QUICK-START GUIDE · VERSION 2.0

CleanOps Studio

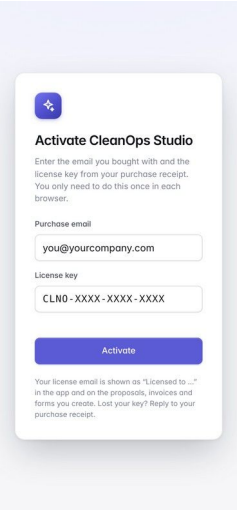
Price a walkthrough, win the contract, schedule the crew and get paid, all from one file that works offline. About ten minutes from download to your first bid.

1 Open and save the file

- **Computer:** save CleanOps_Studio_v2.0.html in a folder you keep (Documents, not Downloads) and double-click it. It opens in Chrome, Edge or Safari and works offline.
- **Phone:** open the file from your email or Files app in Safari (iPhone) or Chrome (Android). Use the same browser every time.
- **Tip:** add it to your home screen. iPhone: Share › Add to Home Screen. Android: ⋮ menu › Add to Home screen. It then opens like an app, with a bottom bar for Home, Quote, Schedule, Invoices and More.

2 Activate your license (once per browser)

On first open you see the activation screen. Enter the email you bought with and the key from your receipt (CLNO-XXXX-XXXX-XXXX). Capitals and dashes don't matter. Your email then shows as "Licensed to…" in the sidebar and on every proposal, invoice and form. Already activated v1.1 in this browser? v2.0 opens straight away.



