	☐	no login — give one	Save
Jessica Dengler dispatcher	\$24/hr	no hire date	☐	dispatcher ✓	Save
Luke Brennan field · hired Apr 2024	P4P ×1	3 PTO days · 7 holidays \$550 yr-end bonus tier	☐	no login — give one	Save
★ Mike Torres crew · hired Mar 2022	P4P ×1.3 +\$1.50/hr leader premium	5 PTO days · 7 holidays \$1,000 yr-end bonus tier	☒	crew ✓	Save
★ Pete Alvarez field · hired Jun 2020	P4P ×1.2 +\$1.50/hr leader premium	7 PTO days · 7 holidays \$1,000 yr-end bonus tier	☐	no login — give one	Save
★ Ray Jimenez field · hired	P4P ×1.25 +\$1.50/hr	7 PTO days · 7 holidays \$1,000 yr-	☐	no login — give one	Save

Employees — create crew logins here; crew members sign into the phone app with these.

To add a crew member:

1. + **Quick Add** → **New Employee** (or from the Employees page).
2. Name, phone, role (crew member / foreman / office).
3. Give them a login — they use it on the crew app on their phone.
4. Assign them to a crew so they see the right route each morning.

8. Reports & KPIs

Sidebar → **Reports** and **Sidebar** → **KPI**. Reports turn your data into answers: revenue by service, hours per route, who's efficient, what jobs lose money. Check Reports monthly; check KPI when you want the scoreboard.

What this feature actually does: This is where the app pays for itself in decisions. Not "did we work hard?" but "did we make money?" — revenue by service line, which routes are dense and which are wasteful, which crews beat their B-hours and which bust them. The answer "mulch installs pay 3× what mowing pays per hour" is hiding in here waiting to change your business.

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Reports

The whole business on one page — work, money, and the queues that need eyes.

TODAY

STOPS ON TODAY'S ROUTES

0

CREWS WORKING

0

7 employees in the field

COMMS NEEDING ATTENTION

1

OPEN TICKETS

4

MONEY

COLLECTED

\$110

OUTSTANDING

\$275

6 invoices

UNBILLED WORK

\$0

0 completed jobs

WAITING LIST VALUE

\$7,182

37 approved jobs

Revenue by service

Mulch Install (per yd)	10 jobs	\$5,510
Fert Step (7-Step Program)	21 jobs	\$1,302
Weekly Mow	14 jobs	\$770
Fall Cleanup	2 jobs	\$675
Spring Cleanup	1 jobs	\$185
Monthly Weeding	2 jobs	\$90
Ice Melt Application	1 jobs	\$85
Snow Plow — Driveway	1 jobs	\$65
Fertilization App	1 jobs	\$65

Pipeline & ops

Active clients	18
Completed work value	\$220
Pending leads	2
Renewals due within 45 days	16
Snow events this season	0

