

CLICK

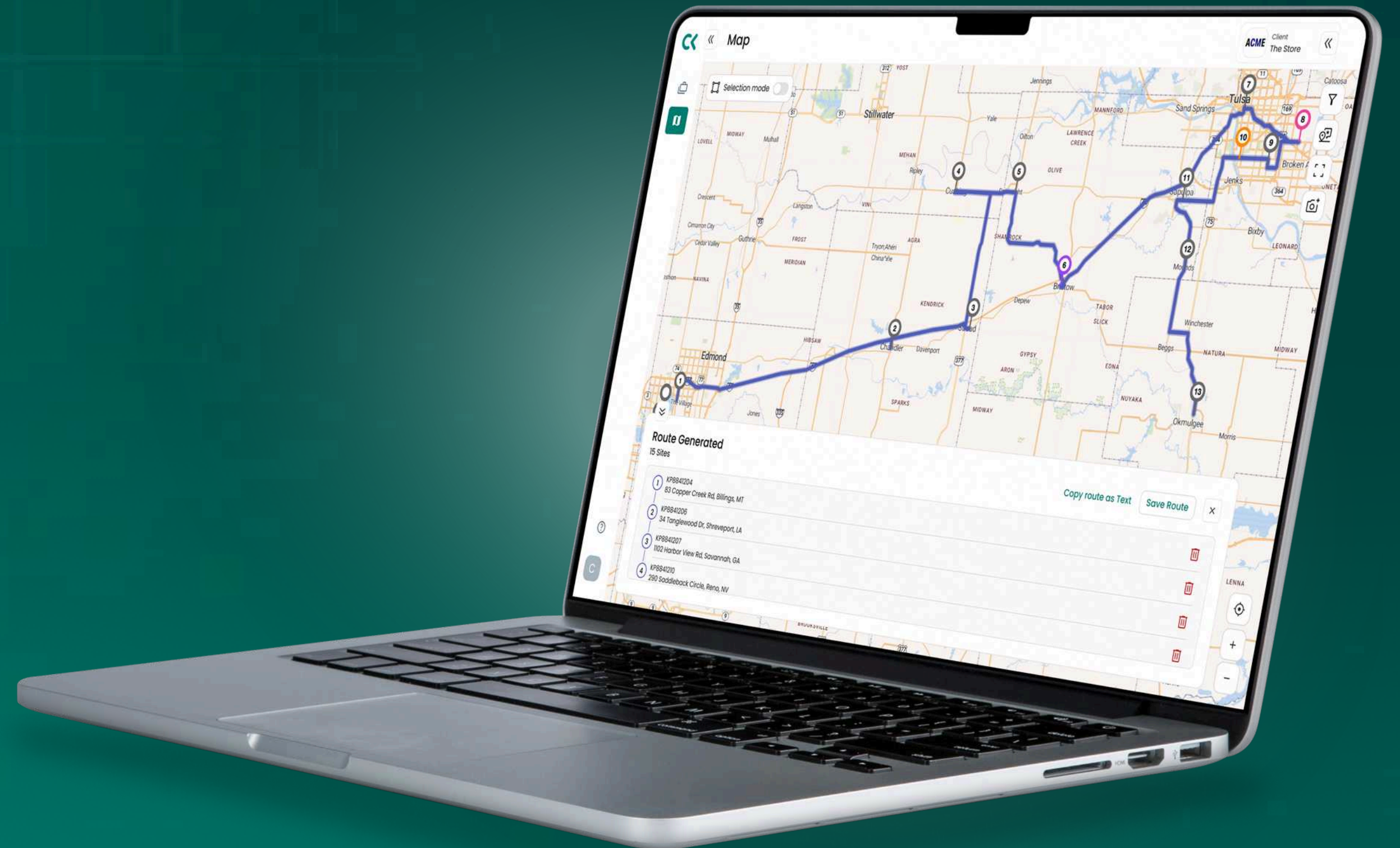
PROJECTS
PEOPLE
PROGRESS
TOGETHER

USER MANUAL

ClickPM User Guide

PART 1 — INTRODUCTION TO CLICKPM

Built for multi-site project management.
Backed by real results.



Projects • Tickets • Contractors • Locations • Routing • Progress

clickpm.io

Welcome to ClickPM

A clearer way to coordinate complex, multi-location work.

OVERVIEW

ClickPM is a project management platform designed to make complex, multi-location projects easier to manage, coordinate, and complete.

When projects involve multiple locations, contractors, tasks, deadlines, documents, and stakeholders, keeping everyone organized can quickly become difficult. Information may be spread across emails, spreadsheets, text messages, shared folders, and different systems. Project managers can spend a significant amount of their time simply trying to determine what has been completed, what still needs attention, and who is responsible for the next action.

ONE PLATFORM

Projects
Tickets
Assignments
Updates
Performance

ClickPM brings this information together into one centralized platform.

The system provides project managers, internal teams, contractors, and other authorized users with a common place to view projects, manage tickets, assign work, track progress, review updates, and monitor overall project performance.

THE OBJECTIVE IS SIMPLE

Make project information easier to find, work easier to coordinate, and project progress easier to understand.

What ClickPM Does

Day-to-day project execution, organized from one central location.

CAPABILITIES

Depending on the user’s role and permissions, ClickPM can be used to:

- 01

Manage projects from start to finish.
- 02

Track work progress in real time.
- 03

Visualize operations on interactive maps.
- 04

Optimize field team routes.
- 05

Assign and dispatch work efficiently.
- 06

Monitor team performance and workload.
- 07

Update and manage tickets in bulk.
- 08

Track tasks and team activities.
- 09

Automate cross-project access.
- 10

Manage billing and invoicing.
- 11

Generate reports and export data.

Rather than relying on several disconnected methods to manage a project, ClickPM provides a structured environment where the information associated with the project can remain connected to the work itself.

Built for scale

For dozens, hundreds, or even thousands of locations or tickets, ClickPM keeps the overall project visible without losing individual details.

One Place. Real-Time Visibility.

Replace fragmented tracking with a live view of the work.

CENTRALIZATION

Without a centralized project management system, a typical project may involve spreadsheets for tracking, email for communication, maps for locations, separate documents for field information, and phone calls or text messages for status updates.

Similarly, contractors can access the work that has been assigned to them and see the information they need to complete their responsibilities without having to search through unrelated project information or lengthy email chains.

REAL-TIME VISIBILITY

Effective project management depends on having accurate information. ClickPM gives users visibility into the current status of projects and tickets so that decisions can be made based on the latest available information.

A project manager can open ClickPM and quickly determine:

Where a project stands • Which tickets are assigned • What has been completed • Which items require attention • How work is progressing.

What has been completed?

What is still outstanding?

Who is responsible for the work?

Which locations require attention?

Where are the contractors working?

How is the overall project progressing?