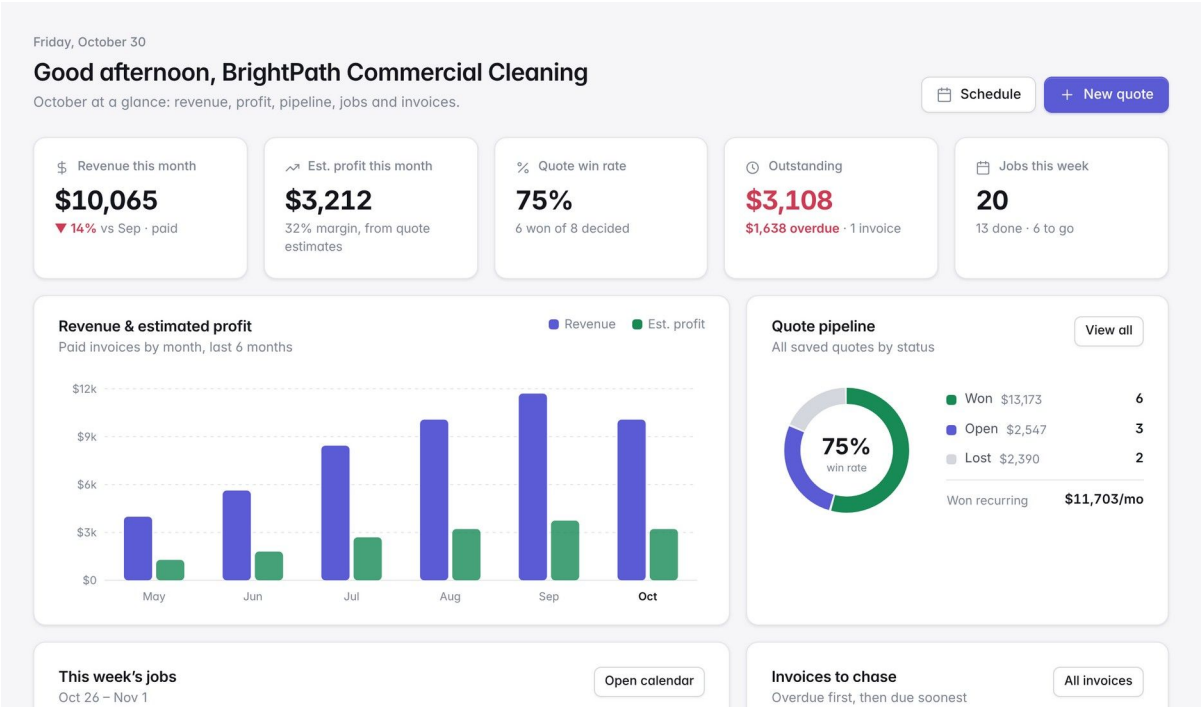
Activation screen on a phone

3 Set up your business

Open **Settings & backup**. Enter your company name, phone, email and license number, upload your logo, and set your cleaner wage, payroll burden, target margin and sales tax. Tap **Save settings**. Prefer a dark screen? Pick Dark under Appearance. Printed documents always stay light.

4 Your dashboard

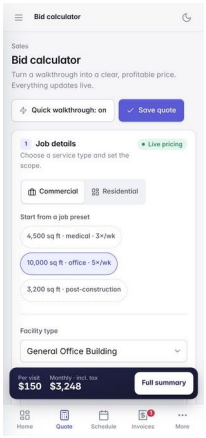
Home shows the month at a glance: revenue from paid invoices, estimated profit (worked out from each quote's margin), your quote win rate, money outstanding and overdue, and this week's jobs. You can tick a job done right from the list. The charts show six months of revenue and profit and your quote pipeline. New accounts see a five-step setup checklist until each step is done.



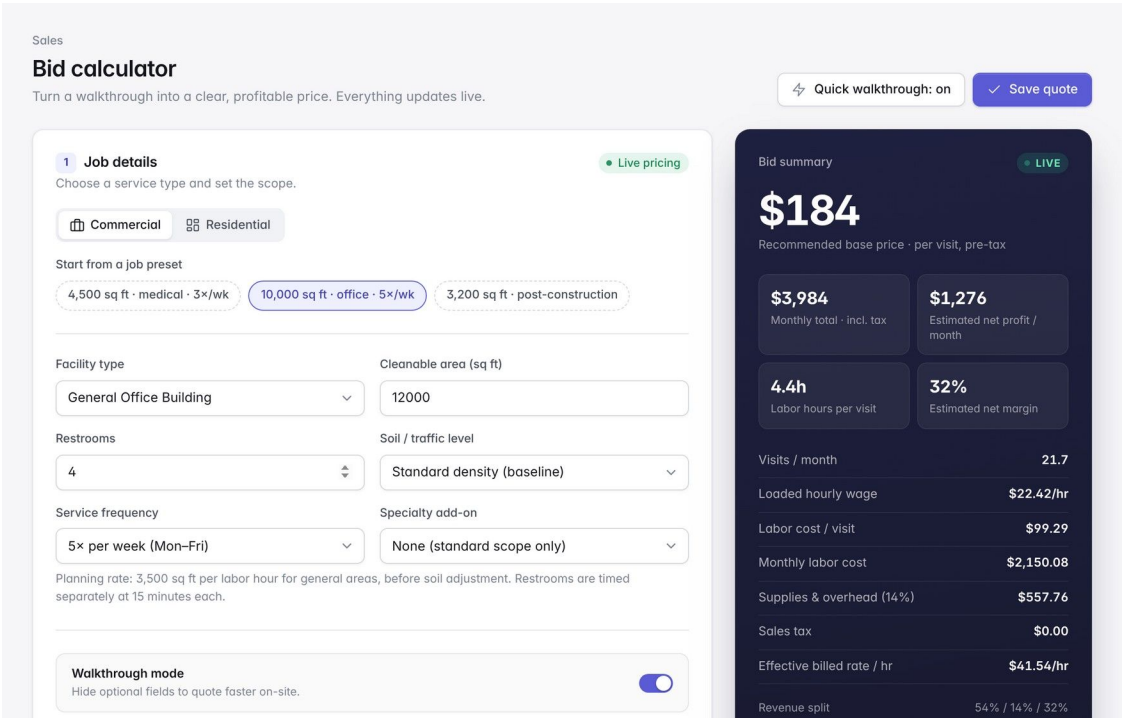
Dashboard: KPIs, six-month revenue chart, pipeline, this week's jobs and invoices to chase