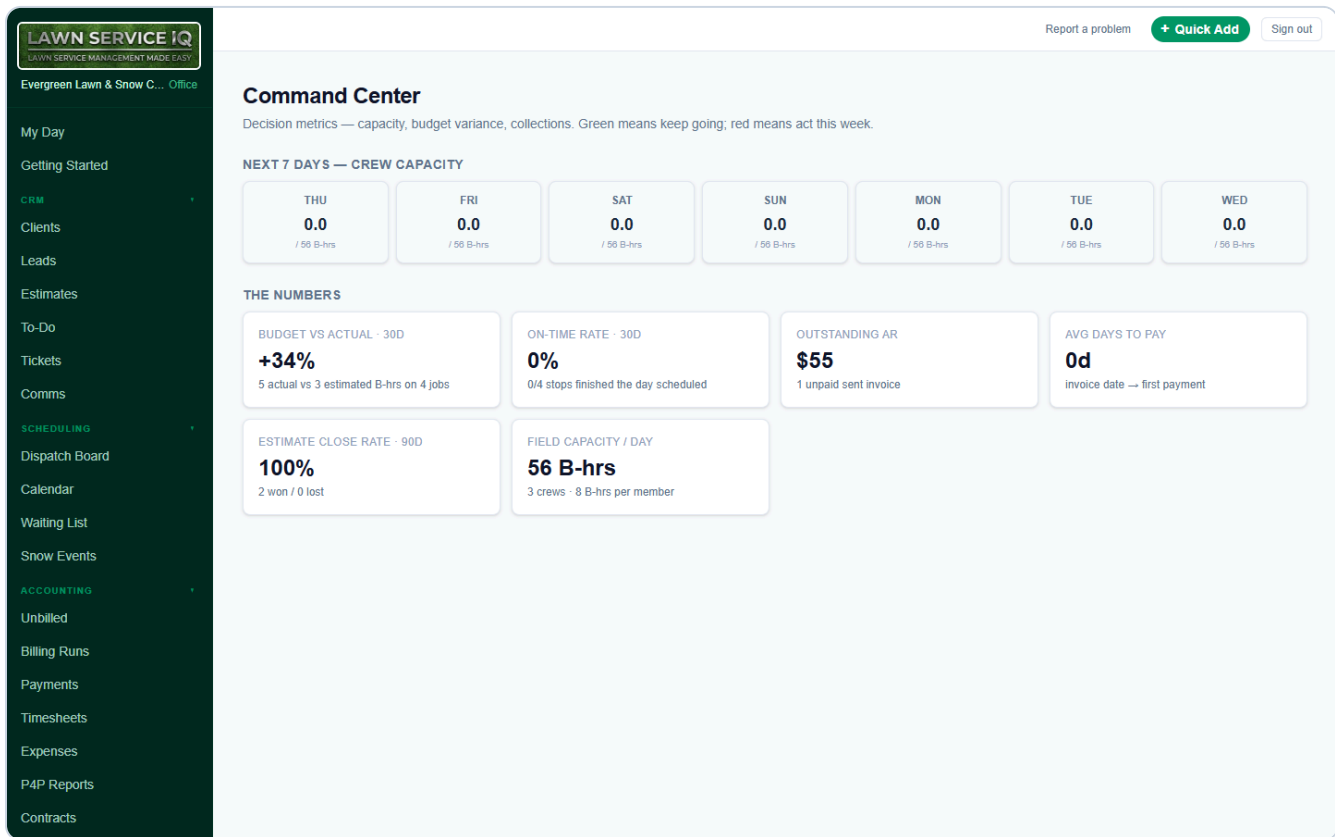
CREW LOAD TODAY

Crew 1 - New East

Crew 2 - Dan Mills

Crew 3 -

Reports — the numbers that tell you where the money is made and lost.



9. Other Pages

What these do and why they exist:

- **Directory** — every business contact that isn't a customer: your seed supplier, the mower repair guy, your insurance agent. When a truck breaks down at 7 AM, the vendor's number is here — not in someone's personal phone.
 - **Assets** — equipment that matters: trucks, mowers, plows. Assign equipment to crews so "who has the zero-turn" is a lookup, not a phone call. Maintenance notes live here too.
 - **Chemicals** — fertilizer/pesticide application log. Some states legally require recording what you sprayed, where, and when. This page exists because a chemical log is a compliance document, not a nice-to-have.
 - **Marketing** — track where customers heard about you (door hangers, referral, Facebook). Marketing money goes to what actually produces — this page proves which channel earned it.
 - **Forms** — custom checklists crews fill out in the field: property inspection, spring startup checklist, equipment pre-trip. Paper forms get lost; these sync back to the office.
 - **Audit** — the paper trail. Every change, every delete, every price edit — who did it and when. If a number looks wrong, this is where you find out who touched it.
 - **Getting Started** — a guided checklist that walks a brand-new company through the setup order, so nothing gets skipped.
 - **Help** — quick answers inside the app.
-
- **Directory** — the company phone book: staff, vendors, contacts.
 - **Assets** — trucks and equipment: who's driving what, maintenance notes.
 - **Chemicals** — fertilizer/pesticide application records (keep these — some states legally require the log).
 - **Marketing** — track where customers heard about you and what campaigns produced.
 - **Forms** — custom forms (property inspections, spring checklists) crews fill out on site.
 - **Audit** — the paper trail: who changed what, when. If a price looks wrong, this tells you who touched it.
 - **Help** — in-app help page with quick answers.
 - **Getting Started** — the checklist for a brand-new company setup.

