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> Use the section headings to find the workflow you need. Feature access depends on your role, permissions and assigned site.

FieldFlow User Manual

For the FieldFlow Master v6 application Audience: administrators, supervisors, sales users, technicians and employees **Purpose:** explain how to use the screens and workflows available to your account.

FieldFlow combines Operations and Workforce under one company account. Your role, feature permissions and assigned site determine which screens and actions are available. If a menu or button described here is not visible, ask your FieldFlow administrator to check your access.

This manual covers user-facing operation only. It does not explain installation, domain management, file uploads to a website, database setup or server configuration.

1. Quick Start

1. Open the FieldFlow sign-in page provided by your company.
2. Enter your COY number and your assigned PIN or password. COY numbers are identifiers; enter them as issued, including leading zeroes.
3. Select **Sign in**. If the browser offers to save your password, only allow it on a device you control.
4. Choose the work area you need: **Operations** for customers, quotes, jobs, stock and business records; **Workforce Centre** for site rosters and attendance; or **Employee clock** for your own clocking and HR self-service.
5. Use the visible navigation to open a feature. Your menu can differ from another person's because permissions are individual.
6. Sign out when finished on a shared device.

Employees using the dedicated **Employee clock** page sign in with their COY/clock number and personal four-digit PIN. This is the same person in the universal user system, not a second employee identity.

2. Accounts, Roles and Permissions

Roles at a glance

Role	Typical work
Administrator	Manage users, permissions, company settings and business records; access authorized administration and reporting.
Supervisor	Coordinate assigned teams/sites, review attendance and HR work, and use permitted operational tools.
Sales	Work with client records, quotations and the invoice actions allowed for the account.
Technician	View assigned job cards, record job work/time and use permitted van-stock or field tools.
Employee	Use employee clocking, own permitted HR records, acknowledgements and messages/tasks.

An administrator may further restrict feature access for a specific person. A role or a visible menu does not override the access checks on an individual record. Do not share PINs or passwords or use another person's

account to get around a restriction.

Administrator: manage a user

1. Open **Team access** in Operations, or open **Universal users** if using its dedicated directory page.
2. Choose **Add user** or select an existing person to edit.
3. Enter the person's full name and unique COY number. Add contact details if needed.
4. Select the suite role and assigned site/branch. Choose the appropriate credential type and set the credential privately with the user.
5. Leave **Account active** selected for a person who should be able to sign in. Disable the account when access must stop; do not delete a person just to prevent sign-in.
6. Select **Save user**. Ask the person to sign in with their own COY number and credential.

To limit a person's features, open **Feature permissions**, select the user and feature area, change the allowed features and select **Save permissions**. **Restore role defaults** returns that area to the role's normal access. A user cannot be granted permissions above their role's ceiling.

3. Shared Interface

- **Operations navigation:** Overview, Quotes, Job cards, Inventory, Team access, Invoices, Suppliers & pricing, Payroll export, Fleet, QA / defects, HR, Workforce Centre, Fault finding, Cleanup, Timekeeping, Clients, Bookkeeping and SARS payroll. Some entries are visible only to permitted roles.
- **Workforce navigation:** use the header links to move among the roster/timekeeping view, HR centre, Employee clock and FieldFlow Operations where available.
- **Themes:** choose System, Light, Dark or High contrast from the Theme selector. Your preference applies across the suite.
- **Status messages:** read save, sync, validation and error messages before repeating an action. A delayed or failed screen is not proof that a change was saved.
- **Exports and print:** use the export button in the relevant screen. Printable documents open in the browser; choose Print or Save as PDF in the browser dialog.

4. Operations: Customers, Quotes and Jobs

Overview

Open **Overview** to review the operational summary and use the available shortcuts to quotes, jobs or inventory. Counts and status summaries help you find work; they are not bank reconciliation or a substitute for checking the source record.

Clients

1. Open **Clients**.
2. Search the client list or enter the client/company details in the client record form.
3. Record the contact person, email, telephone/WhatsApp, billing address and useful notes.
4. Save the client. When creating a manual job, select or explicitly link the client so its work history and eligible invoice contact can be used.

Keep client contact details current. A name typed on a job is not necessarily a CRM link unless the record is explicitly selected/linked.

