INSTRUCTIONS · USER GUIDE

Business Dashboard

How to read the dashboard, drill into an account, log confirmed site visits, enter and import your numbers, and set up your company. For owners, managers, supervisors and office staff.

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About the demo

The demo at **dashboard.acsllc-nc.com** uses a fictional company, **Summit Facility Services**, with 10 contracts in North Carolina, South Carolina and Virginia. Its sample figures refresh daily so the dates stay current. Anything you enter in the demo stays in your own browser.

Your own build carries your company name, your contracts and your targets, at your own web address. Screens and steps are the same.

1. Getting started

Open and install the app

Open your dashboard's web address in Chrome, Edge or Safari. To install it like an app, with its own icon that also works offline, tap **Install app** at the top right, or:

- **iPhone / iPad (Safari):** tap Share, then **Add to Home Screen**, then **Add**.
- **Android:** tap the browser menu (⋮), then **Install app** or **Add to Home screen**.
- **Windows or Mac (Chrome or Edge):** click the install icon in the address bar.

Sign in

How you sign in depends on your plan:

Plan	Sign-in
Single device	No sign-in. The dashboard and its data live in the browser on that one device.
Team	Sign in with the Google account the owner shared the dashboard with.
Team Pro	Sign in with the email and password the owner set up for you. Your role decides what you see.

Roles: who sees what

Role	Sees	Can do
Owner	Everything	Enter data, log visits, change setup, users and alerts. Receives missed-visit alerts.
Senior manager	Everything	Enter data, log visits, change setup. Receives missed-visit alerts.
Account manager	Their region	View the dashboard and accounts, log visits.
Supervisor	Their region's sites, without revenue, margin or receivables	Enter monthly hours, overtime, supplies and complaints; log visits.
Remote viewer	Everything, read-only	View only.

In the demo, the **Viewing as** bar under the menu lets you switch between these roles to see exactly what each person would see. In your own build, each person simply signs in and sees their own view.

2. The Dashboard

The Dashboard is the morning view: everything that matters on one screen, with what needs attention at the top.

Filters

- **Region:** all regions, or one. Supervisors are locked to their own region.
- **Month:** the month to show. Most measures are monthly; site visits look back 90 days and inspection scores 30 days, counted from today.

Status colors

Every measure is compared with your targets and labelled with a color, a symbol and a word, so it reads the same in black and white:

Label	Meaning
✓ On target (green)	At or better than your target.
! Watch (amber)	Slightly off target (within 10% of it), or something coming due soon. Keep an eye on it.
✕ Off target / Act now (red)	Clearly off target, overdue or past due. Act this week.

Needs attention

One list of everything off target for the region and month you picked, with "Act now" items first. Tap an item to open the account it belongs to. Six items show at first; tap **Show more** for the rest.

The modules

Each module is a section of the dashboard. You choose which ones you have.

Module	What it shows
Site visits	Confirmed visit compliance over the last 90 days, visits overdue now, visits due in the next 7 days, and visits that are not fully confirmed. The table lists every contract by how soon its next visit is due.
Finances	Revenue (with change from the month before), gross margin, labor as a % of revenue, receivables over 60 days and cash on hand. Charts show revenue and gross margin by month; tap **Show as a table** for the figures. Receivables aging shows current, 31–60, 61–90 and over-90-day balances, with a table by account.
Contracts	Active contracts, monthly contract value, renewals coming up and contracts below your margin target. The bar chart ranks every contract by gross margin against your target line.
Labor	Hours worked against budget, overtime and labor cost, overall and by contract.
Staffing	Headcount, hires and departures, annualized turnover and open positions by region.
Supplies	Supply spend against budget, overall and by contract.
Equipment	Every item with its last service, next due date and status, soonest first.
Quality	Average inspection score from site visits over the last 30 days, contracts below target, and complaints for the month.

Tip: hover over or tap any bar or point on a chart to see its exact figure. Tap any account name to open that account's page.

3. Accounts

Use **Accounts** to see how any single account stands.

Compare accounts

- Each account has a **health rating**: **Healthy** (nothing off target), **Watch** (something trending off target) or **Act now** (needs action this week). The number in brackets is how many items are flagged.
- Tap any column heading to sort by it; tap again to reverse the order. Red figures are off target.
- Tap an account name to open its page.

