

iTeam – Employee User Instructions

Mobile Device Settings

- a. The recommended web browser for the iTeam application is Google Chrome. If not available, please download for free to your device
- b. The mobile device is required to have Both Internet Connectivity and GPS capability, and make sure they are both enabled
- c. The “Private Browsing” feature (which prevents cookies to be saved) needs to be disabled; otherwise the clock in/out process will not be successful. Since every mobile device has a different way of allowing the user the modify its settings, as a general rule, the “Private Browsing” or “Allow Cookies” settings can be found under the Browser (local or Chrome) Settings menu.
- d. Consider saving the web address <http://iteam.thecleaningauthority.com> as a “bookmark” or “favorite” to enable quick access to the site in the future

Login

1. Open your device’s web browser and go to <http://iteam.thecleaningauthority.com>.
2. The iTeam login page is going to be displayed

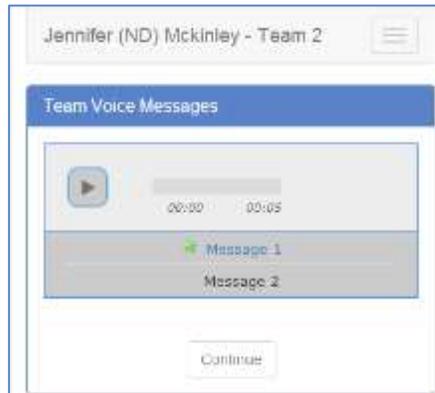


3. Type in your User Name and Password. If you don’t have this information already, it will be given to you by your Office Manager/Owner.
4. Select the “Sign In” button.

Messaging

Team Voice Message:

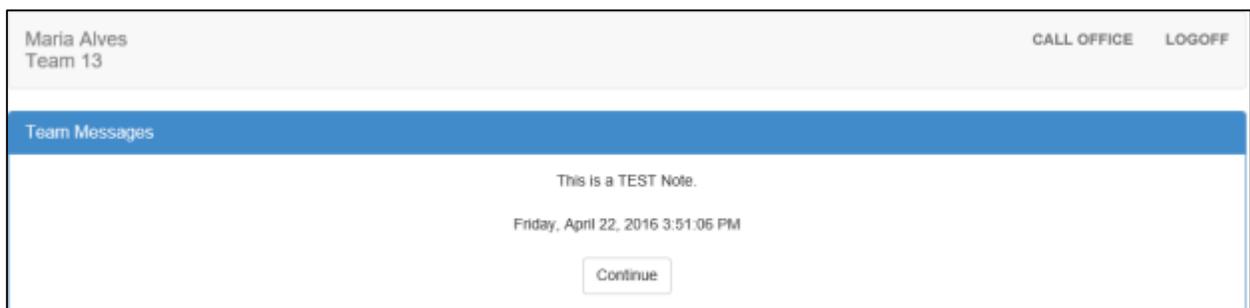
If at any time, the Team gets a Voice Mail message (or occasionally multiple Voice messages), all Customer and Clean information initially shown on the mobile device will be replaced by “voice message panel” (see below). Select the “Play” icon to listen to the message.



Only after listening to the entire message (all messages), the “Continue” button will become enabled, and you can proceed with the “Begin Clean”/Clock In or “Complete Clean”/Clock out process.

iTeam Note Message:

In addition to the Voice message, the office can also post an iTeam Note for your team. This will be displayed for you in the iTeam application, and you will not be able to proceed with the clock in/clock out process until you read and select “Continue” when the iTeam Note is displayed



Multiple iTeam Notes can be posted by the office for your team, though out the day, and the new note will be displayed for you as soon as it is entered by the office. After reading, select “Continue” again to proceed with the clock in/out process.

Starting Out the day

It is recommended that you Login before you leave the office for your first house since you are going to have to enter the “Starting Miles” information.