**Less time collecting
information.
More time managing
the project.**

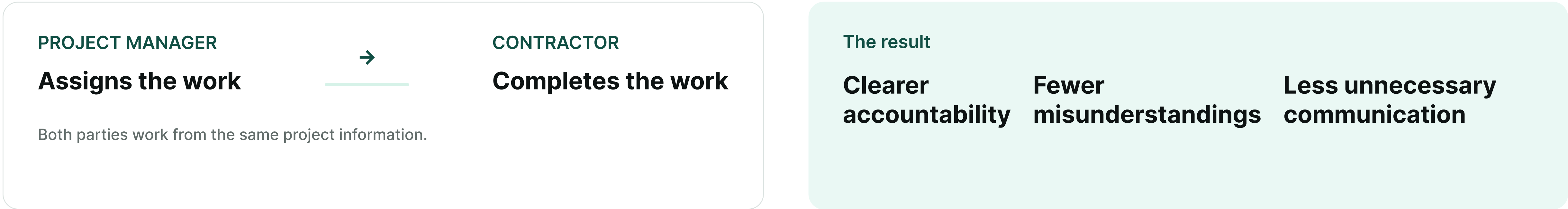
Contractor Coordination

Clear assignments, shared information, less unnecessary communication.

SHARED WORKSPACE

ClickPM is designed to simplify the relationship between project managers and contractors.

Contractors can be provided with a dedicated workspace containing the work assigned to them. Individual tickets can provide the information necessary to understand the location, requirements, and status of the work.



Instead of relying heavily on separate emails, spreadsheets, phone calls, and text messages, ClickPM keeps the project manager and contractor connected to the same source of work information.

Location Visibility & Route Planning

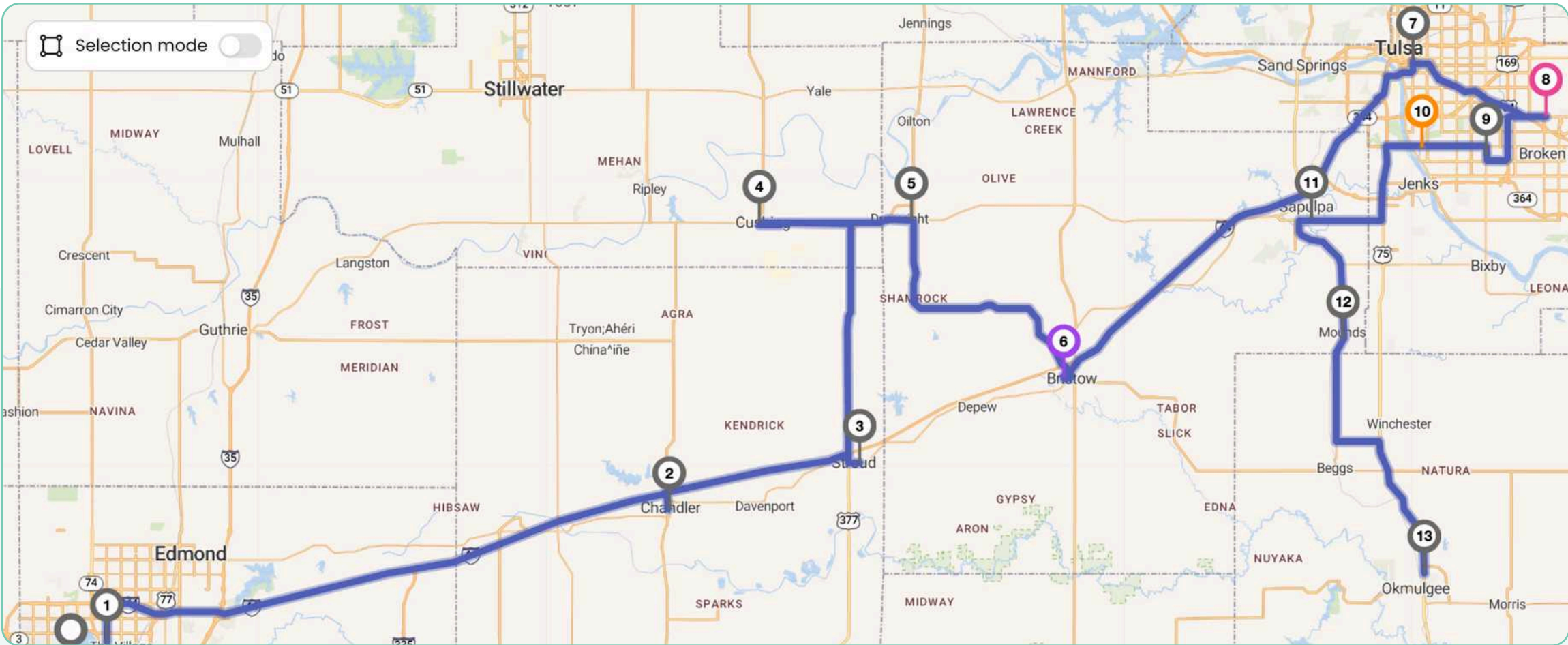
See where the work is, and organize how to get there.

MAP-BASED WORK

For projects involving multiple physical locations, geography can become an important part of project execution.

MAP VIEW

Tickets and project locations can be reviewed geographically, then assigned to contractors accordingly.



ClickPM can also help organize routes between multiple job sites.

For a contractor working at several locations during the same day, this can reduce the amount of manual route planning required. Instead of individually looking up addresses and determining the most efficient order of travel, locations can be organized into a more efficient route.

PROJECT VIEW

Understand how work is distributed across the project — even when many locations are active at the same time.

Less Administration. Better Control.

Designed to save time without adding complexity.

EFFICIENCY

Saving Time

ClickPM is intended not only to organize projects but also to reduce the administrative effort required to manage them. A considerable amount of project management time can be spent searching for information, updating spreadsheets, asking for status updates, determining who has been assigned to a location, reviewing separate documents, planning contractor routes, and reconciling information from multiple sources.

CENTRALIZE THE REPETITIVE WORK

Status • Assignments • Locations • Routes • Updates

Saving Time

ClickPM is intended not only to organize projects but also to reduce the administrative effort required to manage them. A considerable amount of project management time can be spent searching for information, updating spreadsheets, asking for status updates, determining who has been assigned to a location, reviewing separate documents, planning contractor routes, and reconciling information from multiple sources.

PROJECT MANAGER

Broad project
visibility

CONTRACTOR

Assigned
work & details

EXECUTIVE

Progress &
performance

The ClickPM Approach

Structure the complexity. Keep the work understandable.

PROJECT CONTROL

As projects become larger, maintaining control becomes increasingly difficult.

A small project may be manageable through email and spreadsheets. A project involving hundreds of sites, contractors, and individual tasks is considerably more difficult to manage using the same approach.

