

Dunware

User Guide: everything you need to run your business day to day

For owners, managers, office staff, sales, accounts and field technicians.
Written for people who are not technical. No jargon, no setup steps you have to guess at.

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1 Welcome to Dunware

Dunware is one place for the everyday running of your business: your customers and leads, tasks and projects, meetings, service runs and field technicians, invoices and payments, documents, chat and reports. It runs on your own computer or server, and your information stays with you.

How this guide is organised

- **Getting started** and **Signing in safely**: what everyone needs.
- **Finding your way around**: the screen, search, notifications.
- **One chapter per area** of the program (Customers, Tasks, Billing and so on). Each says what it is for, how to do the common jobs step by step, and what to watch out for.
- **Guides by job**: one for field technicians (on a phone), one for owners.
- **Troubleshooting** and a **glossary** at the end.

> **YOU ONLY SEE WHAT YOUR JOB NEEDS**
> Dunware shows each person the areas that go with their role. If a chapter here describes something that is not in your menu, it is not switched on for you. Ask your Owner. The chapter on Team and access explains how it works.

What Dunware does not do

So there are no surprises:

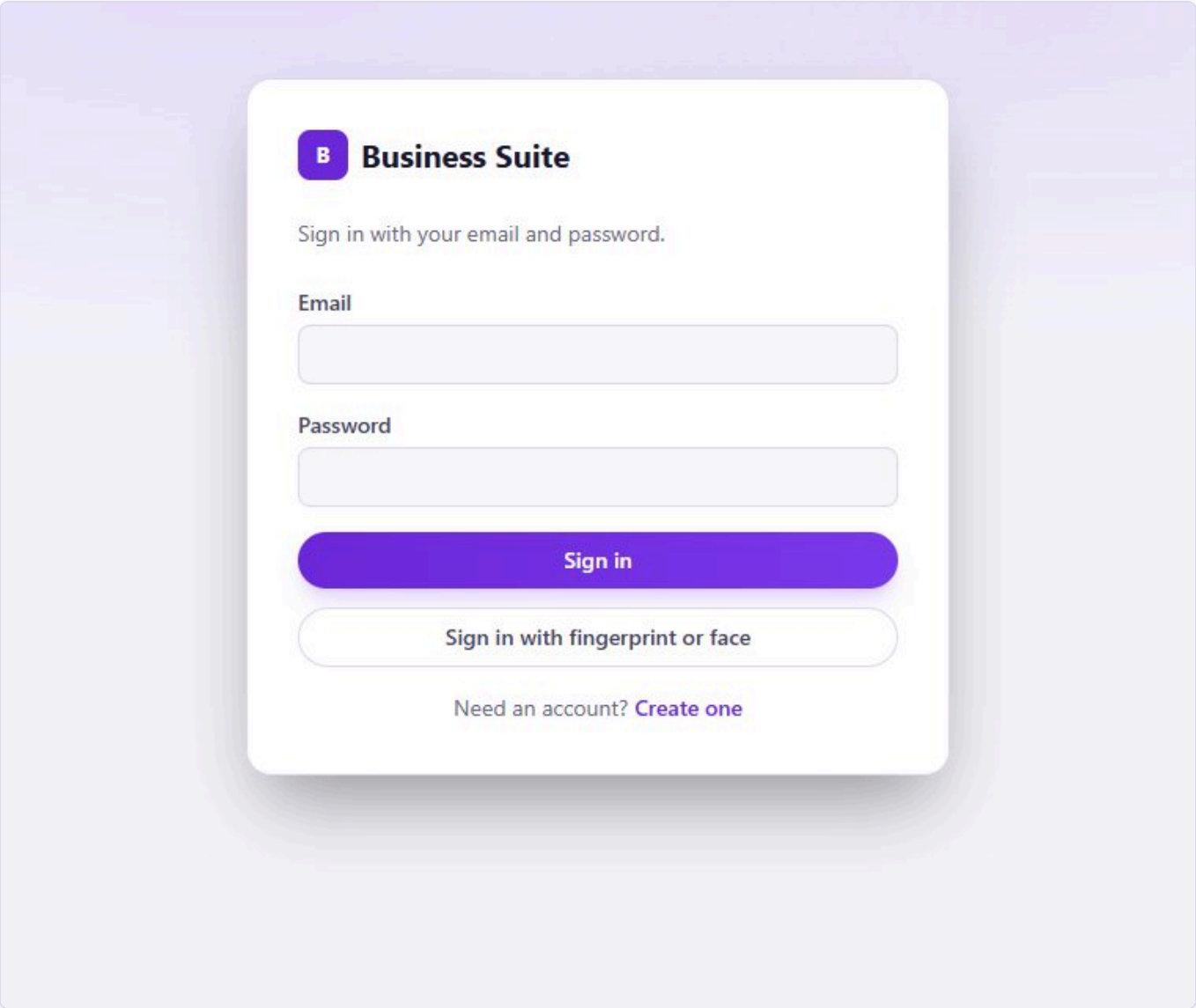
- **No artificial intelligence.** Nothing in Dunware reads your data to guess or write for you. Automations (Workflows) follow the exact rules you set.
- **No live link to accounting software.** You can export your invoices, payments and customers in the file formats QuickBooks and Xero expect, and import them there. Dunware does not connect to them directly.
- **It is not an email inbox.** The Email area sends mail from Dunware and keeps a log of what was sent. You still read your replies in your own email program.