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Asset Tracking

Trucks and equipment assigned to crews — what's ready, what's in the shop.

Ready: 5In Shop: 1Down: 0

EQUIPMENT	TYPE	ASSIGNED CREW	STATUS	NOTES	
Salt spreader (poly hopper)	Spreader	Crew 3 — Projects & Snow	In Shop	Auger bearing — parts ordered 10/4	ReadyDown
Exmark Lazer Z #5	Mower	Crew 2 — Mow West	Ready	—	To shopDown
John Deere Z930M #3	Mower	Crew 1 — Mow East	Ready	—	To shopDown
Toro Z Master #4	Mower	Crew 1 — Mow East	Ready	—	To shopDown
Ford F-550 #1 (plow)	Truck	Crew 3 — Projects & Snow	Ready	—	To shopDown
Ford F-550 #2 (plow)	Truck	Crew 3 — Projects & Snow	Ready	—	To shopDown

Add equipment — e.g., Stihl BR800 blower

misc

No crew

Add

Assets — equipment tracking.

Evergreen Lawn & Snow C... Office

My Day

Getting Started

CRM

Clients

Leads

Estimates

To-Do

Tickets

Comms

SCHEDULING

Dispatch Board

Calendar

Waiting List

Snow Events

ACCOUNTING

Unbilled

Billing Runs

Payments

Timesheets

Expenses

P4P Reports

Contracts

Report a problem

+ Quick Add

Sign out

Help & Manual

Every screen, step by step. The printable copy is docs/MANUAL.txt — or print this page.

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Welcome & how this manual works

Lawn Service IQ runs your whole company from one system: office scheduling and billing, the crew field app, customer-facing estimates and portal, payroll, and snow. This manual walks through every screen in the order you'd actually set them up.

There are two ways to run Lawn Service IQ, chosen at setup:

- Standalone — everything runs and stays on your office computer. Works with no internet. With office-network sharing on (a one-checkbox option), the whole office works from this one computer's live data and crew phones sync live on office WiFi; outside the office, crews work offline all day and sync when they're back. If the office computer is off, the system is off.
- Online (cloud) — your data lives on our servers. Sign in from any computer, tablet, or phone, anywhere. Crews sync live in the field on cellular; an office power outage changes nothing.

Screens in this manual are named exactly as they appear in the left sidebar. Use Ctrl+F in your browser to jump to any term.

Installing the app (standalone)

The standalone version is a normal Windows program — no IT department needed.

- Run LawnServiceIQ-Setup.exe.
- Click Next through the installer. It installs only for your Windows user — no admin password required.
- Leave "Create a desktop shortcut" checked if you want one; a Start Menu entry is created either way.
- Click Finish — Lawn Service IQ launches itself.
- Pin it to your taskbar; right-click the running app's icon → Pin to taskbar.

The app runs quietly in the background after the first launch, so the window opens instantly next time. Everything — including your database — lives inside the app folder on this computer.

Your data folder is appdata inside the install location. Back that folder up (copy it to an external drive or cloud sync

Help — quick answers inside the app.

10. Settings

Sidebar → Settings. The plumbing: company name/logo, users and permissions, email/text setup (Resend/Twilio), **QuickBooks Online connect**, data export, backups, and your license info.

What this feature actually does: Settings is where the product connects to your real life: your company brand on invoices, your email and text services so customers actually receive messages, your QuickBooks connection so the accountant sees everything, and your backup folder so a dead hard drive can't kill the business. It's also where your license lives — the activation code that proves you own it.

Evergreen Lawn & Snow C... Office

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+ Quick Add

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Settings

Company-wide configuration — payroll mode, billing day, and which adapters plug in.

Company

Company name

Evergreen Lawn & Snow Care

Timezone

New York

no logo

Company logo (PNG/JPG, under 1 MB)

Choose File

No file chosen

Shows on the sign-in screen, sidebar, and customer-facing pages. Save settings to apply.