ClickPM is built around this straightforward principle.

PROJECT MANAGEMENT SHOULD MAKE THE WORK EASIER TO MANAGE—NOT CREATE ADDITIONAL WORK FOR THE PEOPLE MANAGING IT.

Projects, tickets, assignments, updates, locations, contractor activity, and performance information can be managed within the same environment. The objective is not simply to collect more data. It is to make the information required to manage the project easier to access and act upon.

By bringing project information, field activity, contractors, tickets, locations, and performance into one system, ClickPM helps teams spend less time searching for information and more time completing the work.

Clarity without unnecessary complexity.

About This Manual

From understanding the platform to performing everyday tasks.

MANUAL STRUCTURE

This manual is designed to help users understand how to navigate and use ClickPM effectively.

PART 1 **Introduction to ClickPM**

Provides an overview of the platform, what it does, and how it can help users manage projects more efficiently.

PART 2 **Core Functions & Workflows**

Provides step-by-step guidance for the primary ClickPM functions and workflows.

THE GOAL

Understand not only how to use ClickPM, but also how ClickPM can make everyday project responsibilities easier, faster, and more organized.

CLICK

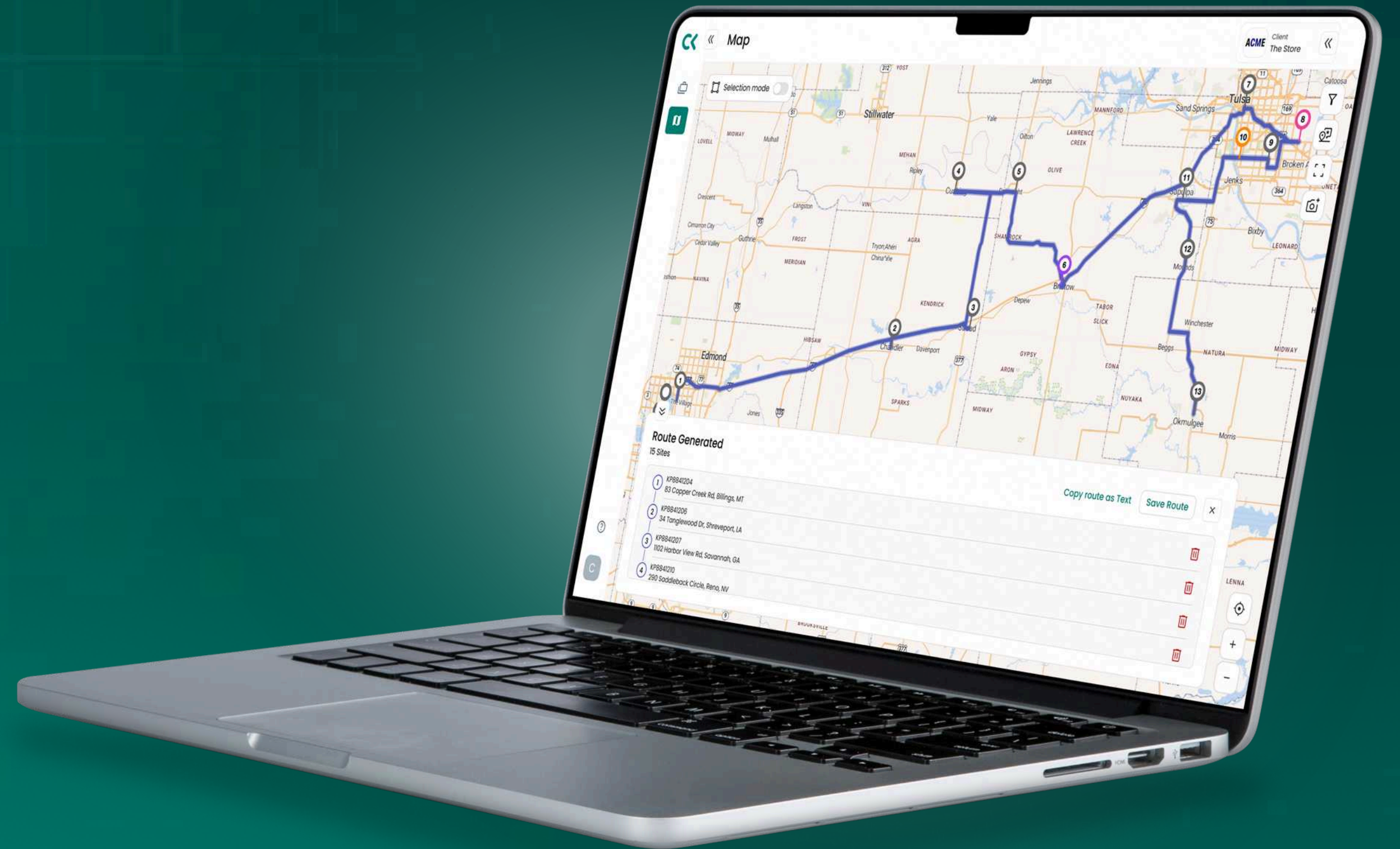
PROJECTS
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USER MANUAL

ClickPM User Guide

PART 2 — CORE FUNCTIONS & WORKFLOWS

A practical guide for setting up, executing, monitoring, and reporting multi-site projects.



Plan • Coordinate • Execute • Deliver

clickpm.io

Table of Contents

Find the workflows, roles, and instructions most relevant to your day-to-day work.

How to use this guide.

1	Environment Setup	03
2	Project Setup & Administration	08
3	Ticket Work	12
4	Map Planning & Navigation	18
5	Performance Oversight	22
6	Billing & Exports	23

Who this guide is for?

- SUPER ADMINS** Configure the ClickPM environment, clients, labels, and access rules.
- ADMINS** Manage projects, tickets, oversight, performance, billing, and exports.
- OPERATORS** Work with assigned tickets, submit progress, and use field maps, and routes.



READING TIP

Menu names, tab names, and buttons are shown in bold. Screen layouts may change slightly as ClickPM is updated.

1

ENVIRONMENT SETUP

SUPER ADMINS

Ticket Labels Setup

Client Setup

Access & Cross-Client Rules

2

PROJECT SETUP & ADMINISTRATION

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3

TICKET WORK

ADMINS / OPERATORS

4

MAP PLANNING & NAVIGATION

ADMINS / OPERATORS

5

PERFORMANCE OVERSIGHT

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6

BILLING & EXPORTS

ADMINS

Ticket Labels Setup

MANAGE STATUSES

Manage ticket statuses to define and track the progress of tickets, helping users quickly understand the current state of work through clear labels and colors

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Management

ClientsUsersGroupsStatusesAssignments

Search

Status Name	Type	Color	Action
Unassigned	System		...
Assigned	System		...
Pending	System		...
Completed	System		...
Paused	User		...