2 Getting started and signing in safely

Your first sign-in

Your Owner adds you to Dunware and gives you an email address and a temporary password. There is no public sign-up: nobody can create a login for themselves once the business is set up.

1. Open Dunware's address in your web browser (your Owner will tell you what it is). On a phone, use your browser's menu to add it to your home screen or bookmarks so it is one tap away.
2. Type your email and the temporary password, then press **Sign in**.
3. Go to **My profile** (on a computer, click your name at the top; on a phone, open the menu and choose **My profile**) and change your password to one only you know. It must be at least 10 characters.



The sign-in page.

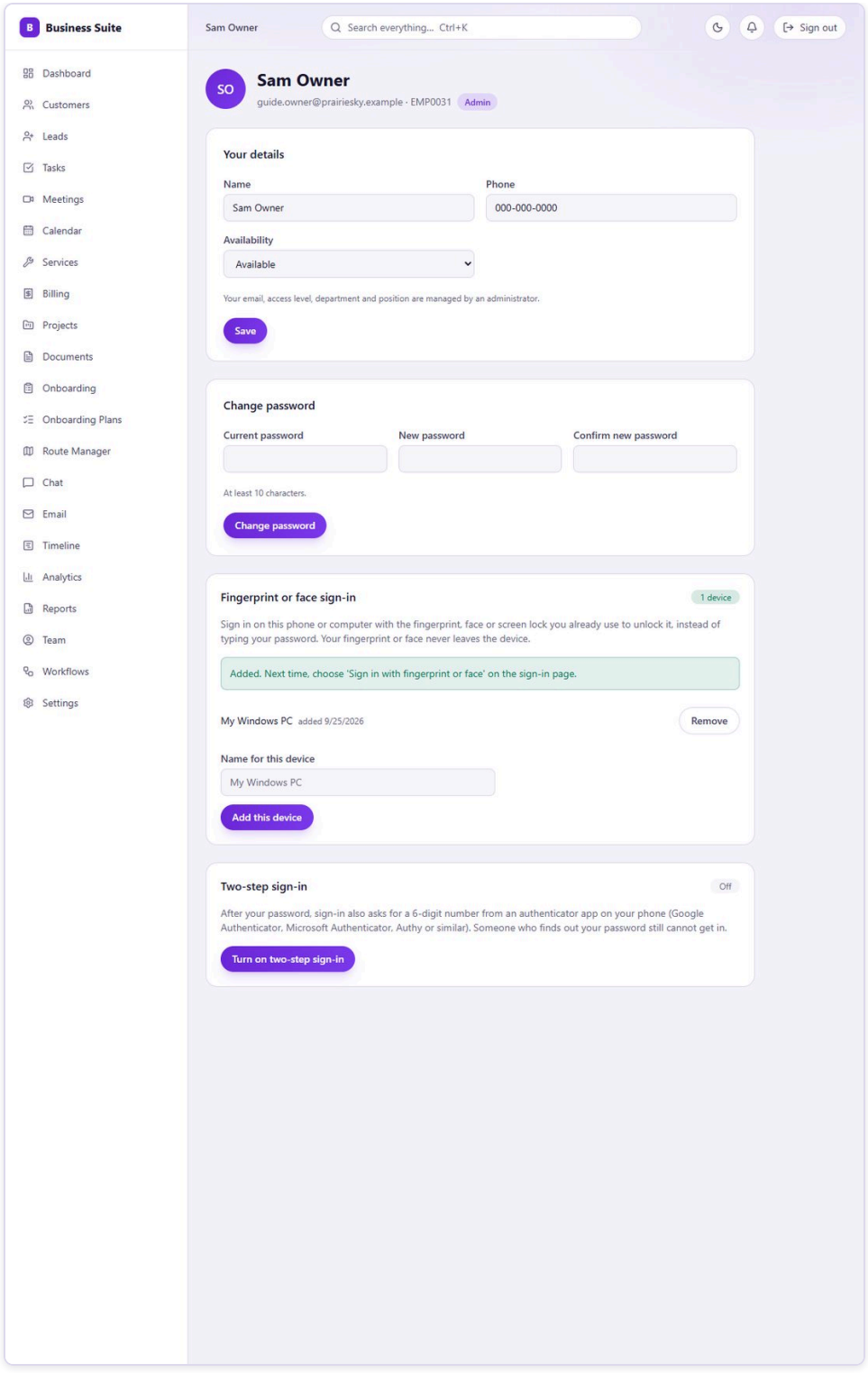
My profile

Your profile is where you keep your own details up to date: your name, phone number and availability (Available, Busy or On leave). Your email, role, department and position are set by an administrator. The same page holds your password, an optional **My email account** card (see *Email and chat*) for sending mail as yourself instead of the shared company account, and the two extra ways of signing in safely, described next.

