CREWSTRO

Office training manual

Every Crewstro feature, step by step. And how to teach technicians to use the app.

For office assistants, managers and owners of cleaning companies.

October 2026 edition

What is in this manual

Part 1. Before you start

1 How to use this manual
2 The words you will see
3 The three parts of Crewstro
4 Sign in to the system
5 The map of the screen

Part 2. Set things up (do it once)

6 The company details and the timezone
7 The services you sell (Catalog) and tax
8 The work rules (Operations)
9 Messages and reminders for the client
10 The company phone and text messages
11 Making and receiving calls through Crewstro
12 Getting paid online (Stripe)
13 The online booking page
14 Bringing clients from another system
15 Receiving leads from Facebook, Google and HighLevel

Part 3. The office day to day

16 The Dashboard: understand the day in 2 minutes
17 Clients
18 Requests (orders that came in)
19 Quotes
20 The Schedule
21 Jobs and regular clients (recurring)
22 The Map and the routes
23 Invoices
24 Payments
25 Messages with clients and the team chat
26 Office tasks

Part 4. The team and the pay

27 Team: invite, permissions and profile
28 Check and fix the timesheet
29 Payroll and the pay stub
30 The meal break and the waiver

Part 5. Growing the company

31 Marketing, reviews and referrals
32 Reports and expenses
33 The extra modules (add-ons)

Part 6. Teaching the technician to use the app

34 Before the training: what to get ready

35 Installing the app on the phone

36 The first sign in

37 Turning on notifications (push)

38 Allowing location (GPS)

39 Allowing the camera

40 A work day, step by step

41 When the signal drops

42 Timesheet, pay stub and time off on the phone

43 The 30 minute training script

Part 7. When something goes wrong

44 Problems with the technician's app

45 Problems at the office

46 Before calling support

Part 8. The office routines

47 Every day, every week, every month

1

Part 1. Before you start

1

How to use this manual

This manual is for people who work in the office of a cleaning company and use Crewstro. It explains every screen, one step at a time.

You do not need to read it all at once. Read Part 1 first. Then look in the index for the topic you need that day.

The colored boxes

WHERE IT IS This box tells you WHERE the screen is in Crewstro. For example: Settings > Company. It means: click Settings and then click Company.

TIP This box gives you a tip to do things faster or better.

CAREFUL This box warns you about something to be careful with. Read it slowly before you click.

The words in bold

When a word is in **bold**, it is the name of a button or a field that appears on the screen. Look for exactly that word.

TIP The photos in this manual were taken in a test company called "Faxinas da Dona Rita". The names and the amounts are made up. Your screen will show your clients, but the buttons are the same.

2

The words you will see

Crewstro always uses some words in the same way. Learn these and everything gets easier.

Word	What it means
Client	The person or family that hires the cleaning.
Home	The address where the cleaning happens. One client can have more than one home.
Job (or visit)	A cleaning booked on a day and at a time. It is the real work: it goes to the technician's phone.
Recurring series	A regular client: every week, every 2 weeks or every month. Crewstro creates the visits by itself.
Request	An order that came in (through the online booking page, for example). It is not a booked job yet.
Quote	The price you send to the client to approve before booking.
Invoice	The bill for the job that was done.
Payment	The money that came in: card, cash, check, Zelle.
Technician	The person who does the cleaning. She uses the app on her phone.
Lead	The technician in charge of the visit. When she clocks out, the job ends.
Timesheet	The time the technician arrived (clock in) and left (clock out) at each home.
Payroll	The calculation of the team's pay, made from the timesheet.

Word	What it means
Phone provider	Your company's phone company (RingCentral, OpenPhone, Twilio or Dialpad). Text messages go out through it.
Push	The alert that shows up on the phone screen, even with the app closed.
Bell	The bell icon at the top of the screen. It shows what is new for the office.

3

The three parts of Crewstro

Crewstro has three "doors". Each person uses one.

- **The office**: the big screen, on the computer. This is where you work. You add clients, book jobs, send invoices, take care of the team and the payroll.
- **The technician's app**: the phone screen. The technician sees the visits of the day, clocks in and out, takes photos and asks for time off.
- **The client pages**: links the client receives. The client approves a quote, pays an invoice, follows the technician on the way and asks for changes. The client does not need a password.

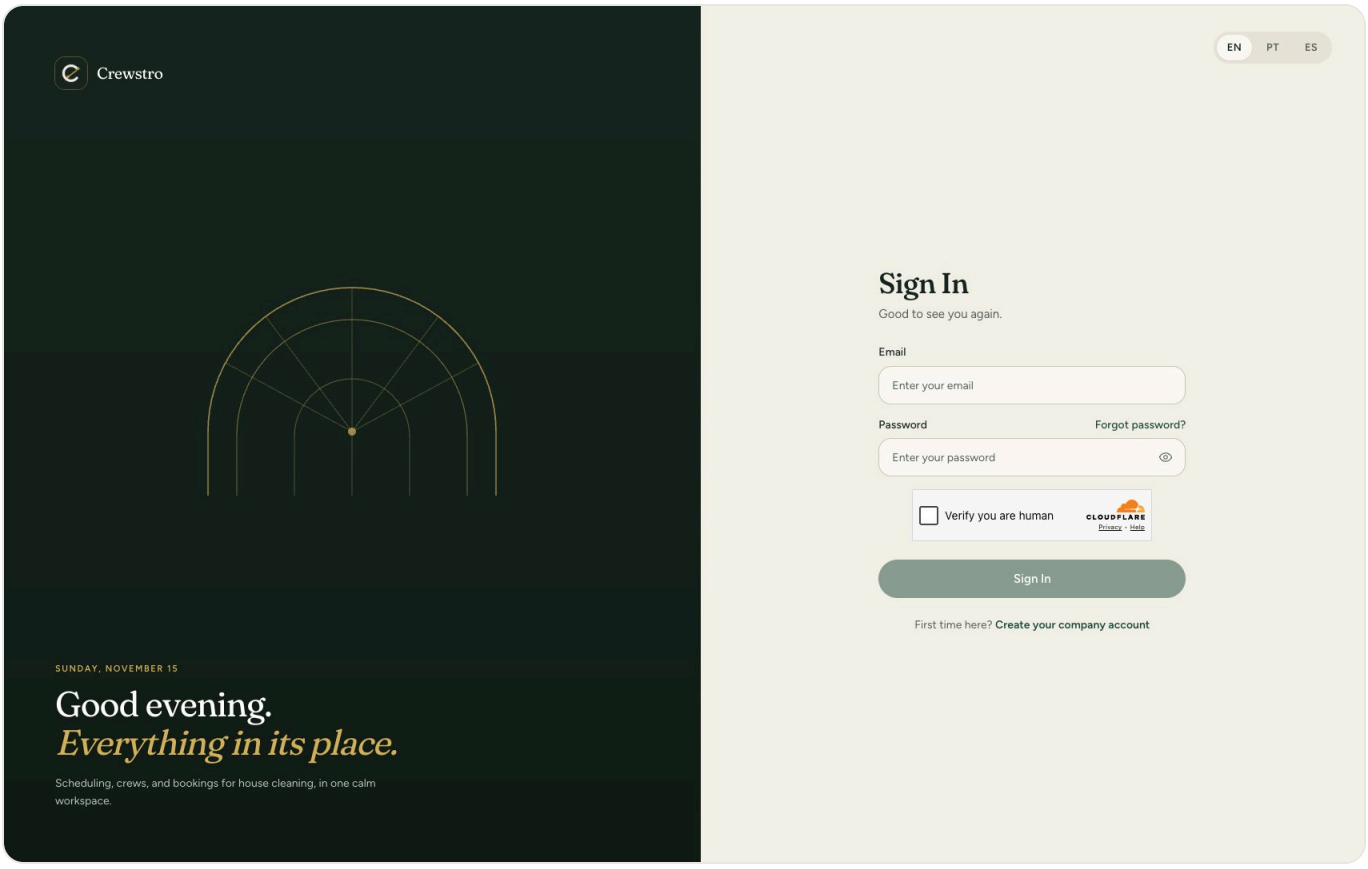
TIP If you open Crewstro on a phone, you will see the app screen, which is smaller. To work in the office, use a computer.

CAREFUL Everything that goes to the client (reminder, invoice, quote, message) goes out in the client's language. The office screen stays in your language.

4

Sign in to the system

WHERE IT IS On the computer, open the browser (Chrome, Safari or Edge) and type: app.crewstro.com



The sign-in screen.

1. Type your email in the **Email** field.
2. Type your password in the **Password** field.
3. If the computer is only yours, check **Remember email only**.
4. Click **Sign In**.

I forgot my password

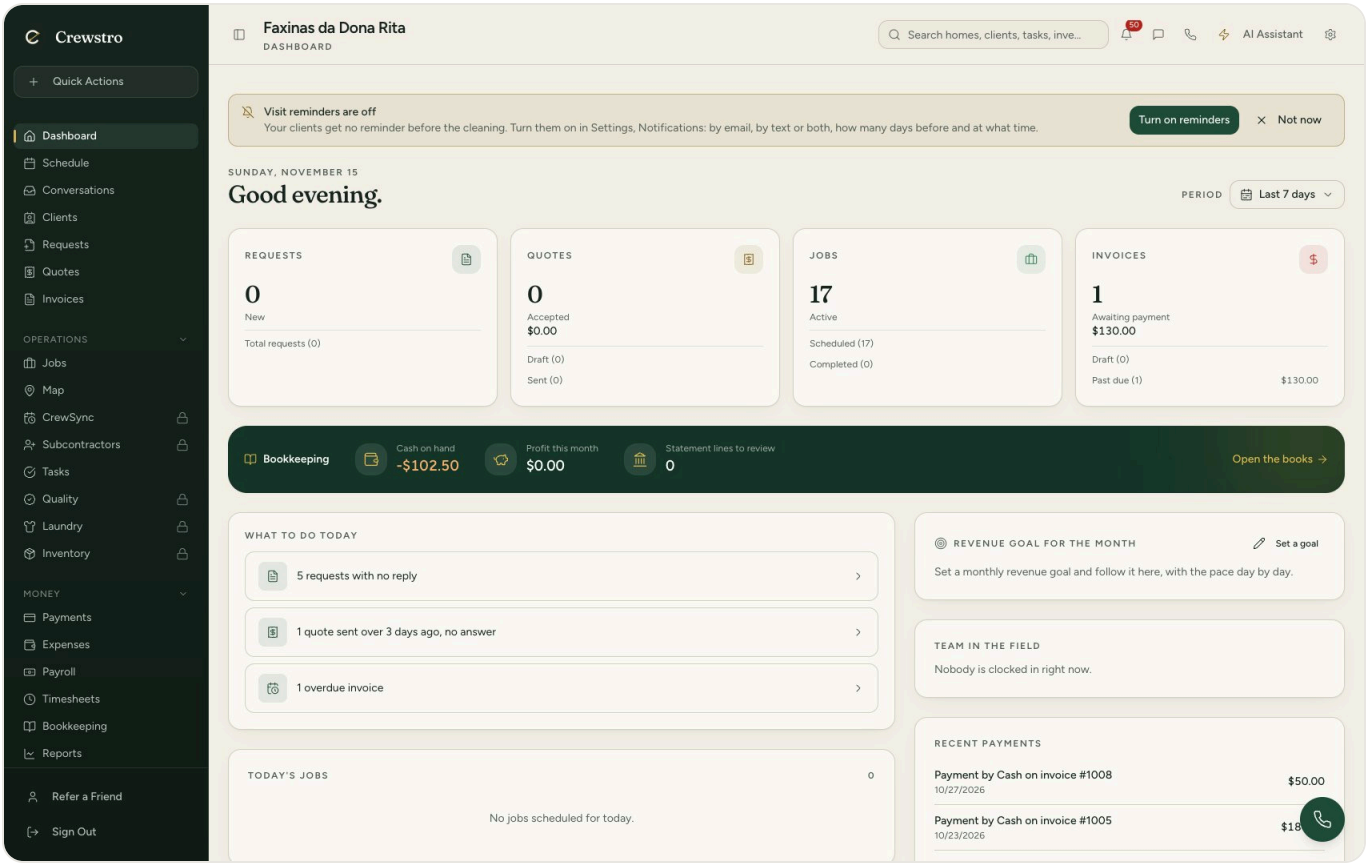
1. On the sign-in screen, type your email.
2. Click **Forgot password?**.
3. Open your email. A message from Crewstro arrives.
4. Click the link in the message and choose a new password.

TIP The email did not arrive? Look in the spam folder (junk mail). Still nothing? Ask the company owner to reset your password in Team.

CAREFUL Never use the **Sign Up** tab to sign in. It creates a new, empty company. If you work at a company that already uses Crewstro, always go in through **Sign In**.

5

The map of the screen



The first screen after you sign in: the Dashboard.

The menu on the left

The dark column on the left is the menu. Each word opens one part of the system: Dashboard, Schedule, Map, Tasks, Chat, Team, Clients, Requests, Quotes, Jobs, Invoices, Payments, Marketing, Reports, Expenses, Payroll, Settings. You only see what you have permission to use.

The top bar

- **The bell**: what is new. Online request, client who replied, declined quote, low rating.
- **The speech bubble**: text messages with clients.
- **The magnifying glass**: search for a client, a job or a team member.

- **AI Assistant**: a helper that answers questions. It only appears if the company added an AI key.
- **The globe with the flag**: changes the language of YOUR screen (English, Portuguese or Spanish).
- **Settings**: the company settings.

Quick actions

The **Quick Actions** button, at the top of the menu, creates the most common things without you having to search: new job, new client, quote, message to the team.

> **TIP** Lost? Click **Dashboard** in the menu. You always go back to the start.

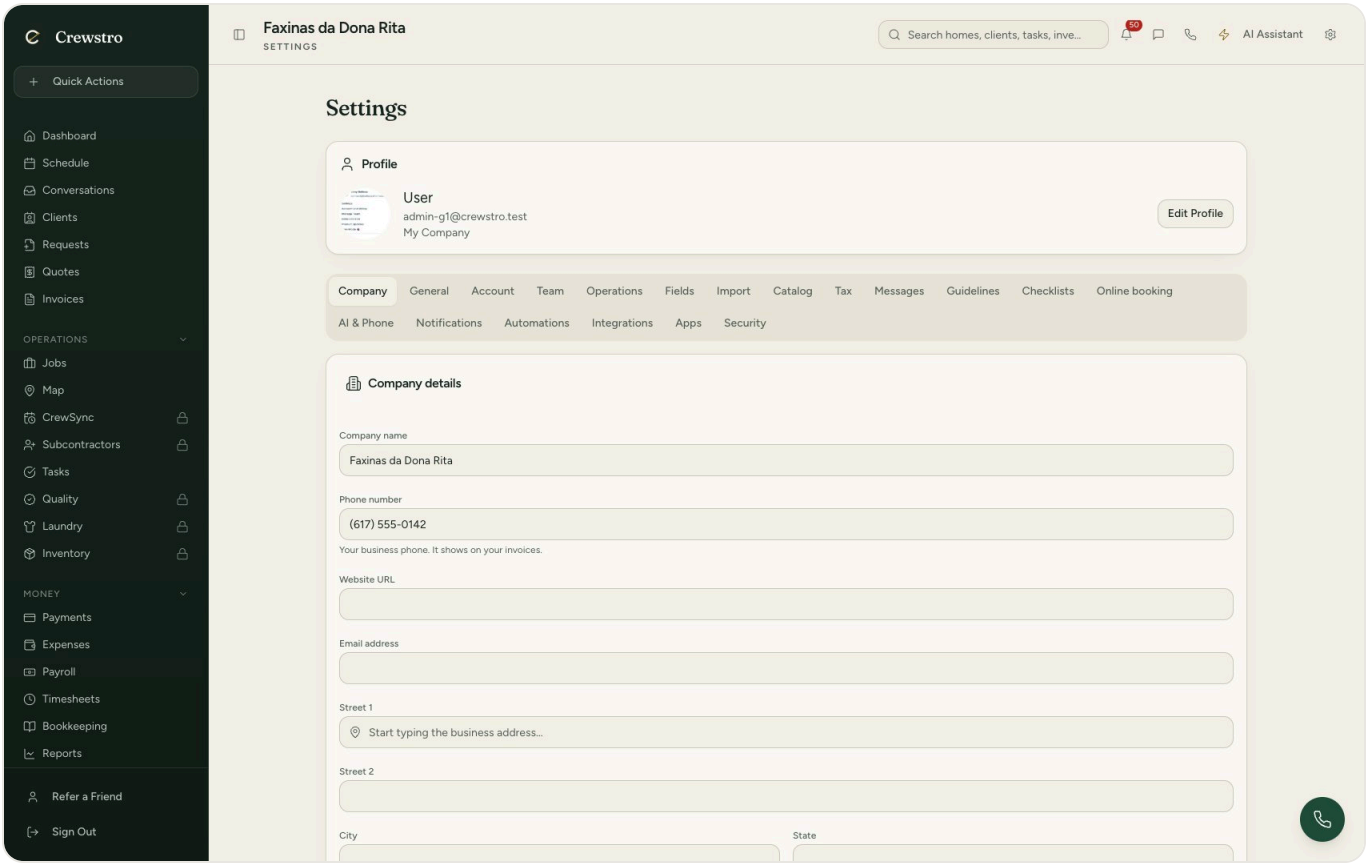
2

Part 2. Set things up (do it once)

6

The company details and the timezone

WHERE IT IS Settings > Company



The Company tab in Settings.

CAREFUL The timezone is the MOST important thing on this screen. Without it, Crewstro thinks the company is in London (UTC). Then visits, the timesheet and invoices can land on the wrong day.

1. Click **Settings** in the menu.
2. Click the **Company** tab.
3. Check the company name, phone, email and address.

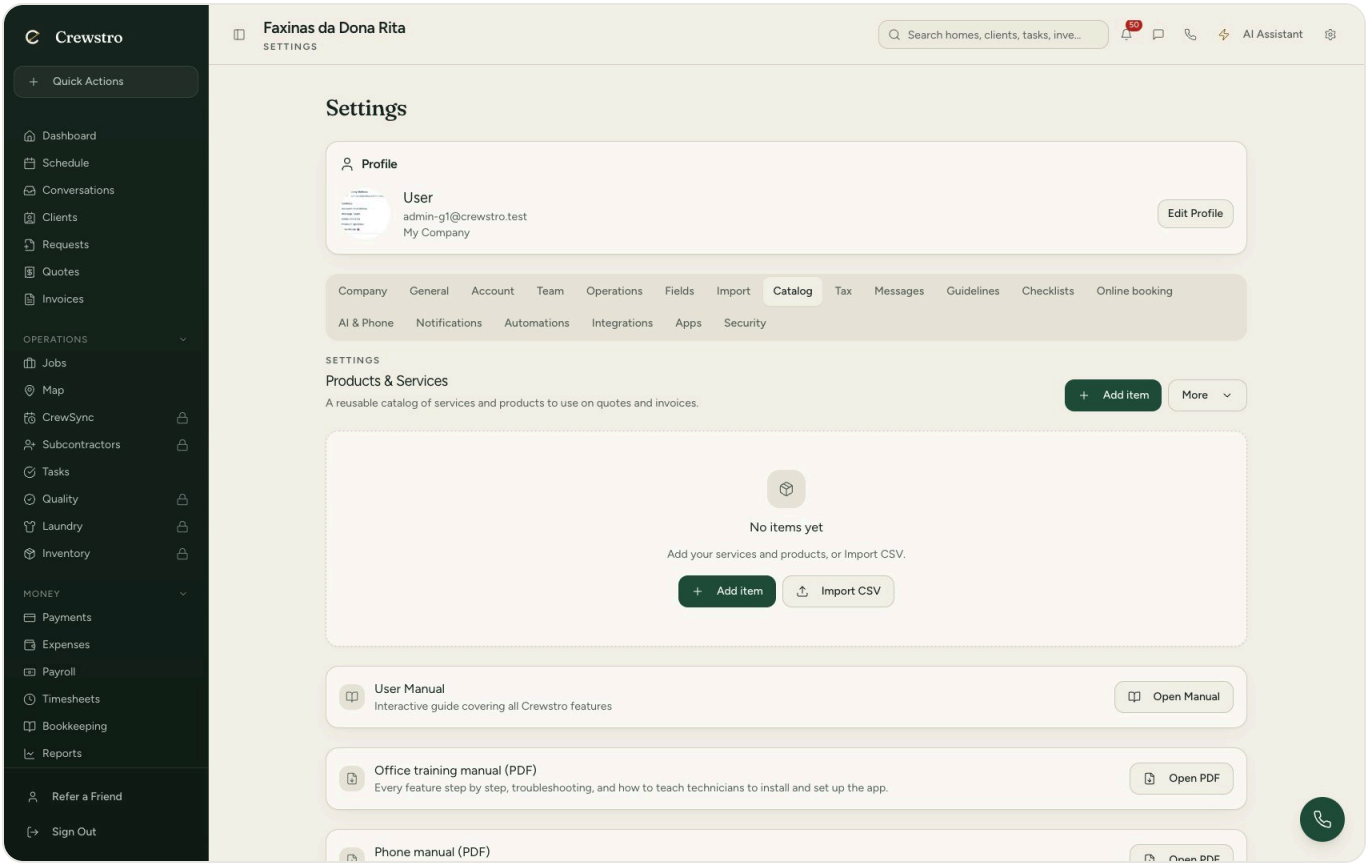
4. In **Timezone**, choose the timezone of your city. Example: New York is "America/New_York"; Los Angeles is "America/Los_Angeles".
5. In the default client language, choose the language most of your clients read.
6. Choose the date and time format and the first day of the week.
7. Click save, at the bottom of the page.

> **TIP** Each client can have their own language. The default language is for the ones who do not.

7

The services you sell (Catalog) and tax

WHERE IT IS Settings > Catalog and Settings > Tax



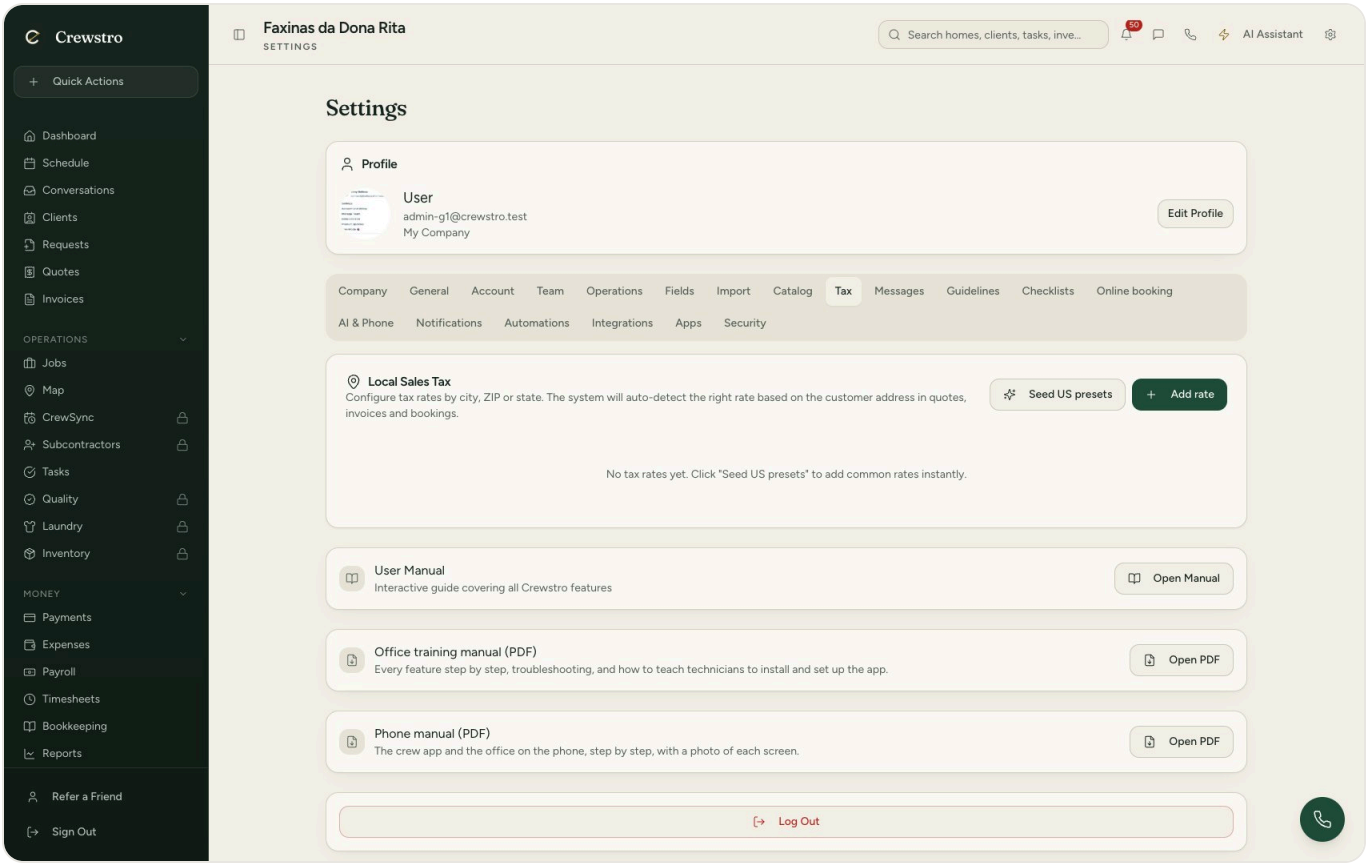
The Catalog: the list of services and products with prices.

The Catalog is the list of everything you sell: residential cleaning, deep cleaning, move-out, extras (oven, fridge, windows). Each item has a price, a cost and a unit. When you build a quote or an invoice, you pull the items from here and do not need to type everything again.

1. Open **Settings > Catalog**.
2. Click to add an item.
3. Type the name, the price and, if you want, the cost (the cost never shows to the client).

4. Check whether the item is taxed.
5. Save. Repeat for each service.

Tax



The Tax tab.

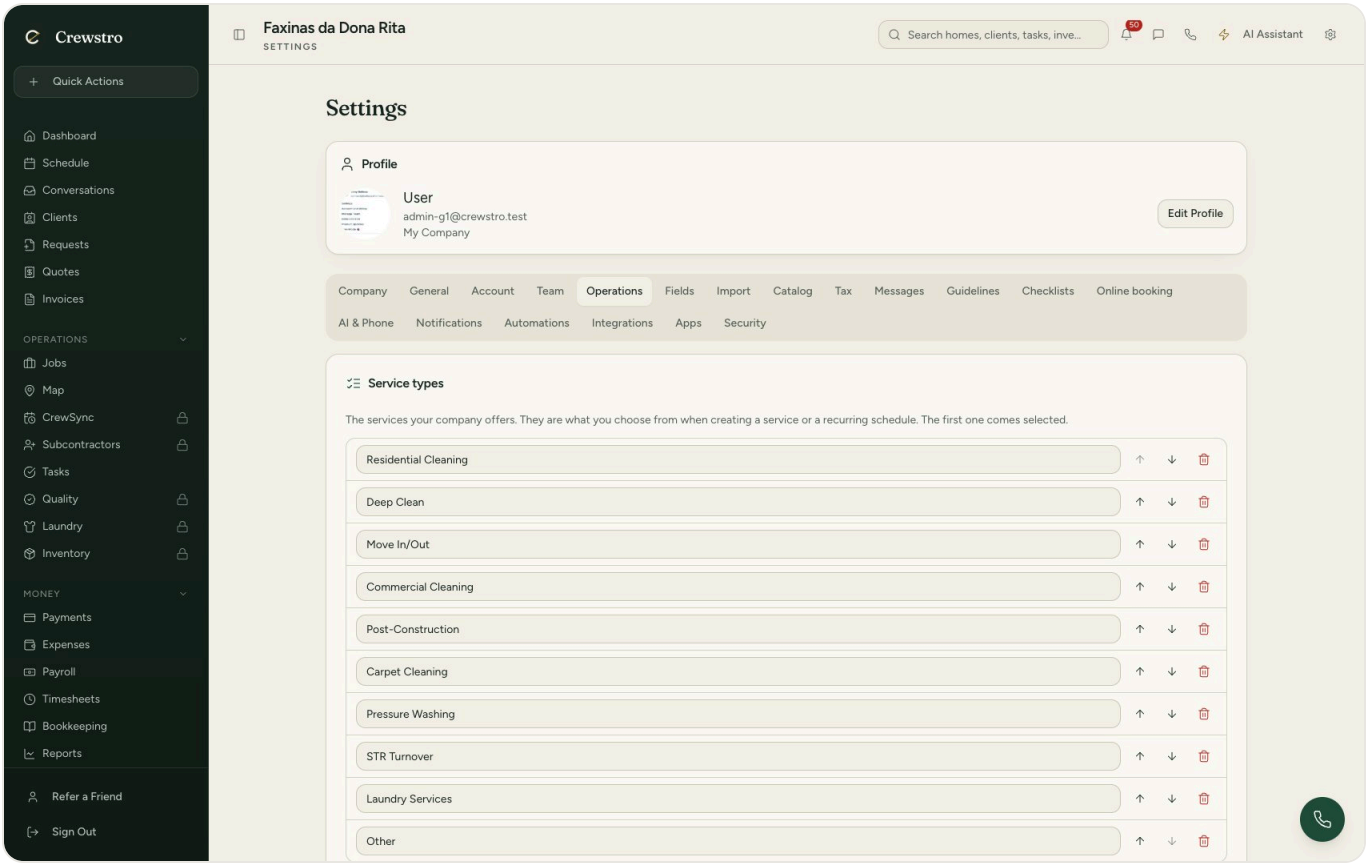
In **Tax** you add the tax rate of your state, city or ZIP. A new invoice finds the right rate by itself from the home address.

> **TIP** The button that loads the common United States rates fills in almost everything. Then you just check your city.

8

The work rules (Operations)

WHERE IT IS Settings > Operations



The Operations tab.

Here are the rules that apply to the whole team. Read each card and turn on only what the company uses.

Card	What it does when it is on
Before & After Photos	The technician can only clock out after taking the photos.
Auto-Invoicing	When the job ends, Crewstro charges the client's saved card or sends the invoice by itself. Off, the invoice stays as a draft for you to check.

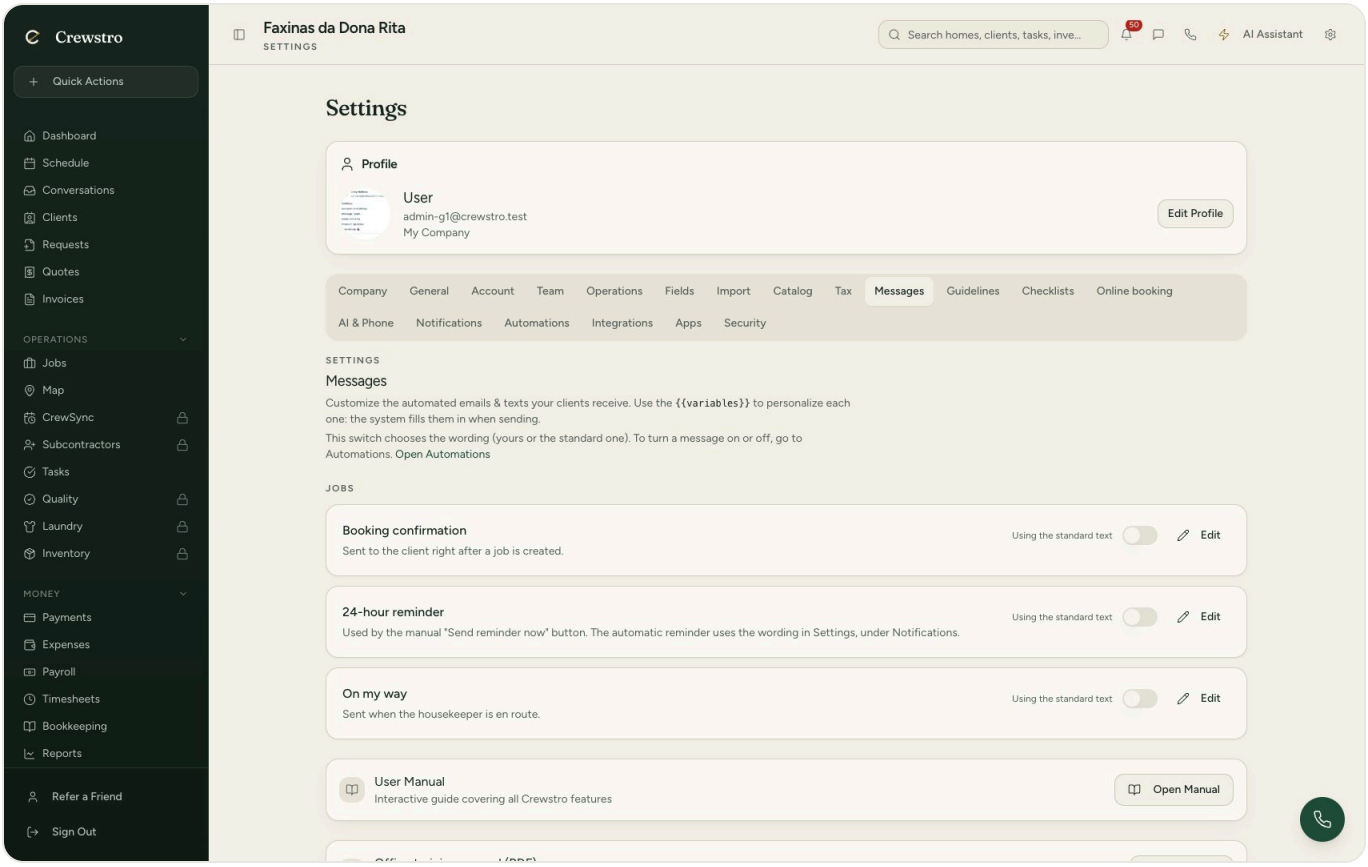
Card	What it does when it is on
Mileage Reimbursement	Pays the miles the technician drives in her own car, at the rate per mile you choose.
Meal break	Checks whether the technician took her lunch break after X hours. If she did not and did not sign the waiver, the payroll adds the penalty.
Notify technicians on the phone	Sends a push when the scheduled break starts and before the break deadline.
Pay rules	Overtime (federal or California rule), paid travel time, minimum wage and sick leave. The **Apply the rules of my state** button adjusts everything at once. Explained in the payroll chapter.
Schedule: suggest times and who is nearest	When you reschedule, cancel or skip a visit, it shows the free times of whoever cleans that home and, after you pick the time, the free technicians who are closest. Explained in the chapter The Schedule.

CAREFUL Auto-invoicing charges the card for real. Only turn it on after checking the prices of the jobs and the recurring series.