Payroll & billing

Payroll mode

Pay-for-performance

Weekly billing day

Monday

Late fee (\$, flat — 0 disables)

15.00

Apply after (days overdue)

30

B-hours per crew member / day

8

Unpaid sent invoices automatically pick up the fee once they age past the threshold — applied once, audited, and shows as a typed line item.

Services & integrations

Payment processor

None (record manually)

Accounting

QuickBooks Online

Review link (Google / Facebook — powers automatic review requests)

https://g.page/r/your-business/review

Settings — company profile, integrations, QuickBooks, backups.

QuickBooks Online: Settings → **Connect to QuickBooks** → sign into Intuit → done. After that, invoices push over with the → **QB** button on the Payments page.

Important: set up **backups** in Settings early. Point the backup folder at OneDrive or Google Drive so a dead computer can't take your customer list with it.

11. Something's Wrong — Fix It Yourself

Nine times out of ten, the fix is in this section. Find your symptom, follow the steps. If none of it works, use **Report a problem** at the top of any page — that goes straight to support.

11.1 — Can't get in

"I forgot my password / my password doesn't work"

1. On the sign-in screen, click **Forgot password** (or "reset") if shown — it emails a reset link.
2. No reset option? The **owner** can set a new password for any user: sign in as owner → **Employees** → open the person → reset their login.
3. Owner locked out? That's the one case that needs support — use Report a problem from another device or email support directly.

"The app opens but shows a license screen" — find the activation code in your purchase email (check spam/junk — automated mail lands there often) and enter it. New computer or reinstalled Windows? The same code reactivates — it's tied to your business, not one machine forever.

"It asks me to set up a company, but I already set one up" — the app is looking at an empty database. Most likely cause: you're on a different computer or user account than the one that ran setup, or the data folder was moved/deleted. On the ORIGINAL computer everything is fine — if that computer died, restore from your backup (Section 10) on the new machine.

11.2 — The app won't start or acts weird

"I double-click the icon and nothing happens"

1. Wait 30 seconds — first start after reboot takes a moment while the database wakes up.
2. Check the system tray (little arrow by the clock) — it may already be running.
3. Restart the computer. Seriously — this fixes most stuck states.
4. Still nothing? Reinstall from the original Setup file — your data is stored separately and survives a reinstall.

"A page is blank or half-loaded" — close and reopen the app first. If it's just one page, the fix is usually waiting 10 seconds (big reports take a moment). If the whole app is blank, restart the computer.

"Everything is in a different language / looks wrong / dates are off" — check the timezone picked during setup: Settings → company settings. Wrong timezone makes dates and schedules look shifted.

11.3 — Customers, work, and routing problems

"I added a customer but can't route them" — a customer needs three things before they can be routed: (1) a **property** with an address, (2) a **service plan** or a job on that property, (3) the job has to be on the **Waiting List** so you can drag it onto a crew. Missing one = nothing to dispatch.

"The crew says their route is empty"

1. Check the Dispatch Board — are there actually cards in their column for today?
2. Check the date — crews might be looking at tomorrow; the day strip at top shows which date you're viewing.
3. Standalone install? Their phone needs to be on the office WiFi to pull the update — sync happens at the yard.
4. Cloud install? Have them pull down to refresh or toggle airplane mode off/on.

"I deleted something by accident" — check **Sidebar** → **Trash**. Deleted records sit there and can be restored. Trash is the safety net — look there before panicking.

"A number looks wrong" (wrong price, wrong hours) — **Sidebar** → **Audit** shows who changed what and when. Find the change, fix it, and you'll know who to retrain.

11.4 — Money problems

"Customer says they never got the invoice"

1. Did you click **Send**? A Draft invoice is invisible to the customer — sending is a separate step.
2. Check the client's email address for typos on their page.
3. Tell them to check spam/junk — invoice emails get filtered often.
4. Still nothing? Settings → email sending — make sure your mail service is connected.

"I made an invoice wrong" — drafts can be edited freely. Already sent? Click **Void**, fix the mistake, and send a fresh one. Never delete — voiding keeps the paper trail clean for taxes.

"The → QB button is missing" — it only shows on unpaid (draft/sent) invoices and only after QuickBooks is connected in Settings. Already paid? The button's gone by design — sync before marking paid next time.