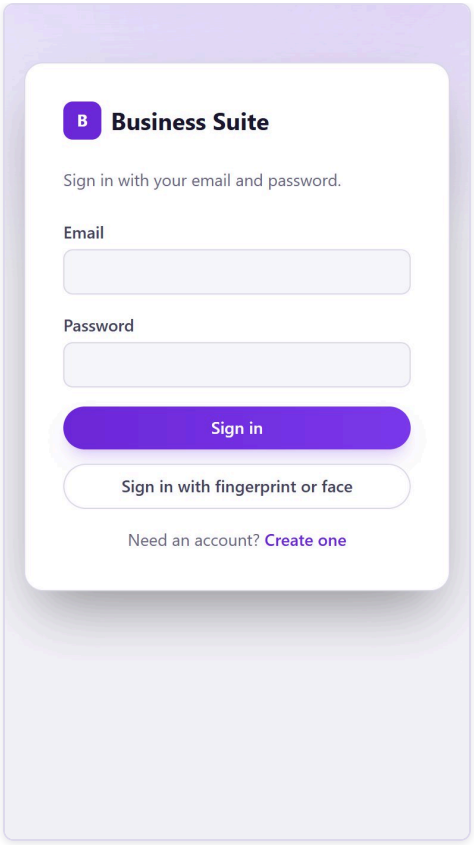
Sign in with your fingerprint or face

Instead of typing your password, you can unlock Dunware with the fingerprint, face or screen lock you already use to unlock your phone or computer. Your fingerprint or face is never sent anywhere: it only unlocks the phone.

1. Open **My profile** on the phone or computer you want to use.
2. In **Fingerprint or face sign-in**, give the device a name (for example "My iPhone") and press **Add this device**.
3. Approve with your fingerprint, face or screen lock when the phone asks.
4. Next time, on the sign-in page, press **Sign in with fingerprint or face**.



My profile: a device added for fingerprint or face sign-in, and the two-step sign-in card below it.



On a phone the sign-in page offers the fingerprint or face button.

GOOD TO KNOW

- You can add several devices, and remove any of them from the same card.
- Your browser only allows this on a secure web address (one that starts with `https`). If you see a message saying so, ask your Owner for the secure address.
- A device belongs to the address it was added on. If the business's address ever changes, add your devices again.
- Lost your phone? Your Owner can remove all your fingerprint and face sign-ins at once (see the Team chapter). Sign in with your password meanwhile.

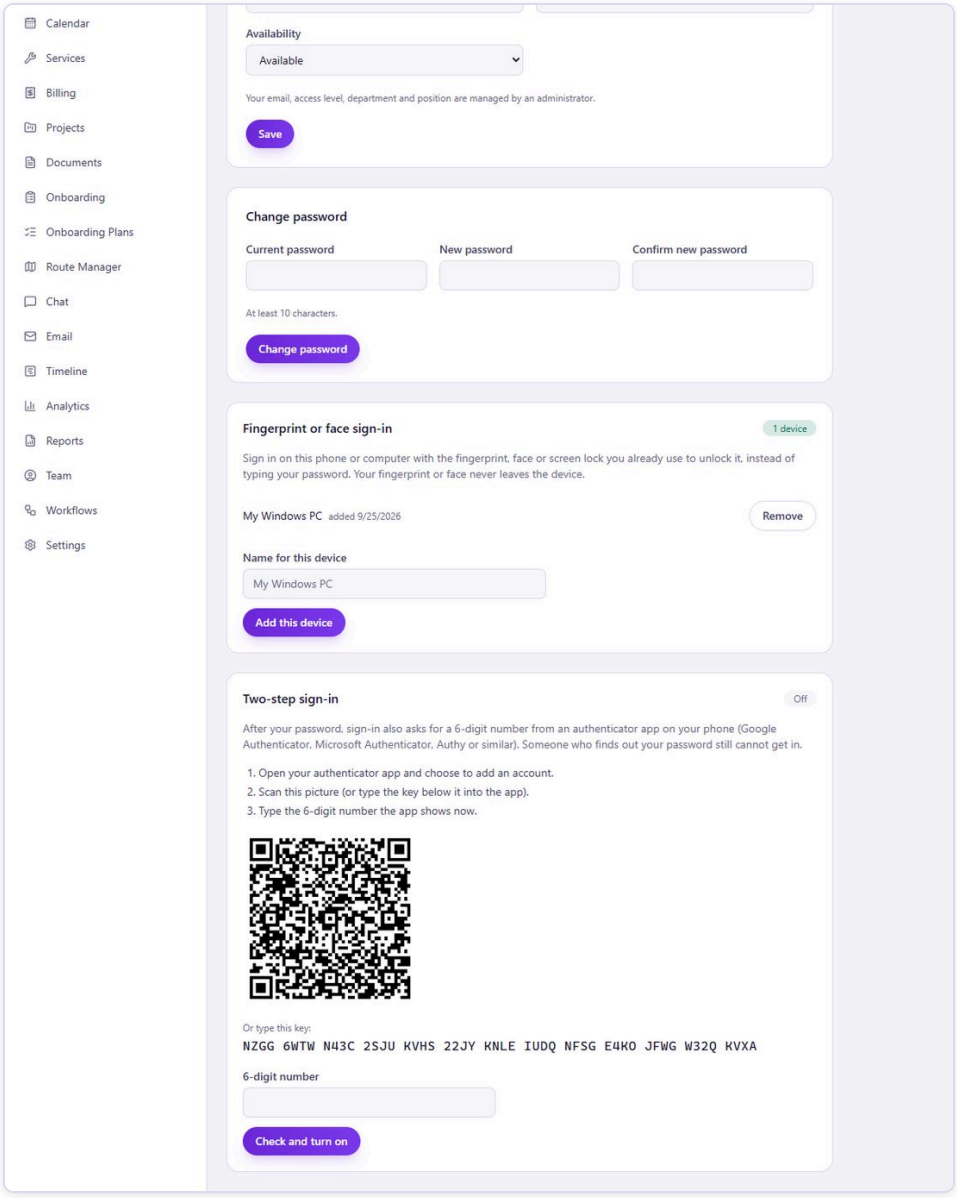
Two-step sign-in (a 6-digit number from your phone)

Two-step sign-in adds a second check after your password: a 6-digit number from an authenticator app on your phone (Google Authenticator, Microsoft Authenticator, Authy or similar). Someone who learns your password still cannot get in.