9

Messages and reminders for the client

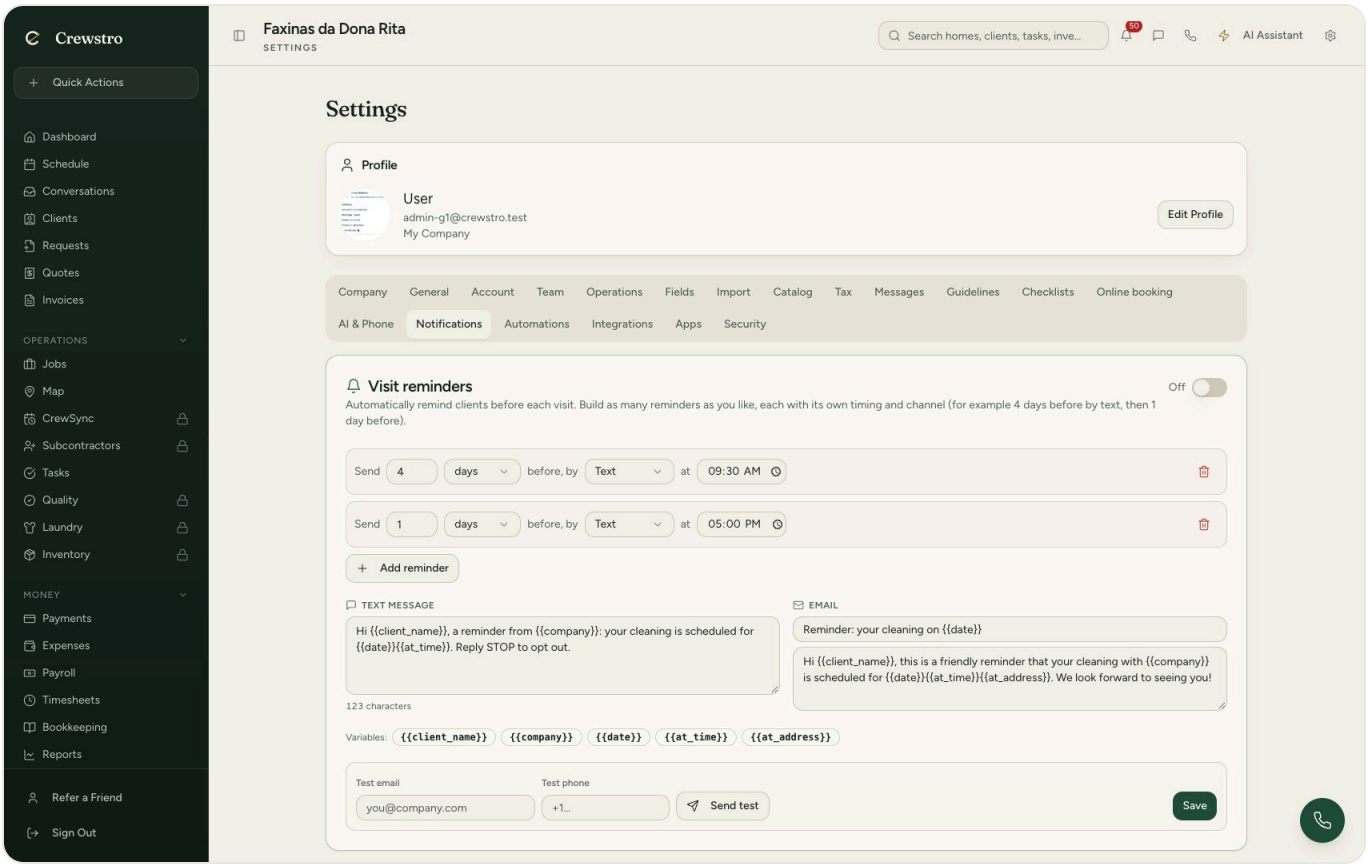
WHERE IT IS Settings > Messages and Settings > Notifications



The Messages tab: the texts the client receives.

In **Messages** there are three texts: the job confirmation, the reminder and the "on the way" notice. You can change the words. Crewstro translates them into each client's language.

Turn on the visit reminders



The Notifications tab: visit reminders and office alerts.

> **CAREFUL** Visit reminders start OFF. While they are off, the client gets no notice before the cleaning. The Dashboard shows a yellow banner warning you.

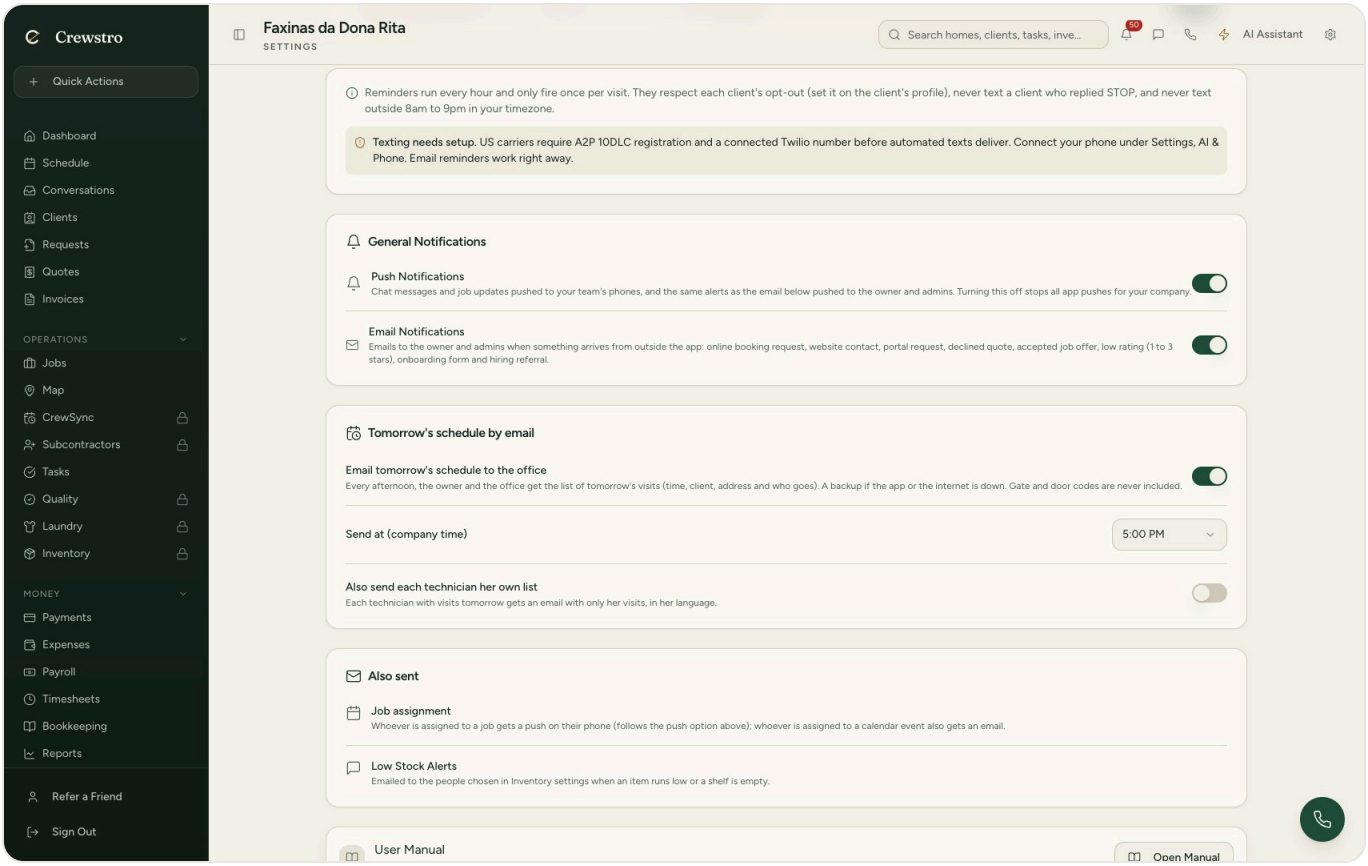
1. Open **Settings > Notifications**.
2. Turn on the visit reminders.
3. Set up the reminders. A good start: 4 days before at 9:30 am and 1 day before at 5 pm.
4. Choose the channel: text, email or both.
5. Click **Send test** to receive an example.
6. Save.

> **TIP** Text messages only go out between 8 am and 9 pm in the client's time. It is the law. If the reminder falls outside those hours, it waits.

Alerts for the office

In the same tab you choose whether the office gets a push on the phone and an email when an online request, a contact from the website, a low rating and other news come in.

Tomorrow's schedule by email

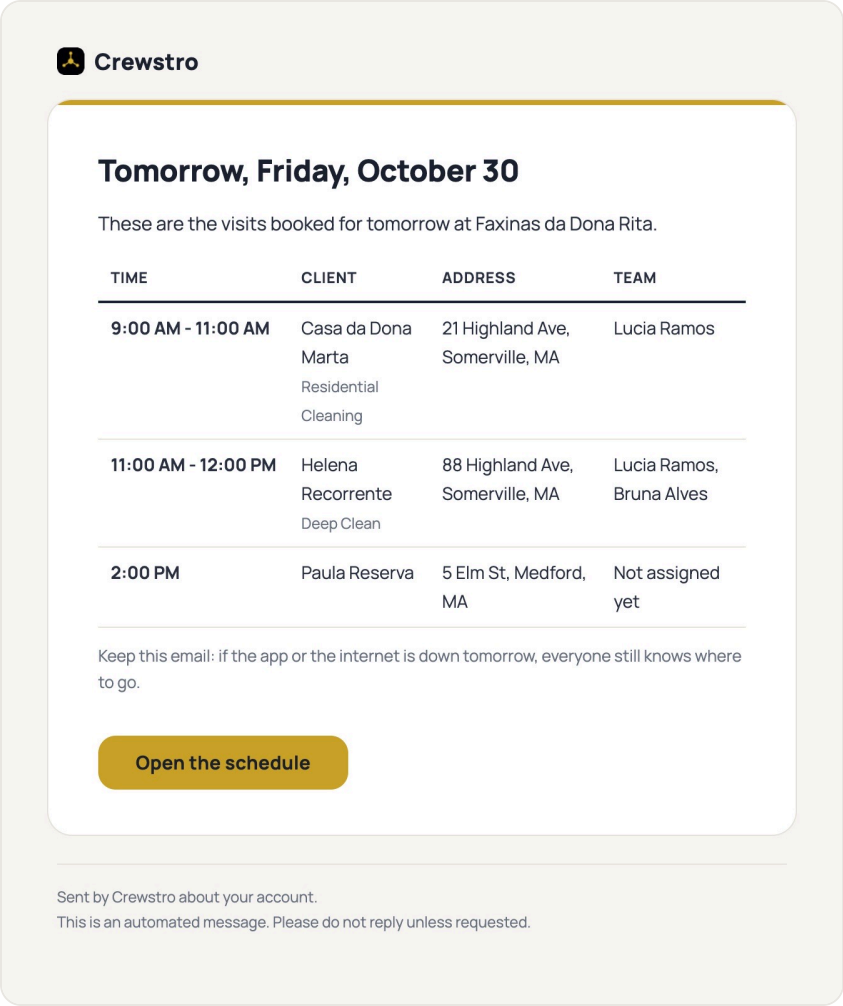


The Tomorrow's schedule by email card, in Notifications.

Every late afternoon, the owner and the office get an email with the next day's visits: the time, the client, the type of cleaning, the address and who is going. It is plan B: if the app or the internet goes down, everyone still knows where to go.

1. Open **Settings > Notifications**.

2. Find the **Tomorrow's schedule by email** card. It comes turned on.
3. Choose the time in **Send at**. It is the company time. The default is 5 pm.
4. If you want, turn on **Also send each technician her own list**. Each technician gets only her visits, in her language.



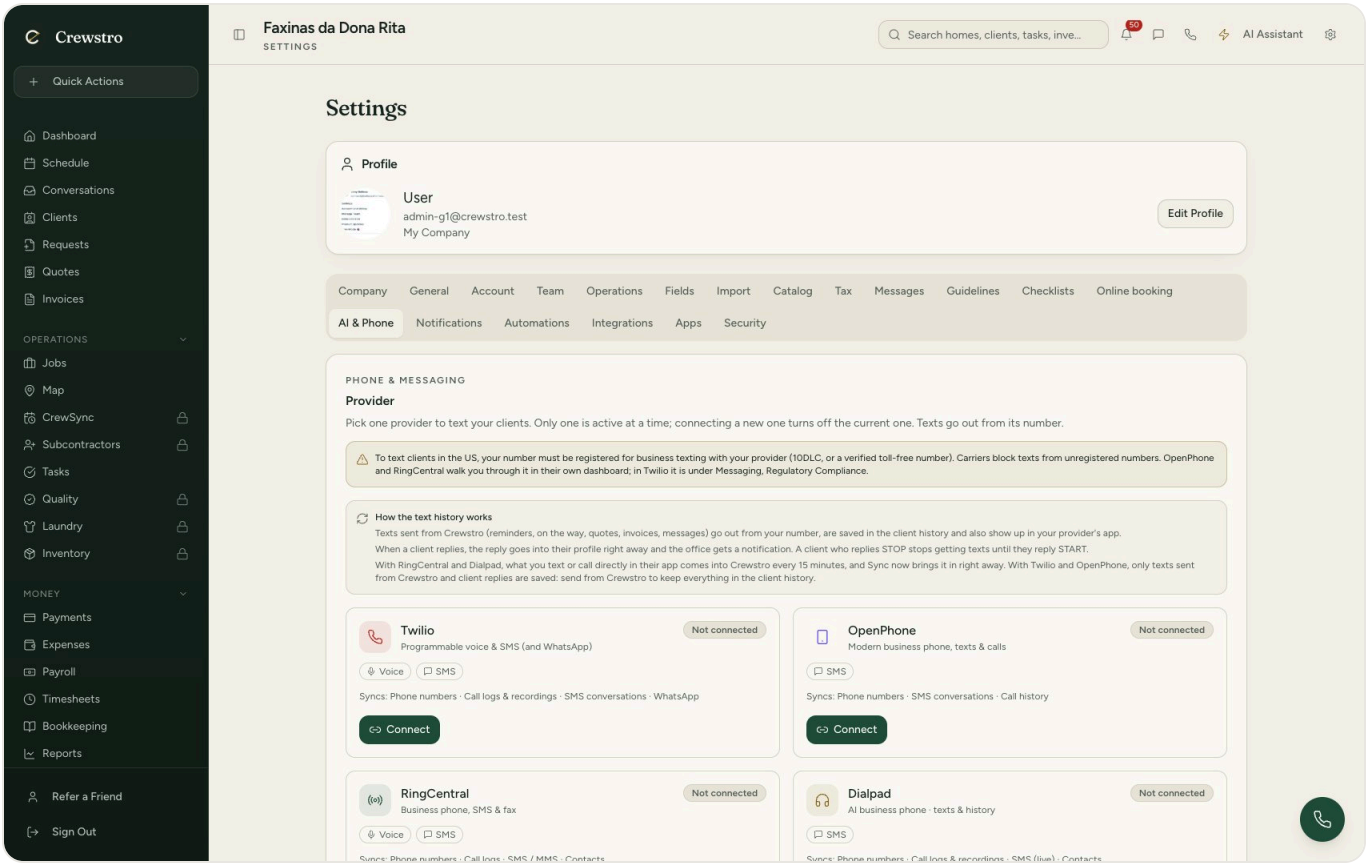
How the email arrives.

TIP Gate and door codes NEVER go in that email. If there are no visits tomorrow, no email goes out.

10

The company phone and text messages

WHERE IT IS Settings > AI & Phone



The AI & Phone tab, with the registration warning and the explanation of the history.

To send text messages, Crewstro uses the company's own number, through a phone provider. Choose ONE: RingCentral, OpenPhone or Twilio. (Dialpad only brings in the history; it does not send texts through Crewstro.)

1. Open **Settings > AI & Phone**.
2. On your provider's card, click to connect.
3. RingCentral: sign in with the company account and accept. OpenPhone: paste the API key (in OpenPhone, Settings > API). Twilio: paste the Account SID, the Auth Token and the number, and click save.

4 Check that the card shows "Connected".

> **CAREFUL** In the United States, the number must be registered for business messages (this is called 10DLC, or a verified toll-free number). Without that registration, the carriers block the text. The registration is done in your provider's dashboard. OpenPhone and RingCentral guide you step by step.

How the history works

- Every text that leaves Crewstro is saved in the client's profile and also appears in the provider's app.
- When the client replies, the reply goes into their profile right away, and the office gets an alert in the bell and on the phone.
- RingCentral and Dialpad: what you send directly in their app comes into Crewstro every 15 minutes. The **Sync now** button brings it in right away.
- Twilio and OpenPhone: only the texts sent through Crewstro and the clients' replies are saved. Send through Crewstro to keep everything.
- A client who replies STOP stops receiving texts until they reply START.

11

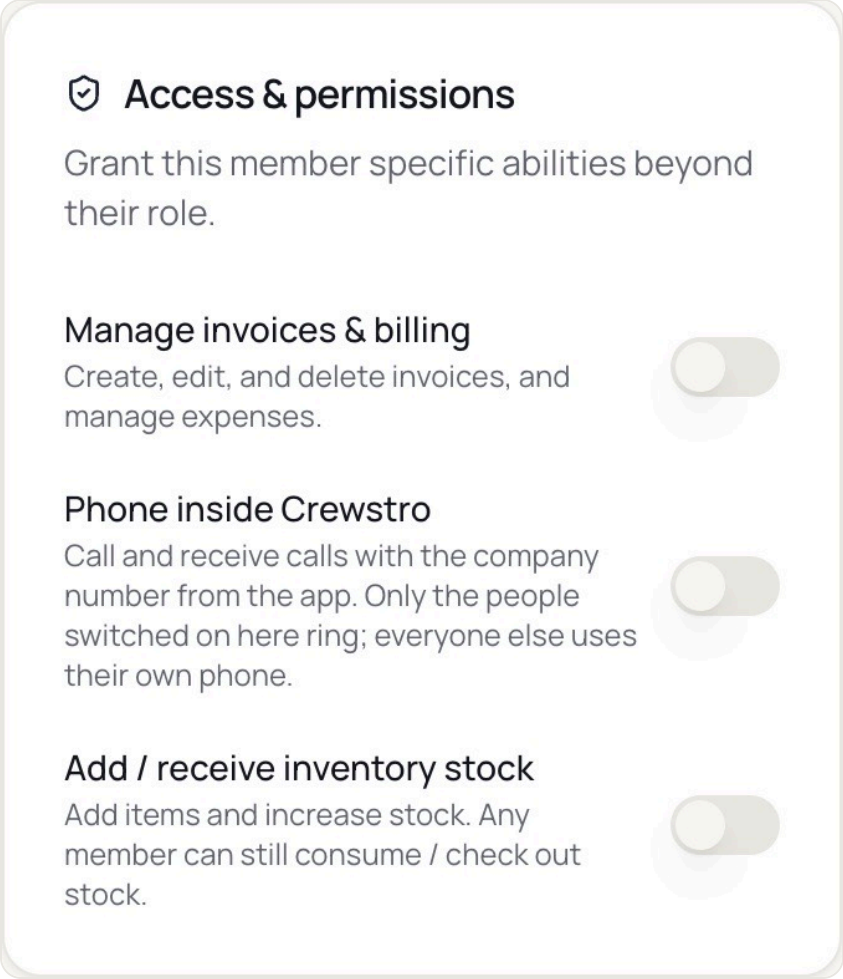
Making and receiving calls through Crewstro

WHERE IT IS Settings > AI & Phone, Calls inside Crewstro card

With RingCentral or Twilio connected, Crewstro becomes the company phone: you can call the client and answer when they call, on the computer or in the phone app, **while the app is open**. The voice comes through the device's microphone and speaker. With OpenPhone or Dialpad it does not work: the call buttons open the device's own phone.

Who receives the calls

Not everyone. It only rings for the people the owner chose. The owner and the administrators are already chosen.

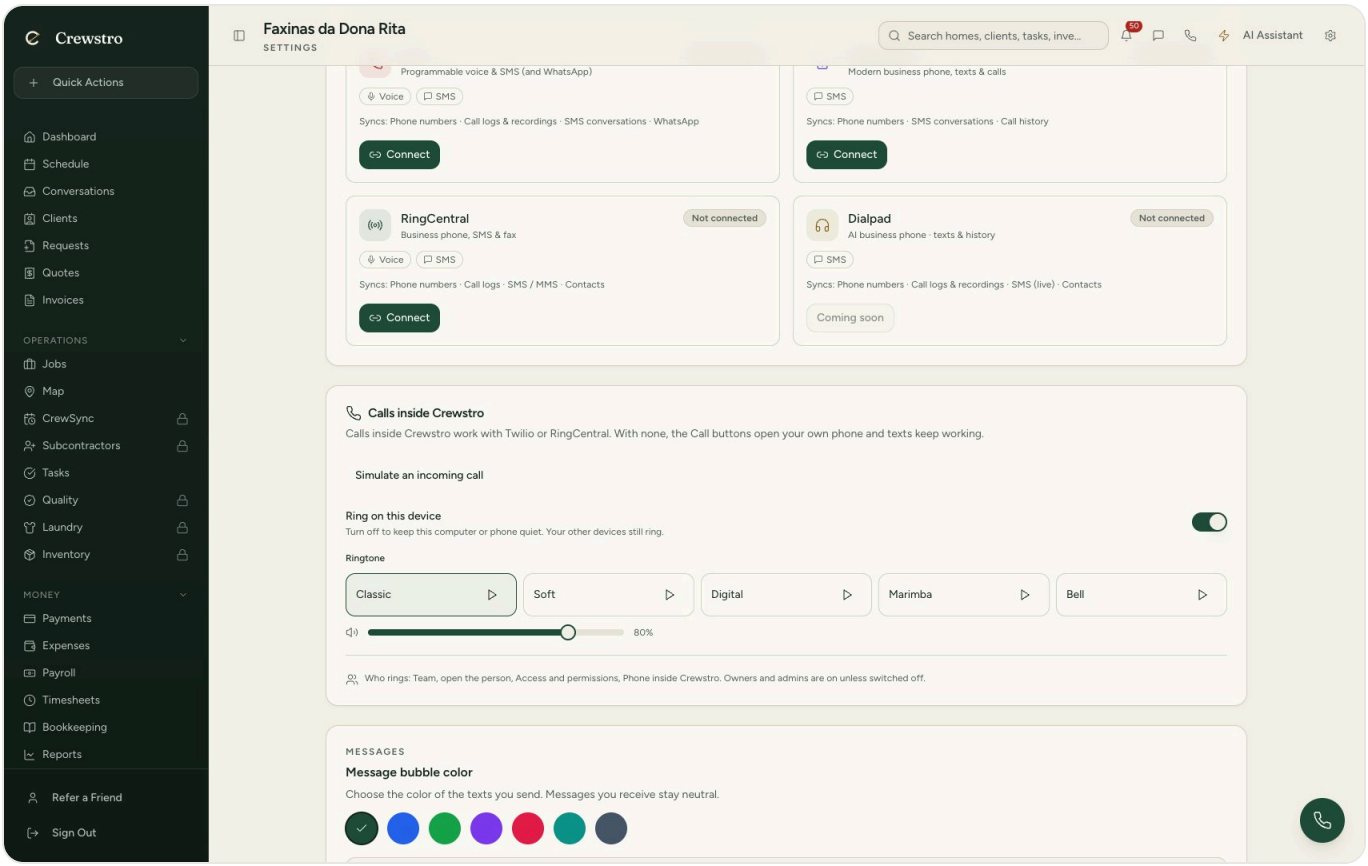


The Phone inside Crewstro switch, on the person's profile.

1. Open **Team** and click the person.
2. Scroll down to the **Access & permissions** card.
3. Turn on **Phone inside Crewstro**. To remove someone, turn it off.
4. When inviting a new person, the same switch is at the end of the **Permissions** block, with the name **Phone**.

> **TIP** Everyone who is turned on rings at the same time. Whoever answers first keeps the call.

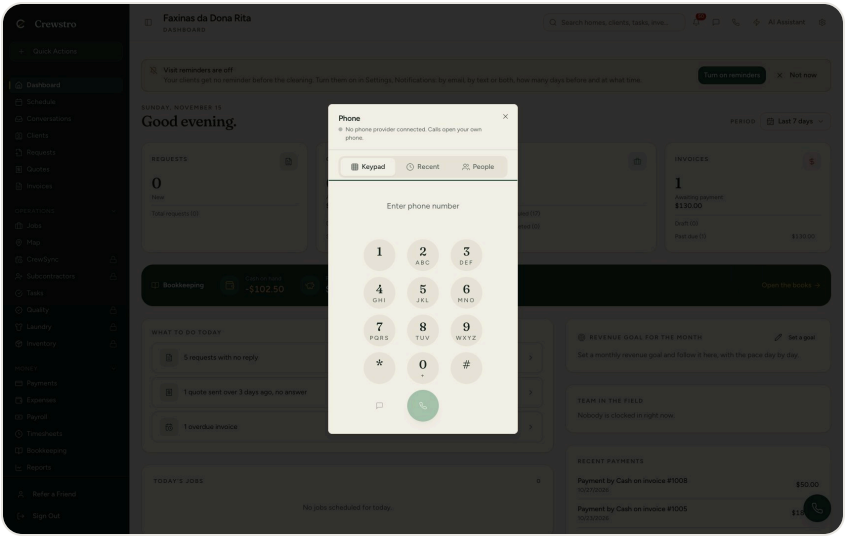
The ringtone and this device



The Calls inside Crewstro card.

- **Ring on this device**: turn it off so this computer or phone stays quiet. The person's other devices keep ringing.
- **Ringtone**: choose between Classic, Soft, Digital, Marimba and Bell. The listen button plays it once.
- **Ringtone volume**: only the ringtone, not the conversation.
- **Start the phone**: appears when the phone is not ready yet. Click it and, if the browser asks, allow the microphone.

Calling someone

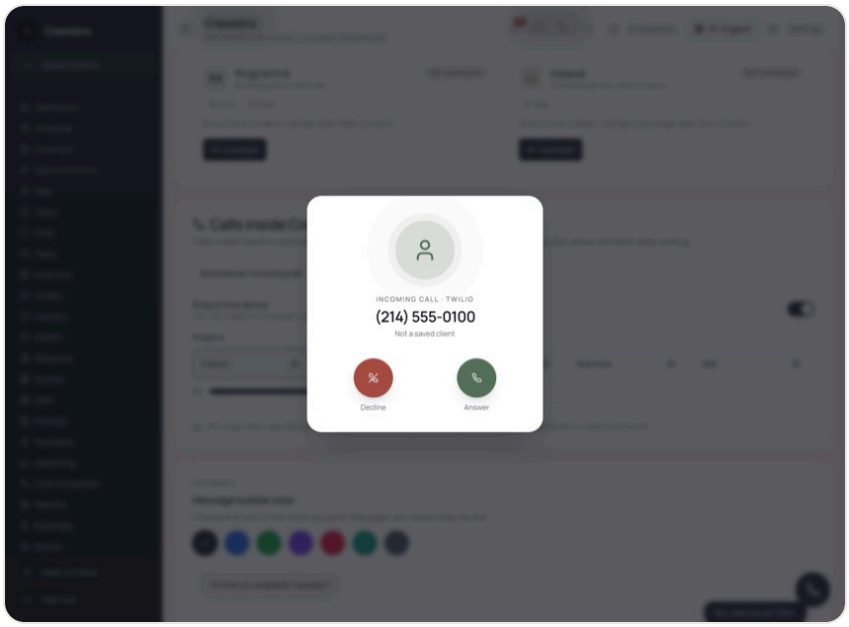


The dialer: keypad, recent and clients.

1. Click the round phone button (bottom corner, on the right) or the phone icon at the top.
2. Type the number on the **Keypad**, or pick someone in **Recent** or in **Clients**.
3. If the company has more than one number, choose in **Call from** which one the client sees.
4. Click the green button.

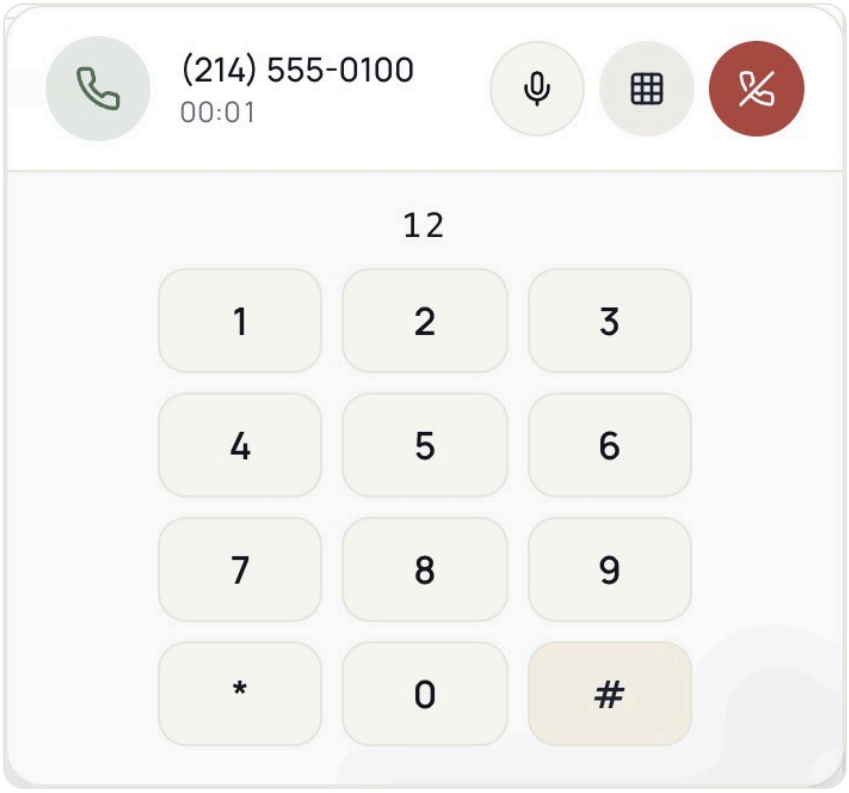
The **Call** button on the client profile and in Messages also calls through Crewstro.

When the client calls



The incoming call screen.

The whole screen shows who is calling, with the client's name if they are on file, and the ringtone starts. Click **Answer** or **Decline**. During the call, a card stays in the corner with the time, the **mute** button, the **keypad** (for menus like "press 1") and the **hang up** button.



The card of the call in progress, with the keypad open.

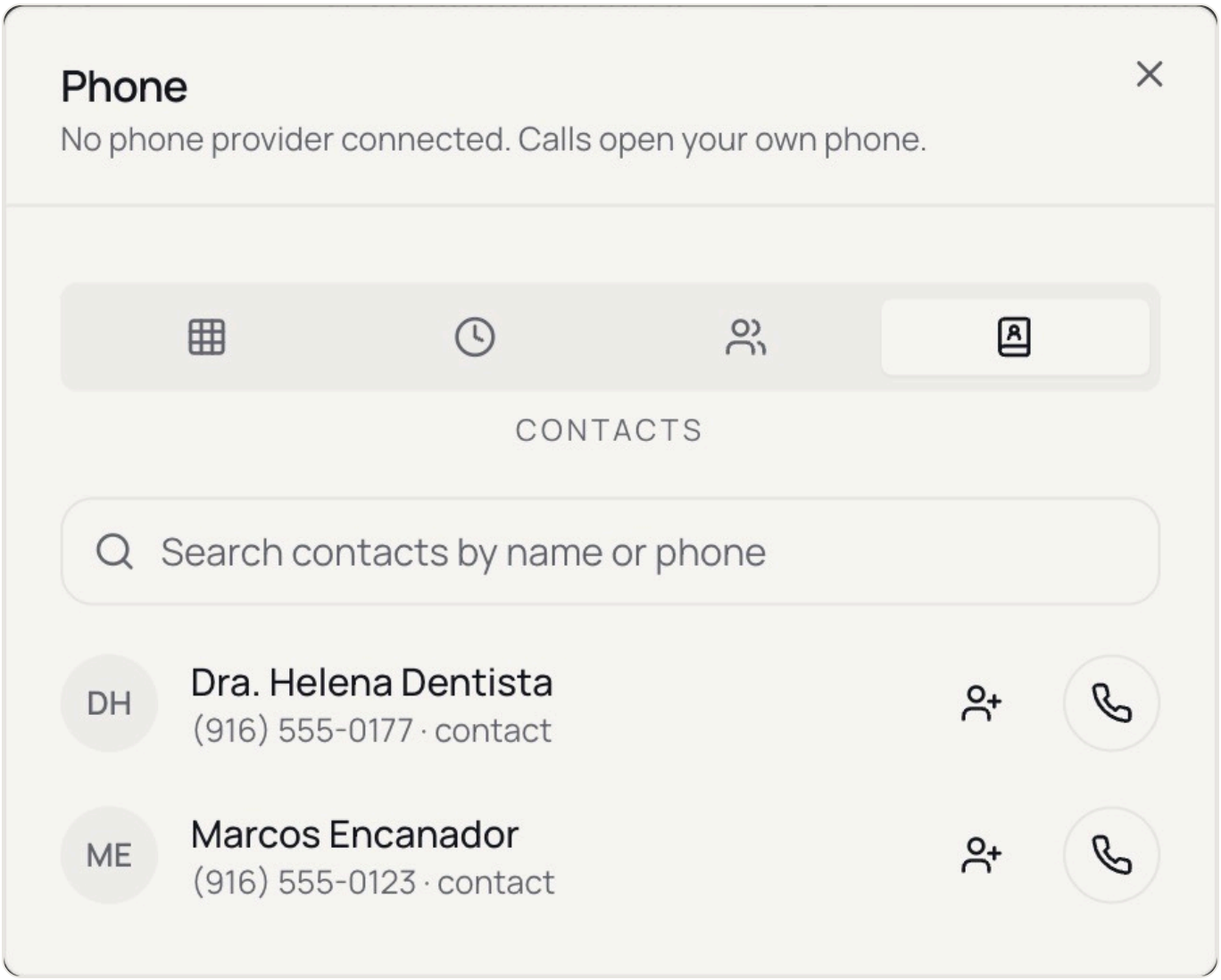
Nobody answered? Voicemail

With Twilio, if nobody answers in 20 seconds (and the AI receptionist is off), the client hears the greeting and leaves a message. The message appears on the client profile as **Voicemail**, with a button to listen, and the office gets an alert on the phone. The greeting is changed on the same card, under **Voicemail**. With RingCentral, the voicemail and the greeting are in the RingCentral account.

CAREFUL With the app CLOSED or the phone screen locked, the call does not ring in Crewstro: it goes to the provider's app or to voicemail, and the office gets a missed call alert. For the call to ring on the phone, keep the app open.

CAREFUL Twilio: the **Connect Twilio** button points the number to Crewstro. If the number had forwarding or another voice setting in Twilio, it is replaced.

Phone contacts (not clients)



The Contacts tab of the dialer: contact, call, and the person icon to make a client.

The phone book is separate from Clients: a supplier, a relative or a vendor stays a contact. In Settings, AI & Phone, on the RingCentral card, **Import contacts** brings the RingCentral address book into this list, not into Clients. A contact whose phone already belongs to a client is linked to that client.