5 Build your first bid in 5 steps

1. **Pick the mode and facility.** Commercial or Residential, then the facility type, or tap a preset.
2. **Enter the walkthrough numbers:** cleanable sq ft, restrooms, soil level and visits per week.
3. **Choose the client.** Pick a saved client from the dropdown to fill in name, contact and address, or type a new one.
4. **Check the summary:** price per visit, monthly total, labor hours, margin and the market benchmark (per sq ft per month).
5. **Tap Save quote.** A new client name is added to Clients automatically. On a phone, the bar above the bottom menu shows the live price.



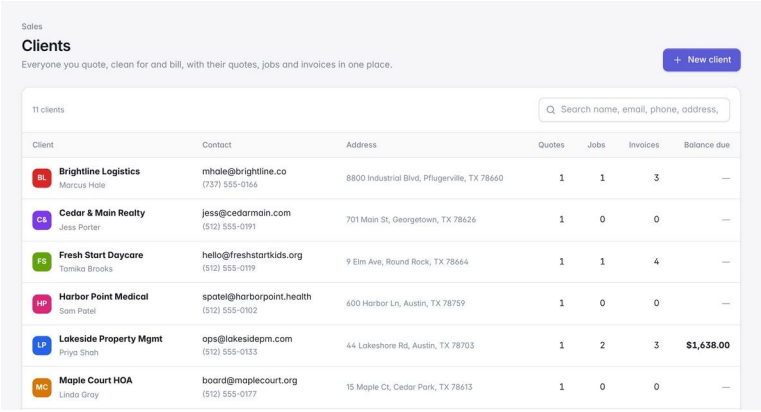
Live price bar on phones



Bid calculator: inputs on the left, the bid summary with the benchmark on the right

6 Clients

Clients keeps everyone you quote, clean for and bill: name, contact person, email, phone, address and notes. Search by any of them. Open a client to see their quotes, recurring jobs, invoices and balance due, and to start a new quote, job or invoice for them in one tap.

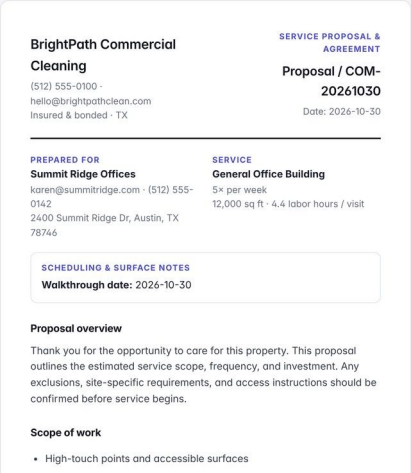


Clients: search, contact details, quote count and balance due

7 Win the work: quotes, proposals and signatures

In **Quotes**, set each bid to Open, Won or Lost. Your win rate updates on the dashboard. Open reloads a quote into the calculator, and Export CSV gives you a spreadsheet.

Tap **Build proposal** in the calculator. Tick the agreement clauses, set the late fee (0 means none), have the client sign on the pad, then tap **Lock signature**. If any price or detail changes, the signature clears and must be signed again. Send it with Print / PDF, Download Word or Copy text.


BrightPath Commercial Cleaning
(512) 555-0100 · hello@brightpathclean.com
Insured & bonded · TX

SERVICE PROPOSAL & AGREEMENT
Proposal / COM-20261030
Date: 2026-10-30

PREPARED FOR
Summit Ridge Offices
karen@summitridge.com · (512) 555-0142
2400 Summit Ridge Dr, Austin, TX 78746

SERVICE
General Office Building
5× per week
12,000 sq ft · 4.4 labor hours / visit

SCHEDULING & SURFACE NOTES
Walkthrough date: 2026-10-30

Proposal overview

Thank you for the opportunity to care for this property. This proposal outlines the estimated service scope, frequency, and investment. Any exclusions, site-specific requirements, and access instructions should be confirmed before service begins.