Records per page: 251-5 of 5

SamsuperadminSuperadmin

1

Go to Management.

2

Select Statuses tab.

3

Add new Status.

4

Edit/Customize an existing Status.

i

Custom statuses that you create yourself to match your workflow.

i

Built-in statuses that come with the app and cannot be removed.

i

Customizable color to help you quickly spot ticket's state.

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Ticket Labels Setup

MANAGE ASSIGNMENTS

Manage assignments to define the type of work a ticket represents inside a project.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

<< Management

Clients

Users

Groups

Statuses

Assignments

Search

Assignment Name

Sustainment

New Store/Relo/Reno

Asset Tagging

Action

...

Edit

Remove

Records per page: 25 1-3 of 3

1

Go to Management.

2

Select Assignments tab.

3

Add new Assignment.

4

Edit/Delete an existing Assignment.

i

Assignments are categories that describe the type of work a ticket represents.

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Client Setup

MANAGE CLIENTS 1/2

Add and configure clients to group projects and tickets by organization or business unit.
Pick the statuses and assignments available for each client to ensure the correct workflow is used.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Management

2

Select **Clients** tab.

3

Add new **Client**.

1

Go to **Management**.

i

Click on desired client row to update its details

Customer OVERSIGHT

Clients

Users

Groups

Statuses

Assignments

Search

Name	Short	Notes	Enabled
BASE	BASE		Yes
OVERSIGHT	OVST		Yes

+ Add New Client

Records per page: 25

1-2 of 2

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1

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Client Setup

MANAGE CLIENTS 2/2

Add and configure clients to group projects and tickets by organization or business unit.
Pick the statuses and assignments available for each client to ensure the correct workflow is used.

CLICK

<< Management

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OVERSIGHT

Client Name *

The Full Name of the Client

Client Short *

The abbreviation of the Client. Used in file downloads and in condensed views

Statuses *

Statuses will be displayed in the order of selection

Assignments *

Assignments will be displayed in the order of selection

Store Format

The store number format in the excel sheet

Supplier AP

Notes

Additional information about the Client

Delete

Disable

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Customer OVERSIGHT

^

v

1 Update fields.

1

Ticket statuses available for this client and the order in which they are shown.

1

Ticket work categories available for this client and the order they appear.

1

Format used for store numbers, such as plain text, numbers only, or with leading zeros (e.g., 007).

1

A default **Supplier Accounts Payable** reference used when generating invoices and reports.

2 Save changes.

Cancel

Submit

- 1

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Access & Cross-Client Rules

AUTO-AUTHORIZE ASSIGNEES BETWEEN DIFFERENT CLIENTS

Automatically grant Assignees permission to switch between clients upon project import. This removes the need to manually configure user access and group assignments for each client.

CLICK

Project Management

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Map

Database Management

<<

Client Settings

Customer OVERSIGHT

All Settings

Operation

User Interface

Identity

Features

Search

Search

Auto-authorize contractors to switch clients

When importing projects, automatically authorize contractors to switch between clients

1

Open user options list and choose **Client Settings**.

2

Select **Features** tab.

3

Enable **Auto-authorize** feature tab.

4

Apply changes.

i

If you want tighter control, turn this off and manage users and groups manually instead.

Save

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Data Import

IMPORT PROJECT 1/2

Quickly add one or multiple projects to the system by importing project data from an external source through a structured Excel file.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Database Management

1

Go to Project Management.

Samsuperadmin
Superadmin

Project Management

SELECT PROJECT TO SEE STATS

Import Project

Project Report

Projects

Tickets

Updates

Metadata

2

Click on Import project.

Search

Filter

☐	Project Name	Abbr	Status	Assignees	Action
No projects found.					

1	ENVIRONMENT SETUP SUPER ADMINS
2	PROJECT SETUP & ADMINISTRATION ADMINS
	Data Import Project Maintenance Project Oversight
3	TICKET WORK ADMINS / OPERATORS
4	MAP PLANNING & NAVIGATION ADMINS / OPERATORS
5	PERFORMANCE OVERSIGHT ADMINS
6	BILLING & EXPORTS ADMINS

Data Import

IMPORT PROJECT 2/2

Quickly add one or multiple projects to the system by importing project data from an external source through a structured Excel file.

CLICK

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<< < Project Import

Important Notes

- Single Project Import: Ensure each ticket entry has the same project name to avoid creating multiple projects.
- Multiple Projects Import: Ensure each ticket entry has a corresponding project name. If project name doesn't exist, the ticket will be ignored.

Upload Spreadsheet *

Use the example spreadsheet format.

4 Upload your project excel sheet.

Click to upload or drag and upload

CSV, Xlsx, Xls (max 25mb)

NTST-NEW-2026-08-20 11_02_05.xlsx

Excel Spreadsheet (.xlsx) | 25.31 KB

Download Template

3 Download the template, review the structure and fill in your project data.

Import File

5 Confirm your project import.

- 1

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Project Maintenance

UPDATE PROJECT

Edit project details such as the project name, short name, and notes to keep project information accurate and up to date.

CLICK

Project Management

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Project Management

SELECT PROJECT TO SEE STATS

Import Project

Project Report

Projects

Tickets

Updates

Metadata

Search

Filter

☐	Project Name	Abbr	Status	Assignees	Action
☐	PILOT	PILOT	Active	Emily Brown, John Smith	Record Edit Project Update Metadata Archive Update Billing Remove

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1

Select **Projects** tab.

2

Open the Action options list.

3

Choose **Edit Project** option.

i

Mark project as inactive. Archive a project to hide it from the main active list.

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Project Oversight

TRACK PROJECTS

Monitor the health and progress of multiple projects through key statistics.

CLICK

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<< Project Management

Completed Tickets
26 / 82

Status Updates
26 C / 42 A / 5 P

Fees
\$46,800.00 / \$147,600.00

Revenue
\$104,000.00 / \$328,000.00

Import Project
Update an existing project or creating a new one

Project Report
Export all data for the selected projects.
1 Projects

Projects Tickets 1 Projects Updates 1 Projects Metadata 1 Projects

Search

Filter

Project Name	Abbr	Status	Assignees	Action
PILOT	PILOT	Active	Emily Brown, John Smith	...

1 record selected.

Records per page: 25 1-1 of 1

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1

Select **Projects** tab.

2

Select one or more projects to view their tickets, updates, and metadata statistics.

3

Fees (X / Y)
X: Assignee fees for tickets with a **Completed Date**.
Y: Assignee fees for all tickets

4

Revenue (X / Y)
X: Revenue for tickets with a "Completed Date"
Y: Revenue for all selected tickets

5

Users assigned to project.

6

(C): Completed
(A): Assigned
(P): Pending

- 1

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Ticket Maintenance

UPDATE TICKET AS AN ADMINISTRATOR 1/2

Edit one or more ticket details as an administrator. Use it to make corrections or perform bulk updates.