Turning it on

1. Install an authenticator app on your phone if you do not have one.
2. On **My profile**, in **Two-step sign-in**, press **Turn on two-step sign-in** and enter your password.

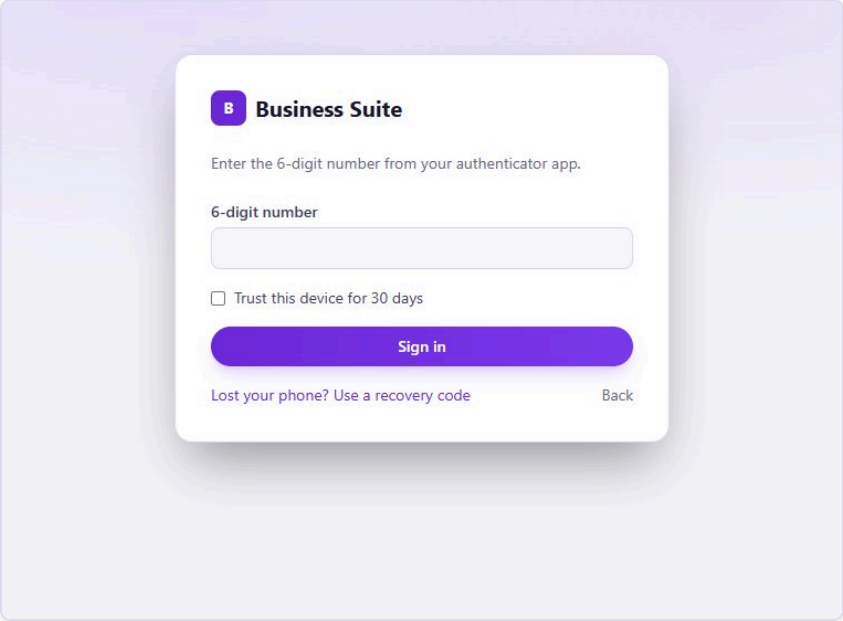
3. In the app, add an account and scan the picture on the screen. If the camera cannot scan it, type the key shown under the picture.
4. Type the 6-digit number the app now shows and press **Check and turn on**.
5. Dunware shows ten **recovery codes**. Save them somewhere safe (a password manager, or printed and locked away). They are shown once.



The set-up step: scan the picture, or type the key, then enter the number the app shows.

Signing in afterwards

Enter your email and password as usual. Dunware then asks for the 6-digit number. Tick **Trust this device for 30 days** if it is your own phone or computer and you do not want to be asked every time.



The second step of signing in.

If you lose your phone

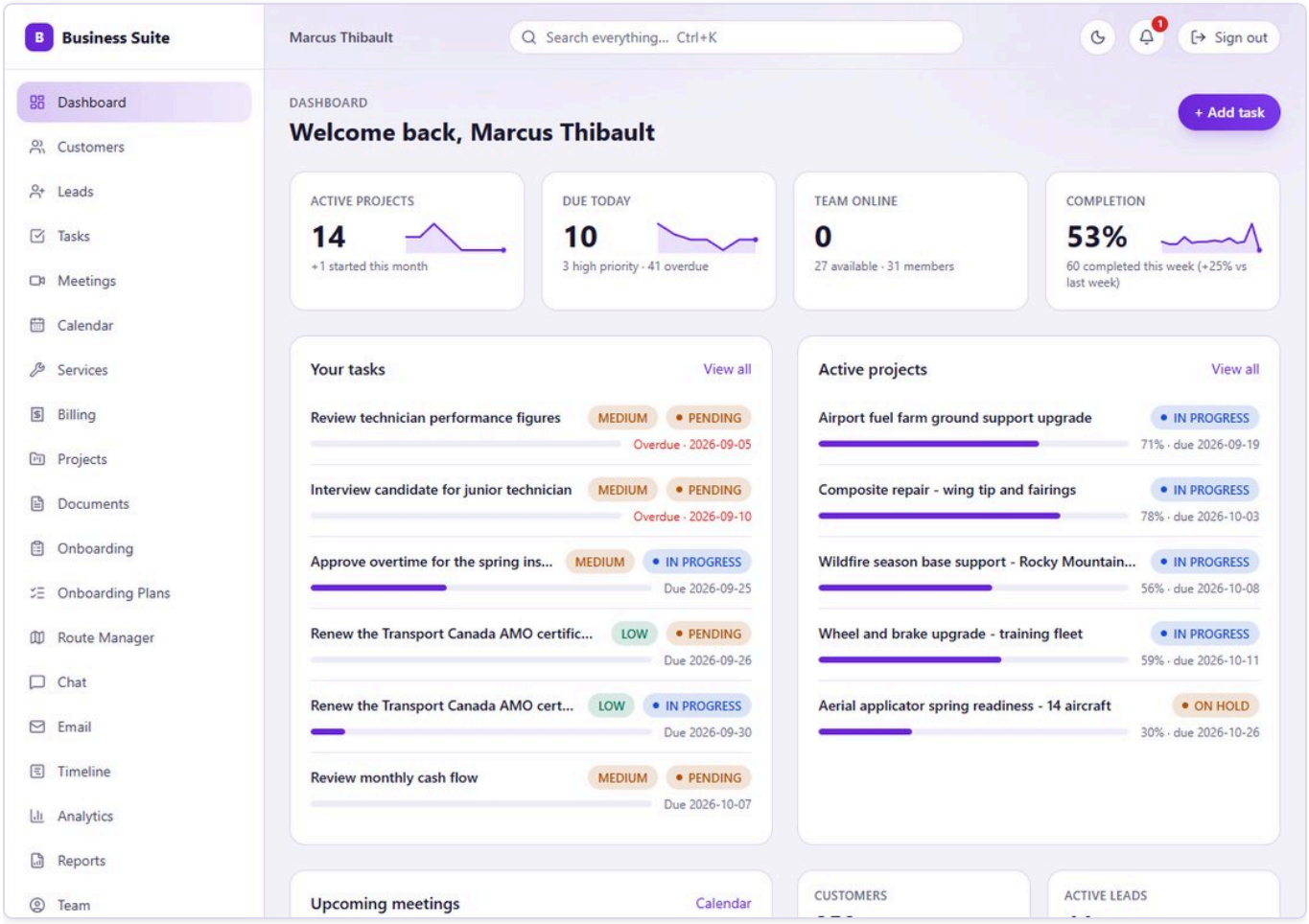
- On the sign-in step, choose **Lost your phone? Use a recovery code** and type one of your codes. Each code works once.
- Out of codes too? Ask your Owner to reset your two-step sign-in. You will be signed out everywhere and can set it up again from your profile.
- You can ask for a fresh set of recovery codes from **My profile** at any time (the old ones stop working).