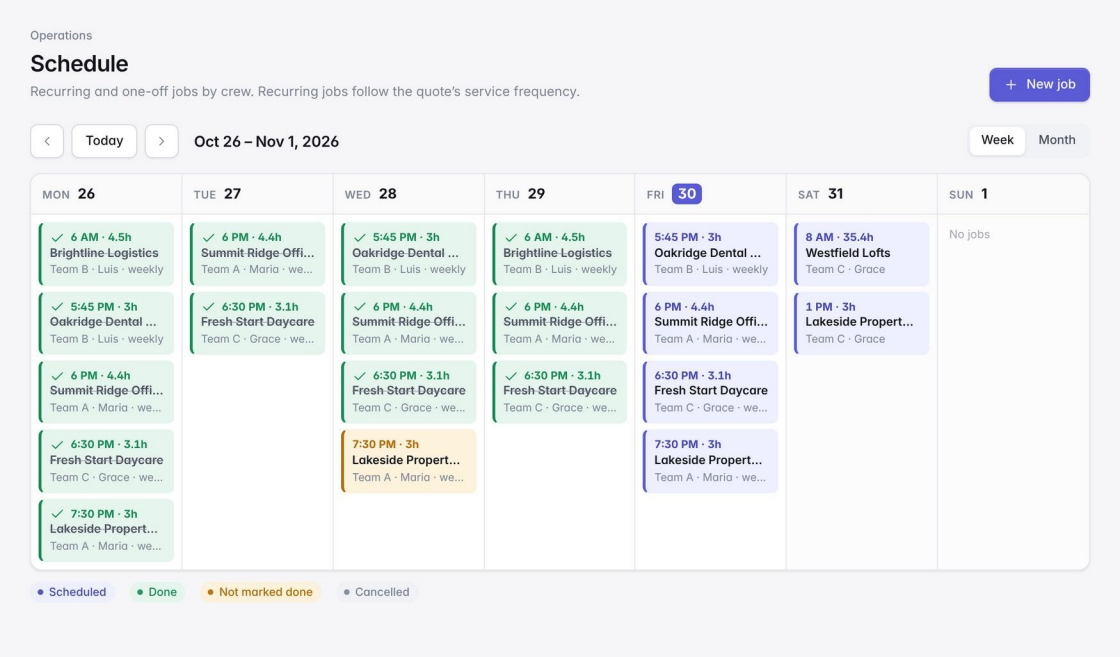
Scope of work

- High-touch points and accessible surfaces

Proposal preview

8 Schedule the crew

In Quotes, tap **Schedule** on a won bid. That one tap creates the job, and the visits follow the quote's frequency: 5× a week becomes Mon–Fri, 3× becomes Mon/Wed/Fri, and bi-weekly homes repeat every two weeks. Open any visit to set the crew, time and end date, or tap **Mark this visit done**. Switch between Week and Month views. Visits in the past that were never ticked show in amber.