CLICK

Project Management

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Customer OVERSIGHT

Completed Tickets
26 / 82

Fees ⓘ
\$46,800.00 / \$147,600.00

Status Updates
26 C / 42 A / 5 P

Revenue ⓘ
\$104,000.00 / \$328,000.00

Import Project
Update an existing project or creating a new one

Project Report
Export all data for the selected projects.
1 Projects

Projects Tickets 1 Projects Updates 1 Projects Metadata 1 Projects

Search

Filter

✓	Project Name	Abbr	Status	Assignees	Action
✓	PILOT	PILOT	• Active	Emily Brown, John Smith	...

1 record selected.

Records per page: 25 1-1 of 1

S Samsuperadmin Superadmin

1

Go to Project Management.

2

Select one or more projects to view their corresponding tickets.

- 1

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Ticket Maintenance

UPDATE TICKET AS AN ADMINISTRATOR 2/2

Edit one or more ticket details as an administrator. Use it to make corrections or perform bulk updates.

Project Management

Completed Tickets
26 / 82

Fees
\$46,800.00 / \$147,600.00

Status Updates
26 C / 42 A / 5 P

Revenue
\$104,000.00 / \$328,000.00

Import Project
Update an existing project or creating a new one

Project Report
Export all data for the selected projects.
1 Projects

Projects

Tickets 1 Projects

Updates 1 Projects

Metadata 1 Projects

Search

Filter

Update Selected

+ Add Ticket

	Ticket	ate	Due Date	Assignees	Store	Address	City	State	Country	Action
☐	PILOTAGHL-10241		09/01/2026		GHL-10241	4021 HILLSBORO PIKE, NASHVILLE, TN 37215, USA	NASHVILLE	TN	USA	...
☐	PILOTACRN-10254		09/01/2026	John Smith	CRN-10254	151 SOCKANOSSET CROSS RD, CRANSTON, RI 02920, USA	CRANSTON	RI		Update Edit Remove
☐	PILOTACGB-10190	226	09/01/2026		CGB-10190	6701 SW 57TH AVE, SOUTH MIAMI, FL 33143, USA	SOUTH MIAMI	FL		
☐	PILOTAPTH-10238		06/22/2026	Emily Brown	PTH-10238	450 RHODE ISLAND ST, SAN FRANCISCO, CA 94107, USA	SAN FRANCISCO	CA		
☐	PILOTASTC-10267		06/15/2026	Emily Brown	STC-10267	29955 STEVENS CREEK BLVD, CUPERTINO, CA 95014, USA	CUPERTINO	CA	USA	...
☐	PILOTAHSK-11110	226	09/01/2026	John Smith	HSK-11110	63-97 KENSINGTON HIGH ST, LONDON, GBR 85, GBR	LONDON	GBR	GBR	...
☐	PILOTACIC-10170		09/07/2026	Emily Brown	CIC-10170	6020 N CICERO AVE, CHICAGO, IL 60646, USA	CHICAGO	IL	USA	...
☐	PILOTAPTL-10291		09/01/2026	John Smith	PTL-10291	2 SOMERSET ST, PORTLAND, ME 04101, USA	PORTLAND	ME	USA	...

Optionally you could update tickets in bulk by selecting them, and clicking on **Update Selected**.

Manually add ticket.

Quickly update the ticket's details using a short form (status, assignee(s) or notes).

Each quick update creates a new update record.

Edit and update ticket information using the full form.

Select **Tickets** tab.

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Progress Reporting

UPDATE TICKET AS AN ASSIGNEE 1/2

Update and report progress on assigned tickets.

CLICK

Work Portal

Map

Work Portal

Project
PILOT

Search

VOS-10552

Pending

Location
1407 S VOSS RD, HOUSTON, TX 77057, USA

Ticket
PILOTAVOS-10552

Project
PILOT

WorkTask#
VOS-10552

Due Date
07/27/2026

Assignees
John Smith

Notes

Update Notes
Updated to pending

INK-10513

Assigned

Asset Tagging

Location
348 HARRISON AVE, BOSTON, MA 02118, USA

Ticket
PILOTAINK-10513

Project
PILOT

WorkTask#
INK-10513

Due Date
09/01/2026

Assignees
John Smith

Notes

Update Notes

POA-10251

Pending

Asset Tagging

Location
1700 POST OAK BLVD, HOUSTON, TX 77056, USA

Ticket
PILOTAPOA-10251

Project
PILOT

WorkTask#
POA-10251

Due Date
07/27/2026

Assignees
John Smith

Notes

Update Notes
Updated to "Pending"

CMP-10497

Assigned

Asset Tagging

Location
10113 LOUETTA RD, HOUSTON, TX 77070, USA

Ticket
PILOTACMP-10497

Project
PILOT

WorkTask#
CMP-10497

Due Date
07/13/2026

Assignees
John Smith

Notes

Update Notes

LNF-10452

Assigned

Asset Tagging

Location
1200 MARKET ST, LYNNFIELD, MA 01940, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

WLY-10413

Assigned

Asset Tagging

Location
442 WASHINGTON ST, WELLESLEY, MA 02482, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

RWF-10235

Assigned

Asset Tagging

Location
11355 WOODGLEN DR, ROCKVILLE, MD 20852, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

COD-10370

Assigned

Asset Tagging

Location
390 CODDINGTON TOWN CTR, SANTA ROSA, CA 95401, USA

Ticket

Project

WorkTask#

Due Date

Assignees

Notes

Update Notes

Customer OVERSIGHT

Export Assignee

View on Map

Filter

John Smith
Contractor

1

Select desired Client.

i

Choose All Clients to be able to switch between projects from different clients.

3

Click on update button.