> **YOUR OWNER CAN REQUIRE IT**
> Under Settings, the Owner can make two-step sign-in required for Owners only, or for everyone. If it is required for you, Dunware takes you to the set-up page the next time you open it, and you cannot turn it off. Signing in with a fingerprint or face counts as the second check, so it does not ask for the number as well.

Signing out

Press **Sign out** at the top right (on a phone, the arrow icon). Do this on any computer that is not your own.

3 Finding your way around



The dashboard: today's picture at a glance.

The dashboard

Everything on it appears only for the areas you may use.

- **Cards:** Active projects (planning, in progress or on hold), Due today (with high-priority and overdue counts), Team online (people available out of all members) and Completion (this week against last week).
- **Your tasks**: your six soonest open tasks, with **View all**. **Active projects**: the five due soonest. **Upcoming meetings**: the next five in the coming 30 days.
- **Quick counts**: customers, active leads, meetings today and overdue tasks, and a 14-day **project timeline**. **+ Add task** is at the top.
- It refreshes by itself about every 30 seconds.

The screen

- **The menu** down the left lists the areas you may use. The small button at its top collapses it to a narrow strip of icons (hover over an icon for its name) to give the page more room; press the button again to

open it. Your choice is remembered. On a phone it is hidden behind the round menu button at the top left; tap it to open the list, which also holds **My profile**.

- **The top bar** has your name (a link to My profile), the search box, a light/dark switch, the notification bell and **Sign out**.
- **The red number** beside Chat is how many messages you have not read.

Search everything

On a computer, press `Ctrl` + `K` (`⌘` + `K` on a Mac) or click the search box and type at least two letters. It searches customers, leads, tasks, projects, meetings, documents and team members (only the areas you may use), showing up to five of each. Pick a result, or use the arrow keys and Enter, to go straight to it. It does not search invoices, service requests, routes or emails, and the search box is not shown on a phone. The Customers and Leads lists each have their own search box and filters too (Leads also has a Board view) — reach for whichever is faster: the top search to jump straight to one result from anywhere, the list's own search when you're already there and want to narrow what's shown.

Notifications

The bell shows things that need your attention: overdue invoices, tasks due today, meetings and events starting soon, at-risk customers, and messages from automations. It shows your unread items (up to 30) and refreshes about every 20 seconds. Press an item to open it and **Mark read** (or **Mark all read**) to clear them.

Light and dark

The moon icon switches between light and dark colours and remembers your choice on that device.