The account page

Section	What you see
Snapshot	Monthly value, gross margin, visit compliance, inspection score, amount owed, and renewal date.
What needs attention	Every flag for this account.
Profit & loss by month	Revenue, labor, supplies, gross profit, gross margin and labor % for each month, with a total.
Receivables	What this customer owes by age, and roughly how many days of billing that represents.
Labor	Hours worked against budget each month, with overtime.
Site visits	Required frequency, last confirmed visit, next due date and every visit in the last 90 days with its GPS and sign-off status.
Quality	Average inspection score and complaints by month.
Supplies and equipment	Supply spend against budget by month, and the equipment at the site with its maintenance status.

Use the drop-downs at the top to switch account or month, and ← **All accounts** to go back.

Client version and printing

1. Open the account and choose the month.
2. To share with the customer, tick **Client version (no financials)**. This hides every dollar figure, labor and supplies, leaving site visits, quality and equipment.
3. Tap **Print / save PDF**. Choose your printer, or **Save as PDF** to email it.

4. Site visits

> **What counts as a confirmed visit**
>
> A visit counts toward compliance only when it has **both** a **GPS check-in** at the site and the **client's sign-off**: the contact's name and signature. A visit missing either one is saved and listed, but marked not fully confirmed.

Log a visit

1. Open **Site visits** and choose the **Contract / site**.
2. Check **Visited by** and the **Date**. They default to you and today.
3. Standing at the site, tap **Check in with GPS** and allow location when the phone asks. A green tick shows your distance from the site. The default limit is about 500 feet.
4. Hand the phone to the site contact. They type their name and sign in the box with a finger.
5. Add an **inspection score** (0–100) and **notes** if you have them.
6. Check the note above the button says **"this visit will count as confirmed"**, then tap **Save visit**.

Your phone shares its location only when you tap the button. In the demo, **Demo: simulate being on site** lets you try this from anywhere.

The visit schedule

Every contract is listed with its required frequency, last confirmed visit, next due date and status, most urgent first:

- **Due in X days:** on schedule.
- **Due today / due in 1–2 days** (amber): visit soon.
- **X days overdue** (red): past due by more than the grace period (2 days unless you change it).

Missed-visit alerts

When a visit is overdue, or a visit in the last 30 days wasn't fully confirmed, the dashboard prepares an alert for your two alert recipients (normally the owner and a senior manager). The page shows today's alert exactly as it will read.

Plan	How alerts reach you
Single device	Shown on screen when the app is opened.
Team	Emailed each morning from your own Gmail.
Team Pro	Emailed each morning from your own database account.

Change the recipients and grace period in **Setup → Alerts**.

5. Enter data

Data can be typed in, imported from a spreadsheet, or both. Entries save as you type.

Monthly numbers by contract

Pick the **month** and **contract**, then enter:

Field	What to enter
Revenue billed	Everything invoiced to this customer for the month, including extra work. (Owner and office only.)
Labor hours	Total hours worked at the site, from payroll or time records.
Labor cost	Wages plus payroll taxes and benefits for those hours. (Owner and office only.)
Overtime hours	The part of labor hours paid at overtime.
Supplies spend	Supplies used or charged to the site.
Customer complaints	Number of complaints received.

The account's monthly budget for hours and supplies is shown under the form for reference.

Company numbers (owner and office)

- **Cash on hand** at month end.
- **Receivables** by age: entered here, or imported account by account (below). Once you import an aging for a month, the totals come from that import.
- **Staffing by region:** headcount, hires, departures and open positions. Supervisors enter their own region.

Import a spreadsheet

Choose what you are importing, then the file:

Import	Use it for	Where to get the file
Monthly numbers by contract	Revenue, hours, labor cost, overtime, supplies and complaints for one or more months.	Any report saved as CSV, or the dashboard's blank template.
Receivables aging by customer	What each customer owes by age.	QuickBooks: Reports → A/R Aging Summary → Export → CSV. Pick the month it is "as of".

1. Excel users: **File → Save As → CSV**. Then tap **Choose CSV file**.
2. The dashboard matches your columns to its fields automatically. Check each match and change any that are wrong.
3. Read the count: how many rows are ready, and which rows were skipped because the month or account wasn't recognized. Report title rows and totals are skipped automatically.
4. Tap **Import**. Imported figures replace any already entered for the same account and month.

Account names must match the names in Setup, or begin the same way. If a customer is named differently in QuickBooks, rename it in Setup or in the file.