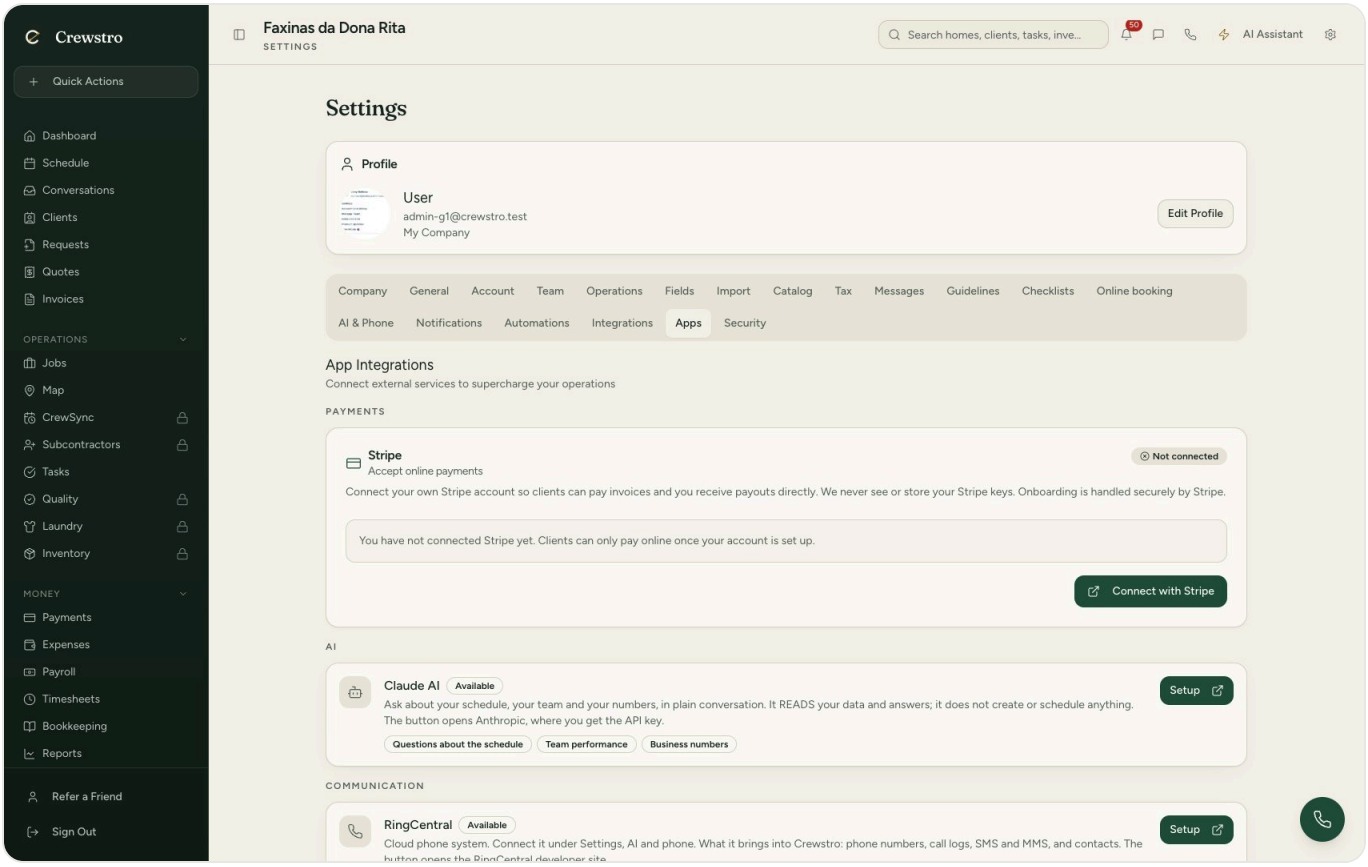
- In the dialer (phone button), the **Contacts** tab searches by name or phone and calls.
- Calls and texts from a contact show their name on the call bar, in recents and in conversations.
- To turn a contact into a client, tap the person icon next to it. Nothing becomes a client on its own.

- **Export to Google Contacts** downloads clients and contacts together so names show on your phone.

12

Getting paid online (Stripe)

WHERE IT IS Settings > Apps



The Apps tab, with the Stripe card.

Stripe is the company that runs the client's card. With it connected, the client pays the invoice through the link, with a card, Apple Pay, Google Pay or a bank account. The money lands in YOUR company's Stripe account.

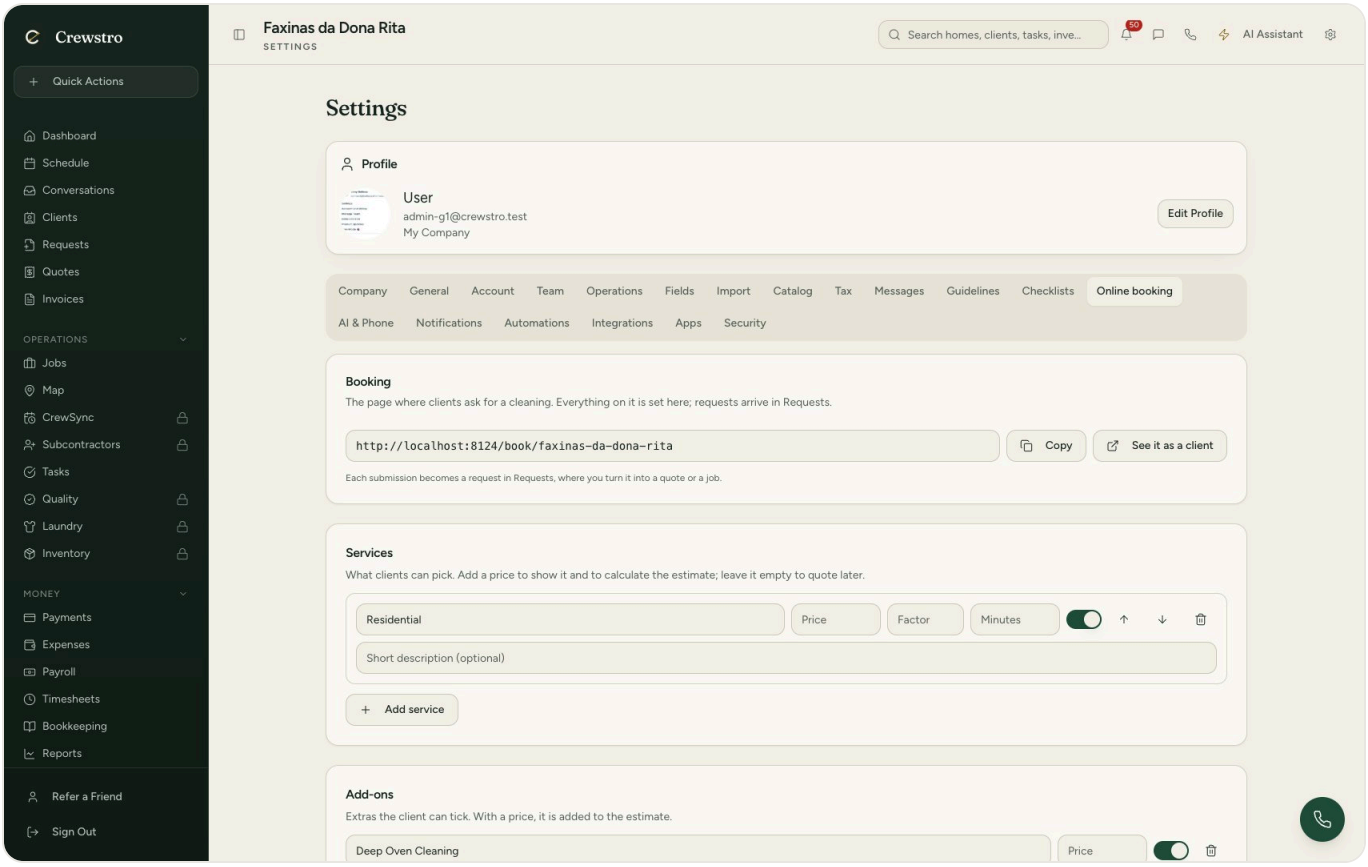
1. Open **Settings > Apps**.
2. Click **Connect with Stripe**.
3. Follow the Stripe screens: company details, bank account, ID document.
4. Go back to Crewstro. The card shows whether everything is ready.

TIP Without Stripe, the invoice page tells the client to arrange payment with you. You can record cash, check and Zelle by hand (see the Payments chapter).

13

The online booking page

WHERE IT IS Settings > Online booking (or the Online booking button in Requests)



The single online booking screen.

It is the page a new client uses to ask for a cleaning. They choose the service, describe the home, pick the day and leave their contact. The order lands in **Requests**.

Everything the client sees is set up on this screen:

- The services, with description, price and duration, in the order you want.
- The extras (oven, fridge, windows), with a price if you want.
- The frequencies (one time, weekly, every two weeks, monthly) and a discount for each one.
- Which fields appear and which are required.

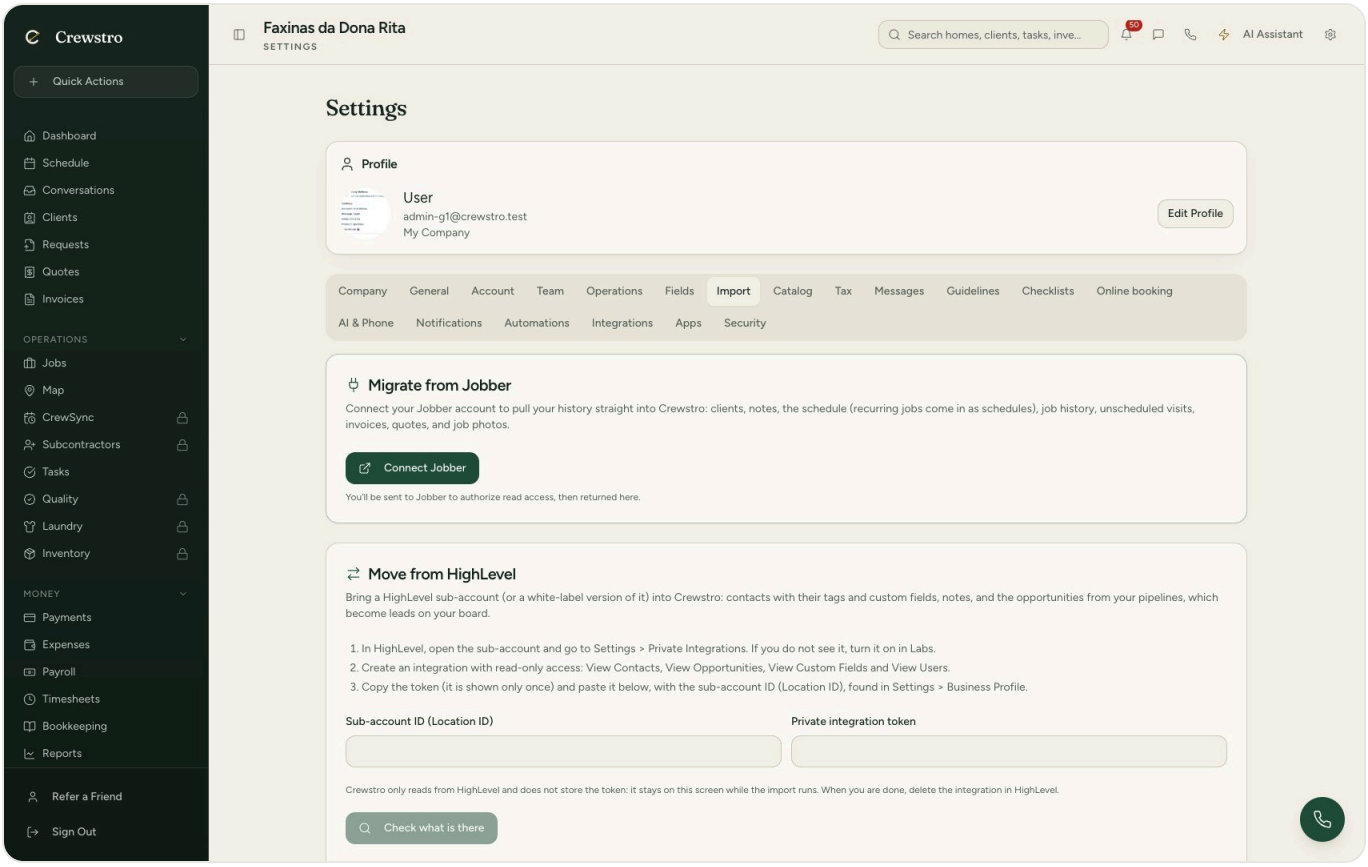
- Your own questions (for example: "Are there pets at home?").
- The estimated price, the minimum notice, the limit of cleanings per day and the blocked days (holidays).
- The texts, the page color and the code to put the page on the company website.

1. Adjust each part.
2. Click save.
3. Click **See it as a client** and make a test request.
4. Check that the request showed up in Requests. Then archive the test.

14

Bringing clients from another system

WHERE IT IS Settings > Import



The Import tab.

If the company already had its clients in Jobber, in Housecall Pro or in a spreadsheet, do not type them one by one. Import them.

From a spreadsheet (CSV or Excel)

1. In the old system, export the client list as CSV or Excel.
2. In Crewstro, open **Settings > Import**.
3. Choose where the spreadsheet came from.

4. Upload the file.
5. Match each column of the spreadsheet to the right Crewstro field (name, phone, email, address).
6. Click the preview and check what will be created.
7. Click **Commit import**.

> **TIP** A column you do not match becomes a custom field. That way the gate and door codes come along. If you run the same file again, Crewstro updates; it does not duplicate.

From HighLevel (GoHighLevel)

1. In HighLevel, open **Contacts**.
2. Select all contacts and click **Export** (CSV).
3. In Crewstro, in **Settings > Import**, choose **HighLevel (GoHighLevel)** as the source and upload the file.
4. Follow the same steps as the spreadsheet.

> **TIP** The tags, the source, the address and the custom fields come along. The pipeline and opportunity columns become custom fields.

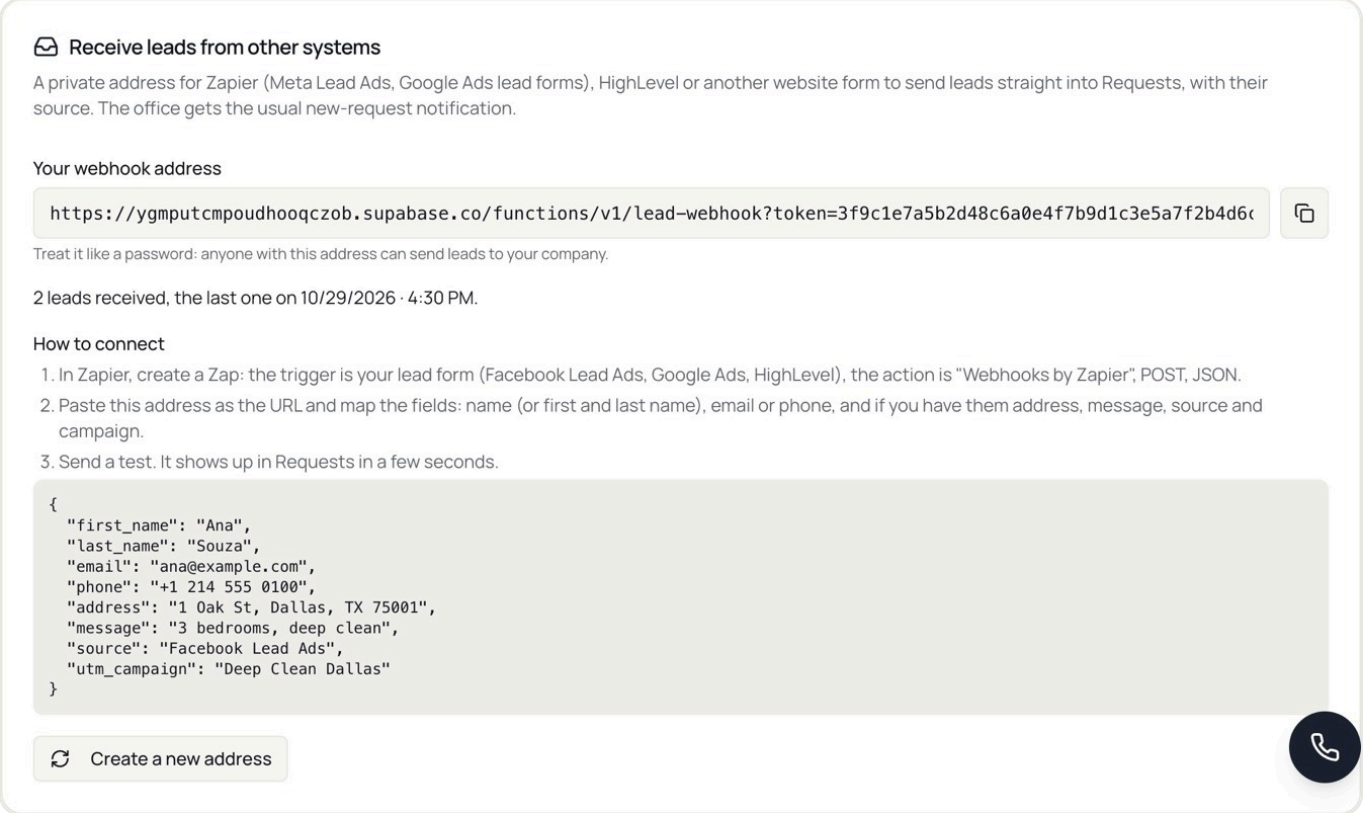
Directly from Jobber

The **Connect Jobber** button brings in clients, schedule, history, invoices, quotes and photos. In the beta there are only 5 direct connections in total (it is a Jobber rule). If they run out, use the spreadsheet.

15

Receiving leads from Facebook, Google and HighLevel

WHERE IT IS Settings > Integrations, Receive leads from other systems card



The Receive leads from other systems card, with the company address.

If you run ads on Facebook, Instagram or Google, you get the contacts in a lead form. With this address, each lead enters Crewstro by itself, in **Requests**, with its source. Nobody needs to copy it by hand.

The easiest way is through **Zapier**, a website that connects one system to another. HighLevel and many website forms also send directly to an address like this (the technical name is webhook).

1 Open **Settings > Integrations**.

2. On the **Receive leads from other systems** card, click **Create my address**.
3. Click the copy button next to the address.
4. In Zapier, create a Zap. The trigger is the lead form (Facebook Lead Ads, Google Ads or HighLevel).
5. The action is **Webhooks by Zapier**, type POST, in JSON.
6. Paste the address as the URL.
7. Match the fields: the name (or first and last name), the email or the phone and, if you have them, the address, the message, the source and the campaign.
8. Send a test. In a few seconds it appears in Requests.

> **CAREFUL** Treat the address like a password. Anyone who has the address can send leads to your company. If it leaks, click **Create a new address**: the old one stops working right away, and you need to paste the new one into Zapier.

What happens	Why
The lead did not come in	The name was missing, or both the email and the phone were missing. One of those two is required.
The same lead arrived twice, but only one shows	If the same contact arrives again within 10 minutes, Crewstro understands it is a repeat and does not duplicate it.
The card shows how many leads arrived	Under the address you see the total and the time of the last one. If the number does not go up, the Zap is not sending.

> **TIP** Each lead brings its source (Facebook, Google Ads, the campaign). It shows in the **Leads and revenue by channel** report, in Reports.

Ask Claude or ChatGPT about your company

It is in **Settings > Integrations**, on the **Claude and ChatGPT** card. Once it is connected, you ask Claude or ChatGPT about your own company, as you would ask an assistant: this week's schedule, who owes you, how much was invoiced this month, finding a client, the quotes, the team.

1. In Crewstro, open the **Claude and ChatGPT** card and click **Connect to Claude**. Claude opens in another tab, with the name Crewstro and the address already filled in. (In the App Marketplace, the button on the Claude card does the same.)
2. In Claude, confirm to add the connector and click Connect. For ChatGPT, the **Connect to ChatGPT** button copies the address and opens ChatGPT: there, click the plus sign, add a custom MCP server named Crewstro, paste the address and leave authentication on OAuth. If the option is not there, turn on developer mode in ChatGPT settings first.
3. Crewstro opens a screen titled **Allow access to Crewstro**. If it asks, sign in with your email and password. Then click **Allow**.
4. Go back to the assistant and ask. For example: "how does my schedule look this week?".

The assistant also answers more specific questions. Some examples:

- Text messages and calls with a client: "what did this client write to me this week?".
- Requests that came in from the booking form, the website and other systems, and which ones are still pending.
- Recurring service plans: who, how often and the price per visit.
- Overdue invoices, grouped by how late they are and by client: "who has owed me the longest?".
- What each team member produced in a period: visits completed, value and hours on the clock.
- Value per hour worked for each client, lowest first.

- Recurring clients who have been at the same price the longest: "who is due for a price increase?". Crewstro does not change any price from the assistant.
- The plan for a day, person by person, with overlapping visits and long gaps flagged. It does not reorder the stops by driving distance.
- Supplies at or below their minimum stock level.

Value per hour is revenue per hour worked, not profit. Only visits that have a price and a complete clock entry are measured, and the answer says how many were left out.

- It is **read only**. The assistant cannot create, change, send or charge anything.
- It never sees home access codes, internal notes, card data or staff pay.
- Only people who manage the company settings can allow it.
- On the same card, under **Connected assistants**, each assistant has a **Disconnect** button.
- Someone who leaves the company loses the connection automatically. You do not need to do anything.

> **CAREFUL** What you ask is processed by Claude or ChatGPT, in the account of whoever asked. Crewstro only hands the answer to that person's assistant.

See the schedule in your calendar (Google, Apple or Outlook)

It is on the same tab, on the **Schedule in your calendar** card. Your Crewstro visits show up in the calendar you already use on your phone and computer.

1. Choose **The whole schedule** or **Only my visits**.
2. Click **Create the calendar address**.
3. Click **Add to Google Calendar**, or **Open in Apple Calendar or Outlook**.
4. Confirm in the calendar. Done: the visits show up there.

- It is **read only**. What you change in the calendar does not come back to Crewstro. To change a visit, change it in Crewstro.

- It shows the client, the service, the address and the time. It never shows prices, phone numbers or notes.
- It shows from 30 days back to 180 days ahead.
- Google can take several hours to show a change. Apple is quick.
- Technicians have the same card in their **Profile**, in the phone app. There it shows only their own visits.

> **CAREFUL** Anyone who has the address can see the schedule. Do not share it with anyone. If it leaks, click **Generate another address**: the old one stops working at once. To stop it for good, click **Turn off**.

Notify other systems when something happens

It is on the same tab, on the **Send events to other systems** card. Crewstro calls an address of yours (it must start with https) when something happens. Use it with Zapier, Make or your own system.

It is the opposite direction of the **Receive leads from other systems** card. That one **brings** data into Crewstro. This one **sends** notices out.

- The notices available: **New client**, **New lead**, **New request**, **Service scheduled**, **Service completed**, **Service cancelled**, **Quote accepted**, **Invoice sent** and **Invoice paid**.

1. In the other tool, create a webhook and copy the address it gives you. In Zapier, it is the **Catch Hook** address.
2. On the card, under **Add an address**, paste that address in the **Address (https)** field.
3. Tick the notices you want to receive.
4. Click **Add address**.
5. Click **Send a test** and check that it arrived on the other side.

- You can have up to 10 addresses per company.

- Each notice is signed, so the other side can check it really came from Crewstro. The signing secret is on the same line, under **Copy the signing secret**.
- If the other side is down, Crewstro tries again for some hours.
- After many failures in a row, the address turns itself off and the card shows **Turned off after repeated failures**. Fix the other side and turn it on again.

> **TIP** Always send a test after adding an address. It is the quickest way to know the connection is right.

More questions for Claude and ChatGPT

- "Which clients are at risk?": the health score of each client, lowest first, with the reason.
- "What is the best order for tomorrow's visits?": a suggested order so each person drives less, compared with the scheduled order.

> **CAREFUL** The route suggestion uses straight-line distance, not driving distance, and it ignores the time promised to the client. Use it for visits whose time can move.

Ask about the team's hours

Claude and ChatGPT, when connected, also answer "how many hours did each person work this week?" and "who went over 40 hours?". The answer shows each person's hours on the clock, week by week, the days worked and the visits with no clock entry.

> **CAREFUL** These hours are not the payroll calculation. Paid drive time, meal breaks and the state overtime rule stay in Payroll only. The assistant never sees anyone's pay.

Let the assistant leave suggestions: a bank line category and a draft quote

It is off until you turn it on. In Settings, Integrations, on the Claude and ChatGPT card, turn on **Let the assistant leave suggestions**. Only people who manage company settings can

change it, and it only works for an assistant connected by someone from the office who signed in to Crewstro.

Draft quote: ask the assistant to save a draft quote for a client, for example a deep clean for 320 dollars. The quote is saved as a draft in Quotes, with the note that it came from the AI assistant. Nothing is sent to the client: you review it and send it.

Bank line category (with the Bookkeeping add-on): the assistant can suggest the category of a bank statement line. The line stays waiting for review in Bookkeeping, Bank, with the suggestion already selected and marked as coming from the AI assistant. You click Add to post it. It never replaces a category that comes from a rule you wrote.

Each suggestion is recorded and listed on the same card, under Latest suggestions. There is a daily limit of 30 draft quotes and 200 category suggestions per company. Everything else stays read only. If the assistant does not show the new actions right after you turn this on, disconnect it and connect again.

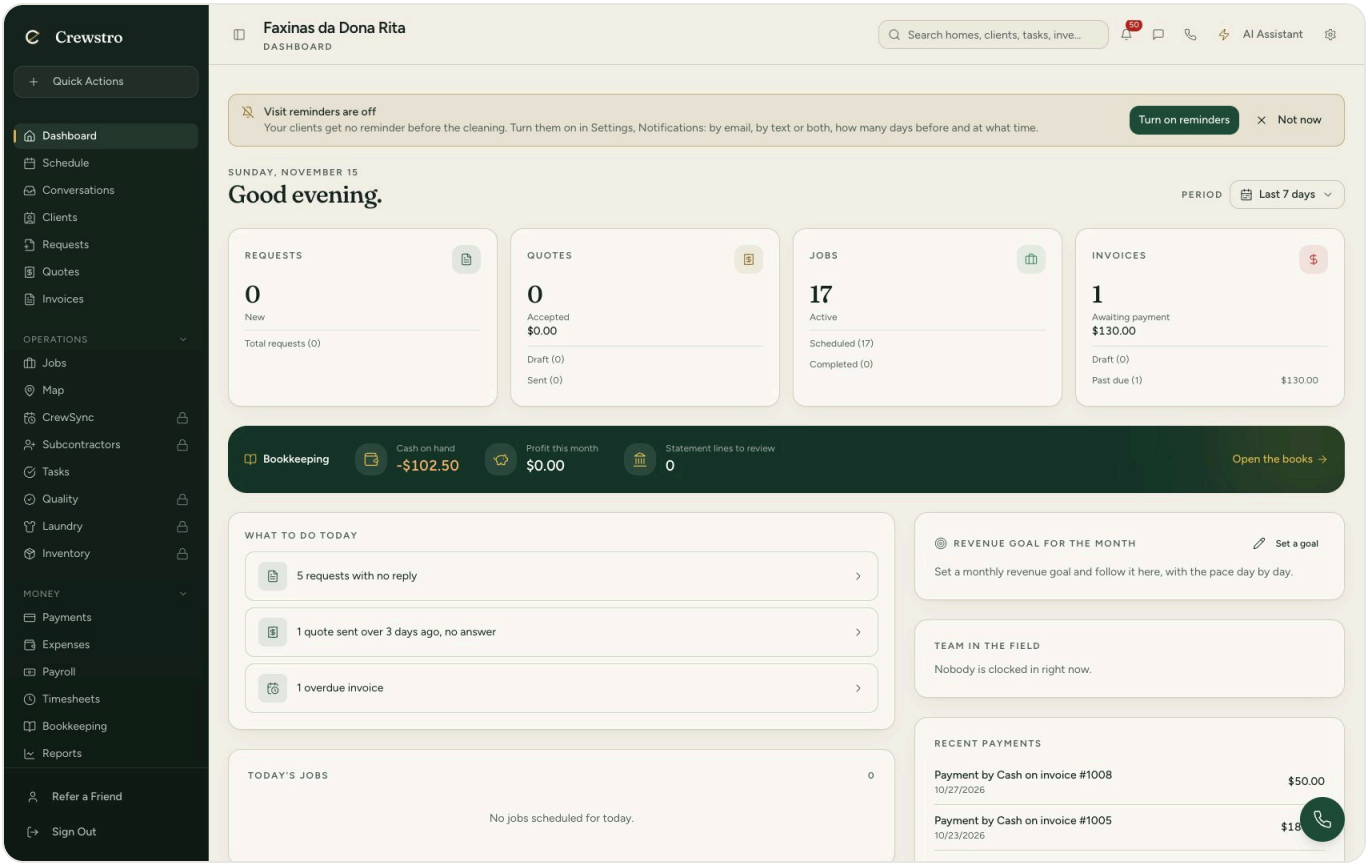
3

Part 3. The office day to day

16

The Dashboard: understand the day in 2 minutes

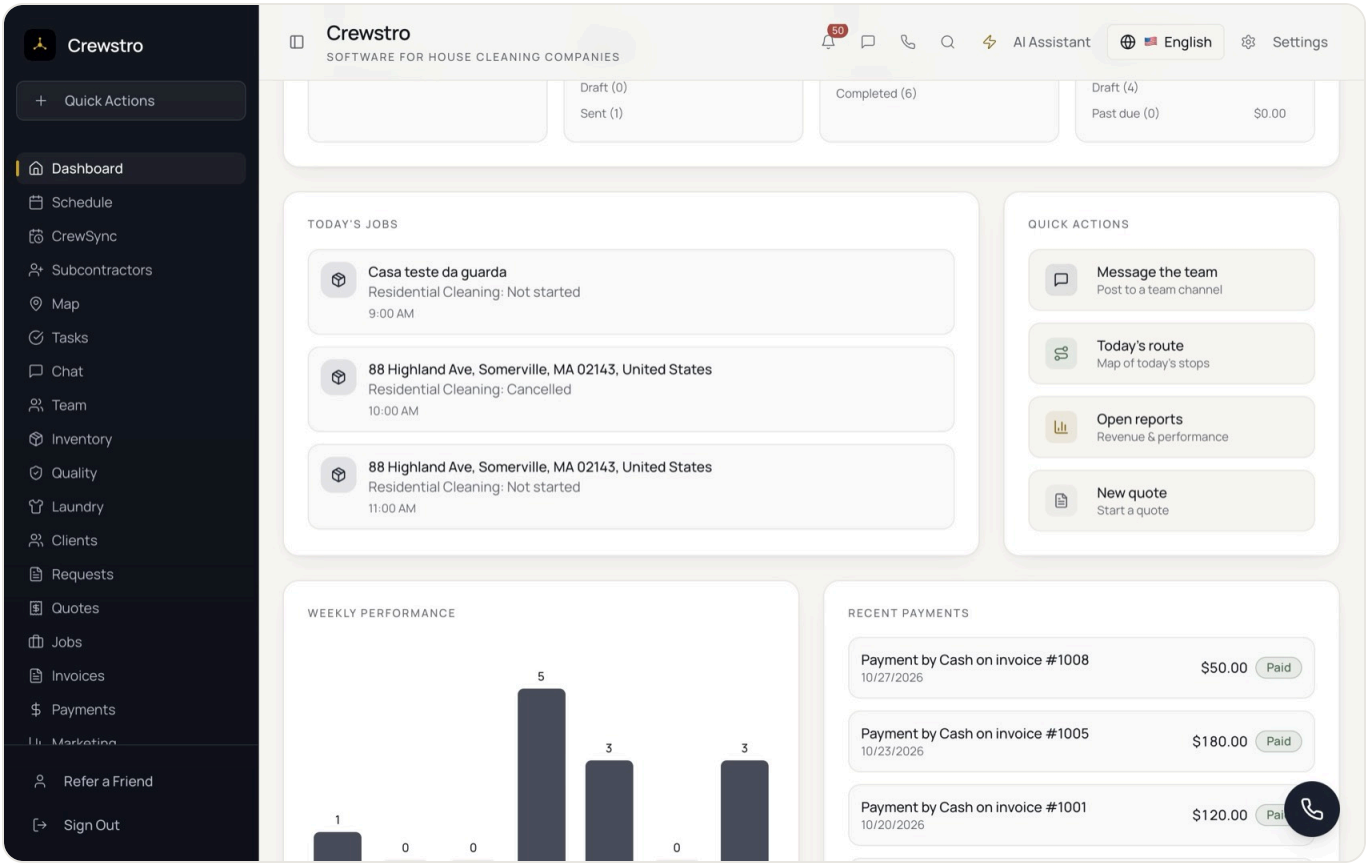
WHERE IT IS Dashboard (the first word in the menu)



The Dashboard, with the numbers for the period.

The Dashboard is the summary of the company. Start every day here.

- **Period**, at the top right: choose how many days of numbers you want to see (3, 7, 15, 30 days, 6 months or another).
- **Cleanings Completed, Team Productivity, Average Rating, Low Inventory**: click each card to see the detail.
- **Revenue Overview**: how much came in, how much is still to be received, how much is overdue.
- **Workflow Overview**: how many requests, quotes, jobs and invoices are open.



Further down: today's jobs and the quick actions.

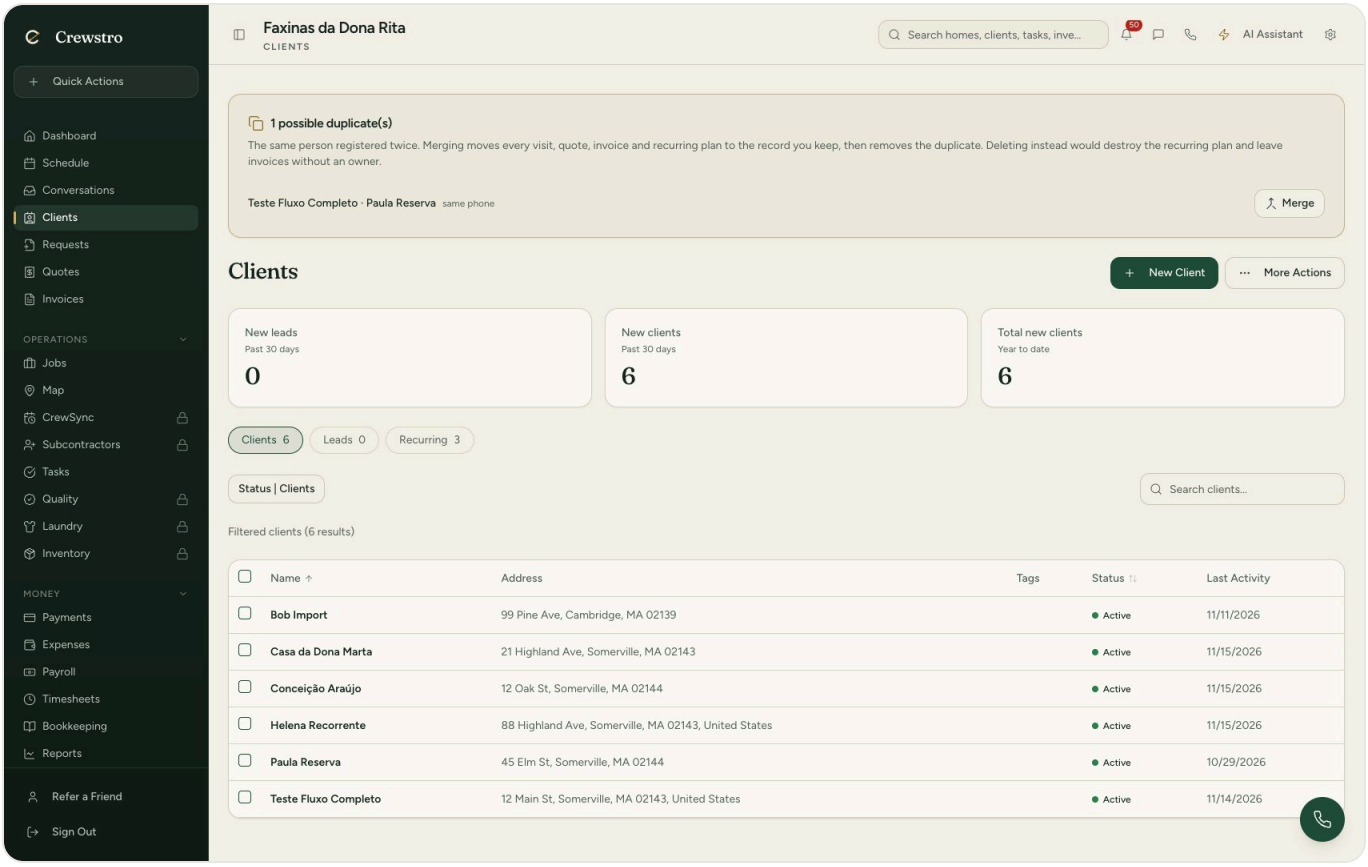
Further down are **today's jobs**. If a job shows as **Not started**, it means the time has already passed and the technician has not clocked in yet. Call her.

> **TIP** The Dashboard updates by itself. No need to press F5.