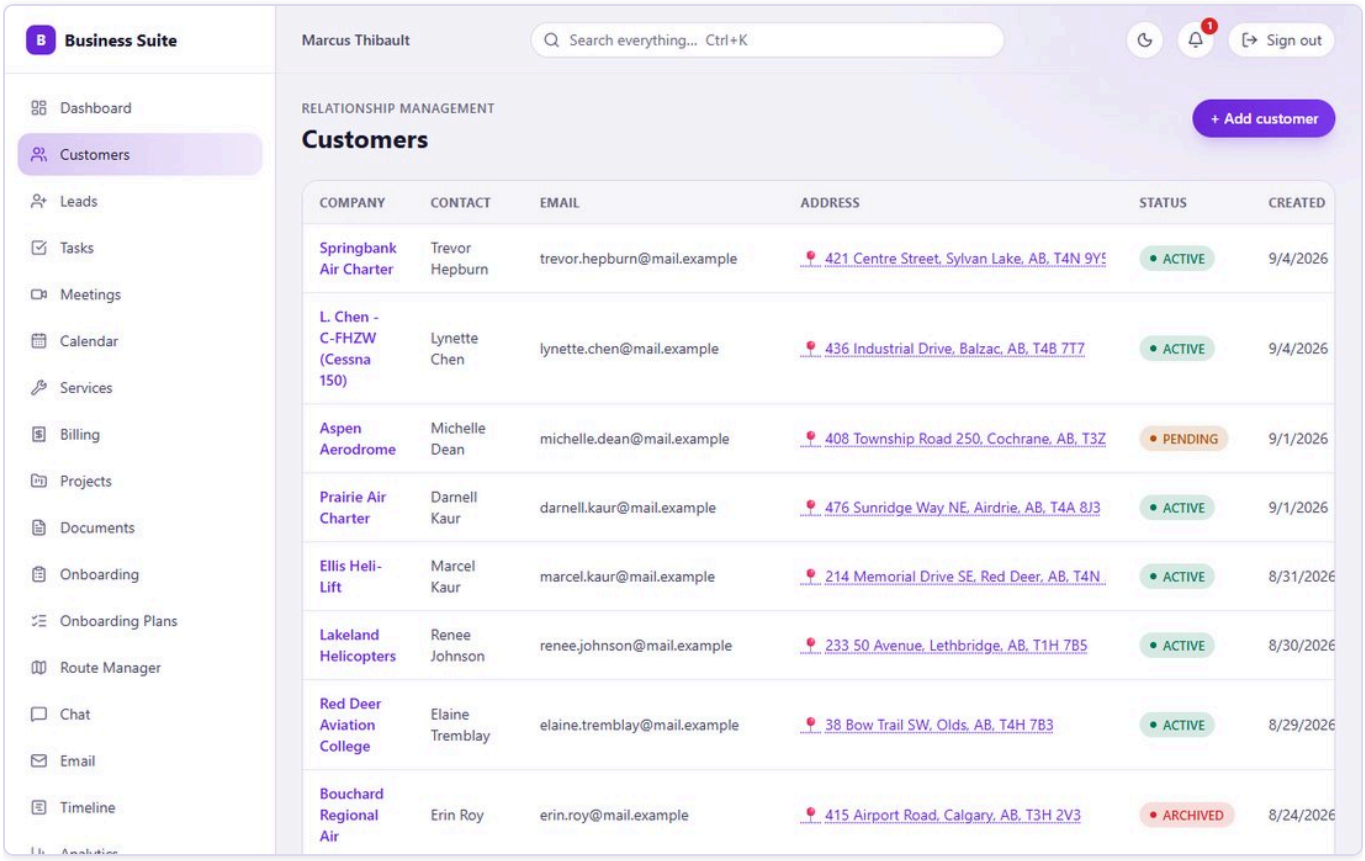
Live updates

When a colleague changes something, lists and counts update for you without refreshing the page.

4 Customers

Customers is your address book and history for the people and companies you do business with: their details, service locations, invoices, work done, tasks, projects, meetings, documents and emails, all on one page.

Owner Manager Dispatcher Sales Accounts by default.



The customer list.

Adding a customer

1. Open **Customers** and press **Add customer**.
2. Fill in **Company name**, **Contact person** and **Email** (all required; each email can belong to only one customer). Add phone, website, address, city, state and ZIP if you have them.
3. Choose an **Account owner** (the team member responsible), or leave it unassigned.
4. If you charge them GST/HST, enter their **tax number**. Tick **Tax-exempt** if no tax should be added to their invoices.
5. Save. On an existing customer you can also set the **Status**: Active, Inactive, Pending or Archived.

ONE PRIMARY CONTACT, PLUS AS MANY OTHERS AS YOU NEED.

Company name/Contact person/Email/Phone at the top are the customer's one primary contact. Add anyone else at that company — a site manager, a billing contact — under **Contacts** on the customer's own page: a name, title, email, phone and a note, with one of them optionally marked **Primary** as a flag within that list (this never changes the Contact person shown at the top).