Backup

Download backup saves everything to one file. **Restore from backup** loads it on another device. On the Single device plan this is the only way to move or protect your data, so download one at least monthly.

6. Setup (owner and senior manager)

Section	What you can change
Your brand	Company name, main and accent colors (or a preset), and your logo.

Section	What you can change
Alerts	The two alert recipients, the grace period before a visit counts as overdue, and the GPS check-in radius.
Contracts & sites	Name, region, required visit frequency, responsible manager, client contact, monthly value, renewal date, monthly budgets for hours and supplies, and the site location.
People & access	Name, role, region and email for everyone who uses the dashboard. The last column shows what each role can see.
Equipment	Item, site, last service date, service interval and value. **Serviced today** resets the date in one tap.

> **Set each site's exact location**
>
> GPS check-ins compare the phone's position with the site's saved location. For the most reliable check-ins, stand at the building's main entrance, open **Setup → Contracts & sites** and tap **Here** on that contract's row.

7. Targets

Targets decide when a measure turns amber or red. Set them in **Build yours → Targets**, or ask us to set them in your build. Values in the demo are **examples, not industry standards**. ACS can set them from your actual contracts with an ACS target review.

Target	Demo example	Flags when
Confirmed visit compliance, minimum	95%	Fewer confirmed visits than required over 90 days
Gross margin, minimum	35%	A contract or the company earns less
Receivables over 60 days, maximum share	10%	Too much of what you are owed is old
Flag renewals within	90 days	A contract renews within this window
Labor cost, maximum % of revenue	60%	Labor takes too much of revenue
Hours over budget, maximum	5%	A site uses more hours than budgeted
Overtime, maximum % of hours	5%	Too many hours are overtime
Turnover, maximum (annualized)	80%	A region is losing staff too fast
Open positions, maximum per region	3	A region has more vacancies
Supplies over budget, maximum	10%	A site spends more on supplies than budgeted
Flag maintenance due within	14 days	Equipment service is coming due
Inspection score, minimum	85	A site's average score falls below this

8. How the numbers are worked out

Measure	Calculation
Gross margin	(Revenue − labor cost − supplies) ÷ revenue. Before overhead.
Labor % of revenue	Labor cost ÷ revenue.
Hours vs budget	Actual hours ÷ budgeted hours − 1. +5% means 5% over budget.
Overtime %	Overtime hours ÷ total labor hours.
Supplies vs budget	Supplies spend ÷ supplies budget − 1.
Turnover (annualized)	Departures this month × 12 ÷ headcount.
Visit compliance	Confirmed visits in the last 90 days ÷ required visits in 90 days (90 ÷ the visit interval, rounded down), capped at 100%.
Overdue visit	Today is later than the last confirmed visit plus the visit interval plus the grace period.
Inspection score	Average of visit scores over the last 30 days.

Measure	Calculation
Receivables over 60 days	Balances aged 61–90 and over 90 days ÷ total receivables. Any balance over 90 days flags the account "Act now".
Days of billing outstanding	Total owed ÷ monthly contract value × 30.
Health rating	Act now if any of the account's flags is red; Watch if any is amber; otherwise Healthy.

9. Your data and privacy

Plan	Where your data is kept	Who can see it
Single device	In the browser on that device only.	Whoever uses that device. Clearing browser data erases it, so keep backups.
Team	A Google Sheet in your own Google account.	People you share the sheet and dashboard with.
Team Pro	A database account in your company's name, paid by you.	People you give a login, limited by their role.

- ACS builds and tests with sample data and keeps **no login** to your data.
- For support, you grant temporary access and remove it when the work is done.
- Your build request sends ACS your design choices only: modules, targets, plan, size and brand colors.

10. Troubleshooting

Problem	What to do
GPS check-in says I'm too far from the site	Step outside or near a window and try again. If it keeps happening, the saved site location may be off. Ask the owner to stand at the entrance and use **Here** in Setup.
"Location permission was declined"	Allow location for the dashboard in your phone's settings (Safari or Chrome → Location), then try again.
I can't see revenue or margins	Your role doesn't include financials. Ask the owner if you need them.
An import skipped some rows	The month or account name wasn't recognized. Check that names match Setup and that the month column holds dates.
The app looks out of date	Close it completely and reopen it. Updates load in the background and apply on the next start.
"Out of storage space" (Single device)	Download a backup, then remove old visit signatures or move to Team or Team Pro.

Need help?

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