i

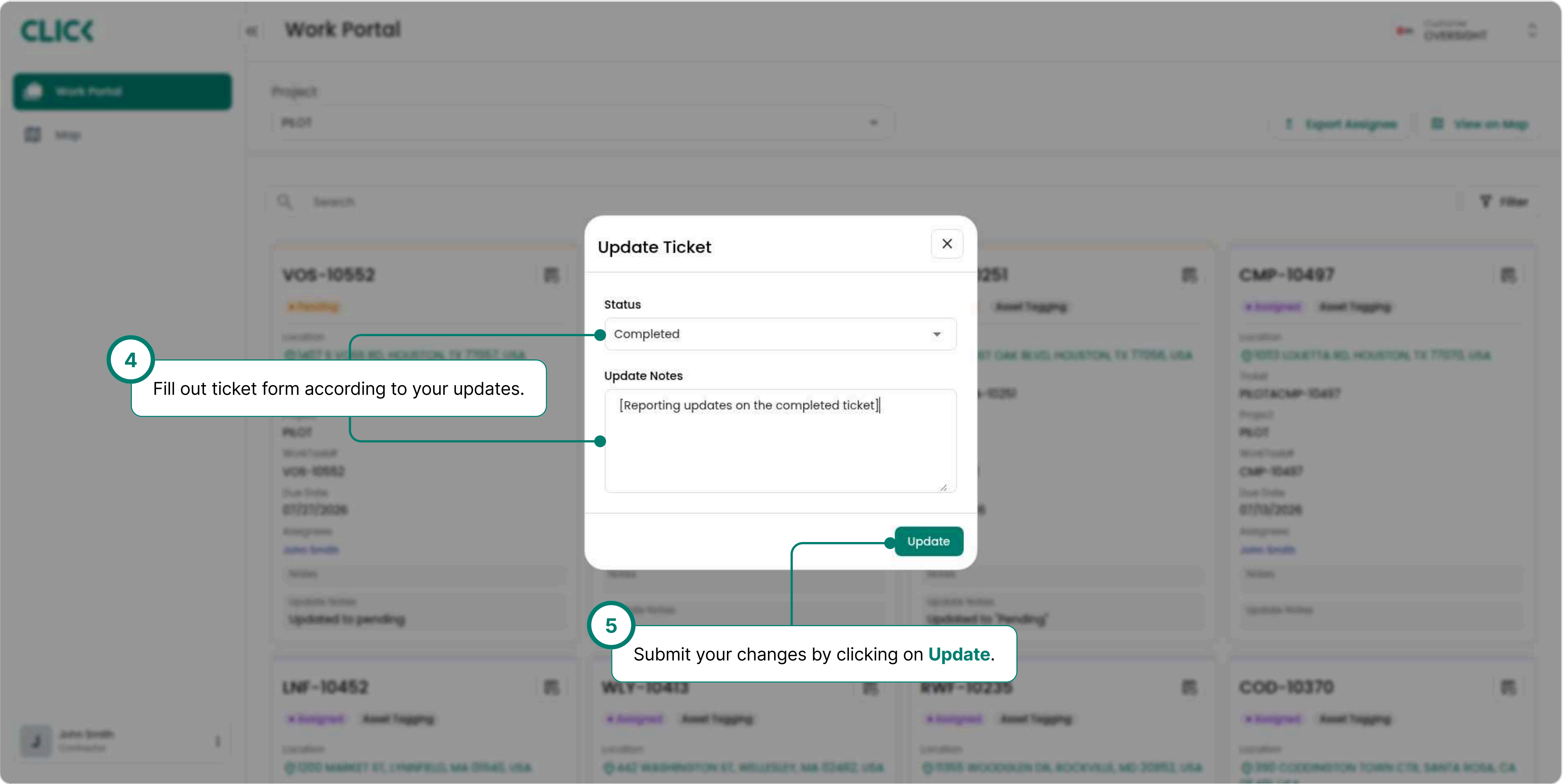
View current selected project tickets on map.

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ADMINS / OPERATORS
- 5PERFORMANCE OVERSIGHT
ADMINS
- 6BILLING & EXPORTS
ADMINS

Progress Reporting

UPDATE TICKET AS AN ASSIGNEE 2/2

Update and report progress on assigned tickets.



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BILLING & EXPORTS
ADMINS

Ticket Maintenance

TRACK TICKET UPDATES 1/2

Follow the ticket’s progress over time by seeing who did what and when.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Project Management

Completed Tickets
26 / 82

Status Updates
26 C / 42 A / 5 P

Fees ⓘ
\$46,800.00 / \$147,600.00

Revenue ⓘ
\$104,000.00 / \$328,000.00

Import Project
Update an existing project or creating a new one

Project Report
Export all data for the selected projects.
1 Projects

Projects

Tickets 1 Projects

Updates 1 Projects

Metadata 1 Projects

Search

Filter

✓	Project Name	Abbr	Status	Assignees	Action
✓	PILOT	PILOT	• Active	Emily Brown, John Smith	...

1 record selected.

Records per page: 25 1-1 of 1

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1

Go to
Project Management

2

Select one or more projects
to view their corresponding
ticket updates.

- 1

ENVIRONMENT SETUP
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BILLING & EXPORTS
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Ticket Maintenance

TRACK TICKET UPDATES 2/2

Follow the ticket’s progress over time by seeing who did what and when.

CLICK

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Completed Tickets
26 / 82

Status Updates
26 C / 42 A / 5 P

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Import Project
Update an existing project or creating a new one

Project Report
Export all data for the selected projects.
1 Projects

Projects

Tickets 1 Projects

Updates 1 Projects

Metadata 1 Projects

Search

Filter

Project	Store	Address	Status	Assignee	Time	Notes	Actions
PILOT	HGM-10159	94 DERBY ST, HINGHAM, MA 02043, USA	Assigned → Completed	Emily Brown	09/08/2026 09:47 PM	Updated to "Completed"	...
PILOT	POA-10251	1700 POST OAK BLVD, HOUSTON, TX 77056, USA	Assigned → Pending	John Smith	09/08/2026 09:46 PM	Updated to "Pending"	...

Records per page: 25 1-2 of 2

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3

Select Updates tab.

i

Optionally delete unwanted ticket updates.

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- BILLING & EXPORTS
ADMINS
- Map Navigation
Bulk Dispatch
Route Planning

Map Navigation

EXPLORE PROJECTS VISUALLY

View tickets for selected project(s), plotted by location. Use it to explore work geographically, filter tickets, select groups for bulk updates.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Map

Clustering

Selection Mode

1 Go to Map.

i Toggle clustering option.

i Nearby tickets are grouped into clusters to keep the map clear. Zoom in to separate and view individual tickets.

2 Filter tickets.

3 Display filtered tickets.

Customer OVERSIGHT

Filter Tickets by

Project

PILOT

Store

Assignee

Status

Assignment

Reset Filter

Show Results

82 Total Tickets

Assigned (42)

Completed (26)

Unassigned (9)

Pending (5)