17

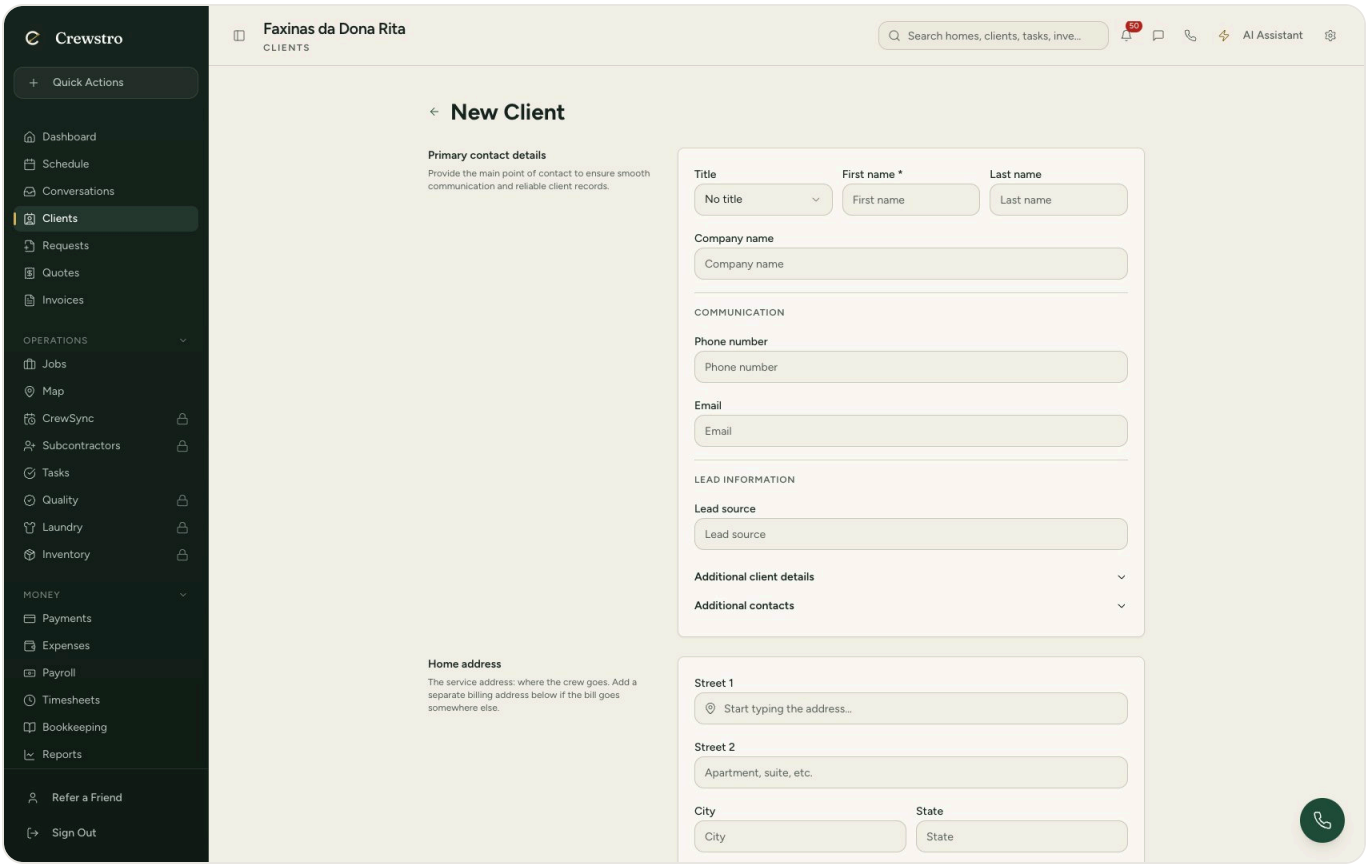
Clients

WHERE IT IS Clients



The list of clients.

Add a new client

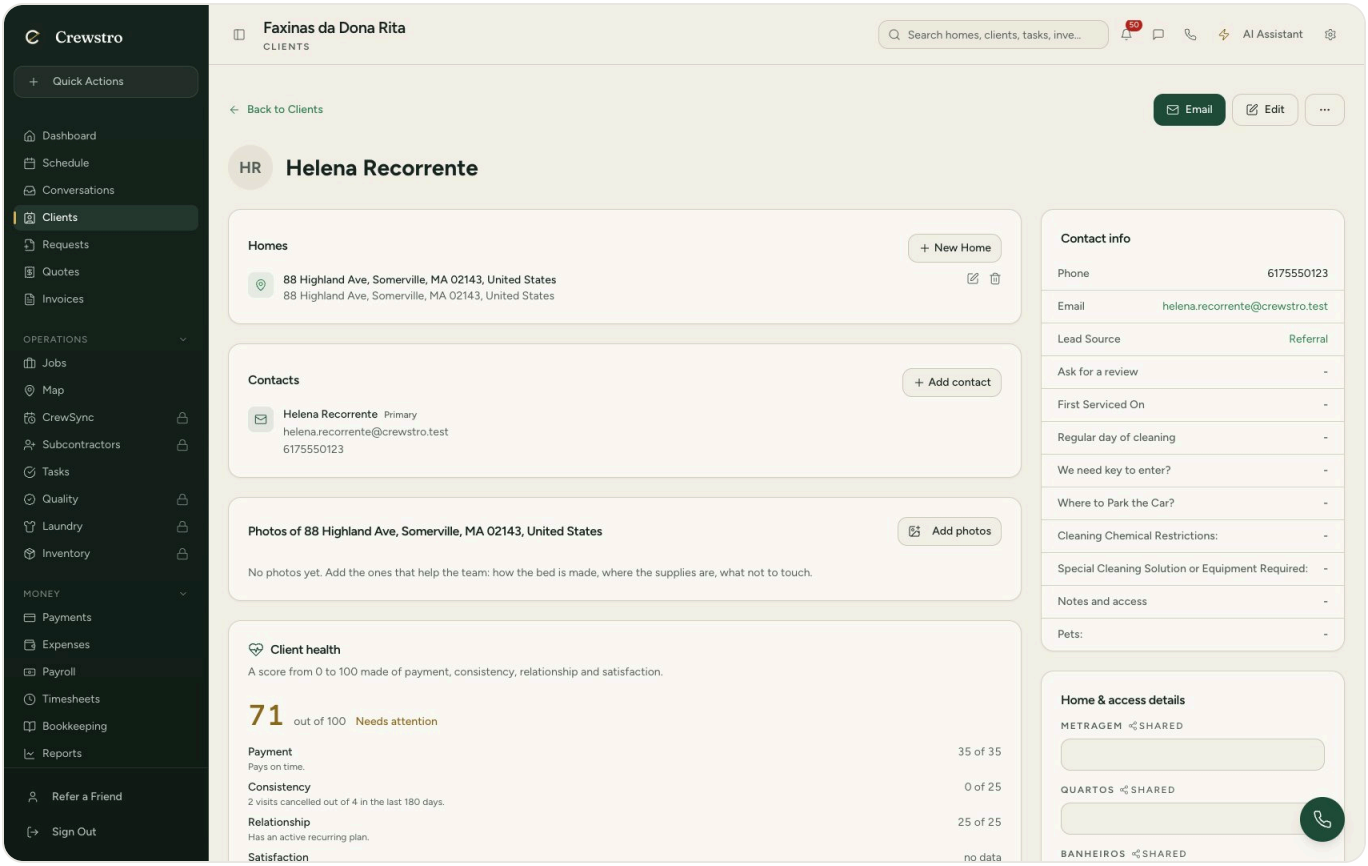


The new client form.

1. Click **Clients** in the menu.
2. Click **New Client**.
3. Type the name, the phone number and the email.
4. Type the address of the house. Start typing and pick the right address from the list that appears.
5. Fill in the details of the house: bedrooms, bathrooms, pets, parking.
6. Fill in the codes: gate, door, alarm, lockbox. The technician sees these codes in big letters on her phone.
7. Click save.

> **CAREFUL** The language of the client's messages is chosen later, in **Edit**, on their profile. If the client speaks Spanish, choose Spanish there: reminders, invoices and quotes will go out in Spanish.

The client profile



A client's profile.

Click a client's name to open the profile. Everything about them is there:

- The houses and the contacts.
- The work view: requests, quotes, jobs, invoices, how much they have already paid and how much they owe.
- The text messages exchanged with them, and the **Send SMS** button.
- The service history, with before and after photos and the arrival and departure times.
- The next visits, the internal notes, the tags and the saved cards.
- The **Client hub**: the link to their own page.

> **TIP** The **Pause automatic reminders** button stops reminders and other automatic messages only for that client. Use it when they ask.

The Client hub

Every client has a page of their own, with no password. There they see the quotes, the latest visits with photos, the invoices to pay, your rules, and they can ask for changes. On the profile, the **Client hub** card copies the link or sends it by email. The change request arrives in the bell and on the profile; when you solve it, click **Resolve**.

Duplicate client, archive or delete

- **Merge**: the list shows possible duplicates (same name, email or phone). Merge brings everything into a single record.
- **Archive**: hides the client. It can be undone.
- **Delete**: erases forever, together with the houses, the contacts and the recurring series.

> **CAREFUL** Always prefer Merge or Archive. Delete cannot be undone.

The client health score

On the client profile, the **Client health** card shows a score from 0 to 100. It helps you see who needs attention before they leave or stop paying.

- **Payment** (35 points): overdue open invoices and a history of paying late.
- **Consistency** (25 points): how many visits were cancelled in the last 180 days.
- **Relationship** (25 points): an active recurring series, a visit scheduled or a recent visit.
- **Satisfaction** (15 points): the average of surveys answered in the last 12 months.

80 or more is **Healthy**, 60 to 79 **Needs attention**, and below 60 is **At risk**. The card shows the points for each part and the reason.

> **CAREFUL** A part with no data shows as "no data" and is left out of the score. So a client with little history is measured on fewer parts: read the reasons, not only the number.

Photos and your own fields for each home, and what the field team sees

Photos of the home: in the client profile, each home has a card **Photos of** that home. Click **Add photos** and send the ones that help the team: how the bed is made, where the supplies are, what not to touch. Each photo can have a caption. Up to 40 photos per home, and the location stored inside the photo file is removed before it is saved.

Field team sees it: every photo has this switch. On (the default for a new photo), the technicians who serve this client see the photo in the app, on the visit, under **About this home**. Off, only the office sees it.

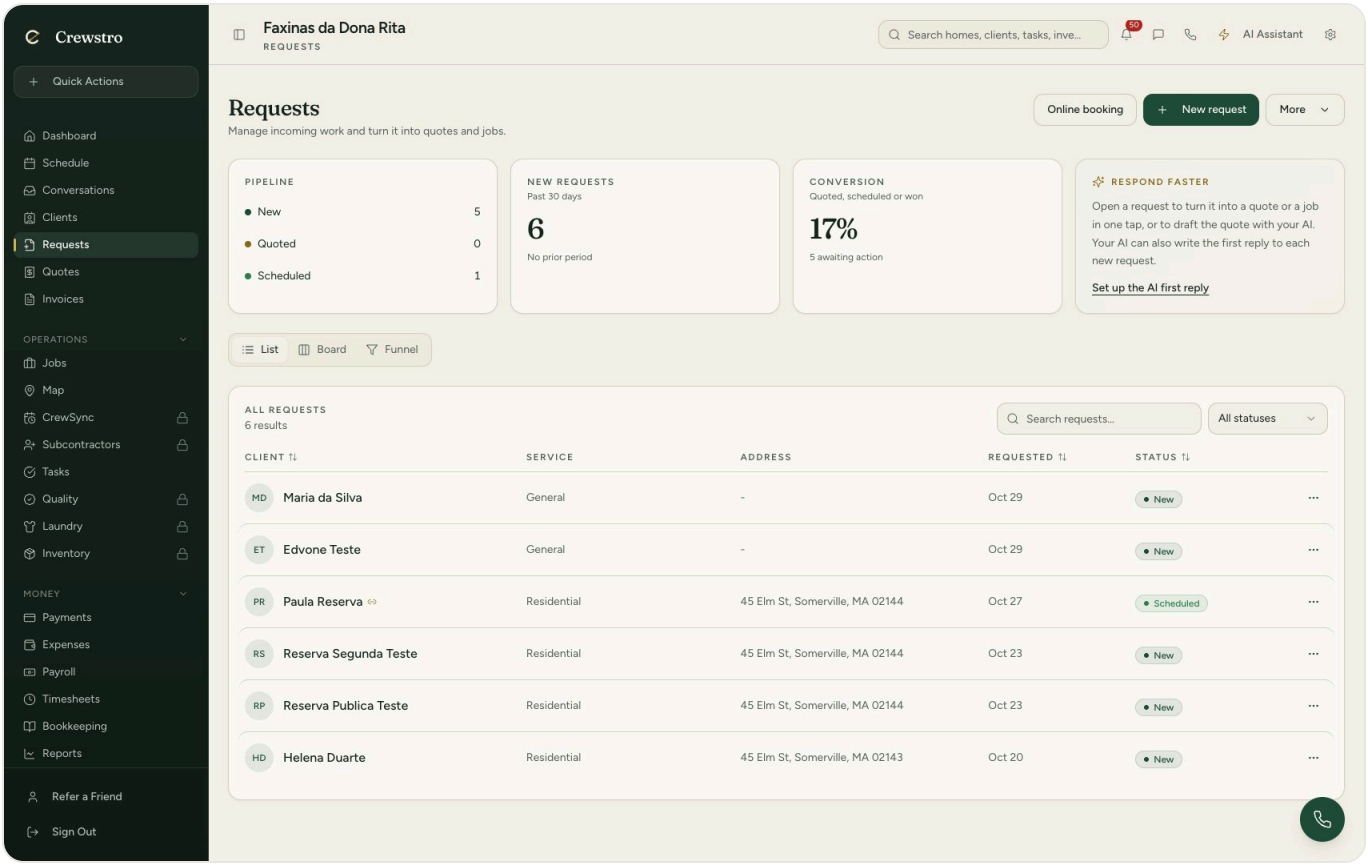
Your own fields for the home: in Settings, Fields, the **Home** tab, each field has the same switch, **Field team sees it**. A field starts hidden from the field team; turn it on for what they need at the door (where the supplies are, which products not to use). You fill in the value in the client profile, on the card of that home.

A technician only sees what you released, and only for the homes of clients she serves. In the app the photo opens on the screen; there is no download button.

18

Requests (orders that came in)

WHERE IT IS Requests



The list of requests.

When a client asks for a cleaning through the online booking page, the order lands here. The owner and the administrators also get a push and an email. The client is NOT confirmed yet: someone in the office needs to answer.

Leads from Facebook and Google ads, and the ones from HighLevel, also land here, if the company turned on the lead address (see the chapter Receive leads from Facebook, Google and HighLevel). Each order keeps where it came from.

1. Open the request.
2. Read what the client asked for: service, house, date, extras, answers.

3 Choose what to do:

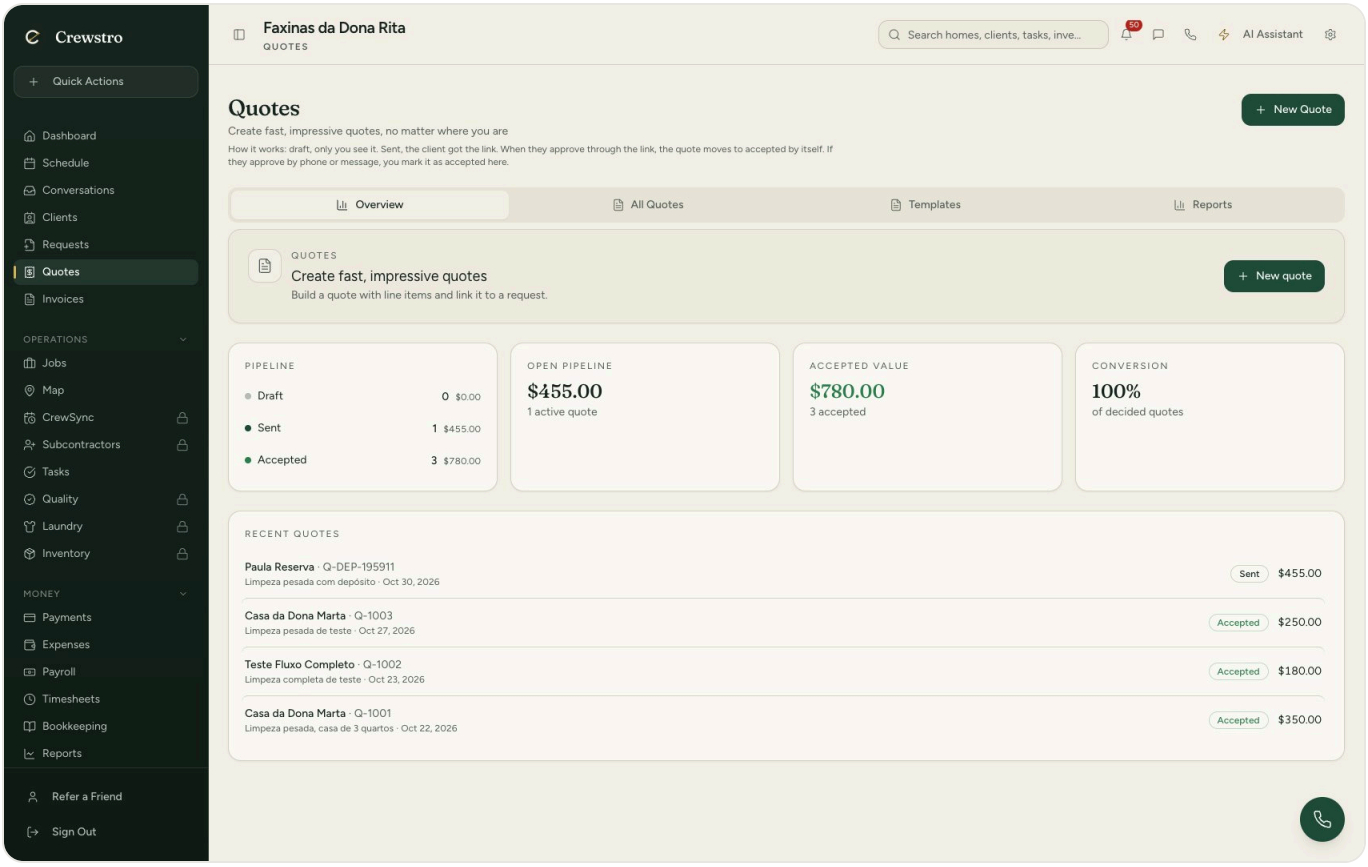
Button	What happens
Convert to Quote	Creates (or finds) the client and a draft quote, with the estimated price. You check it and send it.
Convert to Job	Books the cleaning on the date the client asked for, still with no technician. You choose the technician later.
Set up recurring	For weekly, every 2 weeks or monthly orders: creates the series of visits.

CAREFUL Nothing is sent to the client when they place the order. Call or text to confirm, or send the quote.

19

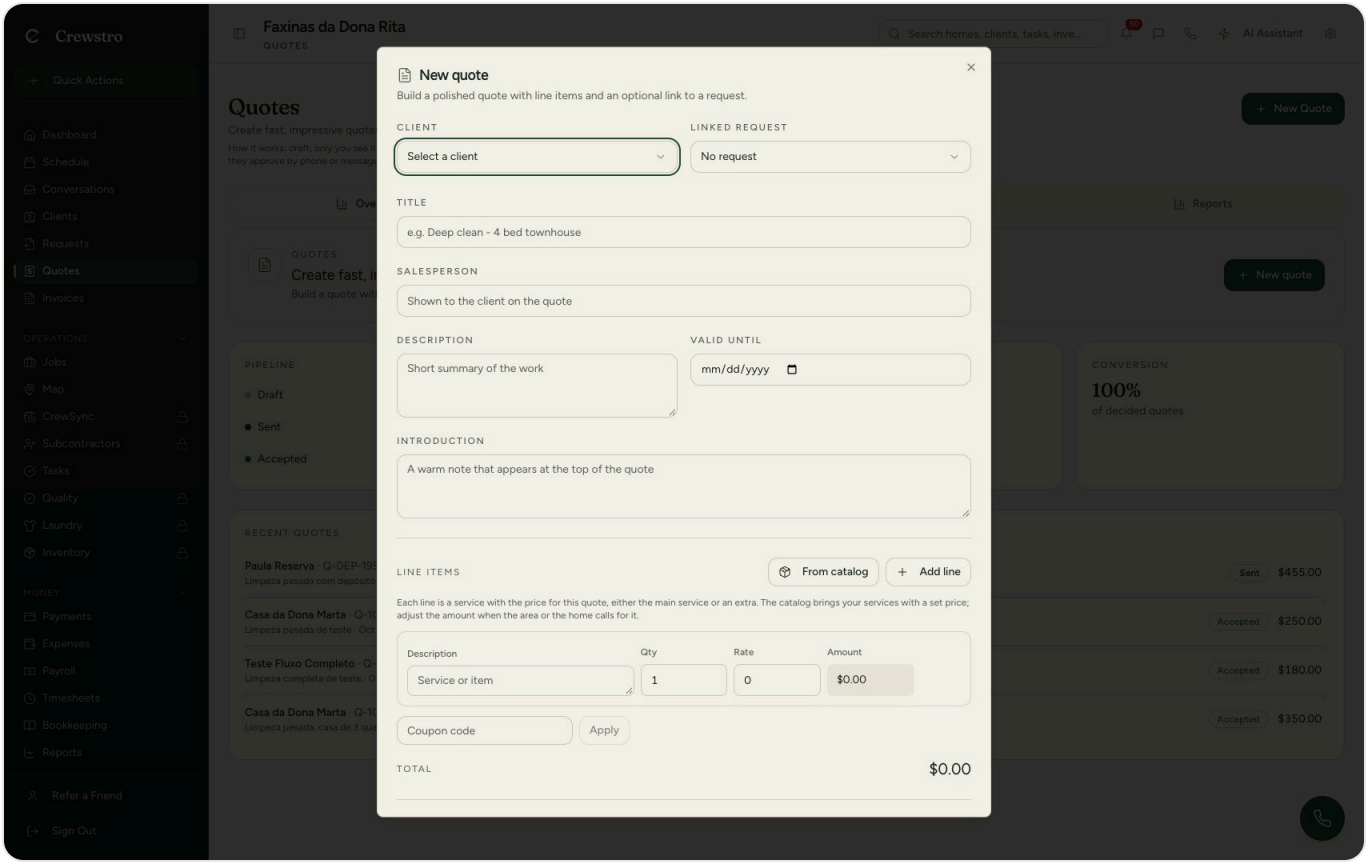
Quotes

WHERE IT IS Quotes



The quotes screen.

Make and send a quote



The new quote form.

1. Click **New quote**.
2. Choose the client.
3. Type a title (example: "Deep clean, 3 bedroom house").
4. Add the lines: click add line or pull from the catalog.
5. Check the validity (until when the price is good).
6. Save.
7. Click **Send**.

The client gets a link by email, and also by text if they have a phone number and the company has a phone provider. All in their language. If they have no email and no phone, use **Copy link** and send it by WhatsApp.

What the client does

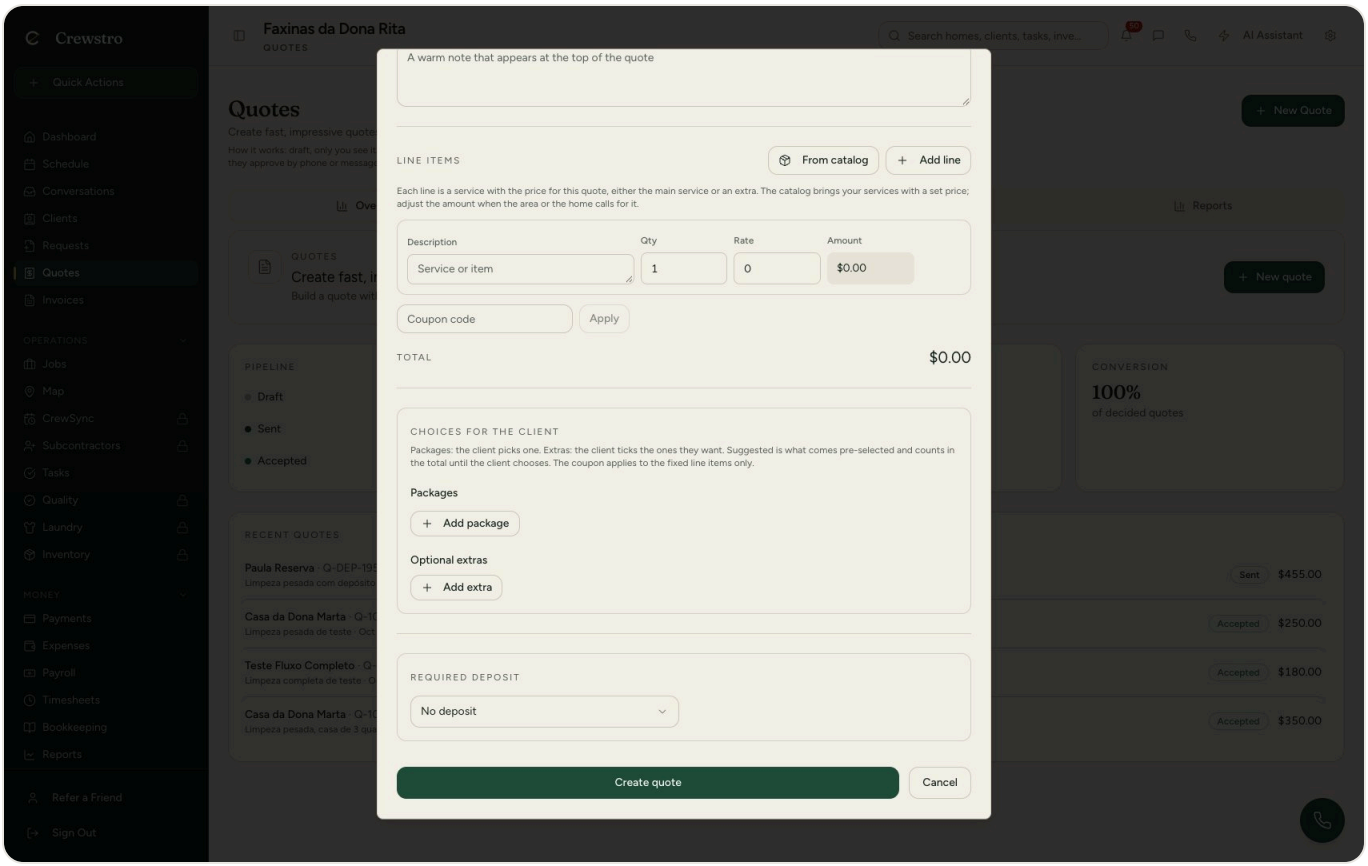
- **Approve**: they type their name and accept the company's rules.
- **Request changes**: they write what they want to change.
- **Decline**: they say why. The office gets a notice.

When the client approves, Crewstro creates a job with NO date, and the office gets an email. Open the job in **Jobs** and set the day.

> **TIP** The cost of each line never shows to the client. It shows you your profit margin.

> **CAREFUL** The quote has no tax. Tax goes on the invoice.

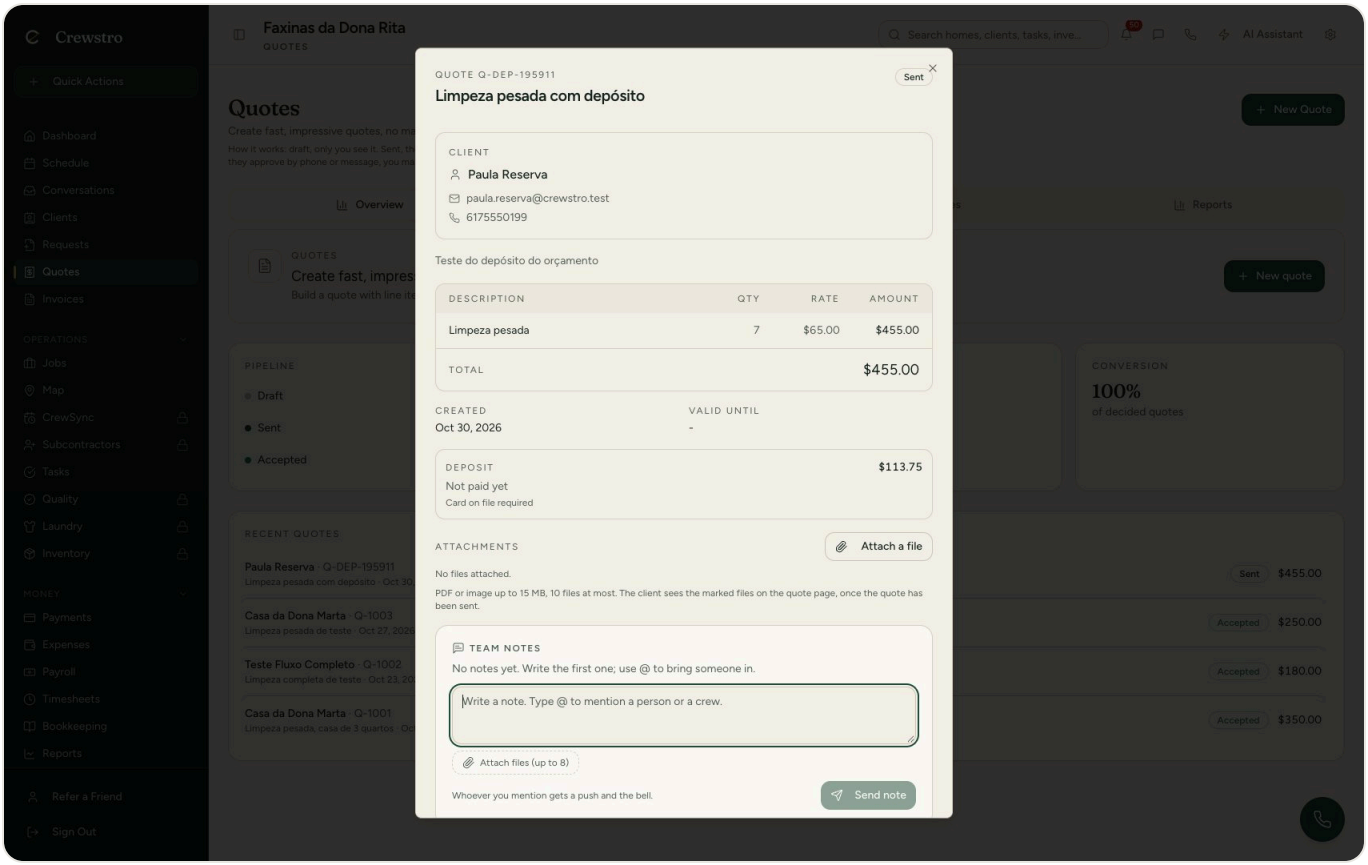
Ask for a deposit (and a card on file)



On the quote: Required deposit, fixed or percent, and the Require a card on file box.

You can ask for a deposit so the client confirms the work. On the quote, under **Required deposit**, choose **Fixed amount** or **Percent of total** and type the value; the screen shows what the client will pay.

1. The client opens the link, approves with their name, and right below sees **Pay your deposit**, with your company's Stripe form (card, Apple Pay, Google Pay or bank).
2. They can tick **Save this card for future invoices**. If you ticked **Require a card on file** on the quote, saving is mandatory and the text explains it.
3. The deposit shows in the bell ("Deposit received") and on the quote detail, with the date.
4. When the first invoice of that job is created, it is born with the deposit already deducted from the balance.



The quote detail: the deposit, whether it was paid (with the date) and whether a card on file is required.

> **CAREFUL** Online deposits need Stripe connected in Payments. Without it the client sees the deposit and a note that the company will arrange payment. Saving a card needs the client to have an email on file.

Attach a PDF or an image to the quote

The quote detail has an **Attachments** block. Use it to send along a proposal in PDF, a floor plan, photos or your contract.

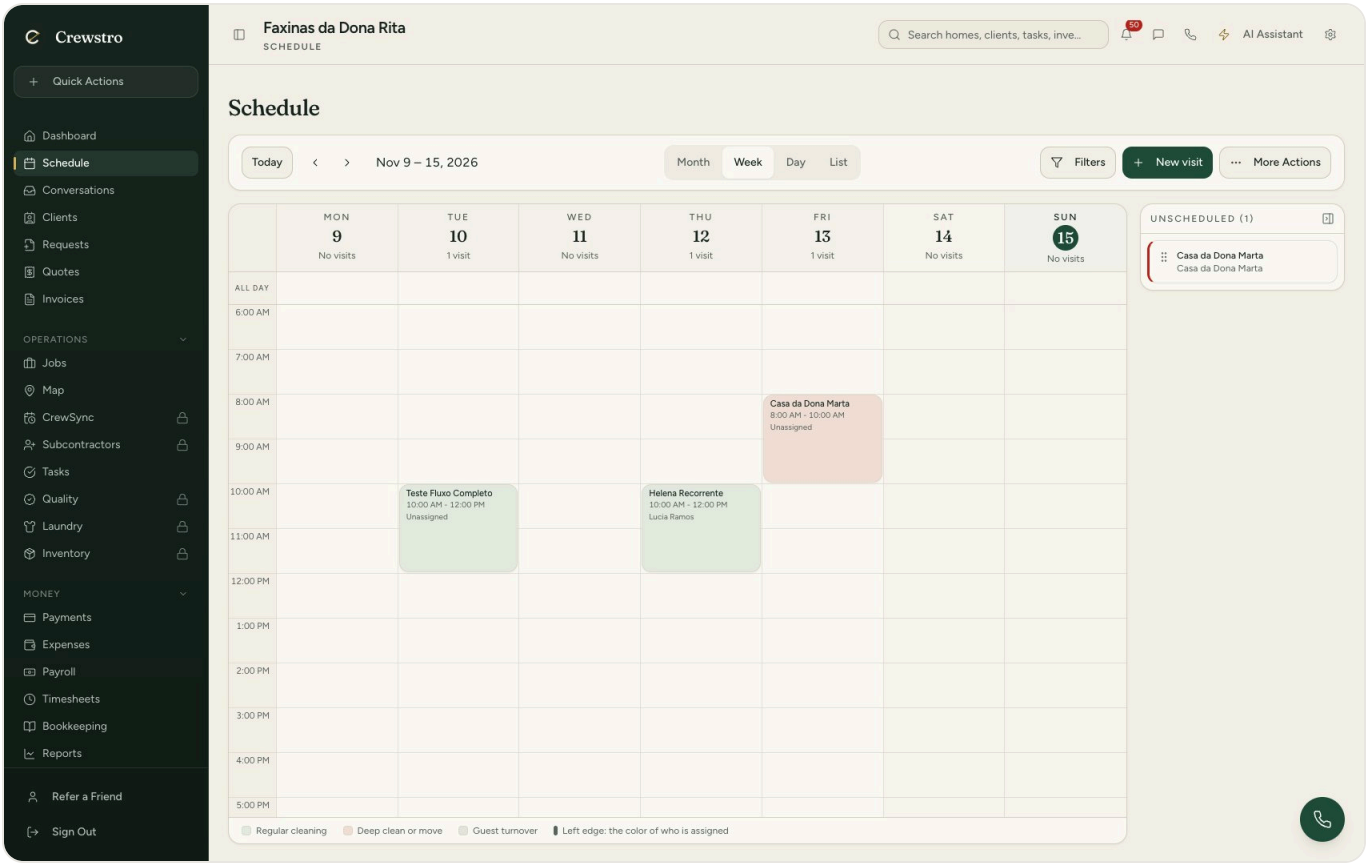
1. Open the quote and click **Attach a file**.
2. Choose one or more files. PDF or image (JPG, PNG or WebP) up to 15 MB, 10 files per quote at most.
3. On each file, leave the switch on **Client can see it** or change it to **Office only**.

- The client sees the marked files on the quote page, in the **Documents** block, once the quote has been sent.
- The attachment does not go inside the email. The client opens it from the quote link.
- Turning the switch off or deleting the attachment removes the file from the client page right away.
- Click the file name to open and check it.