Importing customers from another system

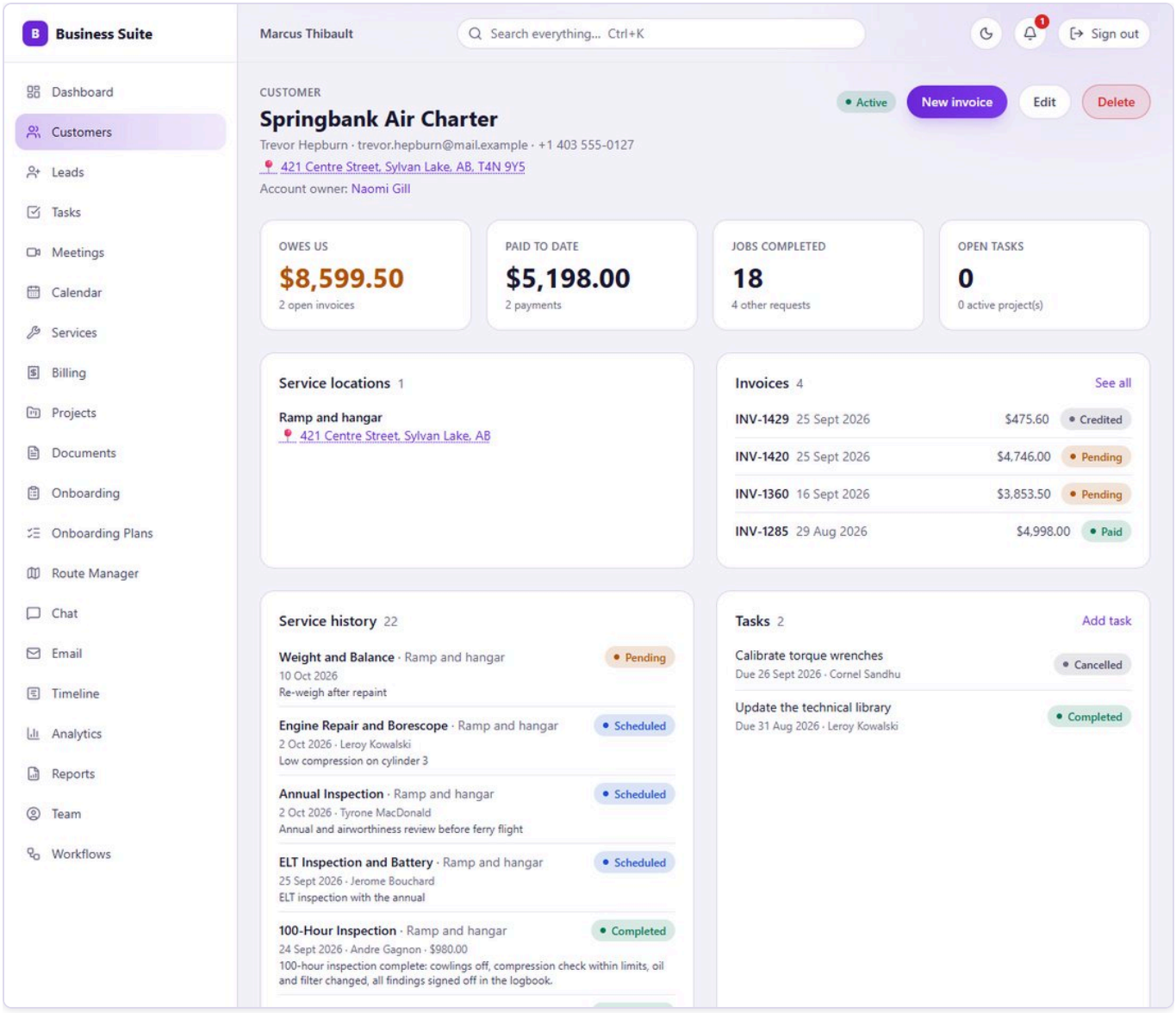
Owner Manager only. **Import** on the customer list brings in a whole file at once instead of typing each customer in by hand — a CSV, TSV, XLSX, JSON or XML export from wherever your customers live today.

1. Choose the file and press **Upload**. For a spreadsheet or JSON/XML file with more than one sheet, array or repeating element, you pick which one holds your customers.
2. Map each column in your file to a Dunware field: **Company name**, **Contact person** and **Email** are required; phone, address, city, state/province, ZIP/postal code, website and tax number are optional.
3. Press **Preview** for a dry run — nothing is written yet. It shows how many rows will succeed and lists what's wrong with any that won't (a missing required field, say).
4. Press **Commit** to actually create the customers.

ONE CLICK TO UNDO

Right after a commit, **Undo this import** removes every customer that import just created, and nothing else — useful if the mapping turns out wrong after the fact.

The customer page



Everything about one customer.

- Cards at the top: **Owes us**, **Paid to date**, **Jobs completed** and **Open tasks** (each shown only if you have that area).
- Below: onboarding progress, service locations, **Contacts**, invoices, service history, tasks, projects, meetings, documents and emails.
- **New invoice** (if you can use Billing), **Edit** and **Delete** are at the top.
- Service locations (the addresses you do work at) are added and edited under Route Manager, Locations, but they are listed here.

DELETING

Only an Owner or Manager can delete a customer (a Sales person can edit and archive), and Dunware refuses if any tasks, meetings, projects or service requests are linked to them. Set the status to **Archived** instead: they disappear from everyday use but the history stays.

FINDING A CUSTOMER

The customer list has its own search box and status filter buttons (Active/Inactive/Pending/Archived) built in, on top of the top search (Ctrl+K) for jumping straight to one result.

Giving a customer their own portal login

The **Portal access** card on a customer's page (Owner or Manager only) lets a customer sign in to their own, separate, read-mostly area at a `/portal` address — nothing to do with your own Dunware sign-in.

- **Create portal login** sets a one-time password you tell the customer; they must change it the first time they sign in. You cannot see or set their password again afterward — only **Clear password**, which emails them a reset link.
- The portal's own home page greets the customer with a summary: what they owe and on how many invoices, any quotes or estimates waiting on their decision, and their most recent invoices and service jobs — everything else lives in its own tab.
- From the portal a customer can view their invoices, quotes, estimates, service history and locations; pay an invoice by card, with an optional tip; accept or decline a quote themselves; and submit **Request more work** at a location (you still turn that into a real appointment from **Route Manager, Requests** — it's never booked automatically).
- While a technician is on the way to their job — from the moment the stop before theirs is finished until their own is marked done — a customer can see that technician's live position (just a dot, no trail) and send them a direct message (handy for a lockbox code or a gate note); a technician sees it on their own stop page and replies the same way.