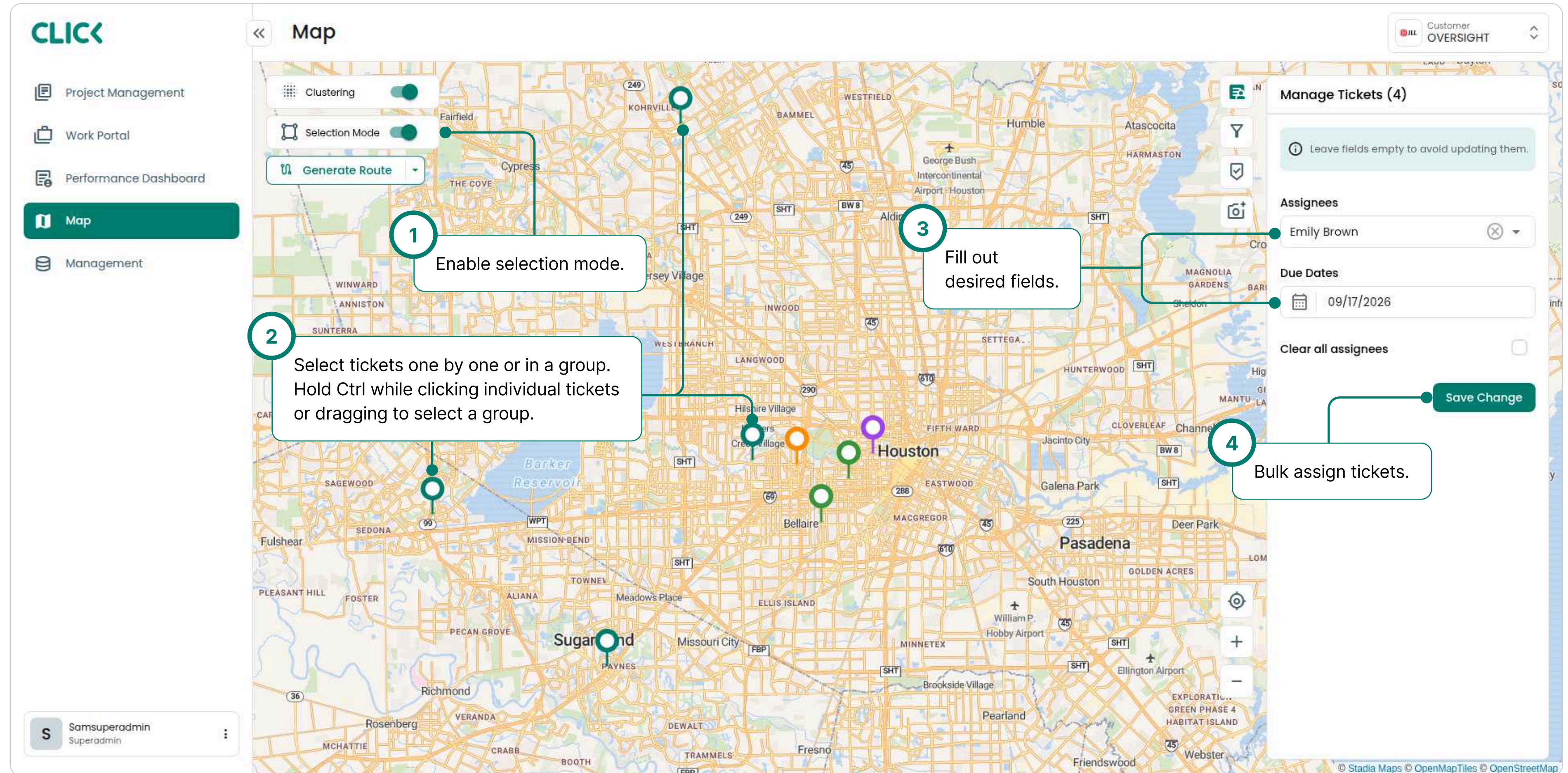
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Last Updates

Bulk Dispatch

BULK ASSIGNMENT IN MAPS

Update multiple ticket participants or due dates all at once in a visual way.



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- Map Navigation
Bulk Dispatch
Route Planning
- 5
- PERFORMANCE OVERSIGHT
ADMINS
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- BILLING & EXPORTS
ADMINS

Route Planning

ROUTE GENERATION 1/2

Build an optimized driving route from the selected places, then save or copy the stop list for field use.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Map

Clustering

Selection Mode

Generate Route

1

Enable selection mode.

3

Generate route.

2

Select tickets one by one or in a group. Hold Ctrl while clicking individual tickets or dragging to select a group.

Customer OVERSIGHT

Manage Tickets (4)

Leave fields empty to avoid updating them.

Assignees

Emily Brown

Due Dates

09/17/2026

Clear all assignees

Save Change

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Route Planning

ROUTE GENERATION 2/2

Build an optimized driving route from the selected places, then save or copy the stop list for field use.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Map

Clustering

Selection Mode

POA-10251
1700 POST OAK BLVD, HOUSTON, TX 77056, USA

VOS-10552
1407 S VOSS RD, HOUSTON, TX 77057, USA

SGL-10258
15900 SOUTHWEST FWY, SUGAR LAND, TX 77478, USA

KTY-10474
6601 S FRY RD, KATY, TX 77494, USA

Copy route as Text

Save Route

Customer OVERSIGHT

Open saved routes.

Manage saved routes.

Copy route as Text or save route for future access.

5 Sites

PILOT

POA-10251
1700 POST OAK BLVD, HOUSTON, TX 77056, USA

VOS-10552
1407 S VOSS RD, HOUSTON, TX 77057, USA

SGL-10258
15900 SOUTHWEST FWY, SUGAR LAND, TX 77478, USA

KTY-10474
6601 S FRY RD, KATY, TX 77494, USA

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Stadia Maps

OpenMapTiles

OpenStreetMap

1

ENVIRONMENT SETUP
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ADMINS / OPERATORS

5

PERFORMANCE OVERSIGHT
ADMINS

Team Monitoring

6

BILLING & EXPORTS
ADMINS

Team Monitoring

TRACK ASSIGNEE PERFORMANCE

Track how Assignees are performing on a project, including workload and progress at a glance.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Performance Dashboard

Project
PILOT

Completed Tickets
1 / 14

Status
1 C / 13 A / 0 P

Search

Assignee	Tickets	Uncompleted	Completed	Completion %	Billed %	Action
Emily Brown	34	34	0	0%	0%	
John Smith	14	13	1	7.14%	7.14%	

1 record selected.

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2

Select project.

1

Go to
Performance Dashboard.

3

Select one or multiple
Assignees to display
performance statistics.

Fees (X / Y)

X: Assignee fees for tickets with a
Completed Date
Y: Assignee fees for all tickets

Billed (X / Y)

X: Revenue for tickets with a
Billed Date
Y: Remaining to be billed for
work completed

Billed Stores %

(Number of tickets with a
Billed Date / Total number of
selected tickets) * 100

Revenue (X / Y)

X: Revenue for tickets with a
Completed Date
Y: Revenue for all selected
tickets

Completion %

Percentage of tickets where this
assignee is the primary assignee
and the ticket is completed.

Billed %

Percentage of tickets
where this assignee is the
primary assignee and the
ticket has been billed

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Billing Operations

UPDATE BILLING 1/2

Set or update the billing date for a project's tickets when you are ready to invoice or re-bill the work.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Management

Project Management

Completed Tickets
26 / 82

Status Updates
26 C / 42 A / 5 P

Fees ⓘ
\$46,800.00 / \$147,600.00

Revenue ⓘ
\$104,000.00 / \$328,000.00

Import Project
Update an existing project or creating a new one

Project Report
Export all data for the selected projects.
1 Projects

Projects

Tickets 1 Projects

Updates 1 Projects

Metadata 1 Projects

Search

Project Name	Abbr	Status	Assignees	Action
PILOT	PILOT	Active	Emily Brown, John Smith	...