Create and manage a quotation

1. Open **Quotes** and select **New quote**.
2. Enter the client and required contact details.
3. Search for the job site and choose an address suggestion so the location is verified. If no valid suggestion is available, check the address/provider connection with your administrator rather than guessing coordinates.
4. Select the stock warehouse. Assign a technician now or leave assignment for later, as permitted.
5. Add the required inventory items and quantities. Check availability and the displayed prices before saving.
6. Enter estimated labour hours and rate. Add transport kilometres/rate, sundries and additional consumables where applicable.
7. Complete the work summary, technician task notes and safety instructions. Review materials, estimated labour, additional charges, discounts, VAT and the final total.
8. Select **Save draft**. Reopen the quote to review or print it.
9. When an eligible quote is approved for the work, use its **Accept** action. This creates the linked job and processes its stock according to the displayed workflow. Use **Cancel** for an eligible quote that will not proceed; cancellation releases its stock reservation.

Draft quote materials may reserve stock. Do not promise reserved stock to another job. Acceptance/cancellation is an internal workflow action; it is not a public customer payment or online-acceptance service.

Create and complete a job card

From a quotation: open the accepted quote's linked job card. Review the customer, site, crew, scope and material details before work starts.

Without a quotation: open **Job cards**, choose the manual job action and enter the job title, client/contact, site address or coordinates, scheduled date/time, crew, labour rate, task notes, safety instructions and any applicable extra charges. Save and review the job card.

During field work:

1. If your role/workflow requires it, start the shift and select the assigned active vehicle.
2. Open the assigned job and complete the required pre-job inspection before starting a job time stamp.
3. Allow location access if the job uses a geofence check. The device must be able to report a usable location.
4. Start the job time stamp. Shift attendance and job time are separate; starting one does not automatically start the other.
5. Record materials used from the assigned van and keep the job notes up to date.
6. Stop the job time stamp when the work session ends. Close open job sessions before ending a shift.
7. Complete the post-job inspection and resolve blocking defects. Capture the customer's name and signature in **Sign off this job** only after the work is ready for approval.

Closed job sessions supply actual labour hours for invoicing. Estimated quote hours are not added a second time. A passed pre-inspection is required before an applicable job stamp; a passed post-inspection and resolved blocking defects are required before client sign-off.

Create an invoice

1. Open **Invoices** and choose an eligible signed/completed job.
2. Check the client email and the labour rate shown. An administrator may need to enter a rate if none was saved on the job/quote.
3. Review actual closed job hours, materials, transport and additional charges, discount, VAT and total.
4. Select **Create invoice** and review the saved invoice.
5. Print the invoice from its document view and use the browser's print/save-PDF option if a PDF copy is needed.

FieldFlow prevents the ordinary workflow from creating a second invoice for an already-invoiced job. Creating an invoice does not record payment or automatically post a bookkeeping entry.

5. Operations: Stock, Suppliers, Fleet and QA

Inventory

- Open **Inventory** and choose the location filter (all, workshop/warehouse or an entitled technician van).
- Check on-hand, reserved and available quantities before promising stock. Low-stock indicators compare available quantities with the item's minimum.
- Administrators can use **Import template** and **Import Excel** for supported stock sheets. Review the import preview/errors before confirming; fix invalid rows and import again.
- Administrators can edit a stock item/location, supplier mapping, cost, sell price/markup or minimum. Enter an accurate change reason. A stale record or insufficient unreserved quantity must be refreshed/reviewed rather than forced.
- Item minimum, cost and pricing rules are shared at item level; quantity is maintained by location.

Stock counts

1. Open the count-sheet action in **Inventory** and choose a location and count date.
2. Open the dated count sheet and enter each physical count. The sheet shows the expected snapshot and calculated variance.
3. Save an incomplete sheet as a draft. Complete it only when every required item has a physical count and the date is due.
4. Export the live location sheet or saved count sheet to Excel, or print/save as PDF.

Completed counts are locked as records. They do not automatically change live stock; an authorized user must make a separate inventory correction with a reason if the count requires one.