20

The Schedule

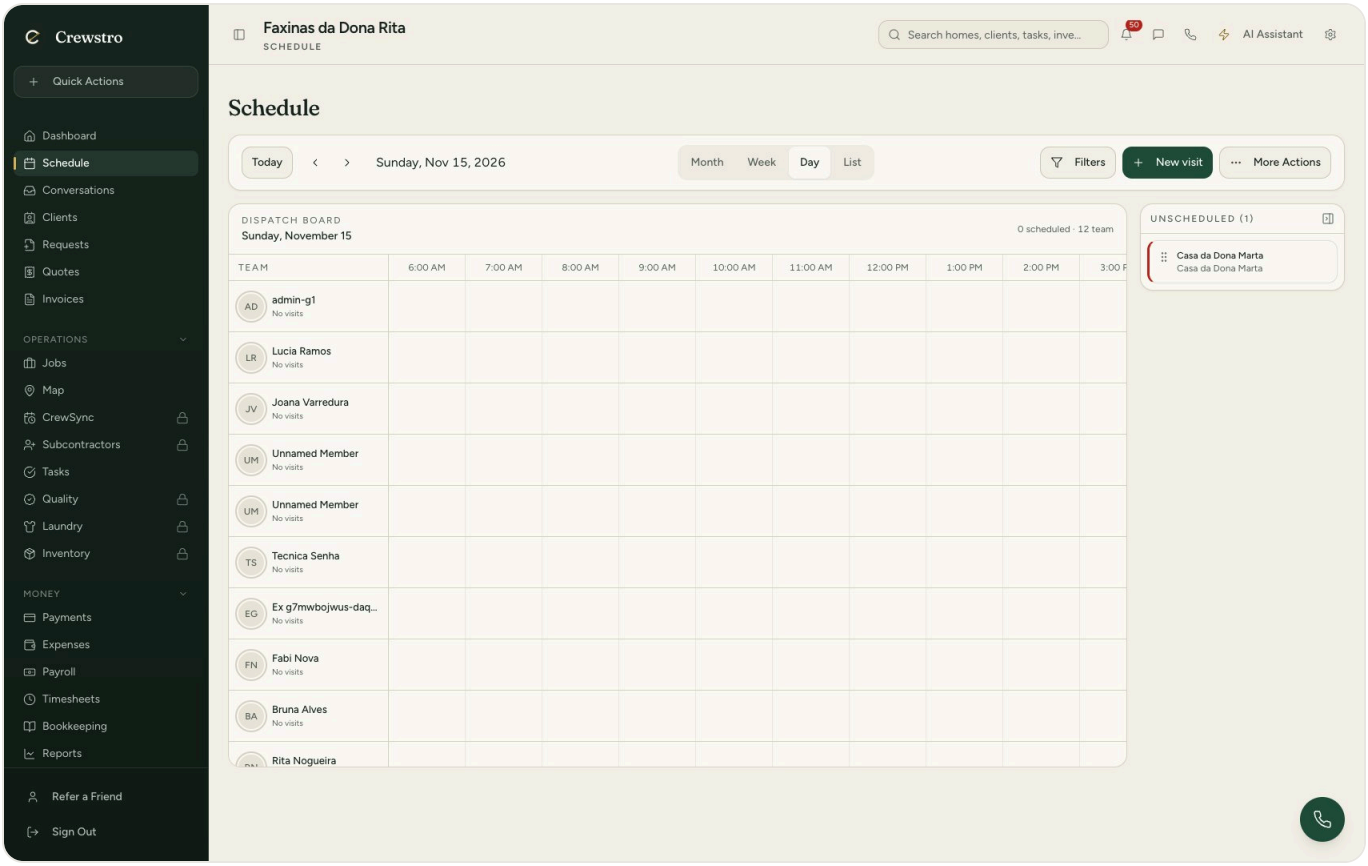
WHERE IT IS Schedule



The Schedule in the Week view.

The four views

- **Month**: the whole month.
- **Week**: the view that opens first, from 6 am to 9 pm.
- **Day**: the dispatch board. One row for each technician, plus an **Unassigned** row.
- **List**: everything in a list, with search and with the groups Overdue, Today, Upcoming and Done.



The Day view: who goes where.

Create by clicking an empty time slot

1. Click an empty space in the Schedule, on the day and at the time you want.
2. A menu "Add to" that day and time appears.
3. Choose **New Job** to book a cleaning. The date and time are already filled in.

Menu option	What it is for
New Job	The real cleaning. It goes to the technician's phone, has clock in and out, photos, and becomes an invoice.
New Task	An office to-do (buy supplies, call someone).
New Event	An appointment only on the office calendar (meeting, consultation).

Menu option	What it is for
Meal break	Books the technician's lunch time. It only appears with the meal break rule turned on.

> **CAREFUL** Event and task do NOT go to the technician's phone and do not become an invoice. For a cleaning, always use New Job.

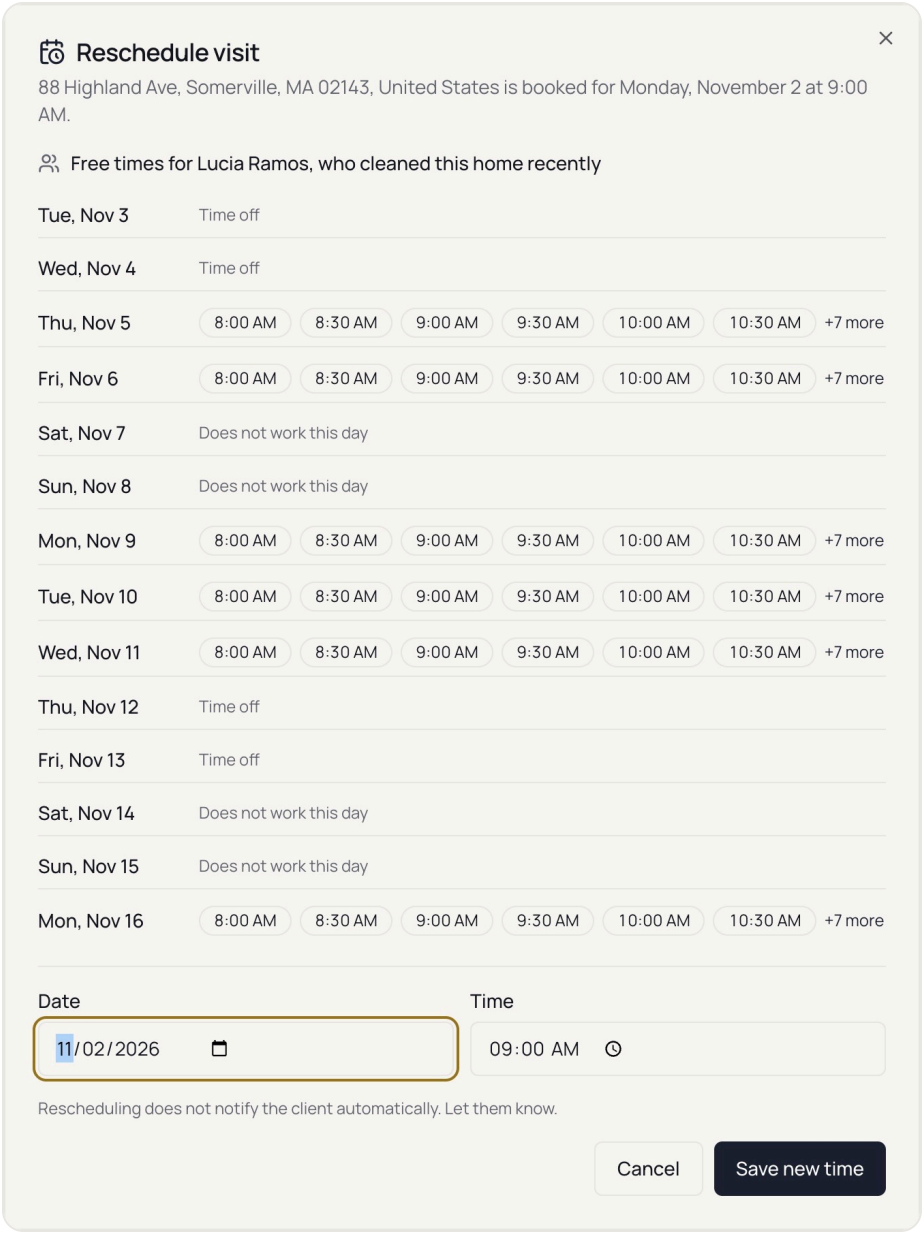
Change the time

Drag the card to another time. The duration stays the same. Jobs with no date stay in the **Unscheduled** panel: drag them onto the calendar to book them.

Click a job

Click a card to see the detail. There you complete, edit, reschedule, cancel the visit, send a reminder, see the client and create the invoice.

Reschedule with the technician's free times

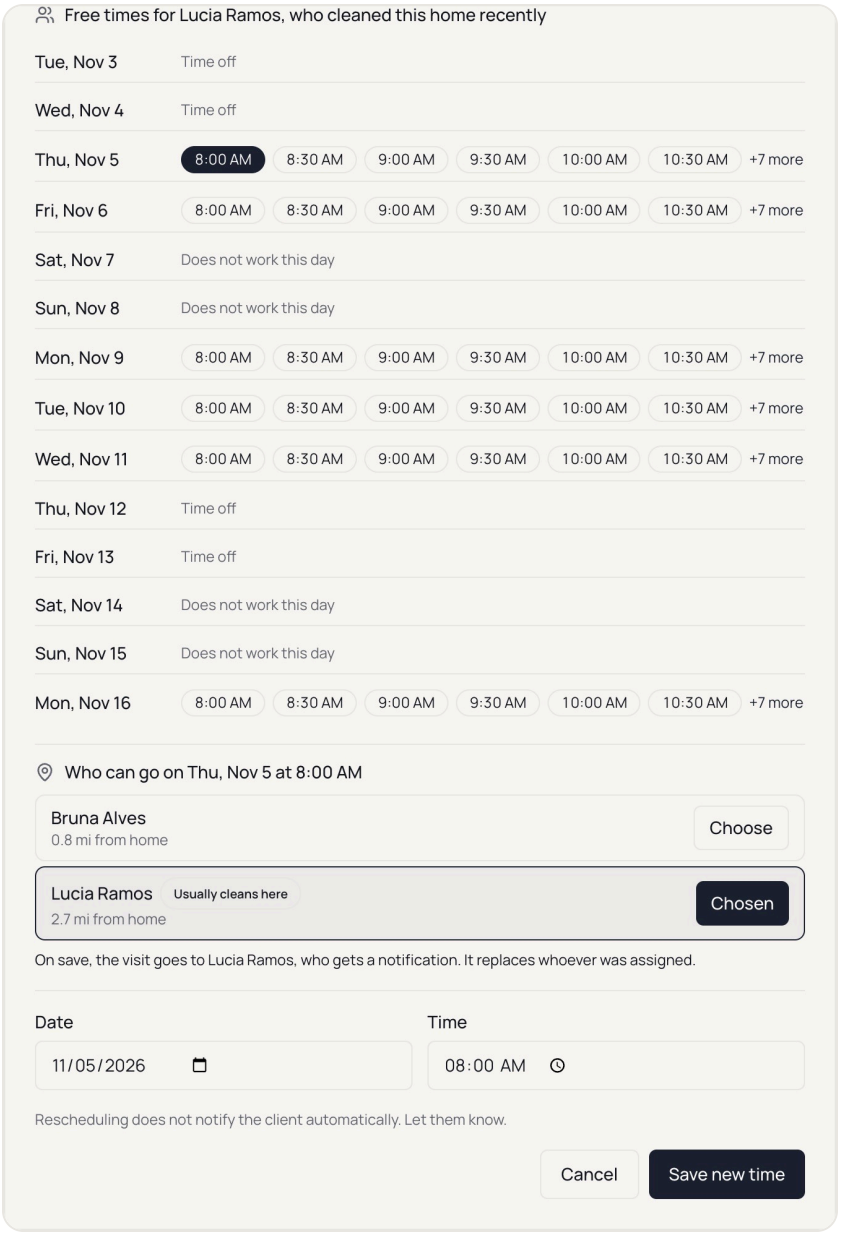


Reschedule: the free times of the person who cleans the house in the next 14 days.

1. Click the visit and then **More Actions** > **Reschedule**.
2. The next 14 days appear with the times when the technician (or the team) that cleans that house is free. Days off, days she does not work and full days appear marked.
3. Click a time. The date and time go into the fields below.
4. Click **Save new time**.

TIP The times take into account the weekly availability on the technician's record (in Team), the approved time off, the jobs already booked (with half an hour for travel) and the daily job limit. If the availability is not filled in, the system uses the company's business hours and tells you.

Who can go that day

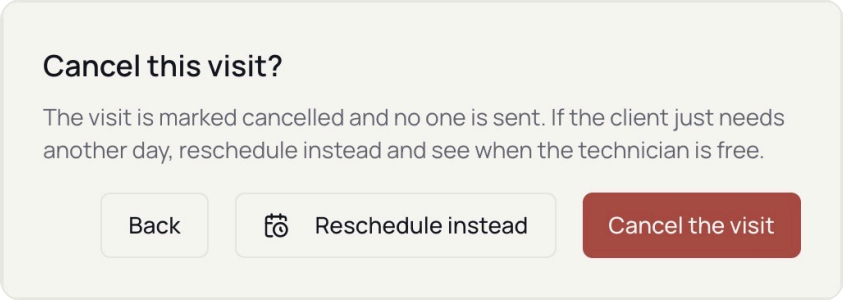


After choosing the time: who can go, from the closest to the farthest.

After choosing the day and time, the **Who can go** list appears: the technicians free at that time, from the closest to the farthest. The distance is in a straight line, from the houses each one is already going to clean that day (or from the home address on her record, if she has no visit that day). The technician who usually cleans the house has the **Usually cleans here** tag. Whoever is not free appears at the end, with the reason (time off, does not work that day, daily limit).

1. If you want to send another technician, click **Choose** next to her name.
2. Click **Save new time**. The visit changes day and goes to the chosen technician, who gets a notice on her phone.

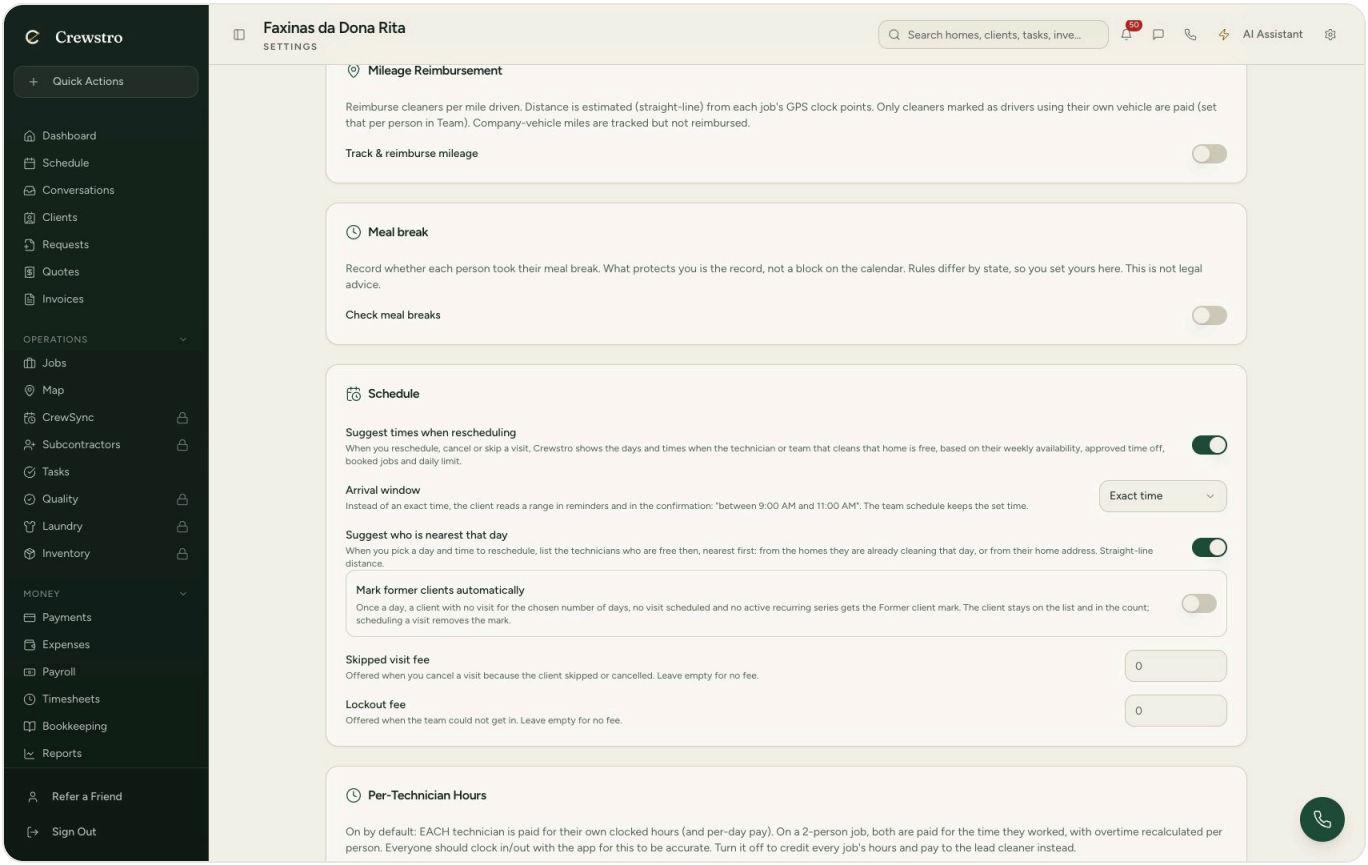
> **TIP** For the distance to work, the address of the house needs to be complete, and it is worth filling in the home address of each technician on her record in Team.



Before cancelling, Crewstro offers to reschedule.

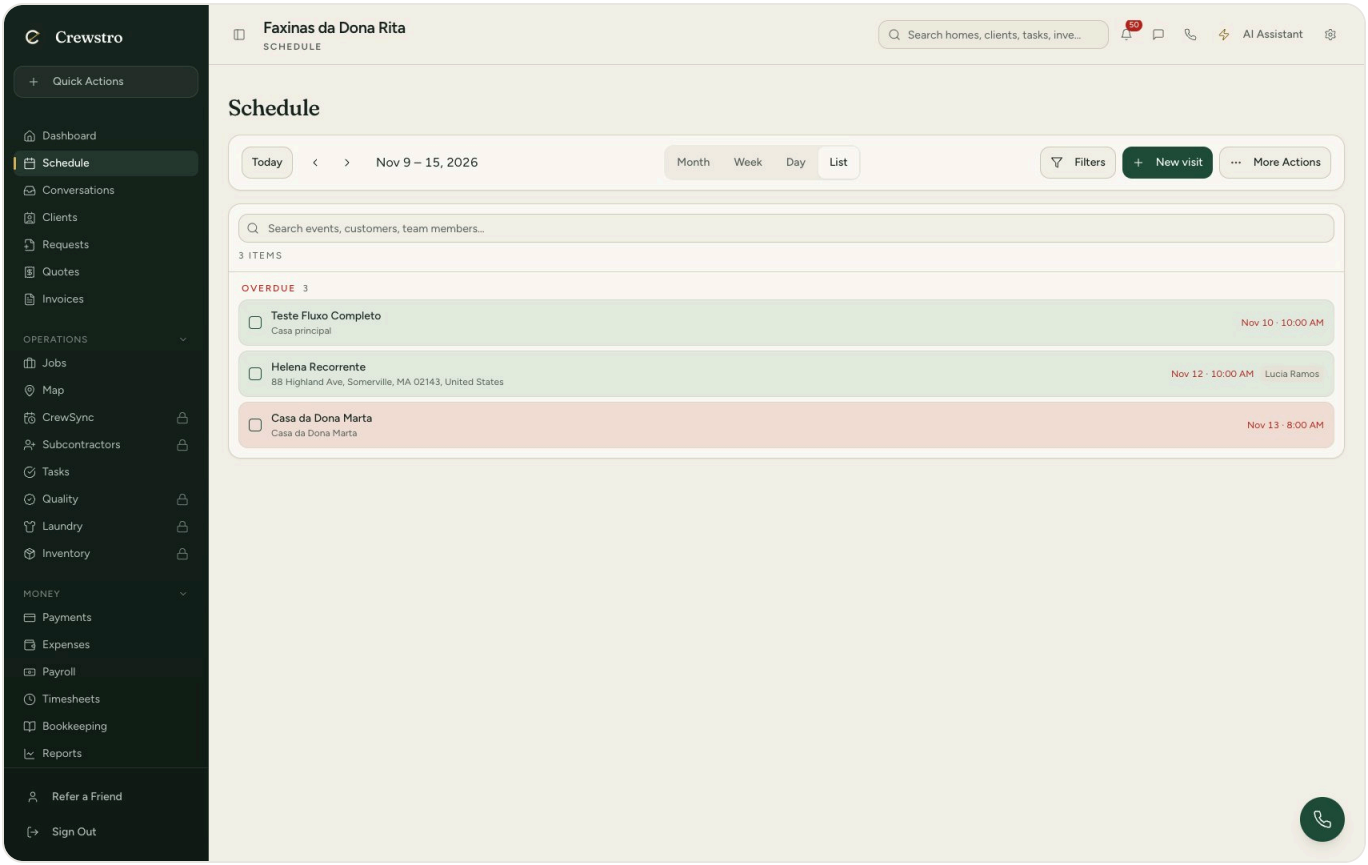
When you click **Cancel visit**, Crewstro asks first and offers **Reschedule instead**: if the client only needs another day, the cleaning is not lost. In the Jobs list, the same button appears when you cancel or skip a visit in the series.

> **TIP** To turn the suggestions off: Settings > Operations > Schedule. One switch turns on the free times and another the list of who is closest.



Settings > Operations > Schedule: the two switches for the suggestions.

CAREFUL Rescheduling, cancelling or changing the technician does NOT notify the client by itself. You tell them.

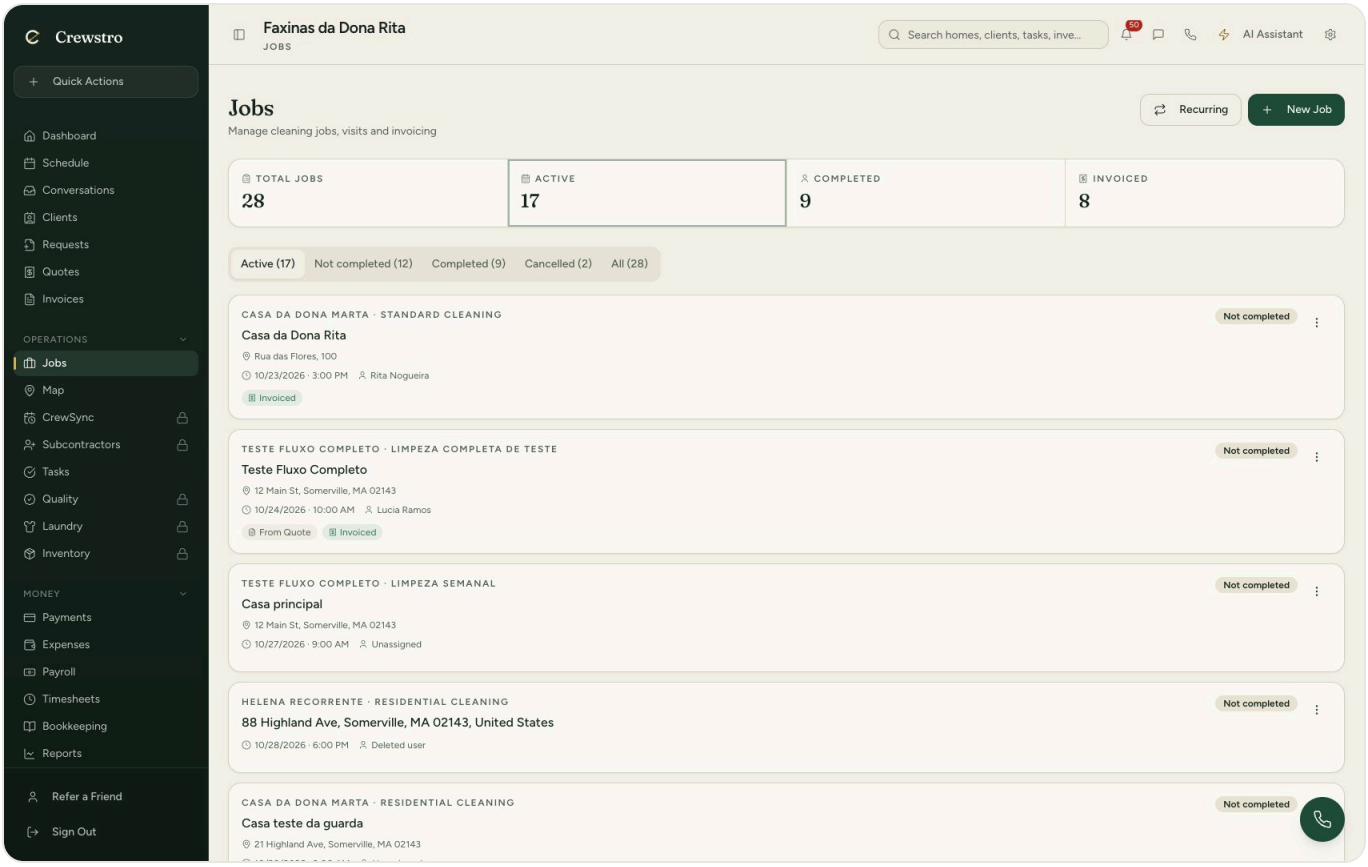


The List view, with search.

21

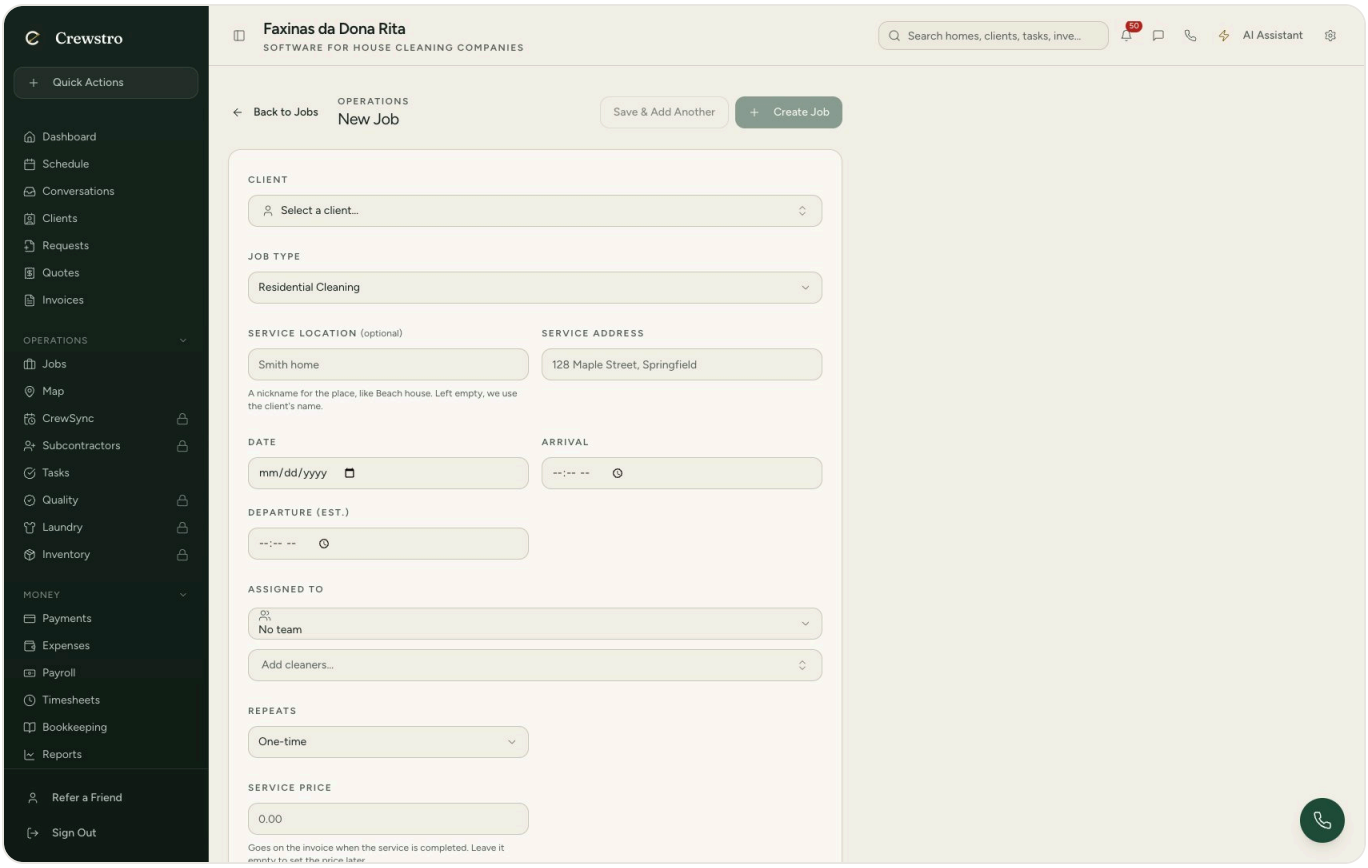
Jobs and regular clients (recurring)

WHERE IT IS Jobs



The list of jobs.

Create a job

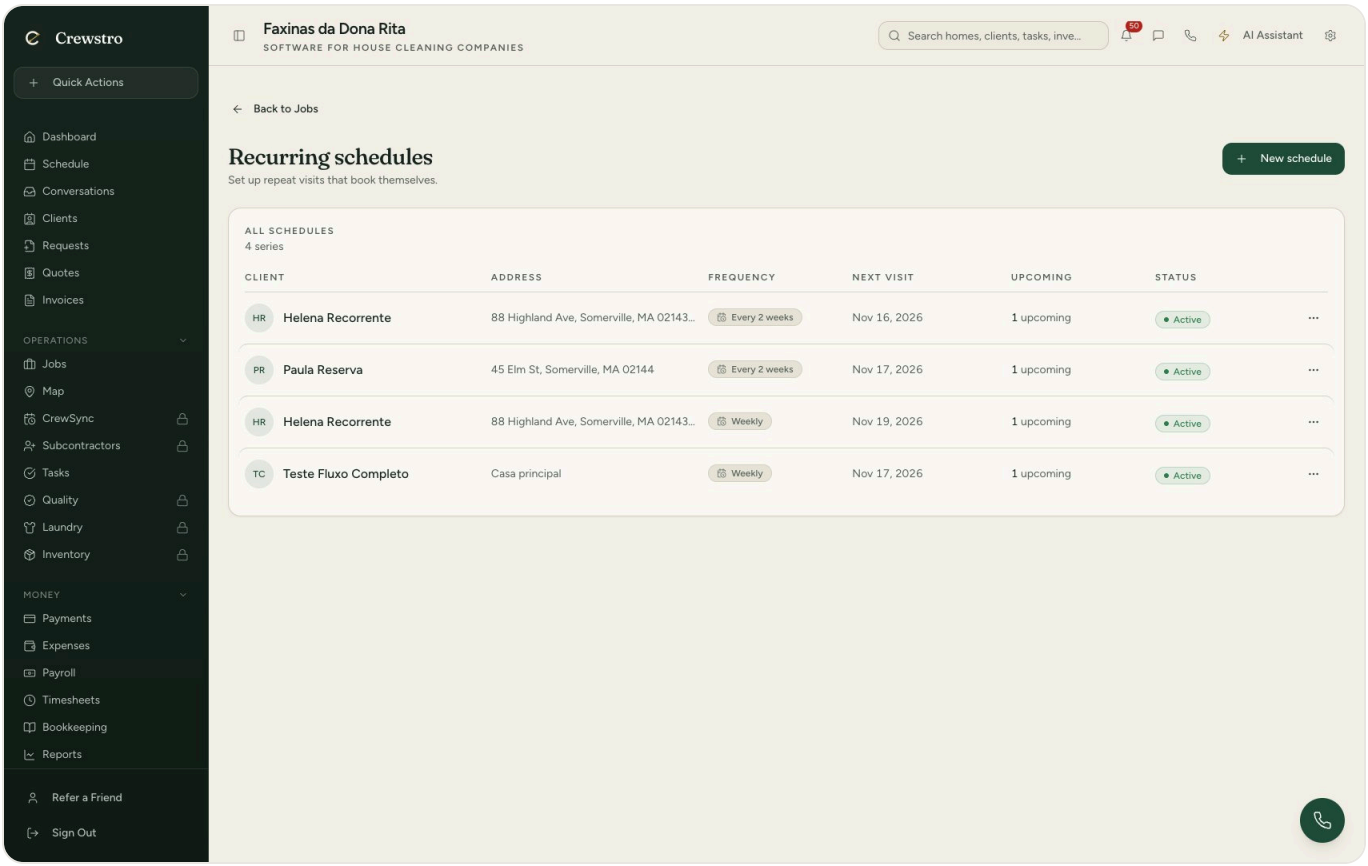


The new job form.

1. Click **New Job**.
2. Choose the client (or create a new one right there).
3. Choose the type of cleaning and the house.
4. Choose the date, the arrival time and the estimated departure time.
5. Choose who goes. It can be more than one person or a team. The screen shows who is free and who is off.
6. In **Repeats**, leave "One-time" for a single visit.
7. Click create.

A one-time job sends a confirmation to the client (email and text) and a push to the technician.

Regular client: the recurring series



The recurring series screen.

1. In Jobs, click **Recurring**.
2. Click new series.
3. Choose the client, the frequency (weekly, every 2 weeks, monthly), the time, the start date and, if you want, the end date.
4. Choose the technician and the price per visit.
5. Save. Crewstro creates the visits for the next 28 days and keeps creating them every day.

Series button	What it does
Edit	Changes the next visits that nobody has touched.

Series button	What it does
Pause	Removes the next visits (client travelling). Resume brings them back.
End	Stops the series today. Use it when the client leaves.
Delete	Erases the series, but the visits already booked STAY.

> CAREFUL To stop serving a client, use **End**, not Delete.

How the job ends

- The lead technician clocks in: the job becomes "In progress".
- The lead technician clocks out: the job becomes "Completed".
- The office can also press **Complete**.
- On completion, Crewstro creates the draft invoice (or charges the card, if auto-invoicing is turned on).

Price history of a recurring client

Every time the price per visit of a recurring series changes, Crewstro records it by itself: the date, the old price, the new one and the percentage. You see it when you open the series to edit, under **Price history**.

- When you change the price, the field **Reason for the price change (optional)** appears. The reason stays in the history only; the client does not see it.
- Series that existed before this feature start with a "since the plan started" line, because earlier changes were not recorded.
- The history covers the recurring series. The price of a one-time visit is not included.

Prices to review

In **Jobs > Recurring**, the **Prices to review** card lists the series that have been at the same price the longest, oldest first, with how much each one brings in per month.

- Choose the period: **6 months or more**, **9 months or more** or **12 months or more**.
- **Review price** opens the series so you can change the price for one client.
- The list does not suggest the new price. That decision is yours.

Change the price for many clients at once

On the **Prices to review** card, select the clients and click the **Adjust** button. The **Price change** screen opens, in three steps.

1. Choose **Percentage** or **Fixed amount**, type the increase and the date under **Takes effect on**. The client needs 30 days of notice, so the screen does not accept an earlier date. It shows how much more comes in per month and per year.
2. Choose the message tone (**Friendly**, **Professional** or **Formal**) and review the email to each client. You can edit any of them. Each client gets it in their language.
3. Check the summary and click **Approve and send**. The notice emails go out right away.