1 record selected.

Filter

Open action options.

Record

Edit Project

Update Metadata

Archive

Update Billing

Remove

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1

Go to Project Management.

2

Open action options.

3

Click on Update Billing.

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Billing Operations

UPDATE BILLING 2/2

Set or update the billing date for a project's tickets when you are ready to invoice or re-bill the work.

CLICK

Project Management

Work Portal

Performance Dashboard

Map

Database Management

Maintenance

<< < Update Billing

Customer Oversight

Selected Project

PILOT

Change between different projects.

Search

Filter

Update Billing 4

	Ticket	Status	Assignee	Store	Address	Billed Date
☒	PILOTAWPB-10529	Completed	—	WPB-10529	1845 PALM BEACH LAKES BLVD, WEST PALM BEACH, FL 33401, USA	—
☒	PILOTADVE-10549	Completed	—	DVE-10549	1903 S UNIVERSITY DR, DAVIE, FL 33324, USA	—
☒	PILOTAPOM-10352	Completed	—	POM-10352	2411 N FEDERAL HWY, POMPANO BEACH, FL 33064, USA	—
☒	PILOTAMIA-10191	Completed	—	MIA-10191	299 SE 3RD ST, MIAMI, FL 33131, USA	—
☐	PILOTACLW-10515	Completed	—	CLW-10515	27001 US HIGHWAY 19 N STE 8520, CLEARWATER, FL 33761, USA	—
☐	PILOTASSC-10477	Completed	—	SSC-10477	12150 BISCAYNE BLVD, NORTH MIAMI, FL 33181, USA	—
☐	PILOTACWD-10339	Completed	—	CWD-10339	3602 NORTHDAL BLVD, TAMPA, FL 33624, USA	09/03/2026
☐	PILOTAPEM-10193	Completed	—	PEM-10193	14996 PINES BLVD, PEMBROKE PINES, FL 33027, USA	09/03/2026
☐	PILOTAJAX-10253	Completed	—	JAX-10253	10601 SAN JOSE BLVD, JACKSONVILLE, FL 32257, USA	09/03/2026
☐	PILOTAWLL-10195	Completed	—	WLL-10195	2635 S STATE RD 7, WELLINGTON, FL 33414, USA	09/03/2026
☐	PILOTANPL-10192	Completed	—	NPL-10192	9101 STRADA PL, NAPLES, FL 34108, USA	09/03/2026

4

Select tickets that you want to update billing for.

5

Open billing modal, choose a date and submit.

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Invoice Exports

EXPORT INVOICE BACKUP 1/2

Generate a backup of invoice data for a selected billing date so you can keep accounting records or reissue invoice details.

CLICK

Project Management

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<< Project Management

Completed Tickets
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Fees ⓘ
\$46,800.00 / \$147,600.00

Status Updates
26 C / 42 A / 5 P

Revenue ⓘ
\$104,000.00 / \$328,000.00

Import Project

Update an existing project or creating a new one

Project Report

Export all data for the selected projects.

1 Projects

Projects Tickets 1 Projects Updates 1 Projects Metadata 1 Projects

Search

Filter

✓	Project Name	Abbr	Status	Assignees	Action
✓	PILOT	PILOT	• Active	Emily Brown, John Smith	...

1 record selected.

Record

Edit Project

Update Metadata

Archive

Update Billing

Remove

S Samsuperadmin Superadmin

1Go to Project Management.

2Select your desired project.

3Click on Project Report.

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-
- Billing Operations
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Invoice Exports

EXPORT INVOICE BACKUP 2/2

Generate a backup of invoice data for a selected billing date so you can keep accounting records or reissue invoice details.

CLICK

Project Management

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<<

< Project Report

Customer OVERSIGHT

Produce a multi-sheet spreadsheet showing the current status of the selected project, tickets, and the contractor links. Only projects for the current customer are shown.

Select a project

You can select/unselect multiple projects

PILOT

Report Type *

Backup Invoice

Billing Date *

2026-09-03

Export progress

100%

Export File

Files Exported

OVST_2026-09-03.xlsx

Excel Spreadsheet (.xlsx) • 6.5 KB

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4

Choose **Backup Invoice**.

5

Choose specific **Billing Date**.

6

Launch the export process.

7

Save your exported file on your device.

- 1

ENVIRONMENT SETUP
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BILLING & EXPORTS
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Billing Operations

Invoice Exports

Project Exports

Project Exports

EXPORT PROJECT(S) 1/2

Generate a report that contains all data for the selected project(s), so you can review or archive all project details in one file.

CLICK

Project Management

Work Portal

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Customer OVERSIGHT

Completed Tickets

26 / 82

Fees ⓘ

\$46,800.00 / \$147,600.00

Status Updates

26 C / 42 A / 5 P

Revenue ⓘ

\$104,000.00 / \$328,000.00

Import Project

Update an existing project or creating a new one

Project Report

Export all data for the selected projects.

1 Projects

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Updates 1 Projects

Metadata 1 Projects

Search

Filter

✓	Project Name	Abbr	Status	Assignees	Action
✓	PILOT	PILOT	• Active	Emily Brown, John Smith	...

1 record selected.

Record

Edit Project

Update Metadata

Archive

Update Billing

Remove

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1

Go to Project Management.

2

Select your desired project.

3

Click on Project Report.

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- Billing Operations
- Invoice Exports
- Project Exports

Project Exports

EXPORT PROJECT(S) 2/2

Generate a report that contains all data for the selected project(s), so you can review or archive all details for the selected project(s) in one file.

CLICK

<< < Project Report

Project report generated successfully

Customer OVERSIGHT

Project Management

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Database Management

Produce a multi-sheet spreadsheet showing the current status of the selected project, tickets, and the contractor links. Only projects for the current customer are shown.

Select a project

You can select/unselect multiple projects

PILOT

Report Type *

Project Report

Export progress

100%

Export File

Files Exported

OVST-PILOT-2026-09-08 14:54:54.xlsx

Excel Spreadsheet (.xlsx) • 20.6 KB

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5 Launch the export process.

4 Choose Project Report.

6 Save your exported file on your device.

Optionally you could adjust desired project(s) to export.

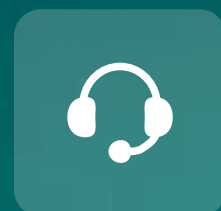
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PROJECTS
PEOPLE
PROGRESS
TOGETHER

USER MANUAL

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PART 2 — CORE FUNCTIONS & WORKFLOWS



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