Once you are logged in, you will see:

- All Houses/Customers Names on your team for the day
- Job Ticket Rotation Slip Time for each customer
- Any Clean Notes associated with today’s cleans
- Any Team Voice message or iTeam Notes you may have

Start by following the steps below:

1. Enter the “Starting Miles” information
2. Select the “Driver” by checking the appropriate flag
3. Indicate if a “Company Car” is used by selecting the appropriate flag
4. Select the “Save” button to save the data entered

The screenshot displays the iTeam application interface. At the top, it shows the user's name 'Kimberly Guthrie' and team 'Team 5', along with 'CALL OFFICE' and 'LOGOFF' links. The main form area includes input fields for 'Starting Miles' and 'Ending Miles', and radio buttons for 'Driver' and 'Company Car' selection. Below this, there are two rows of employee names: 'Kimberly Guthrie' and 'Michelle Beall', each with a radio button. To the right of these fields are 'Save' and 'Complete Day' buttons. A red arrow points to the 'Save' button. Below the form is a section for 'House 1 - Stapf' with a 'Job Ticket' link. It shows 'Time In:', 'Time Out:', and 'Job Ticket Time:' fields, with the time '1:26' displayed. A 'Clean Scheduled' status is shown, and a 'Begin Clean' button is at the bottom.

Clocking In /Out homes during the day

1. When you arrive at the first House and clock in by selecting the “Begin Clean” button. The “Time In” will be displayed and the clean status will change to “Clean in Process”
2. You can open the “Job Ticket” by selecting the link for the respective clean. The “Job Ticket” will be displayed in a new window/tab and you can keep it open for your reference as long as you are in the house

House 1 - Stapf Job Ticket

Time In: 3:17 PM Payment Type: Credit Card

Time Out: Check #: CC

Job Ticket Time: 1:26 Payment (\$):

Customer Note:

Additional Charge Amount:

Additional Charge Note:

	Dust	Vac	Bath	Kitch
Kimberly Guthrie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michelle Beall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Clean in Process

Complete Clean

Job Ticket Rotation Slip

Tuesday, April 26, 2016 Order : 1

Team : 5 1.800.953.6243

Time Constraints : Anytime

Name :	Leanne	Account :	2259884	Price :	\$50.00
Street :	Aspenwood Way	Estimated Time :		2 People :	1:26
City, Postal Code :	Jessup, 20794	Mode of Entry :	Key	3 People :	0:57
Phone :	443-400-0539	Frequency :	BW	Alarm :	No
Emergency :	443-400-8104				

Entry Notes :

General Notes :

Payment Notes : Pays by Credit Card

Wood Furniture : Our products

Pet Information : None

Trash Information : Bags under sink - leave trash by front door

Area of Rotation 2

Clean Every Time:

- Foyer
- Living Room
- Kitchen
- Powder Room
- Stairs
- Halls
- Master Bedroom
- Master Bath
- Hall Bedroom
- Hall Bath
- Basement Living Area
- Basement Bathroom

Never Clean:

- Loft

Map Directions : Map : H20 Grid : C5

Left on Robert Fulton, Straight on Snowden, Left on Oakland Mills, Left on Guilford, Right on Volmerhausen, Right on Castleford, Left on Aspenwood

3. Before you Clock out of the House, you will need to enter the following information:

a. **Payment Information:**

- If the Customer always pays by Credit Card or eCheck, the “Payment Type” field will display that information and you don’t need to enter any additional payment information

- If the Customer pays by Check, Cash, or did not leave a payment for the clean, you will need to select the appropriate “Payment Type” from the drop-down displayed

- If “Check” is selected for “Payment Type”, you need to enter a check # and the “Payment(\$)” amount

- If the Customer pays by check by mails in the check, that will be indicated next to the “Check #”

House 4 - Power Job Ticket

Time In: 3:37 PM
 Time Out:
 Job Ticket Time: 1:58

Payment Type: Check
 Check #:
 Payment (\$): Mark In

Customer Note:
 Additional Charge Amount:
 Additional Charge Note:

	Dust	Vac	Bath	Kitchen
Tammy Harley	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Victoria Zawosky	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Clean In Progress

- If “Cash” is selected as the “Payment Type”, you will ONLY need to enter the payment amount in the “Payment (\$)” field.