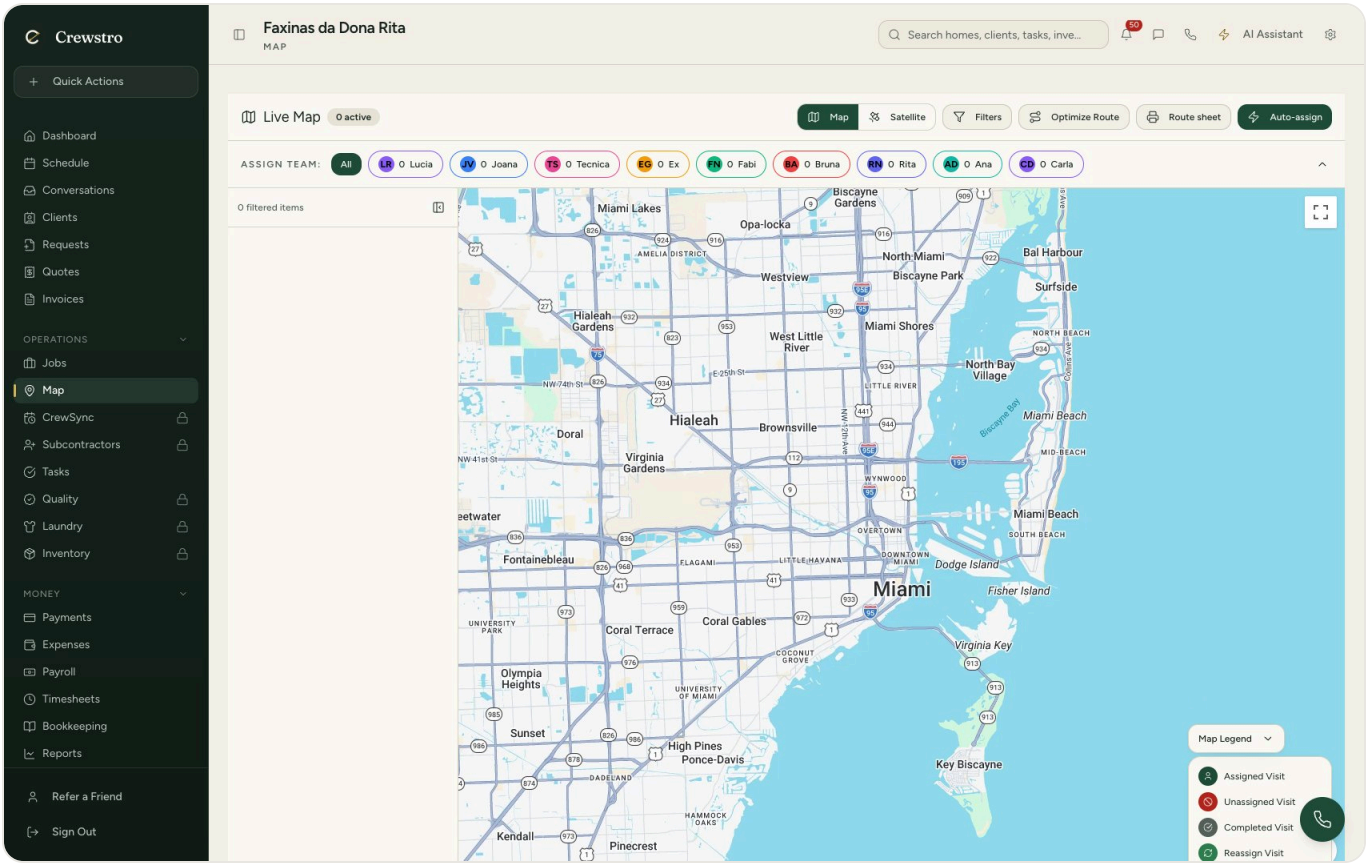
- The price **does not change when you approve**. It changes by itself on the date, and only for clients who were notified.
- Client with no email on file: notify them another way and mark **I notified them another way** on the **Scheduled price changes** card. Without that, their price does not change.
- On the **Scheduled price changes** card you can also **Resend email** or **Cancel price change** until the date.
- Increases only: the new price must be higher than the current one and at most three times it.
- If someone changes the price of the series before the date, that price change is set aside.
- The notice goes by email only, and only the office approves.

> **CAREFUL** The revenue projection uses today's clients. It is not guaranteed revenue: a client may leave.

22

The Map and the routes

WHERE IT IS Map



The Map with the jobs of the day.

The Map shows today's jobs and where the team is right now (the position from the last 3 minutes of whoever has the app open or is on the way).

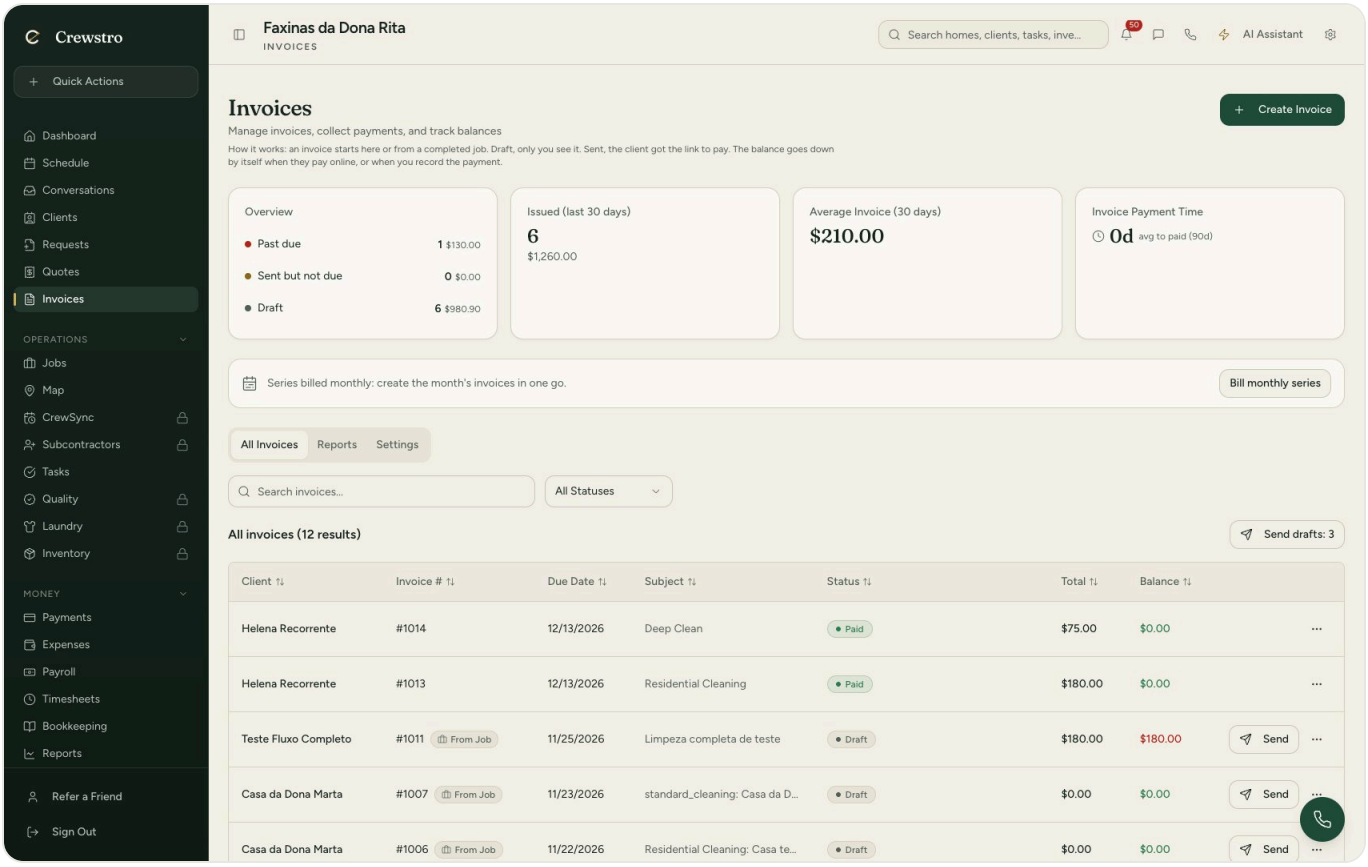
- **Optimize Route**: suggests the best order of stops.
- **Auto-assign**: suggests the least busy technician for each job with no technician. You accept one by one or all. Each technician gets a push.

TIP If a technician does not show on the map, see the chapter "When something goes wrong": it is almost always location turned off on her phone.

23

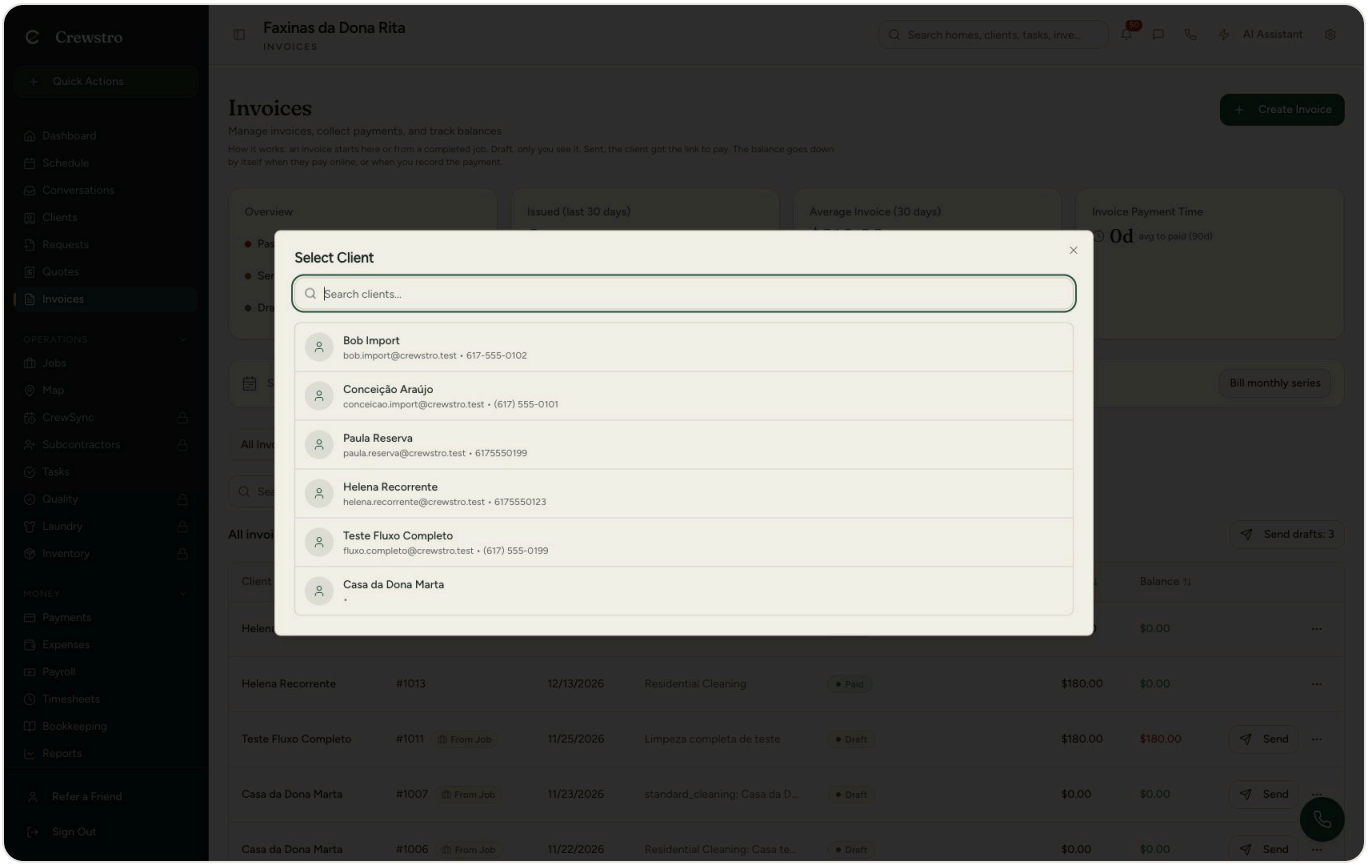
Invoices

WHERE IT IS Invoices



The list of invoices.

An invoice is born in three ways: with the **Create Invoice** button, from the job page, or by itself when the job ends.



Create an invoice.

1. Click **Create Invoice**.
2. Choose the client.
3. Add the lines (or pull from the catalog).
4. Check the discount and the tax. The tax comes from the table, by the address of the house.
5. Choose the term: on receipt, 15, 30, 45, 60 days or a date.
6. Save (it stays as a draft) or save and send.

Button	What it does
Email	Sends the invoice link to the client, in their language.
Send as Text	Sends the link by text message, through your provider.

Button	What it does
Preview as Client	Shows the page the client is going to see.
PDF and Print	Makes the paper copy.
Collect Payment	Records a payment or charges the saved card.
Close Invoice	Cancels the invoice. It does NOT give money back.

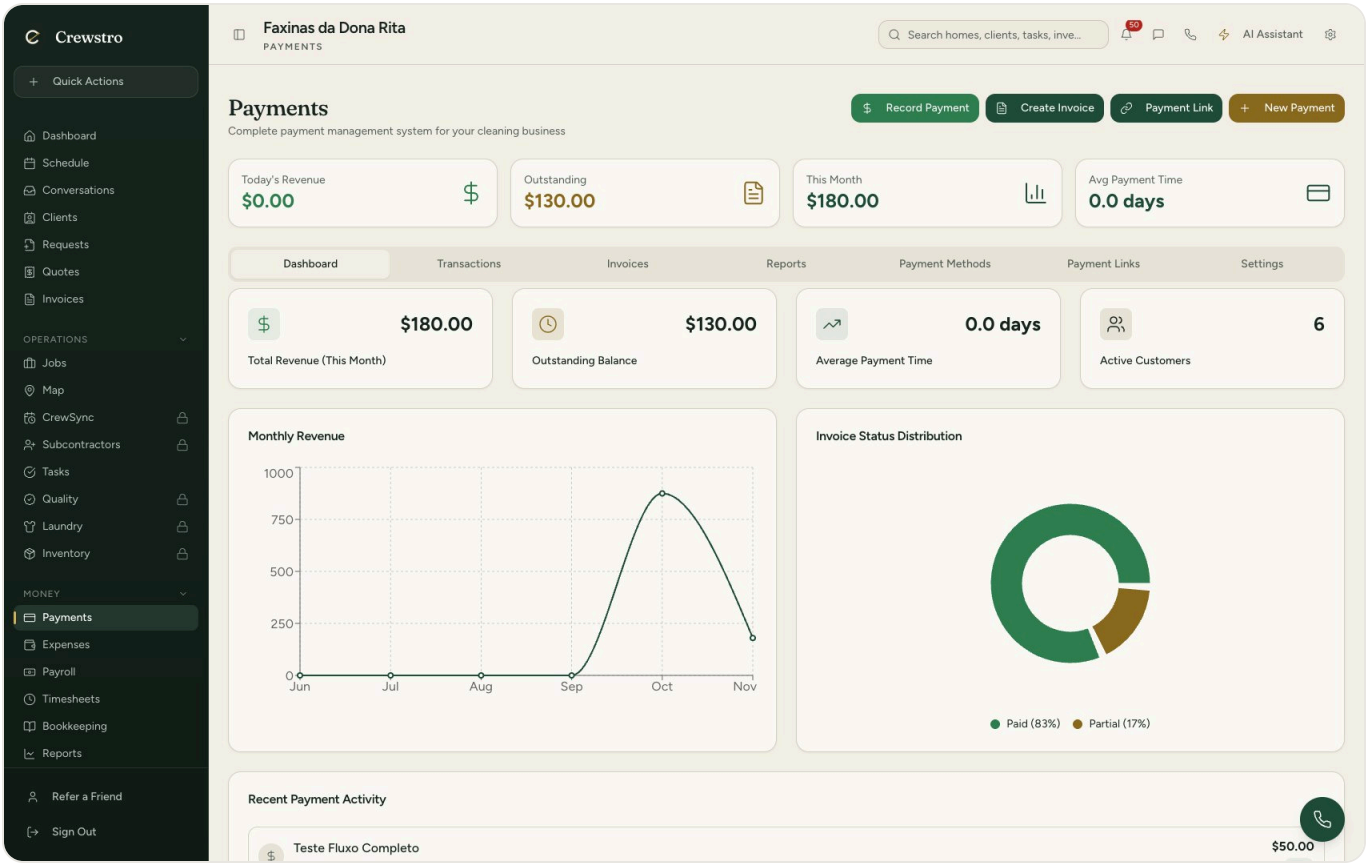
CAREFUL Giving money back (a refund) is done on the Stripe website. After the refund, the invoice reopens by itself in Crewstro.

TIP The default term for invoices is in Invoices > Settings.

24

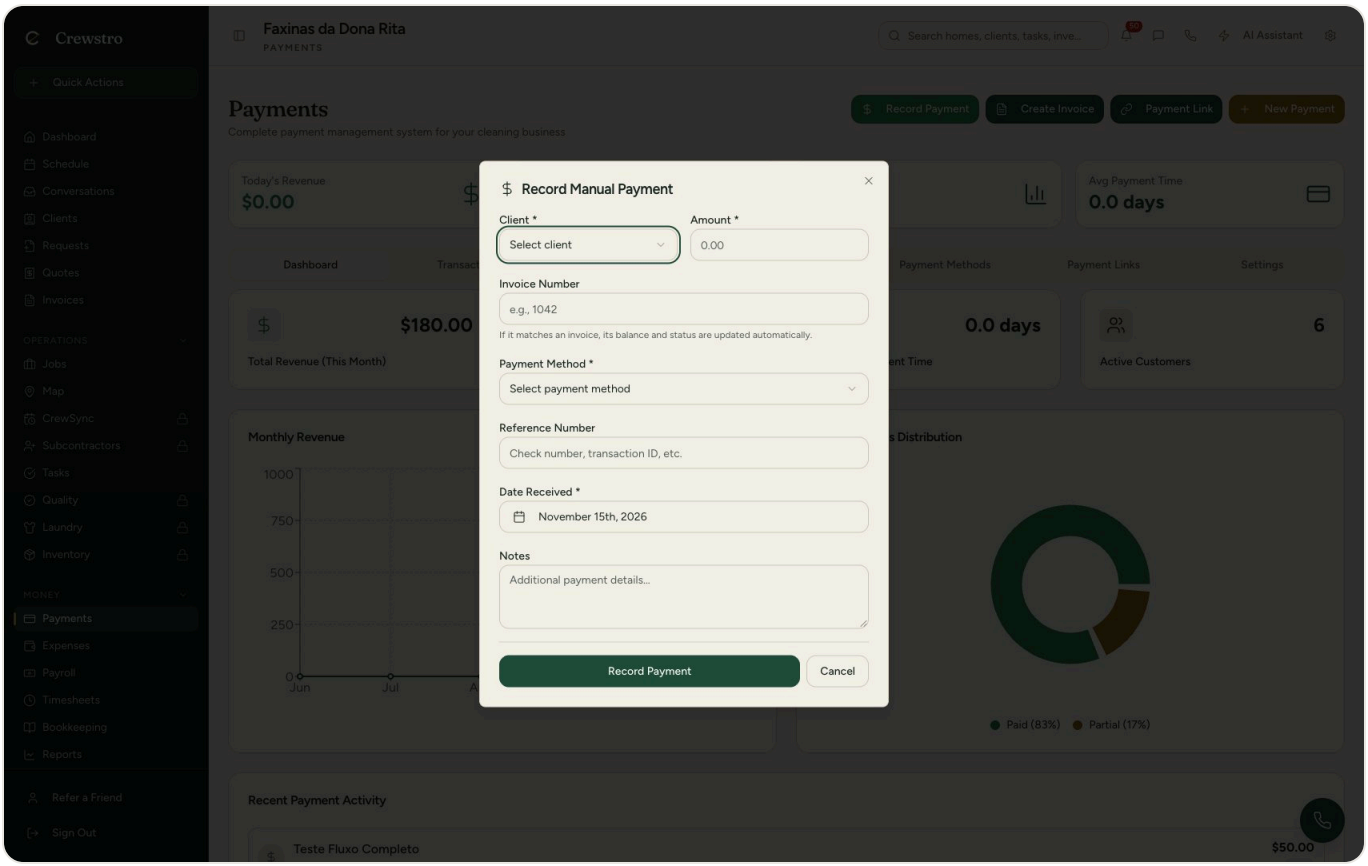
Payments

WHERE IT IS Payments



The payments screen.

Record cash, check or Zelle



Record a payment by hand.

1. Click **Record Payment**.
2. Choose the client and the invoice.
3. Type the amount.
4. Choose the method: cash, check, bank transfer, money order, PayPal, Venmo, Zelle or other.
5. Type the reference (the check number, for example) and the date.
6. Save. The invoice becomes paid (or partially paid).

> **TIP** A payment can be split between several invoices: use **Collect Payment** on the invoice.

CAREFUL A payment recorded by hand does not send a receipt to the client. If they ask, send the PDF of the paid invoice.

25

Messages with clients and the team chat

Message to a client

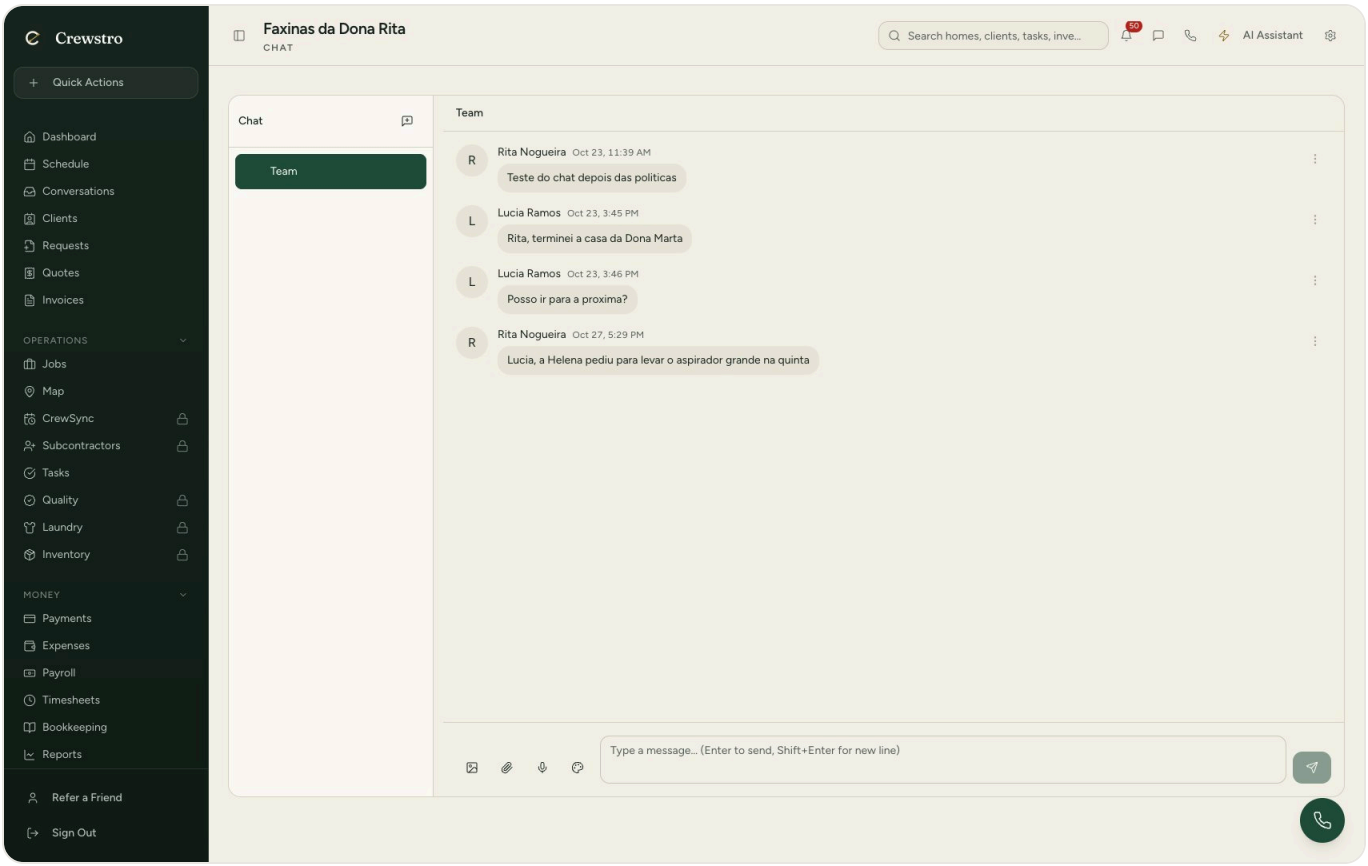
1. Open the client's profile.
2. On the messages card, click **Send SMS**.
3. Type and send. The message goes out from the company number and stays saved on the profile.

When the client answers, the answer appears on the profile right away and in the bell. The speech bubble at the top of the screen also shows the conversations.

What the system sends by itself

Message	When it goes out
Job confirmation	When you create a one-time job.
Visit reminder	On the days and times you chose in Notifications.
On the way	When the technician presses "I'm on my way", with the tracking link.
Quote	When you send it (email and text).
Invoice	When you send it, or by itself if auto-invoicing is turned on.

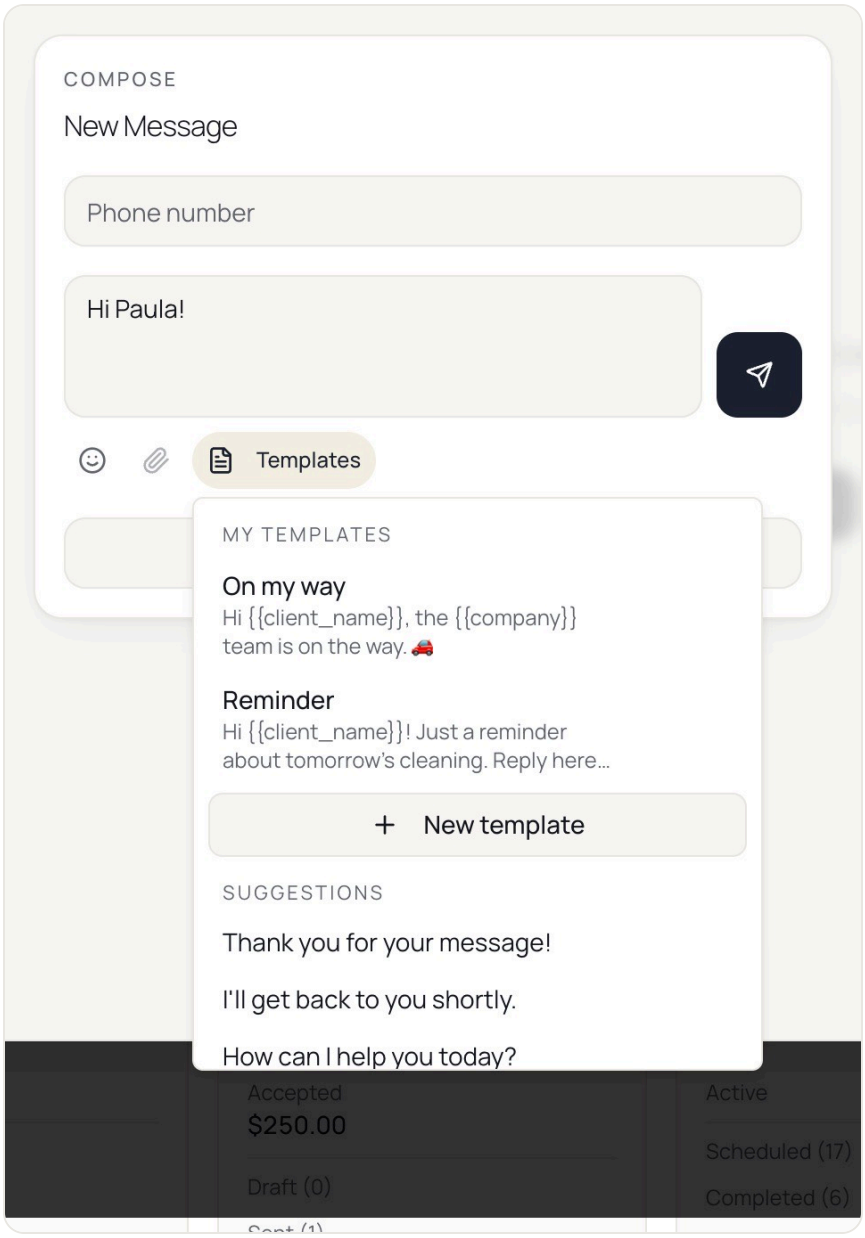
Team chat



The team Chat.

The **Chat** has the whole team's conversation and the direct conversations. You can send photos, files (up to 25 MB) and audio. Everyone gets a push.

Photos, emoji and message templates



The composer: smiley (emoji), paperclip (attachment) and Templates, with your phrases and the suggestions.

- **Paperclip**: attaches a photo, video or PDF (up to 5 per message). Goes out as MMS through Twilio (up to 5 MB) and RingCentral (up to 1.5 MB). With OpenPhone or Dialpad a message with an attachment does not go out and the app says so. Photos the client sends show in the conversation too.
- **Smiley**: inserts an emoji where the cursor is.
- **Templates**: the phrases you send every day. In **New template**, give it a name and write the text; use **{{client_name}}** and **{{company}}**, which are filled in when you insert it.

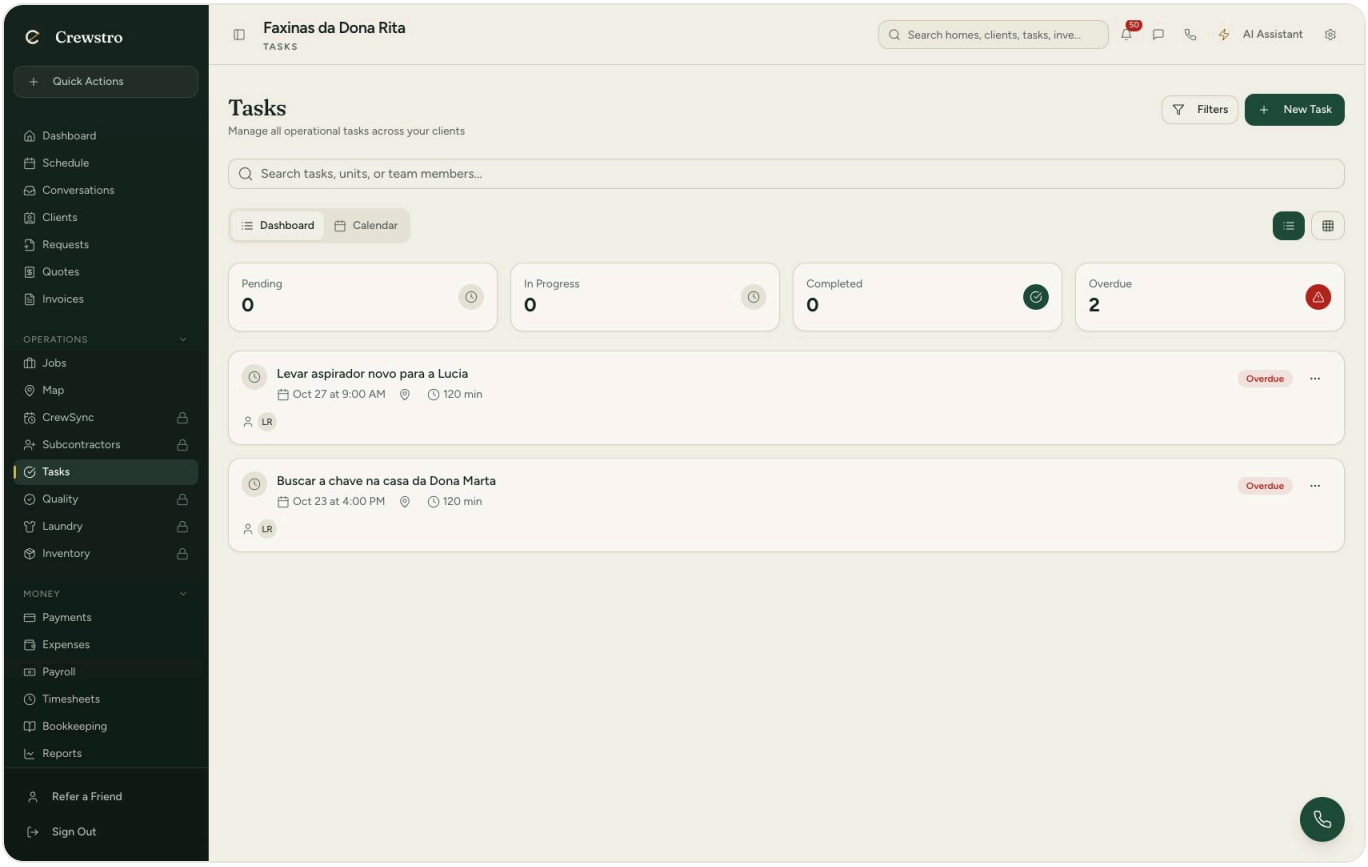
The four usual suggestions stay at the bottom. Whoever manages settings creates, edits and deletes; the whole team uses them.

> **TIP** When you open Messages, the list shows right away with what is already in the database, and the provider sync runs in the background. No need to press Sync after changing screens.

26

Office tasks

WHERE IT IS Tasks



The tasks screen.

A task is an office to-do: buy supplies, call a client, drop off the key. It has priority, due date, checklist and notes. An overdue task gets marked by itself.

CAREFUL A task does not go to the technician's phone. Work at a house is always a Job.