"QuickBooks push failed" — Settings → QuickBooks shows a sync log with the actual error. Most common: connection expired → click **Reconnect** and sign in to Intuit again.

"A payment came in but doesn't show" — payments get recorded manually: find the invoice in Payments → click **Paid** → enter the amount and method. The app doesn't see your bank; you tell it when money clears.

11.5 — Crew app problems (the phone side)

"Crew member can't sign in" — check Employees: do they have a login at all? ("no login — give one" means they don't.) Email typo? Also confirm their role is **Crew** — wrong role lands on the wrong screen.

"Crew says 'not assigned to a crew'" — Employees → open them → assign them to a crew. The app can't show a route until they belong to one.

"Their work isn't showing up in the office" — they're offline or out of coverage. Their app queues everything and sends it when signal returns — watch for the green Synced bar on their phone. Don't panic-edit the route until they sync.

"iPhone won't install the app" — there's nothing to install on iPhone: it's Share → Add to Home Screen, and it **MUST** be done in Safari, not Chrome. Walk them through the Crew Manual section 1.

11.6 — The scary-sounding stuff

"The computer the app lives on died / is getting replaced" — standalone installs keep data in the app's own folder. New computer: install the app, activate with your code, restore your latest backup (Settings → backup/restore). If backups were pointed at OneDrive/Google Drive, this takes minutes. If you never set a backup folder — this is the lesson that hurts; start backups today.

"Windows says the app is dangerous" — SmartScreen warns on anything not from a giant company. More info → Run anyway. It's your own software.

"Everything's just GONE" — 99% of the time you're looking at a different org, a different computer, or a filtered view. Check Trash, check you're signed into the right account, check the date filters on the page. Then Report a problem.

12. The Words — Plain-English Glossary

Everything the program calls things, translated:

Client	A paying customer — a person or business you work for.
Property	The actual address you service. One client can have several (landlords, HOAs).
Lead	Someone interested who isn't a customer yet.
Estimate	A price quote you send. Customer approves it → it becomes real work.
Dispatch / Route	Assigning jobs to a crew for a specific day, in order.
Waiting List	Work that's sold but not scheduled yet.
B-hours	Budgeted hours — how many man-hours you think a job takes. Prices and P4P pay are built on this.
P4P	Pay-for-performance — crew pay based on budgeted hours, so fast crews earn more per hour.
Unbilled	Work done but not invoiced yet — money owed to you that you haven't asked for.
Draft / Sent / Paid / Void	Invoice statuses. Draft = editable, not sent. Sent = customer got it. Paid = money recorded. Void = canceled but kept on file.
Ticket	A complaint, request, or follow-up assigned to a person until it's handled.
Snow Event	One storm's dispatch: which lots get plowed, when, proof of service.
Role	What a login is allowed to see: Owner > Dispatcher > Estimator > Crew.
Standalone vs Cloud	Standalone = data lives on the office computer. Cloud = data lives on our servers, reachable from anywhere.
Synced	The phone sent its work to the office and got the office's updates. Green = current.
QB / QuickBooks	QuickBooks Online — the bookkeeping program. The app pushes invoices and payments into it so your accountant sees everything.

13. A Typical Day — Putting It All Together

Morning:

1. Open **My Day** — read field messages, clear overdue tickets.
2. Open **Dispatch Board** — confirm today's routes, drag anything new from the Waiting List onto a crew.
3. Check **Dashboard** — glance at money and work numbers.

During the day:

1. New customer calls → + **Quick Add** → **New Client**, or make a **Lead** and send an **Estimate**.
2. Complaint comes in → make a **Ticket** and assign it.
3. Message crews from **My Day** → **Message the field**.

End of day / week:

1. **Unbilled** → **Run billing now** → invoices become drafts.
2. **Payments** → Send drafts, mark paid when money arrives, push → **QB**.
3. **Timesheets / P4P** → approve hours for payroll.
4. Snow storm → **Snow Events** → create the event, routes build themselves.

Stuck? Use **Report a problem** (top of every page) — it sends the issue straight to support. Or check **Sidebar** → **Help** first.