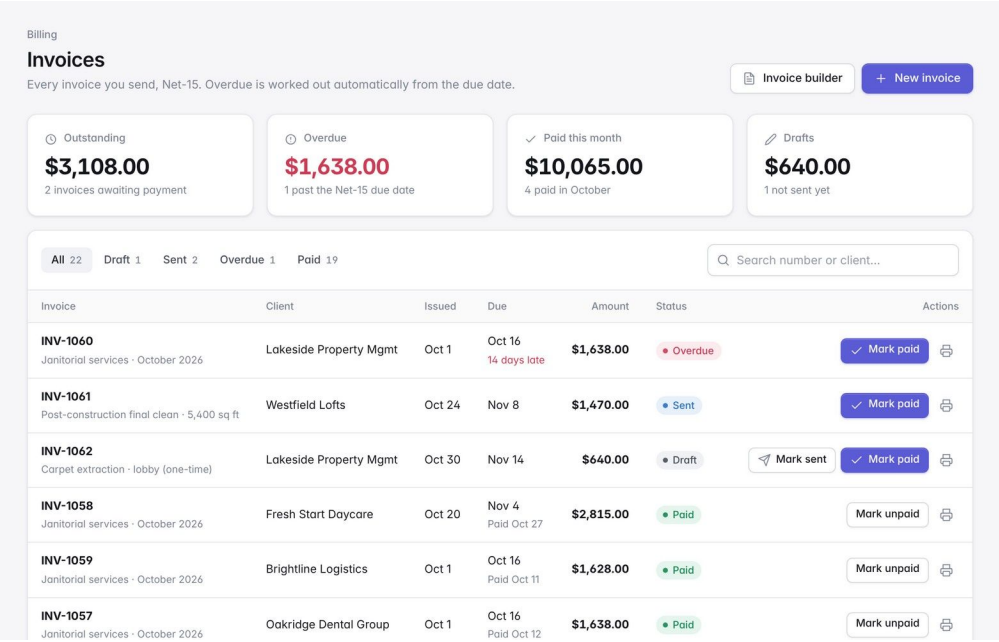
Schedule, week view: green is done, amber is not marked done, indigo is upcoming

9 Crew checklist and WhatsApp text

Crew checklist builds the task list for the job you priced, in English, Spanish or both. Crews tick tasks as they go, and the QA score passes at 90%. Add tasks for the site and enter the alarm code. It appears only here, never on client documents. Then tap Copy WhatsApp text for your crew lead, or Print checklist.

10 Invoices and getting paid

Create an invoice from a quote (the **Invoice** button), from the invoice builder (**Add to invoice tracker**), or with New invoice. Each one is Net-15: draft, then sent, then paid. A sent invoice turns **Overdue** by itself the day after its due date, and the red badge on Invoices shows how many are overdue. Tap **Mark paid** and enter the date the money arrived. The cards at the top total what is outstanding, overdue and paid this month. Print any invoice as a PDF from its row.

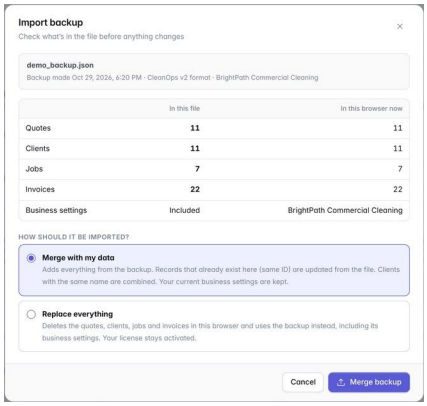


Invoice tracker with automatic overdue status

11 Back up, restore and move devices

> **Your data lives only in this browser.** Clearing browser data, private browsing, or switching browser or phone starts you fresh. Once a week, open Settings & backup and tap Export backup.

To restore or move to a new device, tap **Import backup** and pick the file. You see what is inside before anything changes. Choose **Merge** to add it to what's there, or **Replace** to swap everything. v1.1 backups work too.



Import preview

12 FAQ

Do I need internet or an account? No. Everything runs in the file on your device, and nothing is uploaded.

I used v1.1. Will my quotes carry over? Yes. Open v2.0 in the same browser and your quotes, settings and logo load automatically, with clients created from your quote names. Nothing is deleted.

My key says it doesn't match. Use the exact email you bought with, since the key is tied to it. Check for typos, then reply to your receipt.

Phone and laptop? Activate once in each browser. Data doesn't sync, so use Export backup and Import backup to move it.

Are the benchmarks and profit figures exact? No. Benchmarks are estimates from published US pricing guides, and profit uses your quote assumptions. Check your local market, wages and scope. The proposal is a template, so have its terms reviewed for your state.