Suppliers & pricing

Authorized administrators can maintain supplier contacts, account/lead-time notes, preferred supplier item codes and supplier cost history. Review the global markup and VAT settings before new documents are issued. A VAT change affects new calculations; it does not rewrite issued documents. Ask the responsible finance person before changing VAT treatment.

Use **Company details** within the pricing/administration area to keep the legal/trading name, registration/VAT numbers, address, email, phone, website and logo reference used on printed documents current.

Fleet

Open **Fleet** to review vehicles and histories. Authorized users can add odometer readings, fuel entries and maintenance work, including date, driver/vehicle, litres/cost, service details and replacement spares. Check the vehicle registration and odometer carefully before saving. Field shifts and fuel records may be checked against the assigned vehicle.

QA / defects

Open **QA / defects** to record or review inspections and defect follow-up. Select the correct job and inspection stage, record pass/fail, score/notes and evidence as applicable. A failed inspection or blocking defect must be addressed before the relevant job can start or be signed off. Link rework to its originating defect and verify its close-out before resolving that defect.

6. Operations: Time, HR and Administration

Payroll export and timekeeping

- **Payroll export** handles supported shift-attendance exports. Shift time is different from job-card stamps.
- **Timekeeping / Payroll hours** supports authorized manual entries and monthly summaries. Choose the correct period and source: Field Services, Site Work or Combined.
- Review employee matches, field/site subtotals, open shifts and overlap/conflict warnings. Resolve the source records or get supervisor review before using a final export.
- Leave and forecast shifts are not actual worked hours. Do not add a forecast to actual payroll time.
- Choose the output layout/file format required by your payroll process. Starter layouts still need review against the receiving payroll product and period.

Operations HR

Open **HR** to review/manage the Operations HR records available to your role, such as notices, leave, reviews and expiry information. Use the correct employee and dates, save the record and print the branded notice when needed. Acknowledged notices and linked history may be protected from ordinary editing.

Operations HR and Workforce HR have distinct record areas. A record created in one is not guaranteed to appear automatically in the other. Follow your employer's instruction about which area is the official record for that workflow.

SARS payroll workbench

Authorized payroll administrators can open **SARS payroll** to manage preparation periods and enter reviewed employee figures. Verify remuneration and PAYE against the employer's approved payroll calculation before saving. Review UIF/SDL settings, period totals and available EMP201/IRP5 source summaries. A status marked submitted is an administrative record, not proof that a filing was sent to SARS.

Bookkeeping

Open **Bookkeeping** for standalone ledger activity. Select a period, enter debtor invoices/receipts or creditor bills/payments as appropriate, and use balanced debit/credit entries for general journals. Review trial balance, profit-and-loss, balance-sheet and outstanding party balances. Correct errors using the authorized accounting workflow; do not assume an operational invoice, fuel entry or payroll record has posted automatically here.

Team access and record cleanup

Team access and **Feature permissions** are administrator functions; follow the user-management instructions in Section 2. **Cleanup** is also administrator-only and permanent. Read the eligible record type and confirmation details before continuing. Financial, payroll, linked, acknowledged and audit history is protected. If you are unsure whether a record is safe to remove, do not delete it.

7. Workforce Centre

Supervisor roster and attendance

1. Open **Workforce Centre** from Operations or use the shared module selector.
2. Choose the permitted site/branch and review the date at the top. Use the date picker, previous/next controls or **Today** to change the day.
3. Review the daily summary and each person's planned shift, actual time and balance.
4. Use **Add employee** to create a roster record, or **Import employees** to preview a supported CSV before confirming. Correct the listed column/row problems before importing. A roster entry is not itself a universal user account.
5. Set the employee's name, clock number, normal shift, work category and applicable pay details. An authorized supervisor can assign a clock PIN through the employee PIN control.
6. Use the person's clock action to record an eligible clock-in/out. Use the absence action when recording an absence; do not overwrite existing clock times with leave.
7. Open the person's attendance/history control to enter or amend historical hours, or to add a future forecast where permitted. Label actual and forecast information correctly.
8. Review the period totals and resolve missing clock-outs or conflicts before exporting.

Sites, periods and sync

Authorized site managers use **Manage sites** to maintain site names and the monthly period start day (1 to 28). For example, a period starting on the 26th runs from the 26th through the 25th of the next month. Changing the boundary changes reporting periods, not recorded clock events; export/review payroll before changing an established period.