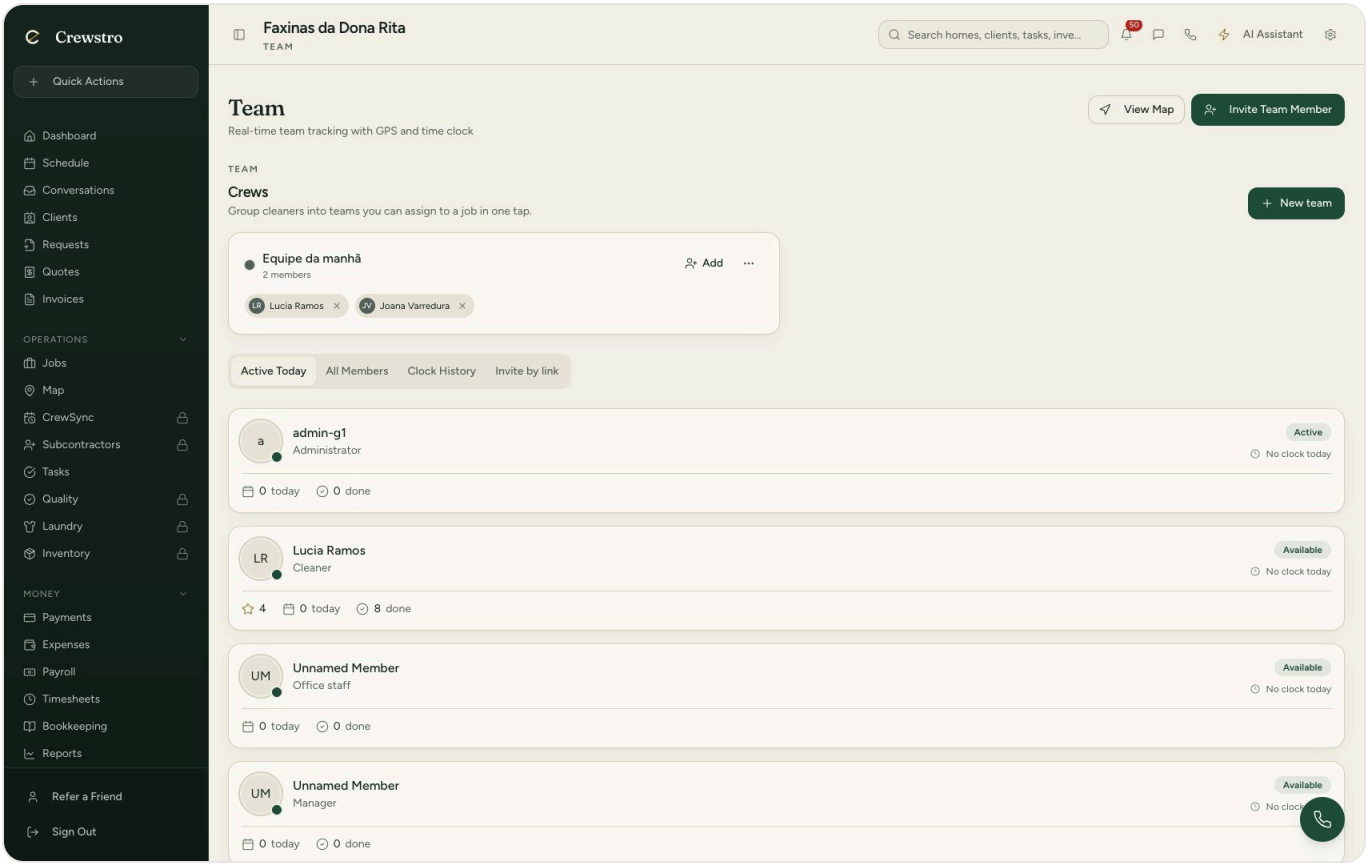
4

Part 4. The team and the pay

27

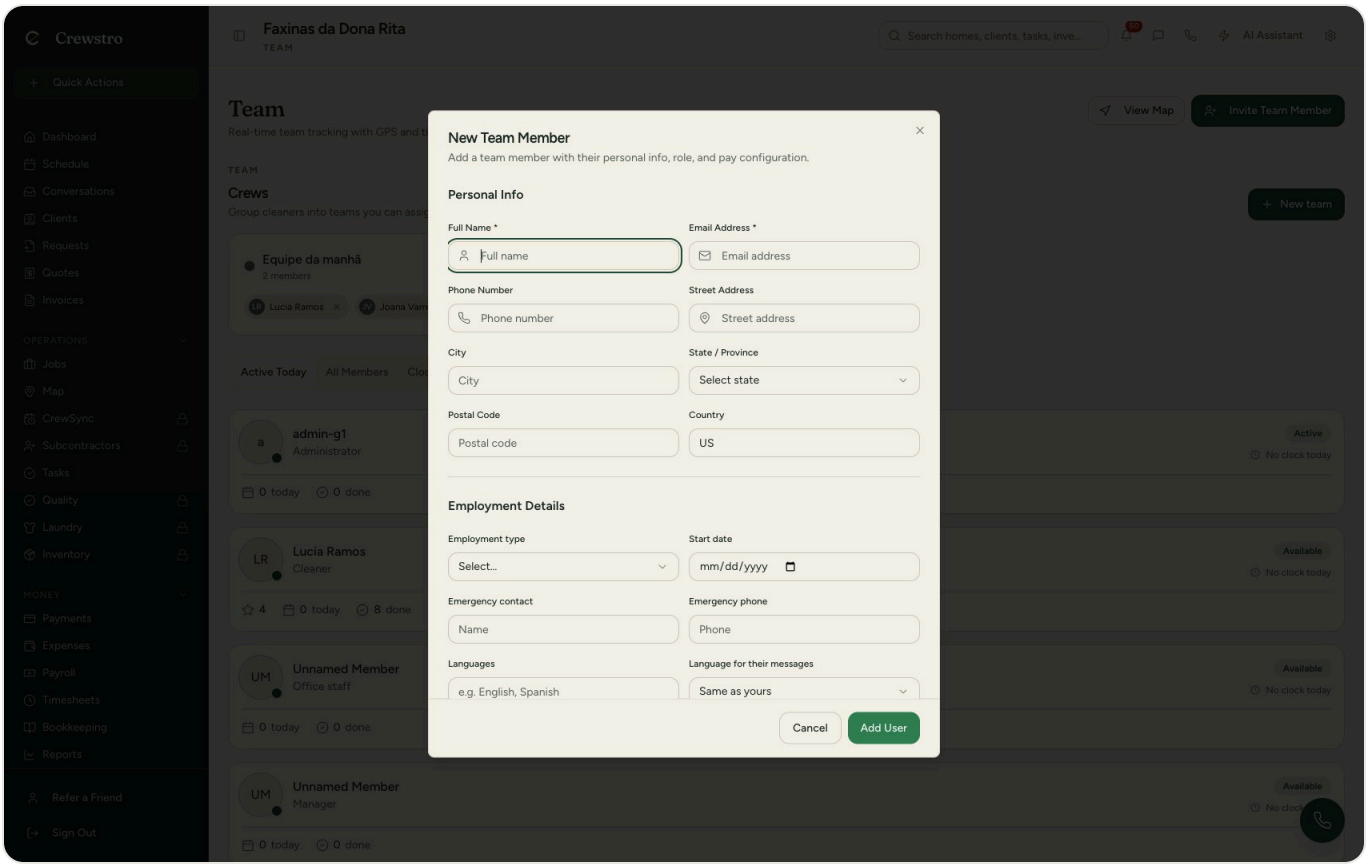
Team: invite, permissions and profile

WHERE IT IS Team



The Team screen.

Invite a technician (way 1: you fill it in)



The invitation of a new person.

1. Click **Team** in the menu.
2. Click **Invite Team Member**.
3. Fill in the person's details: name, email, phone, language.
4. Fill in the job details: type, start date, emergency contact.
5. Choose the role and the permissions (see the table below).
6. Choose how she gets paid: by the hour, by the day, salary, commission or percentage of the service, and the amount.
7. Send the invitation.

Crewstro creates the access and sends the person an email, in her language, with a temporary password and the link to the iPhone app. The password also shows on your

screen: click **Copy Credentials** and keep it, in case the email does not arrive.

Invite a technician (way 2: she fills it in herself)

1. In Team, open the **Invite by link** tab.
2. Type the name, the email, whether she is W-2 or 1099, and the role.
3. Click to create the link and send it to the person (WhatsApp or text).
4. She fills in her own profile, with a photo and documents.
5. You check it and click **Accept and create the account**.

Roles and permissions

Role	What she sees
Cleaner	Only her own visits. No prices, unless you turn them on.
Lead Cleaner	Her own visits, and she is the one who completes the job.
Dispatcher	Everyone's schedule and jobs, to organize the day.
Manager	Almost everything in the office.
Administrator	Everything, including settings and team.

After choosing the role, adjust the switches: expenses, show pricing, clients, requests, quotes, jobs, invoices, payments, inventory, reports and **phone** (making and receiving calls through Crewstro, only for the people you mark). The server is what enforces these permissions: even if someone tries to "find a way around it", they cannot see what they are not allowed to.

The person's profile

Click the person's name to open the profile: role, schedule color, weekly availability, jobs, job details, vehicles, time-off balance and the sensitive area (SSN stored safely and documents like the I-9 and W-4).

Button	When to use it
Reset password	The person forgot the password. A new temporary password shows ONCE: write it down and send it to her.
Archive (deactivate)	The person left for a while. You can reactivate her.
Remove	The person left for good. The access is turned off and the system asks you to pass the next visits to someone else.

> **TIP** The amount the person gets paid is edited in **Settings > Team**, with the edit pay button.

Time off

The technician asks for time off in the app. The request shows in the bell and in Team, together with the visits that fall on those days. Click **Approve** or **Deny**. The technician does not get a push about your decision yet: tell her yourself.

The person's photo

On the person's profile, under the name, click **Add photo** (or **Change photo**). JPG, PNG or WebP image up to 5 MB. Only a company admin can change someone else's photo; each person can also set their own photo in the app.

> **TIP** The photo shows on the team, on the map and on the "on the way" page the client receives. The client sees the face of who is arriving.

Tax ID: SSN, ITIN or EIN

On the person's sensitive data card, click **Edit**. Under **Tax ID**, choose the type and type the number.

- **SSN**: Social Security number, for employees.
- **ITIN**: taxpayer number for people without an SSN. It starts with 9.
- **EIN**: the business number, for a contractor who has their own company.

- The number is stored encrypted. Only admins see it, and each time someone reveals it is logged.
- To change only the type, choose the new type and leave the number blank.
- The system checks the format: 9 digits, and an ITIN must start with 9.

Tax ID in the invite by link

Invite by link: name, email, W-2 or 1099 and role, then Create link and send it yourself. The person fills in their own record with photo and documents, and you review it and press Accept and create account. The link also asks for the tax ID: SSN or ITIN for a W-2 employee, and EIN too for a 1099 contractor. The number is stored encrypted; in the review you see the type and the last 4 digits, and when you accept, it goes to the sensitive data card of that person. If you cancel the link, the number is erased.

28

Check and fix the timesheet

The timesheet is the clock-in and clock-out time the technician records at each house. Payroll comes from it. So check it every week before closing payroll.

Fix a clock-in or a clock-out

1. Open the job (from the Schedule or from Jobs).
2. Go to the **On the visit** part.
3. Fix the clock-in or clock-out time.
4. Save.

The technician forgot to clock out

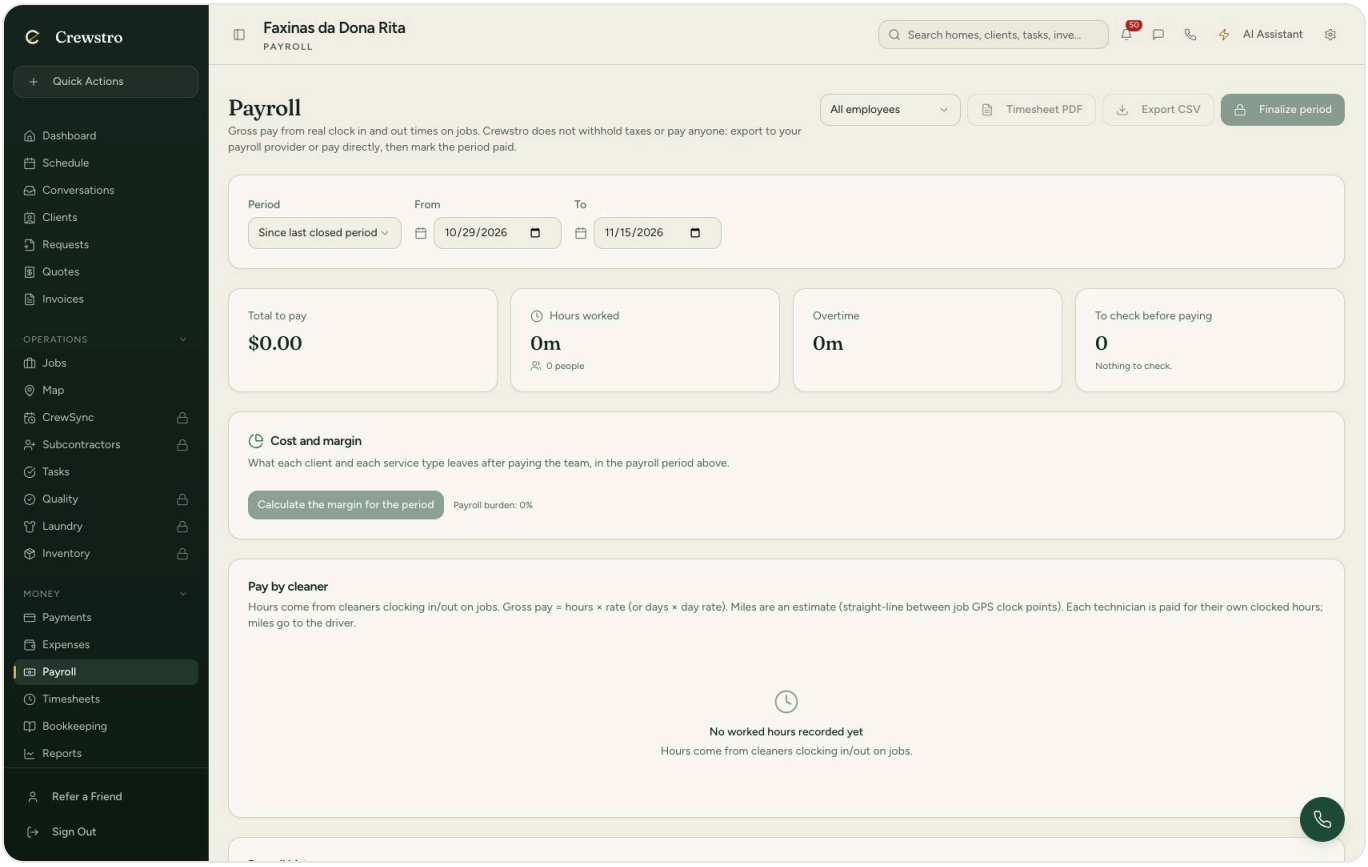
In Payroll there is a card with the open clocks. Click it and choose the right clock-out time. While there is an open clock in the period, payroll does not close.

> **CAREFUL** After the payroll for the period is closed, the timesheet for that period is locked. To fix it, reopen the payroll first.

29

Payroll and the pay stub

WHERE IT IS Payroll



The Payroll screen.

Payroll works out how much each person earned in the period, from the timesheet. Crewstro works out the GROSS amount. Taxes, deductions and the deposit are done by your payroll service or by your accountant.

Close the payroll for the week

1. Open **Payroll**.
2. Choose the period (for example, last week).
3. Read each line: visit hours, travel, overtime, meal penalty, mileage.

4. Read the warnings: minimum wage, long gaps between houses, break not taken.
5. Resolve the open clocks (see the previous chapter).
6. If you need to, add a bonus or an adjustment for someone.
7. Click to close the payroll.
8. Export the CSV to your payroll service.
9. After paying, click **Mark paid**.

Word on the payroll	What it is
Visit hours	From clock-in to clock-out at each house, minus the breaks. It counts down to the second, with no rounding.
Travel	The time between one house and the next, for whoever drives (if the rule is turned on).
Overtime	By the rule the company chose: federal (more than 40 hours in the week) or California (more than 8 hours in the day).
Meal penalty	One extra hour when the person went past the limit with no break and no waiver.
Mileage	Reimbursement of the miles driven in her own car. It comes separate from the pay.

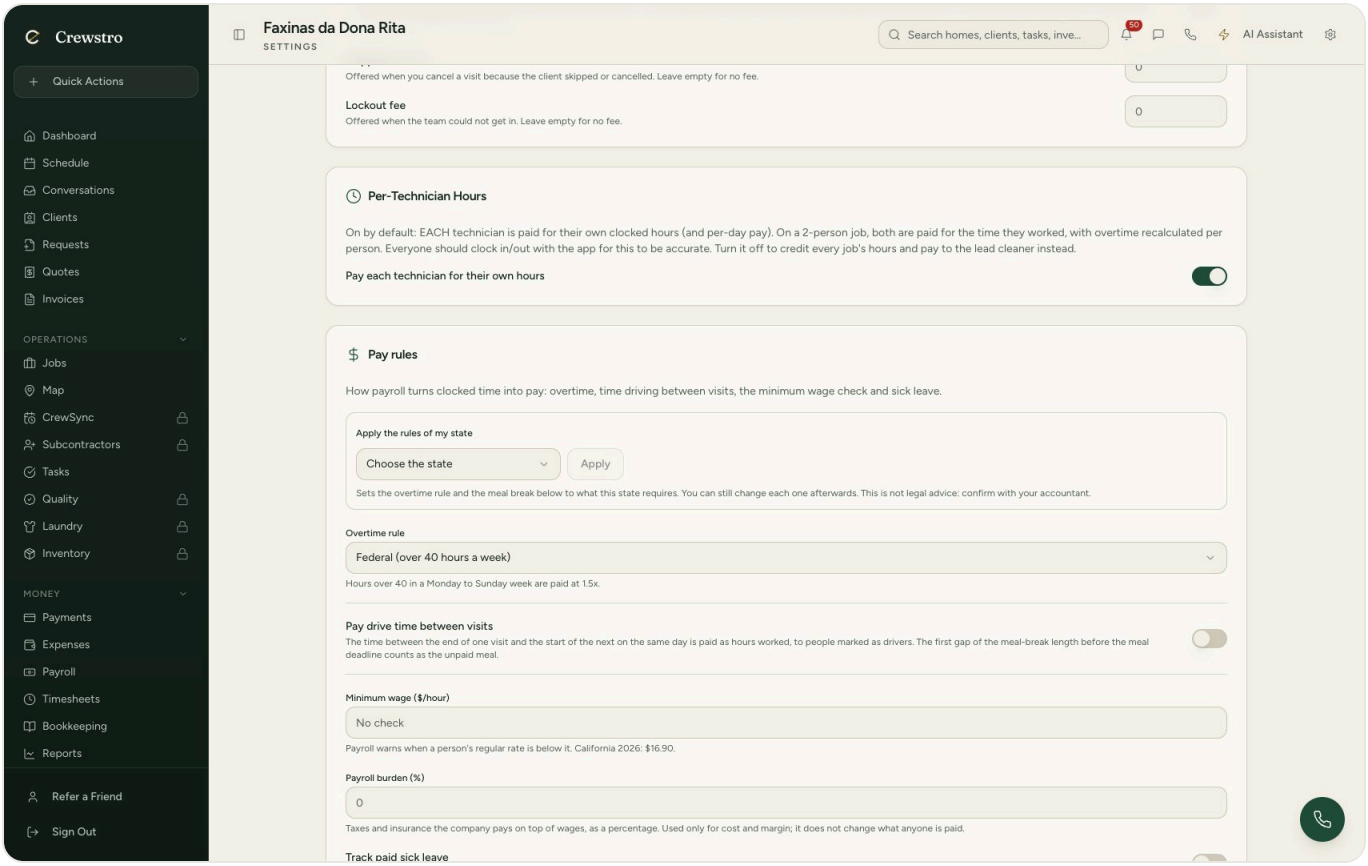
The rules of your state

> **WHERE IT IS** Settings > Operations, Pay rules card

Each US state has its own overtime and meal break rule. Instead of you figuring it out on your own, Crewstro adjusts to the law of the state.

1. Open **Settings > Operations** and scroll down to **Pay rules**.

2. In **Apply the rules of my state**, check the state. It already comes with the company's state.
3. Click **Apply** and confirm.
4. Read the orange warnings that show up below.
5. Fill in the minimum wage of your city or your state.



The Apply the rules of my state block, with the warnings after applying.

The button changes two things: the overtime rule (federal or California) and the meal break (whether it is required, after how many hours, how many minutes and whether there is a penalty). After that you can still change each one by hand.

Warning	What to do
Daily overtime	Some states (like Alaska, Nevada and Colorado) pay overtime by the day. Payroll does not work that out on its own. Check the long days with your accountant.

Warning	What to do
Paid rest breaks	The state requires short paid breaks. They already count as hours worked. Just make sure the team takes them.
Second meal	On very long days the law asks for a second break. Payroll only checks the first one.
Minimum wage	The amount changes every year and in some cities. The company fills it in.

TIP Example: in Texas the federal rule applies (overtime after 40 hours in the week) and there is no required meal break.

CAREFUL This helps, but it is not legal advice. Confirm the rules with your accountant.

The pay stub

Each line has a pay stub to open and print. It comes out in English and in the person's language, side by side, explaining each amount. After closing, the technician sees the pay stubs in the app, in **Timesheet > Past pay**.

Made a mistake? Reopen

Click **Reopen**, fix it and close again. The system keeps each version.

Paying by percentage of the service

Besides hourly, daily, salary and commission, there is one more way to pay: **Percentage of the service**. The person earns a part of the price of each visit she worked.

You choose this type in the same place where you set the person's pay: in the invite, or in her pay in **Team**. The number you type is the percentage (for example, 40). It is not an amount in dollars.

- The price that counts is the one saved on the job, in the price field. Without tax and without tips.

- It counts when the visit is completed, even if the invoice has not been paid yet.
- A visit with no price pays zero for that visit. It shows up in the **Check before paying** list, in Payroll, so you can set the price on the job.
- Drive time between homes is paid apart, and overtime gets its premium. This is the same as for commission.
- The pay stub shows the percentage and the total. It does not show the price of each home.

When more than one person works the same visit, the service value is split equally among them. A person paid by percentage earns her percentage on her own share.

> **TIP** Example: a 300 dollar visit done by two people. Each share is 150. A person at 40% earns 60 dollars from that visit.

Commission still exists and it is a different thing: it is a fixed amount per job.

Change the split of a visit

In **Payroll** you will see the **Job split** card. It lists each visit done by more than one person, with a box per person, in %.

1. Open **Payroll** and find the **Job split** card.
2. On the visit you want to change, type each person's percentage in her box.
3. Click **Save split**.
4. To undo it, click **Go back to an equal split**.

> **CAREFUL** Once the pay period is closed, the split is locked.

The minimum wage top-up

If in a week the percentage pay comes out below the minimum wage for the hours worked, payroll adds the difference by itself. It shows on its own line of the pay stub: **Minimum wage top-up**.

> **CAREFUL** For this, the minimum wage must be filled in the Payroll settings. Without it there is no top-up, only a warning. Check this rule with your accountant.

Cost and margin

In **Payroll**, the **Cost and margin** card shows what each client and each service type leaves after paying the team, in the period chosen in payroll. Click **Calculate the margin for the period**.

- **Revenue**: the invoice for the visit, before tax. Without an invoice, the job price or the series price. Draft and cancelled invoices do not count.
- **Labor**: everything payroll paid the person in the period, plus the burden, spread over the hours of each of her visits.
- **Supplies**: what each person took from inventory in the period, spread the same way. Only for companies with the inventory module.
- Fixed costs, such as rent, car and insurance, are not included.

The burden is the taxes and insurance the company pays on top of wages. Fill in the percentage in **Settings > Operations**, in the field **Payroll burden (%)**. It is used only in this calculation; it does not change what anyone is paid.

> **CAREFUL** Always look at the coverage line at the top of the result. It says how many visits were measured and how many were left out for having no price or no clock entry. With few visits measured, the margin is only a hint.

> **TIP** Only people who can see payroll see the margin.

30

The meal break and the waiver

In some states (like California), the law says the employee must take a meal break after some hours of work. The person can give up the break by signing a waiver.

1. Turn on the rule in **Settings > Operations**, in the meal break card.
2. To schedule the break time: in the Schedule, click an empty slot and choose **Meal break**.
3. The technician sees the break on the Home screen of the app and gets a push when it starts.
4. If the shift goes past the limit with no break, she gets a push 30 minutes before the deadline.
5. If she decides not to take the break, she taps **I'm not taking it today**, types her name and signs.

With no break and no waiver, payroll adds the penalty (normally one hour at the regular rate).

> **CAREFUL** The technician should not sign the waiver if she took the break and forgot to record it. In that case, she tells the office and you fix it.

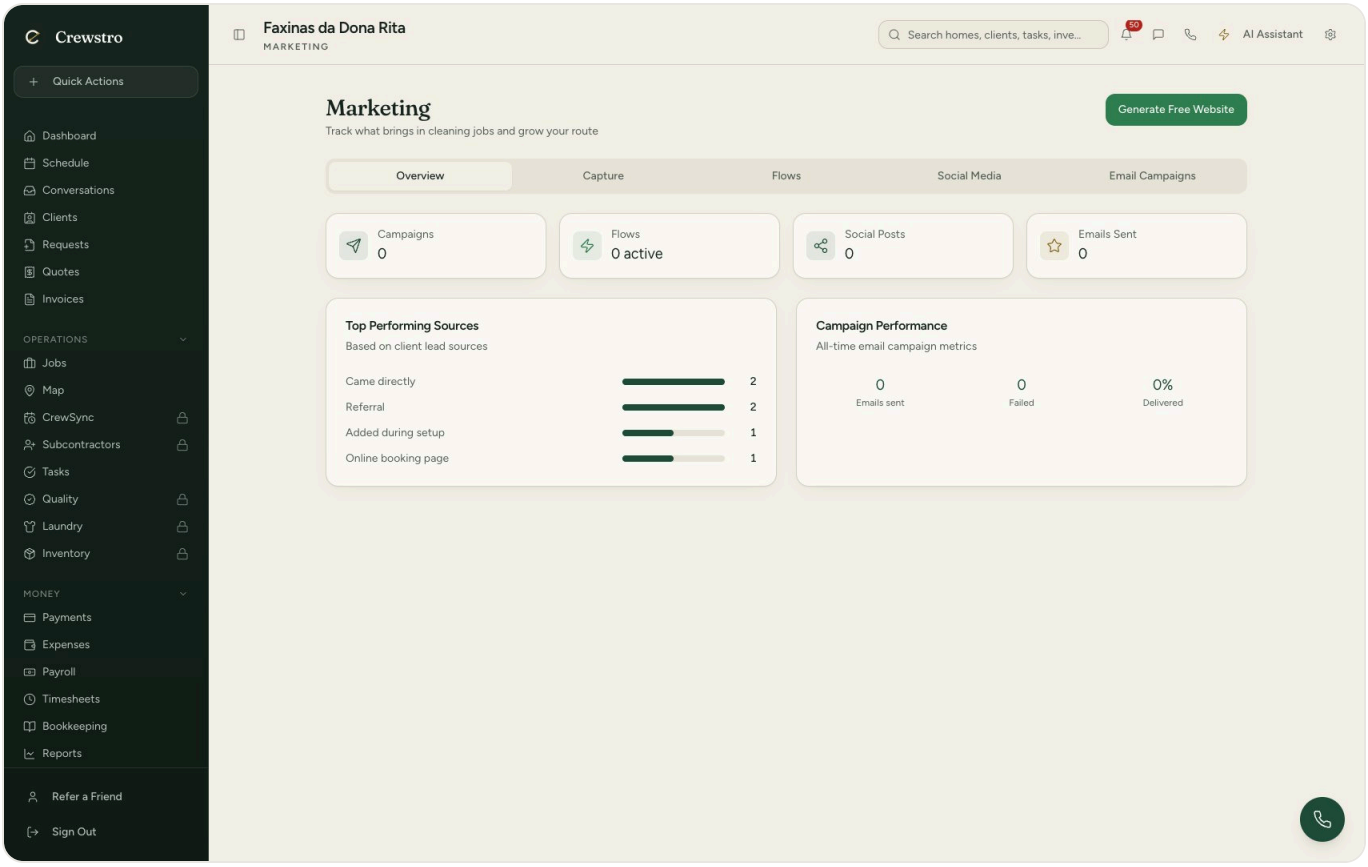
5

Part 5. Growing the company

31

Marketing, reviews and referrals

WHERE IT IS Marketing



The Marketing screen.

Campaigns

1. Open **Marketing** and the campaigns part.
2. Type the name, the subject and the text. Use {{client_name}} for the client's name and {{company_name}} for the company's name.
3. Choose who it goes to: everyone, a tag or a type of client.
4. Choose the channel: email, text or both.
5. Save as a draft or send.

> **CAREFUL** A sent campaign is real: it reaches every client you chose. Read it again before. Whoever replied STOP does not get a text.

Ask for a review

In the client's profile, tap **Request feedback**. The client gives a score from 1 to 5. A score from 1 to 3 alerts the office right away, so you can call and sort it out.

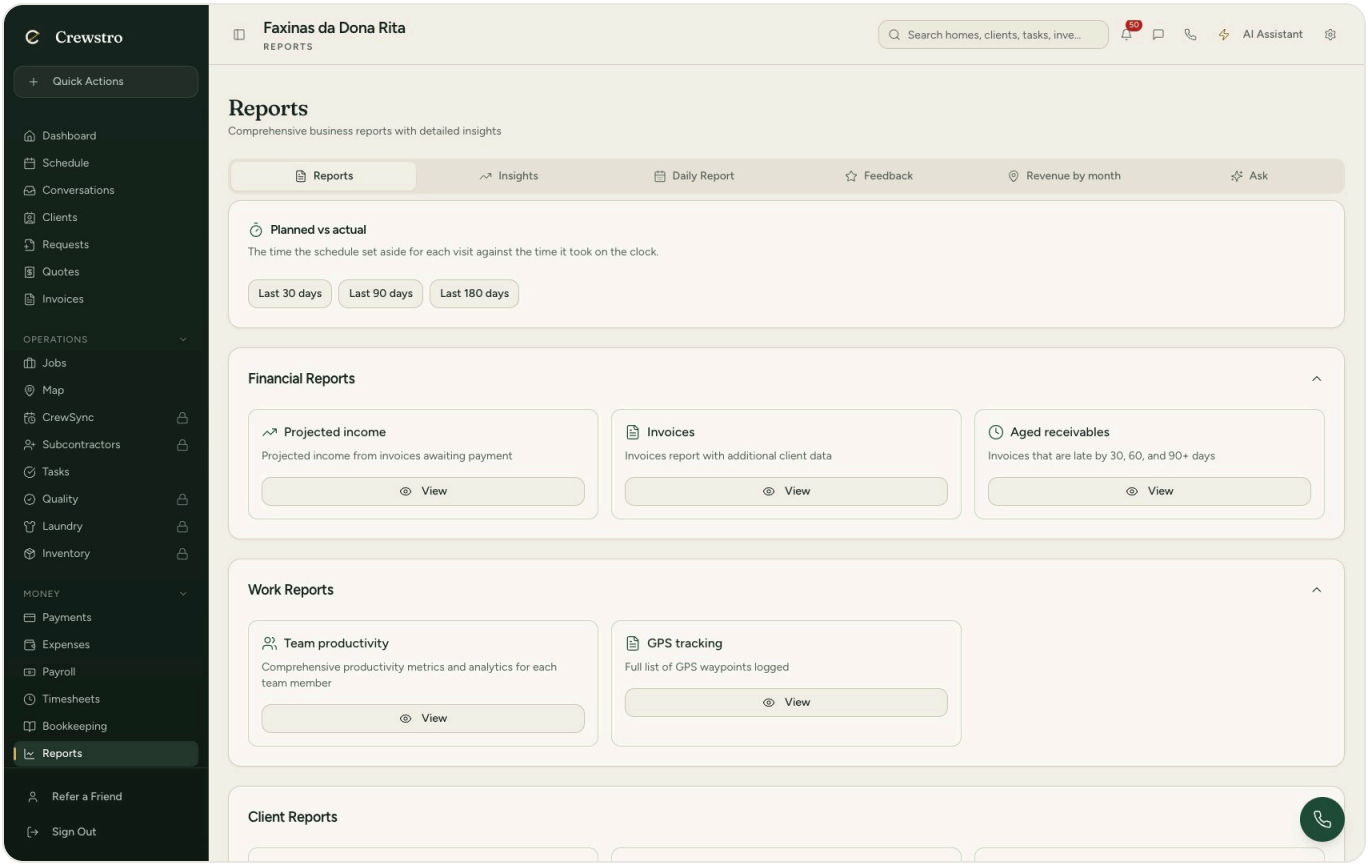
Refer a friend

In **Refer a Friend**, the client refers friends to the company (they get the booking link) and the company refers other companies to Crewstro (one free month for each company that signs up).

32

Reports and expenses

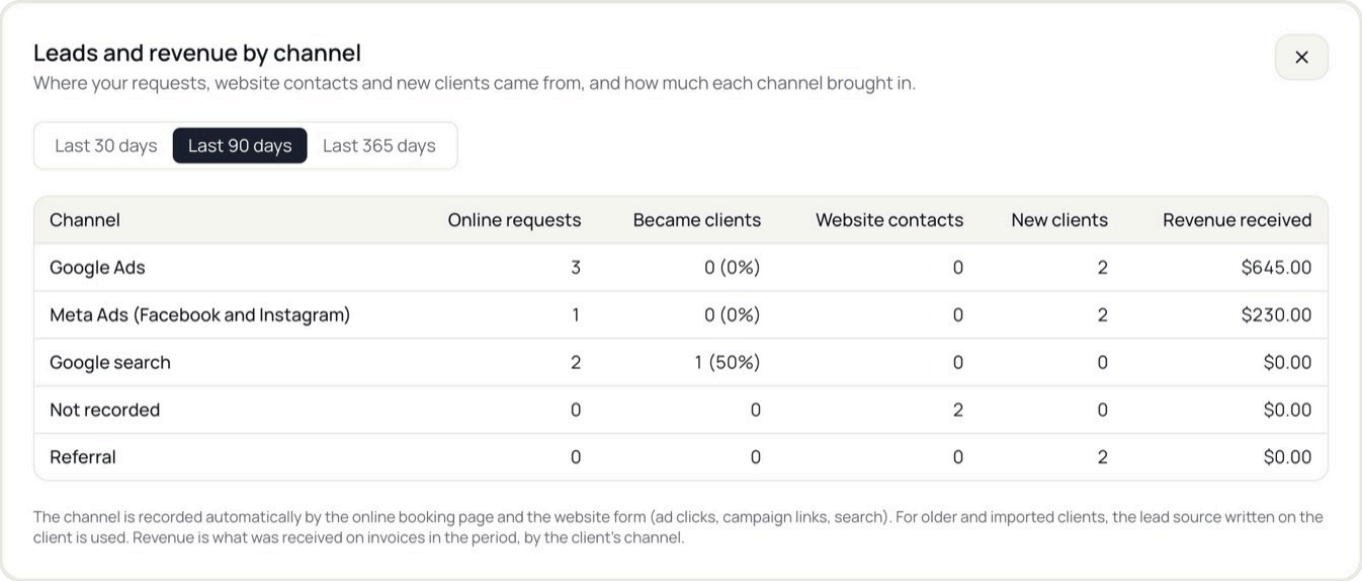
WHERE IT IS Reports



The Reports screen.

The reports that work today: productivity, expected revenue, client list, accounts receivable by how late they are, invoices, GPS, revenue by month, daily report, reviews, and leads and revenue by channel. The ones marked "coming soon" are not ready yet.

Where the clients come from (leads and revenue by channel)



Leads and revenue by channel

Where your requests, website contacts and new clients came from, and how much each channel brought in.

Last 30 days | Last 90 days | Last 365 days

Channel	Online requests	Became clients	Website contacts	New clients	Revenue received
Google Ads	3	0 (0%)	0	2	$645.00
Meta Ads (Facebook and Instagram)	1	0 (0%)	0	2	$230.00
Google search	2	1 (50%)	0	0	$0.00
Not recorded	0	0	2	0	$0.00
Referral	0	0	0	2	$0.00

The channel is recorded automatically by the online booking page and the website form (ad clicks, campaign links, search). For older and imported clients, the lead source written on the client is used. Revenue is what was received on invoices in the period, by the client's channel.