House 2 - Stouffer Job Ticket

Time In: 3:26 PM
 Time Out:
 Job Ticket Time: 1:11

Payment Type: Cash
 Check #:
 Payment (\$): 150

Customer Note:
 Additional Charge Amount:
 Additional Charge Note:

	Dust	Vac	Bath	Kitchen
Kimberly Guthrie	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michelle Beall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Clean In Progress

b. Duties:

Select the appropriate flag for each employee who performed the respective duty

House 1 - Stapf Job Ticket

Time In: 3:17 PM
 Time Out:
 Job Ticket Time: 1:26

Payment Type: Credit Card
 Check #:
 Payment (\$): 00

Customer Note:
 Additional Charge Amount:
 Additional Charge Note:

	Dust	Vac	Bath	Kitchen
Kimberly Guthrie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michelle Beall	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Clean In Progress

c. Additional Data:

- Enter a “Customer Note” if the customer had any comments about the clean and/or wanted to send a message to the office
- Enter an “Additional Charge Amount” if the customer asked you to perform any additional cleaning that was not included in the “Job Ticket” of the clean and for which additional pay is required
- Enter an “Additional Charge Note” to explain what the “Additional Charge Amount” was for

4. Proceed with the Clock Out by selecting the “Complete Clean” button
The status of the Clean will change to “Clean Complete”

House 1 - Stapf Job Ticket

Time In: 3:17 PM
Time Out:
Job Ticket Time: 1:26
Payment Type: Credit Card
Check #:
Payment (\$): CC

Customer Note: Customer wants the manager to call to discuss schedule

Additional Charge Amount: 10

Additional Charge Note: Customer asked for changing sheets

	Dust	Vac	Bath	Kitch
Kimberly Guthrie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michelle Beall	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Clean In Process

Complete Clean

5. Drive to the next House and repeat Steps 1 through 4 described above

6. If your office is tracking the lunch time break, make sure you are entering the “Lunch Out” and the “Lunch Back” times, and select the “Save” button in order to save the information entered

Tammy Hurley
Team 7 LOGOFF

Starting Miles:
Ending Miles:

Employee	Driver	Company Car
Tammy Hurley	<input type="radio"/>	<input type="checkbox"/>
Victoria Zawoysky	<input type="radio"/>	<input type="checkbox"/>

Lunch Out:
Lunch Back:

Save
Complete Day

House 1 - Butlers Job Ticket

Time In:
Time Out:
Job Ticket Time: 1:49

Clean Scheduled

Begin Clean

Closing out the day

Upon returning to the office, you will need to:

1. Enter the “Ending Miles” data
2. Select the “Complete Day” button to indicate that all data pertaining to the all cleans for the day has been entered in the iTeam application
3. Logoff the iTeam application

The screenshot displays the iTeam application interface. At the top, it shows the user's name 'Kimberly Guthrie' and 'Team 5'. There are two buttons in the top right corner: 'CALL OFFICE' and 'LOGOFF'. The main form area is divided into two sections. The top section is for entering 'Ending Miles' data, with a text input field containing '45900' and a 'Save' button. Below this is a table for selecting employees as 'Driver' or 'Company Car'. The bottom section is titled 'House 1 - Steps' and contains fields for 'Time In', 'Time Out', 'Job Ticket Time', 'Payment Type', 'Check #', and 'Payment (\$)'. There is also a 'Customer Note' field and a table for selecting services like 'Dust', 'Vac', 'Bath', and 'Kitch'. A 'Clean Complete' button is visible at the bottom of the form.

Important Considerations:

1. You cannot select the “Complete Clean” button less than 5 minutes from the “Begin Clean” action (This is a safety feature to ensure you don’t accidentally clock in and out at the same time)
2. If the “Clock In/Out” is **not a success** you will see one of the following exceptions or error messages popups displayed:
 - * Permission Denied Accessing Location
 - * Current Location Unavailable
 - * Timeout Obtaining Location
 - * Unknown Error
 - * Customer Address Not Found on Map
 - * Location Data Not Supported with the Web Browser

You will be asked to confirm that you want to continue the “Clock In/Out” process. Select the “Continue Anyway” button and the “Clock In/Out” will complete, but the exception will be recorded and visible to your management team

3. When logged in during the allowed time range, your login typically will not expire and you should not have to login repeatedly
4. If your office has the “Call Office” feature enabled, at any time you can call the office by touching the Menu button and Call Office option (this service is a feature that the Owner/Manager must enable for it to be available)

Wanda Rush-Gurson
Team 4

CALL OFFICE LOGOFF

Starting Miles

Ending Miles

Employee	Driver	Company Car
Ernestine Selby	<input type="radio"/>	<input type="checkbox"/>
Wanda Rush-Gurson	<input type="radio"/>	<input type="checkbox"/>

Save

Complete Day

House 1 - Platt [Job Ticket](#)

Time In:

Time Out:

Job Ticket Time: 0:55

Clean Scheduled

Begin Clean