Watch the sync/save indicator. Use **Sync** when shown and wait for its result. If the app reports a conflict, do not repeatedly overwrite or import the same changes; ask the supervisor to review which record is correct. Local saved status and server sync status are not interchangeable. Offline availability is limited to supported roster workflows.

Workforce exports

- **CSV** exports the selected day's roster.
- **Excel** exports a workbook with a sheet for each employee.
- **Payroll** opens the time/leave export workflow. Select the right dates and check the summary and warnings before exporting.
- Authorized multi-site users can export the master workbook. Confirm the selected sites and period before sharing it because it can contain multiple employees' information.

8. Employee Clock, Leave and HR Self-Service

1. Open **Employee clock** and sign in with your COY/clock number and personal PIN.
2. Check today's attendance, select the correct worksite and choose **Clock in** or **Clock out** as appropriate. Use **Refresh status** if the displayed state seems out of date.
3. Allow location access for the clock event if requested. Location is checked at clock-in/out for the site check; the record retains measured distance/accuracy rather than the submitted coordinates.
4. If the site requires a selfie, follow the photo prompt and submit the selected image with the clock event. Camera permission/device support is required; the selfie is available to authorized supervisors for review and is not used for face recognition.
5. Use the **My HR** area to review your leave balances, requests, certificates, appraisals and permitted disciplinary information.
6. To apply for leave, select **Apply for leave**, choose the leave type and first/last dates, add an optional reason and attach a requested supporting document if needed. Send the request and wait for its decision. A request is not approved just because it has been submitted.
7. Use the available acknowledgement controls to confirm receipt of notices/documents. Ask your employer's HR contact to correct a record; do not use another person's login.

Supporting HR files must be PDF, JPEG, PNG or WebP and no larger than 5 MB. Upload only documents needed for the HR request. Employee visibility is limited; disciplinary evidence is supervisor-only.

9. Messages, Tasks and Fault Finding

Messages and tasks

1. Select **Messages** in Workforce Centre, HR centre or Employee clock.
2. Choose an eligible recipient from the site address book and write the message.
3. Select **To-do task** if the recipient needs to complete an action, then select **Send**.
4. Use **Reply** on the relevant message card to continue its thread. Unread indicators show messages awaiting attention.
5. The task recipient can select **Mark done** when complete or **Reopen** if more work is needed.

AI-assisted fault finding

Open **Fault finding** only if it is available to your trade/role. Describe the equipment and symptoms, include the fault code/checks already performed and add an optional clear photo. Read and accept the consent notice before sending information to the external AI provider. Review the answer as suggestions, check referenced manufacturer information and follow approved site procedures.

Never use an AI answer as authorization to work on live equipment, defeat guards/interlocks, open pressurized systems or replace a qualified inspection. Stop and escalate hazardous, uncertain or safety-critical work. Daily limits, provider availability and connectivity may restrict use.

10. Upgrade Catalogue and Specialist Add-ons

Open **Upgrade** to read about the proposed industry packages and select items for an enquiry. The catalogue selection is not a purchase, activation, installation or booking. ClubFlow, MarketFlow, RetailFlow, LodgeFlow, BuildFlow, AgriFlow, EngFlow, ProdFlow and MineFlow are proposed add-ons; do not plan work around specialist functions until your provider confirms they are available for your account.

11. Documents, Exports and Information Handling

- Check the company/customer, period, site, employee and output format before printing or exporting.
- Print a saved quote, job card, invoice, stock sheet or HR notice from its document view; select the browser's **Print** or **Save as PDF** option.
- Use Excel for stock sheets and supported Workforce workbooks. Use CSV for the daily roster or supported payroll layouts.
- Treat exports, employee workbooks, signatures, HR files and customer contact information as confidential. Share only with people authorized to receive them and store them according to your employer's rules.
- Do not use sample print examples as live quotes, job cards, invoices or HR records. Sample documents are illustrative only.