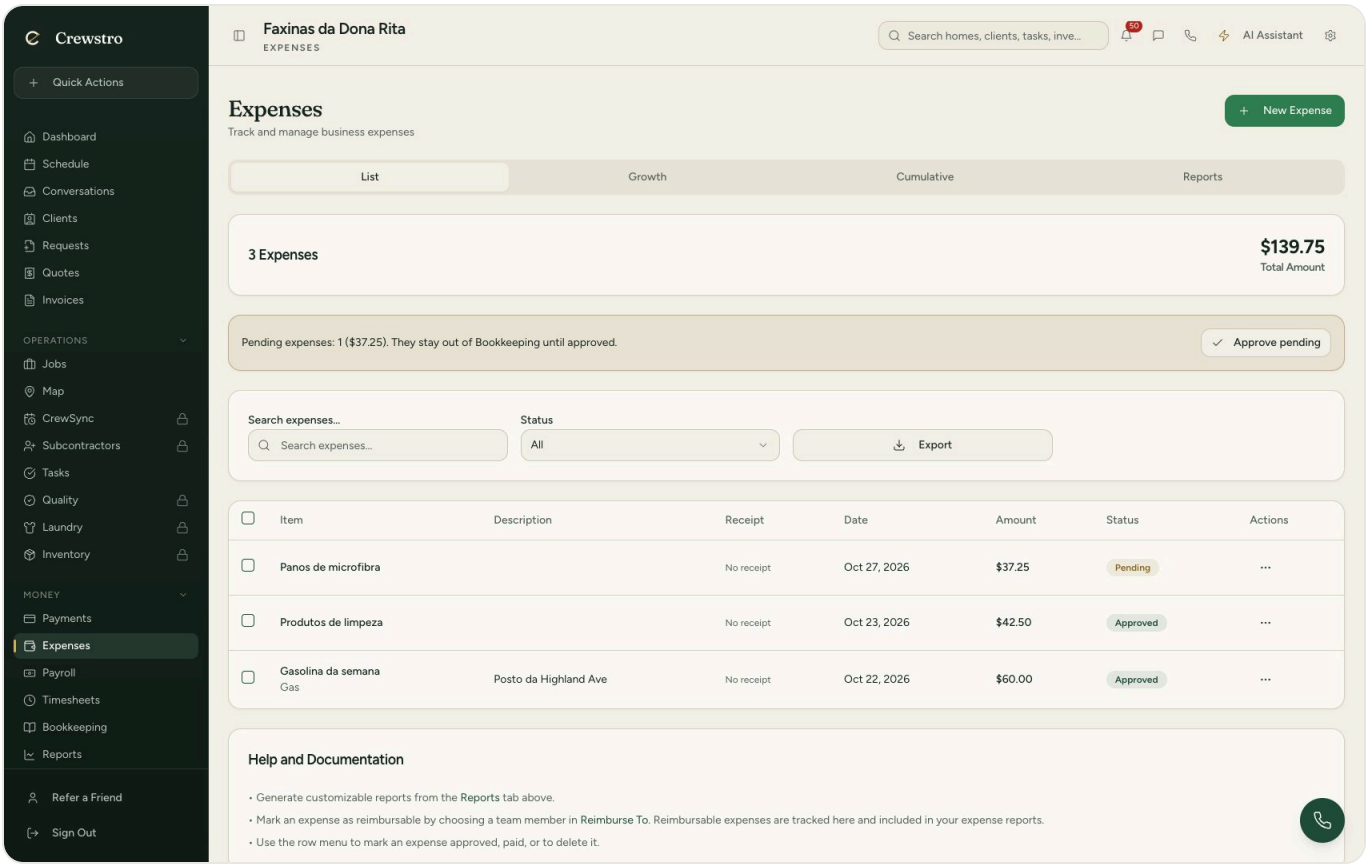
The Leads and revenue by channel report.

This report answers: is the Google ad bringing in clients? And the Facebook one? For each channel it shows the online bookings, how many became clients, the website contacts, the new clients and how much money came in on the invoices.

The channel is recorded on its own when the client comes in through the online booking page, the website form or the leads address: an ad click, a campaign link, a Google search, a referral.

> **TIP** Old clients and imported clients do not have that automatic record. For them, the source written in the client's record is what counts. That is why the report gets more complete over time.

Expenses



The Expenses screen.

1. Open **Expenses** and click to create a new one.
2. Type the date, the amount, the name and the details.
3. Choose who will be reimbursed and, if it applies, the job.
4. Take a photo of the receipt and attach it (up to 10 MB).
5. Save. Later, approve it and mark it as paid.

CAREFUL The expense reimbursement does not go into payroll on its own. Pay it separately or as an adjustment on the payroll.

Planned vs actual

In **Reports**, the **Planned vs actual** card compares the time the schedule set aside for each visit with the time it took on the clock. Choose the last 30, 90 or 180 days.

- **Planned**: from the arrival time to the end time on the schedule.
- **Actual**: from clock in to clock out on the visit, breaks not deducted.
- It is the time of the visit, not the sum of each person's hours.
- The list comes by client and by service type, most over the plan first.
- Running up to 15% over does not count as running over.
- When the visit has a price, you see revenue per planned hour and per actual hour.

> **CAREFUL** Only completed visits with an arrival and end time on the schedule and a complete clock entry are measured. The coverage line says how many were left out. If the team does not clock in, almost nothing is measured.

> **TIP** Claude and ChatGPT, when connected, answer the same question: "which clients are taking longer than planned?".

Bookkeeping

Your books kept from what Crewstro already records: profit, cash, bank, budget.

What Bookkeeping is and how the books fill themselves

Bookkeeping is a paid add-on ($29 a month), under Money in the menu; owners and admins turn it on from that screen. It keeps double-entry books on a cash basis: income counts when the client pays, an expense counts when it is approved or paid.

You do not type the day to day. Payments received (Stripe, Square or recorded by hand), refunds, approved or paid expenses and payroll marked as paid become entries on their own, with no duplicates. Sales tax charged to the client and tips go to their own accounts and are not income.

The books update every hour and whenever someone opens the screen. The **Update the books** button does it on the spot.

The Bookkeeping dashboard

Pick this month, this quarter, this year or 12 months. The cards show cash, income, spending and profit, each with the change against the period before.

Below: profit and loss for the last 12 months, where the money went, the 90-day cash forecast, what clients owe and what is waiting to be paid by age, the budget for the year, your bank accounts, what is left to do, what the numbers say, a tax set-aside figure and the clients who paid the most.

The 90-day forecast is an estimate: today's cash, plus the average profit of the last closed months, plus open invoices on their due date, minus closed payroll not yet paid. The tax set-aside is a simple percentage to help you plan, not a tax calculation.

Print or PDF saves the dashboard as a PDF through your browser.

Record a transaction without debits and credits

New transaction, at the top of Bookkeeping: choose Expense, Income, Transfer, Owner draw or Owner contribution, type the amount and the date, pick the account the money left or entered and the category. Crewstro writes the balanced entry for you. Use it for what did not go through Crewstro: bank interest, an insurance payment, the cash deposit, the credit card payment, money the owner took out or put in.

Tips: how they enter the books and how to settle them

A tip the client pays is not company income: it goes to **Tips payable**, money the company owes the team. The dashboard reminds you while there is a balance there.

Click the reminder and say how the tips were handed over. **Added to the payroll payment**: the paid payroll already left the bank with the tip inside, so the amount comes out of Wages. **Paid outside payroll** (cash, Zelle): the amount comes out of the account you choose. You confirm the amount; Crewstro does not guess.

Import your bank statement and reconcile

1. On your bank or card website, download the statement as CSV, OFX or QFX. In Bookkeeping, Bank, pick the account and click **Import statement**. Importing the same file twice does not duplicate.
2. Each line under **To review** can be: added to a category (and you can write a rule so the next ones like it are recognized), matched to something already in the books (Crewstro warns when it looks like a repeat, for example a deposit of payments already recorded), split across several accounts (a Stripe payout that arrives net of the fee), or ignored.
3. When your rules already recognized several lines, **Add all** adds them at once, each in its suggested account.
4. To reconcile, click **Reconcile**, type the statement end date and ending balance, tick the lines that are on the statement and finish when the difference is zero.

Bookkeeping reports

Bookkeeping, Reports: Profit and loss (month by month), Balance sheet (with the trial balance), Expenses by category, Income by client, Month by month, Receivables aging and Payables aging. Each one exports CSV and has **Print or PDF**.

Receivables are the invoices clients still owe. Payables are closed payrolls not yet paid (an approved expense is already in the books as paid). On a cash basis neither is in the books until the money moves, so these two reports show what is coming, not what already happened.

Export for your accountant opens the journal, where every entry exports as CSV or in the QuickBooks Online journal import format.

Set a budget and follow it

1. Bookkeeping, Budget. Click **Suggest from history** to start from last year's monthly average (or this year so far when last year is empty), or **Start from scratch**.

2. Type the monthly goal for each income and expense account. For a month that differs from the others, open the account with the arrow and adjust month by month. Save.
3. The screen then compares goal and actual from January through the current month: green is on target, gold is up to 10% off, red is more than 10% off. For income the bad side is falling short; for expenses it is going over. The current month counts its full goal while the actuals are still partial.

Books health, indicators and the what-if simulator

Bookkeeping, Tools. **Books health** is a score from 0 to 100 with what needs attention: statement lines to review, expenses with no category, accounts not reconciled in 45 days, money sitting in Undeposited funds, entries that look duplicated. Click an item to go fix it.

The indicators cover the last 12 months: profit margin, cash runway in months, average payment and payroll over income.

What if? tries a change on a typical month: raise or lower prices, do more or fewer jobs, add a new monthly cost. It shows the profit per month and over a year. It is a simulation on the average of your last closed months; it saves nothing.

Smart books: what Crewstro does on its own, and asking your own AI

It learns how you categorize. After you add two statement lines with the same description to the same account, the next one arrives with that account already suggested, with no rule to write. A clock icon marks a suggestion learned from your history; a spark marks one from a rule you wrote. **Add all** adds every suggested line at once.

It finds anomalies. Bookkeeping, Tools, Anomalies lists what deserves a look in the last 12 months of spending: the same amount typed twice on the same day in the same account, an entry far above what is usual for its account, and an expense that happened every month and stopped.

A scenario becomes a budget. In What if?, try a price change, more or fewer jobs or a new monthly cost, pick the year and click the button to save it as the budget for that year.

Each account starts from its average over your last closed months with the scenario applied.

Ask your own AI. With Claude or ChatGPT connected (Settings, Integrations), ask in plain words for the profit and loss, the balance sheet, budget against actual, or a checkup of the books: what is waiting for review at the bank, the anomalies and what has no category. The assistant only reads; it changes nothing. The answers go to your own AI account, under that provider's terms.

These are fixed rules over your own company's history, not guesses: every suggestion shows where it came from, and nothing is added or changed without your click.

Give your accountant access

Team, Invite, and choose the **Accountant** profile. The accountant signs in with their own login and sees Bookkeeping only: no schedule, clients, prices, payroll or messages. They can review the bank, reconcile, write entries and export everything.

Starting out: opening balances, categories and closing a period

Bookkeeping, Settings. **Start of the books** is the date the books begin; nothing before it enters. **Opening balances** is what the company already had on that date (bank, cash, card balance): type them once.

Which account each expense category goes to sets the account for each Crewstro expense category. A category with no account lands in Uncategorized expenses, and the dashboard reminds you.

Close period locks the books through a date. After that nothing in the period changes on its own: if an invoice or expense from the period is edited later, the entry is flagged for review instead of being rewritten.

The chart of accounts comes ready for a cleaning company; rename, add or deactivate accounts in Chart of accounts. An account type never changes.

What Bookkeeping does not do yet

It does not connect to your bank on its own: you import the statement file. It does not sign in to QuickBooks: you export the entries in the QuickBooks import format. It is cash basis only. Payments recorded by hand (cash, check, Zelle) all land in Undeposited funds until you match them to the bank deposit. It does not file taxes or replace your accountant.

33

The extra modules (add-ons)

Some modules are paid separately. Only the owner and the administrators turn them on, in **Settings > Account**.

Module	What it is for
Quality	Inspection with a score after the cleaning. A low score creates an automatic re-clean.
CrewSync	Capacity board: how many cleanings each crew can handle per day.
Subcontractors	Send a job offer to people from outside; whoever accepts first gets it.
Laundry	Laundry orders, items and suppliers.
Inventory	Cleaning supplies on the shelf: who took what and what to buy.

6

Part 6. Teaching the technician to use the app

34

Before the training: what to get ready

The best training is in person, with the technician's phone in her own hand. It takes about 30 minutes. Get these ready first:

- [ ] The invite has already been sent (Team chapter) and the technician has the email and the temporary password.
- [ ] The technician's phone is charged and has internet (Wi-Fi or data).
- [ ] The technician knows her own phone password and her Apple (iPhone) or Google (Android) password. She will need it to install the app.
- [ ] There is at least one test visit scheduled for her today, to practice.
- [ ] You have this manual open at this chapter.

TIP Let the technician do each step with her own finger. You only show. The one who does it is the one who learns.

35

Installing the app on the phone

iPhone

1. Open the **App Store** (the blue icon with the letter A).
2. Tap the magnifying glass (Search) and type: **Crewstro**.
3. Tap **Get** (or the cloud with the arrow).
4. If asked, enter the Apple password or use Face ID.
5. Wait for it to install and tap **Open**.

> **TIP** The invite email also has the direct App Store link. Tapping the link is the fastest way.

Android

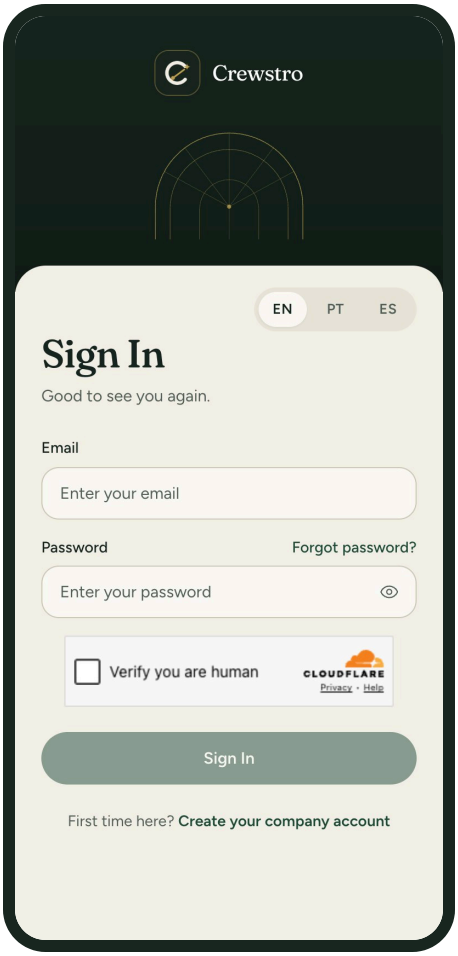
The Android app is still in testing. For now, a technician with Android uses Crewstro through the browser:

1. Open **Chrome**.
2. Type in the address bar: **app.crewstro.com**
3. Sign in with the email and password.
4. Tap the three dots (⋮) in the top corner.
5. Tap **Add to Home screen** (or "Install app").
6. Done: now there is a Crewstro icon on the phone's screen.

CAREFUL Through the browser, Android does NOT get push notifications and only sends the location with the screen on and Crewstro open. That is why a technician with Android needs to open Crewstro before leaving for each house. When the Android app comes out on the Play Store, this step changes.

36

The first sign in

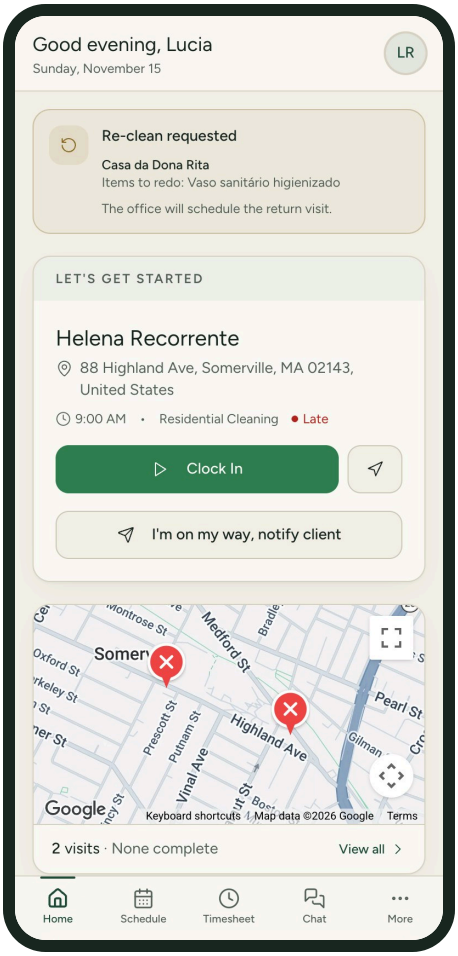


The sign in screen on the phone.

1. Open the Crewstro app.
2. Type the technician's email.
3. Type the temporary password that came in the invite email.
4. Check **Remember email only**.
5. Tap **Sign In**.
6. The app asks for a new password. Choose a password with 12 characters or more that she will remember.

7 Write the password down somewhere safe (not in the WhatsApp group).

> **CAREFUL** The technician must NEVER tap **Sign Up**. That creates a new, empty company, and she will not see the visits. If that happens, contact support.



The Home screen of the technician's app.

After signing in, the technician sees **Home**. At the bottom there are five buttons: **Home**, **Schedule**, **Timesheet**, **Search** and **More**.

37

Turning on notifications (push)

Without notifications, the technician does not find out about a new job, a visit coming up, the break or the chat messages. ALWAYS turn them on.

iPhone, the easy way

1. On the app Home there is a card asking to turn on notifications.
2. Tap **Turn on notifications**.
3. The iPhone asks if Crewstro can send notifications. Tap **Allow**.
4. The card goes away. Done.

iPhone, if she tapped "Don't Allow"

1. Close Crewstro.
2. Open the iPhone **Settings** (the gray gear).
3. Scroll down and tap **Crewstro** (or Notifications > Crewstro).
4. Tap **Notifications**.
5. Turn on **Allow Notifications** (the switch turns green).
6. Leave these on: Lock Screen, Notification Center and Banners.

TIP If the iPhone is in Portuguese, the names are: Ajustes > Crewstro > Notificações > Permitir Notificações.

CAREFUL Focus mode (Do Not Disturb, Sleep, Work) hides notifications. If the technician uses Focus, put Crewstro on the list of allowed apps.

38

Allowing location (GPS)

Location is used for three things: to prove the technician was at the house when clocking in and out, to show the team on the office Map, and to show the client the technician arriving when she taps "I'm on my way".

iPhone, the first time

1. On the first clock in (or the first photo), the iPhone asks if Crewstro can use the location.
2. Tap **Allow While Using App**.
3. When the technician taps "I'm on my way" and uses another app (the map, for example), the iPhone may ask again.
4. This time, tap **Change to Always Allow**.

iPhone, checking it is right

1. Open the iPhone **Settings**.
2. Tap **Crewstro**.
3. Tap **Location**.
4. Choose **Always**.
5. Leave the **Precise Location** switch on.

> **TIP** In Settings > Crewstro, also leave **Background App Refresh** on. It helps the map follow the technician while she drives.

> **CAREFUL** **Low Power Mode** (the yellow battery) holds back the location. On the way to the house, it is better to leave it off.

Android (through the browser)

1. The first time, Chrome asks if the site can use the location. Tap **Allow**.
2. If she tapped Block: in Chrome, tap the padlock next to the address > Permissions > Location > Allow.
3. Also check that the phone's location is on (pull down the top bar and look for the location icon).

39

Allowing the camera

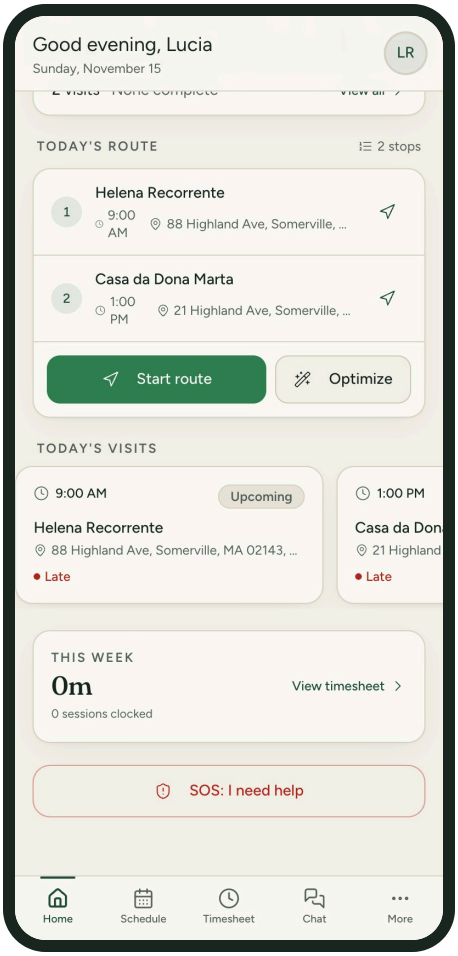
1. On the first photo, the phone asks if Crewstro can use the camera. Tap **OK** or **Allow**.
2. If she said no: iPhone, Settings > Crewstro > Camera, turn the switch on.

> **TIP** Photos carry the location and the time as proof. The hidden data in the photo (which phone it came from) is removed before saving.

40

A work day, step by step

Go through this script together with the technician, on a test visit.



Home, with the map and today's route.

1. **See the day.** Home shows today's visits, the map and the route. **Start route** opens Google Maps with all the stops.

2. **Open the visit.** Tap the visit card. You see the address, the **Route**, **Call** and **Text** buttons, the access codes in large print (**Notes & access**), what to do and the client's checklist.

3. **Leave for the house.** Tap **I'm on my way, notify client**. The client gets an email and a text with the link to watch the technician arriving. It only works once per visit.

4. **Arrive.** Tap **Clock In**. The clock starts counting.
5. **Before photos.** Take the photos under **Before**.
6. **Clean and check off the checklist.** Check each item when done.
7. **Break.** To eat or rest, tap **Take a break**. To come back, tap **End break**. The break is taken out of the hours.
8. **After photos.** Take the photos under **After**.
9. **Leave.** Tap **Clock Out**. If the company requires photos, the clock out waits for them. If the checklist is incomplete, the app asks first.

TIP If she forgets to tap "I'm on my way", Clock In notifies the client just the same.

CAREFUL The lead technician is the one who completes the job. When the lead clocks out, the job ends and the invoice is created.

41

When the signal drops

The technician can work without internet. A "No signal" banner shows at the top of the screen.

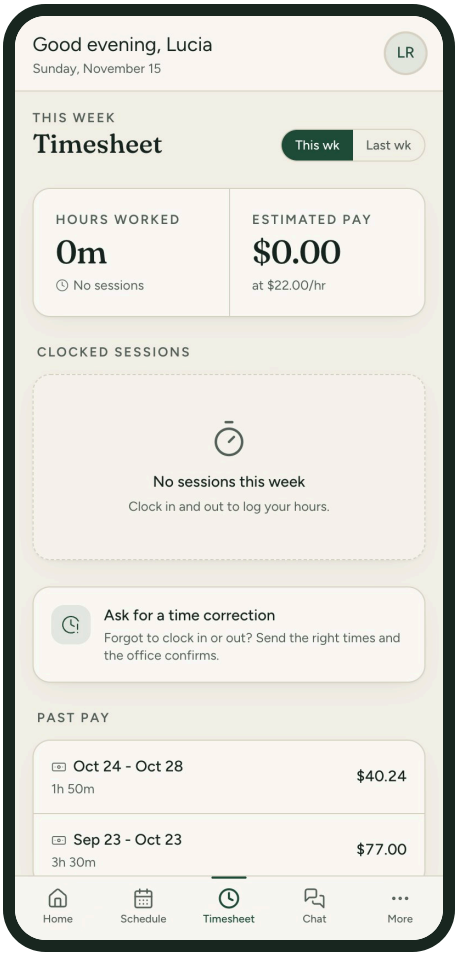
Works without signal	Needs signal
Clock in and clock out	I'm on my way
Take and end a break	Mileage
Check off the checklist	Checking the required photos
Take photos (they are kept)	Taking a card payment

Everything done without signal is kept on the phone, even if she closes the app, and is sent on its own when the signal comes back. The time that counts is the time she tapped the button.

> **TIP** To send faster when the signal comes back, pull the Home screen down.

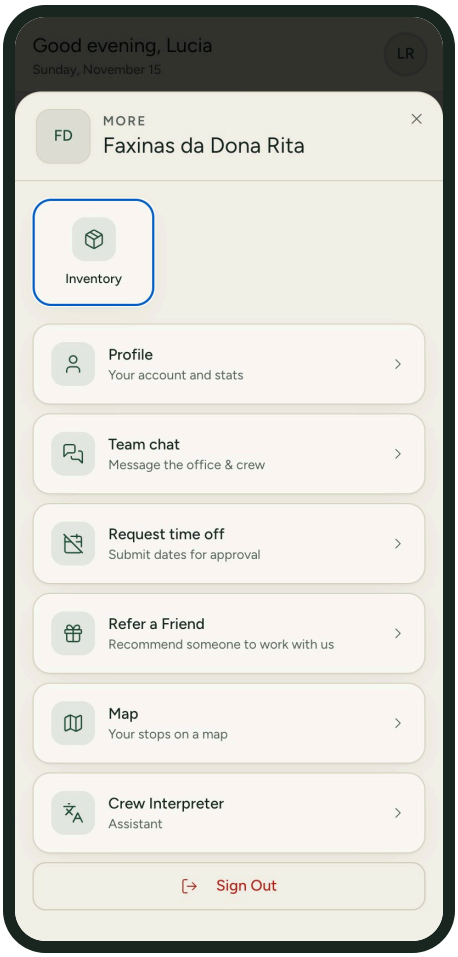
42

Timesheet, pay stub and time off on the phone



The Timesheet tab: the week's hours.

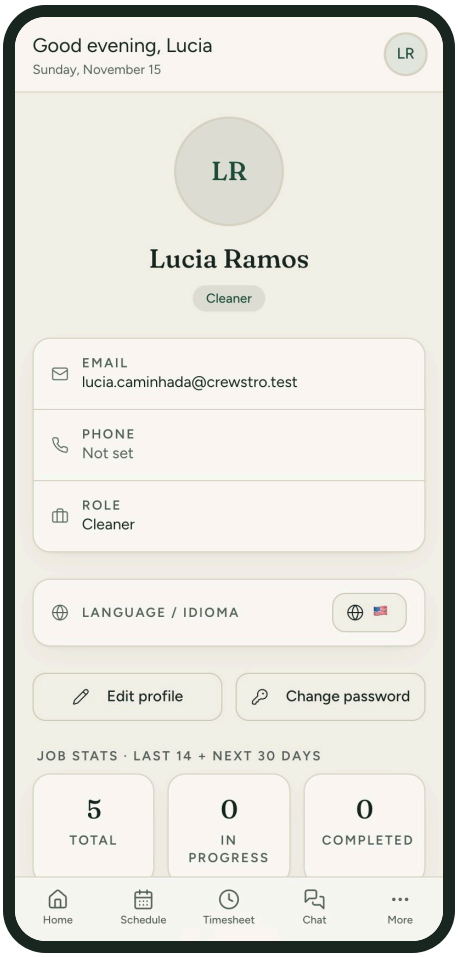
In the **Timesheet** tab, the technician sees this week and last week: the hours, the estimated pay (for those paid by the hour) and each visit. Under **Past pay** are the pay stubs of the closed periods.



The More menu.

The More menu

- **Profile**: photo, phone, app language and change password.
- **Team chat**: talk with the office.
- **Request time off**: choose the days and the reason, and send.
- **Refer a Friend**: refer someone to work at the company.
- **Map** and **Crew Interpreter**.
- **Sign Out**.



The technician's Profile: language and password.

> **TIP** The technician can change the app language (English, Portuguese or Spanish) in Profile. It changes nothing for the client.

43

The 30 minute training script

Minutes	What to do
0 to 5	Install the app (iPhone) or add to the Home screen (Android).
5 to 10	Sign in, change the password, check Remember email only.
10 to 15	Turn on notifications, location (Always) and camera. Check in Settings.
15 to 25	Do the whole test visit: on my way, clock in, photos, checklist, break, clock out.
25 to 30	Show Timesheet, Past pay, Request time off and Chat. Answer questions.

Final test: the technician knows how to...

- [ ] Sign in to the app by herself.
- [ ] Find today's visits and open one.
- [ ] Find the gate code and the door code.
- [ ] Tap I'm on my way.
- [ ] Clock in and clock out.
- [ ] Take before and after photos.
- [ ] Take and end a break.
- [ ] Request time off.
- [ ] Send a message in Team chat.
- [ ] What to do when the signal drops.

After the training, at the office

- [ ] Send her a message in Chat and check that the push arrived on her phone.
- [ ] Open the Map while she taps I'm on my way and see if she shows up.
- [ ] Delete (or cancel) the test visit.

7

Part 7. When something goes wrong

44

Problems with the technician's app

? The technician gets no notifications at all.

WHAT TO DO

1. Does she use Android through the browser? Through the browser there is no push. Let her know by message.
2. iPhone: Settings > Crewstro > Notifications > Allow Notifications turned on?
3. Did she sign in through the iPhone app at least once? The phone is only registered to receive after that.
4. Is Focus mode (Do Not Disturb) on? Set Crewstro as allowed.
5. Still nothing? Ask her to sign out of the app (More > Sign Out) and sign in again.

? The technician does not show up on the Map.

WHAT TO DO

1. The Map only shows who sent a location in the last 3 minutes. Does she have the app open, or did she tap I'm on my way?
2. iPhone: Settings > Crewstro > Location set to Always? Precise Location on?
3. Is Low Power Mode on? It holds back the location.
4. Android through the browser: the screen needs to stay on with Crewstro open.

? The technician does not see today's visit.

WHAT TO DO

1. Is the visit really assigned to her? Open the visit at the office and check who is going.
2. Is the date right? Check the company's time zone (Settings > Company).
3. Ask her to pull the Home screen down (refresh).
4. The app shows visits from 14 days ago up to 30 days ahead.

? The technician cannot clock out.

WHAT TO DO

1. Does the company require before and after photos? She needs to take the photos first.
2. Checking the required photos needs signal. Ask her to go somewhere with signal.
3. Is the checklist incomplete? The app asks; she can confirm the clock out anyway.

? The client did not get the "on my way" notice.

WHAT TO DO

1. The notice only goes out once per visit. If she tapped it before, it does not go out again.
2. Does the client have an email or phone on file?
3. It needs signal at the moment of the tap.
4. The notice may be turned off in Settings > Automations.

? The technician forgot her password.

WHAT TO DO

1. In the app, she taps Forgot password? and follows the email.
2. Or you open her profile in Team, tap Reset password and send her the temporary password.

? The technician created an account through "Sign Up" and sees nothing.

WHAT TO DO

1. She created a new, empty company. Contact support (hi@crewstro.com) to link her email to the right company.

? The app went blank or froze.

WHAT TO DO

1. Close the app completely (swipe up) and open it again.
2. Check for an update in the App Store.
3. Still nothing? First wait for the "No signal" banner to go away (what was saved needs to be sent). Then sign out (More > Sign Out) and sign in again.

45

Problems at the office

? Dates and times are wrong (a visit shows on the day before or the day after).

WHAT TO DO

1. It is almost always the time zone. Open Settings > Company and choose the right time zone.

? The client did not get the visit reminder.

WHAT TO DO

1. Are reminders turned on in Settings > Notifications? They start off.
2. Does the client have an email or phone? Is the phone right?
3. In the client's profile, are automatic reminders paused?
4. Did he ever reply STOP? Then texts stop until he replies START.
5. Texts only go out between 8am and 9pm in the client's time zone.
6. Is the company's number registered (10DLC)? Without registration, the carrier blocks it.

? The Facebook or Google lead did not show up in Requests.

WHAT TO DO

1. In Settings > Integrations, the Receive leads from other systems card shows the total and the last lead. Did the number go up?
2. Is the address in Zapier the same as the one on the card? If someone clicked Create a new address, the old one stopped.
3. Does the Zap send the name and the email or phone? Without that, the lead is refused.
4. The same contact within 10 minutes is not duplicated: look for the request that already exists.

? Tomorrow's schedule email did not arrive.

WHAT TO DO

1. In Settings > Notifications, is the Tomorrow's schedule by email card turned on?
2. The time is the company's. Check the time zone in Settings > Company.
3. Is there a visit scheduled for tomorrow? Without a visit, no email goes out.
4. The technician only gets her list if the Also send each technician her own list option is on and she has an email on her profile.
5. Look in the spam folder.

? The phone does not ring on the computer (or on the phone).

WHAT TO DO

1. Is the person turned on in Team > profile > Access & permissions > Phone inside Crewstro?
2. In Settings > AI & Phone, is Ring on this device on? Does the card show Ready? If not, click Start the phone and allow the microphone.
3. Is the app OPEN? With the app closed or the screen locked, the call does not ring in Crewstro.
4. Is the active provider Twilio or RingCentral? With OpenPhone and Dialpad there are no calls through the app.
5. RingCentral: if starting gives a permission error, reconnect RingCentral.

? The Call button opens the device's phone instead of calling through Crewstro.

WHAT TO DO

1. That is how it works for anyone without the phone turned on in their profile, and always with OpenPhone and Dialpad.
2. If the person has the phone turned on, the softphone has not started yet: Settings > AI & Phone > Start the phone.

? The text message does not go out.

WHAT TO DO

1. Is there a provider connected in Settings > AI & Phone?
2. Is the provider Dialpad? It does not send texts through Crewstro.
3. Did the client reply STOP?
4. Is the number registered for business messaging (10DLC)?

? The client's reply does not show on the profile.

WHAT TO DO

1. Twilio: open Settings > AI & Phone and press Save once. That turns on replies for the number.
2. RingCentral: press Sync now on the provider's card.
3. OpenPhone: disconnect and connect again.
4. Is the client's phone on file the same one he replies from?

? Payroll will not close.

WHAT TO DO

1. There is an open clock in the period (someone who did not clock out). Fix it through the open clocks card.

? I cannot fix a clock entry.

WHAT TO DO

1. The payroll for that period is already closed. Reopen the payroll, fix it and close it again.

? The client cannot pay the invoice online.

WHAT TO DO

1. Is Stripe connected in Settings > Apps?
2. Is the invoice already paid, closed or cancelled?
3. Without Stripe, record the payment by hand (Payments > Record Payment).

? The client says he paid, but the invoice is still open.

WHAT TO DO

1. Paid by Zelle, cash or check? Record it by hand.
2. Paid by card? Wait a few minutes and refresh the page. Check on the Stripe site.

? The client cannot approve the quote.

WHAT TO DO

1. The quote has expired. Edit the expiration date and send it again.

? The online booking did not show up in Requests.

WHAT TO DO

1. Check the list filters (New, Archived).
2. Did the client finish the booking? He needs to get to the last screen.
3. Was the chosen day blocked or full? The page does not let him book.

? A visit disappeared from the Schedule.

WHAT TO DO

1. Check the Schedule filters: people, types, unassigned, weekends.
2. Was it cancelled? Look in Jobs, Cancelled tab.

? A duplicate client showed up after importing.

WHAT TO DO

1. In the Clients list, use the possible duplicates card and click Merge.

? The technician sees prices she should not (or does not see what she should).

WHAT TO DO

1. Open her profile in Team and adjust the Show Pricing switch and the other permissions.

? The AI Assistant or the Interpreter do not show up.

WHAT TO DO

1. The company needs to add an AI key in Settings > AI & Phone.

? The office screen froze or went blank.

WHAT TO DO

1. Press F5 (or Cmd+R on Mac) to reload.
2. Still nothing? Sign out, close the browser, open it and sign in again.
3. Check if the system is up at crewstro.com/status.

46

Before calling support

To solve it fast, send to **hi@crewstro.com**:

- [ ] The company name and your email.
- [ ] Which screen it happened on (for example: Invoices, invoice 1008).
- [ ] What you did, step by step.
- [ ] What you expected to happen.
- [ ] What really happened.
- [ ] A screenshot (on Mac: Cmd+Shift+4; on Windows: Windows key+Shift+S; on iPhone: side button + volume up).

The system status is at **crewstro.com/status**. Quick answers are in the help center: **crewstro.com/help**.

8

Part 8. The office routines

47

Every day, every week, every month

Every day, in the morning

- [ ] Open the Dashboard and look at today's jobs.
- [ ] Open the Schedule in the Day view and check that every visit has a technician.
- [ ] Check the bell: new requests, client replies, low ratings.
- [ ] Answer the new Requests.
- [ ] Check that every technician clocked in (Not started = call her).

Every day, late afternoon

- [ ] Check that all of today's visits were completed.
- [ ] Review the draft invoices and send them.
- [ ] Record the payments received by hand (cash, check, Zelle).
- [ ] Look at tomorrow's Schedule.

Every week

- [ ] Review the clock entries and fix the open ones.
- [ ] Close the payroll, export the CSV and mark it as paid.
- [ ] Look at the overdue invoices and follow up with the clients.
- [ ] Answer the time off requests.
- [ ] Review the recurring series (clients who paused or left).

Every month

- [ ] Look at the month's revenue report and the accounts receivable report.
- [ ] Approve and pay the expenses.

- [ ] Review the team: who joined, who left, permissions.
- [ ] Ask the month's new clients for a review.