12. Common Issues

What you see	What to do
Sign-in is rejected	Check the COY number, leading zeroes and credential. If still blocked, ask an administrator to confirm the account is active and that the credential is correct.
A menu or action is missing	Ask your administrator to review your role, feature permissions and assigned site. Do not use a coworker's account.
Quote address cannot be verified	Choose a listed address suggestion. If suggestions do not load, stop and ask the administrator to check the address service; do not guess coordinates for a verified quote.
Stock cannot be reserved or reduced	Refresh Inventory and check location, reserved amount and current availability. Ask an administrator to resolve conflicting edits.
A quote/job cannot advance	Review missing required fields, open job/shift clocks, inspection results and blocking defects shown by the page.
GPS check fails	Confirm the correct site/job, enable location permission, move to a place with a better signal and refresh. If it still fails, contact the supervisor rather than entering false coordinates.
Attendance does not sync	Wait for the save/sync indicator, try the shown Sync action once and note any conflict/error. Do not repeatedly import or overwrite records.
Payroll export shows warnings	Review the period, source, employee links, open shifts and overlaps. Ask the supervisor to resolve uncertain time records before finalizing.
Excel/print does not open	Allow the browser's download/pop-up for the FieldFlow page and retry. For PDF, use the browser print dialog.
AI search is unavailable	Check that the feature is permitted, consent is accepted, the provider is available and the daily limit is not reached. Escalate the technical issue; do not repeatedly resubmit sensitive photos.

13. What FieldFlow Does Not Do

- Core bookkeeping is separate from operational invoices and does not automatically reconcile every bank receipt or job cost.
- Payroll/SARS screens prepare and summarize information; they do not file returns, make payments or certify tax calculations.
- Google Places, email, WhatsApp, GPS, camera and AI features depend on permissions, connected services and the availability of the user's device.
- Offline operation is limited to supported workflows; assume an action needs a connection unless the screen confirms it was saved and synced.
- Core inventory is not a full retail POS, webshop, batch/serial traceability or inter-branch transfer engine.
- The Core does not certify legal, engineering, safety or statutory compliance.
- Proposed specialist add-ons are not included as working features until separately confirmed and made available.

14. Complete Core Feature Reference

This reference names every registered Core feature group. Availability still depends on the signed-in user's role, feature permissions and site.

Operations

Feature	What users do here
Overview	Review permitted operational summaries and shortcuts.
Quotes	Create, price, reserve stock for, print, accept or cancel quotations.
Job cards	Plan, assign and execute work; record time/materials, inspections and sign-off.
Inventory	Check stock by location, import supported sheets and perform authorized adjustments/counts.
Team access	Administrators maintain universal accounts, roles, credentials and active status.
Invoices	Prepare, review and print invoices from eligible completed jobs.
Suppliers & pricing	Maintain suppliers, item pricing, markup/VAT settings and company document details.
Payroll export	Export supported attendance/payroll layouts after review.
Fleet	Maintain vehicles, fuel, odometers, maintenance and spares.
QA / defects	Record inspections, defects, evidence, linked rework and close-out.
HR	Review/manage the Operations HR records allowed to the signed-in person.
Timekeeping	Enter authorized hours and reconcile monthly sources.
Clients	Maintain CRM contacts and explicitly link customers to work.
Bookkeeping	Record standalone debtor, creditor and journal entries; review financial reports.
SARS payroll	Maintain payroll preparation periods and summaries for review.

Feature	What users do here
Fault finding	Use permitted AI-assisted trade fault search with consent and safety review.

Workforce

Feature	What users do here
Roster	Review daily planned/actual shifts, attendance, balances and permitted exports.
People	Maintain employee roster records and permitted employee details.
Sites	Select authorized sites and manage site/period settings when permitted.
HR	Use the Workforce HR centre for employee records and people workflows.
Leave	Apply for, review, approve or cancel requests according to role.
Certificates	Record certificates and review expiry alerts.
Legal appointments	Maintain authorized legal-appointment records.
Disciplinary	Manage/view permitted warnings, acknowledgements and history.
Appraisals	Record and review employee assessments.
Documents	Upload, retrieve or remove protected HR attachments according to permission.
Messages	Send/reply to site messages and assign/complete tasks.
Fault finding	Access the same trade-restricted, consent-based fault-finding feature where permitted.

End of user manual. For access changes, uncertain records or workflow questions, contact your FieldFlow administrator or the supervisor responsible for your site.