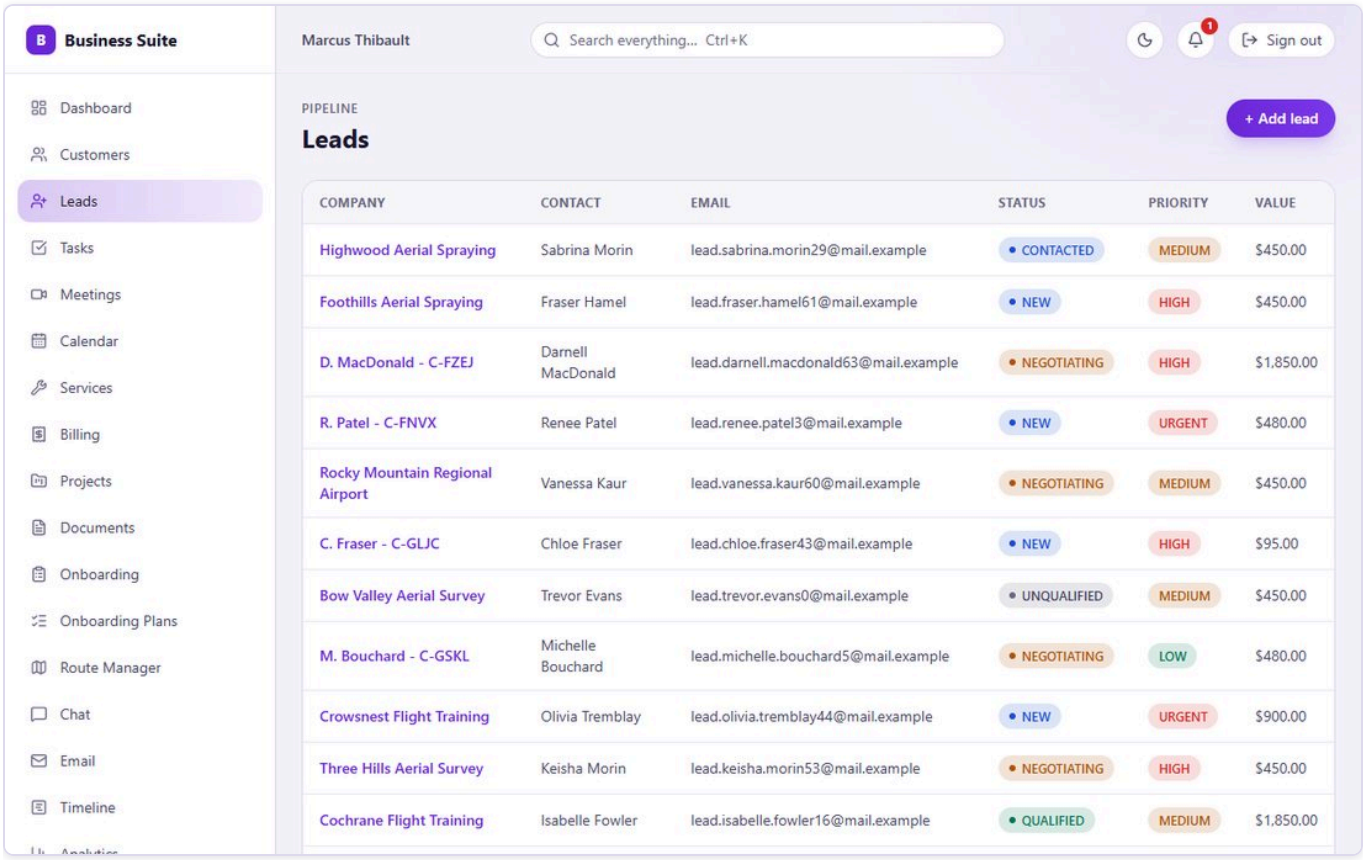
A CUSTOMER IS A THIRD PARTY SEEING THIS DATA.

Your written monitoring policy (*Settings, Shifts and technician tracking*) should say so — the Employee Monitoring Policy Template shipped with Dunware already covers it.

5 Leads: the sales pipeline

A lead is a possible customer you are still working on. Track each one from first contact to a win or a loss, then turn a won lead into a customer in one click.

Owner Manager Sales by default.



The lead list.

The lead list has its own search box and status filter buttons, plus a **Table / Board** switch: Board is a drag-and-drop Kanban view, one column per status, for moving a lead through the pipeline with a drag instead of opening it and changing its status by hand. Converted is shown as a column but isn't a place you can drop a card — a lead only ever becomes Converted through **Convert to customer** below, never by dragging.

Adding and updating a lead

- **Add lead**: company name, contact person and email are required. Add phone, the **source** (website, referral, cold call...), an **estimated value**, a **priority** (Low, Medium, High, Urgent) and an owner.
- **Edit** a lead to change its **status** (New, Contacted, Qualified, Unqualified, Negotiating, Converted, Lost) and to add **notes**.

Owner Manager only. **Import** on the lead list bulk-imports leads from a CSV, TSV, XLSX, JSON or XML file — same upload/map/preview/commit/undo steps as Customers' own import, above.

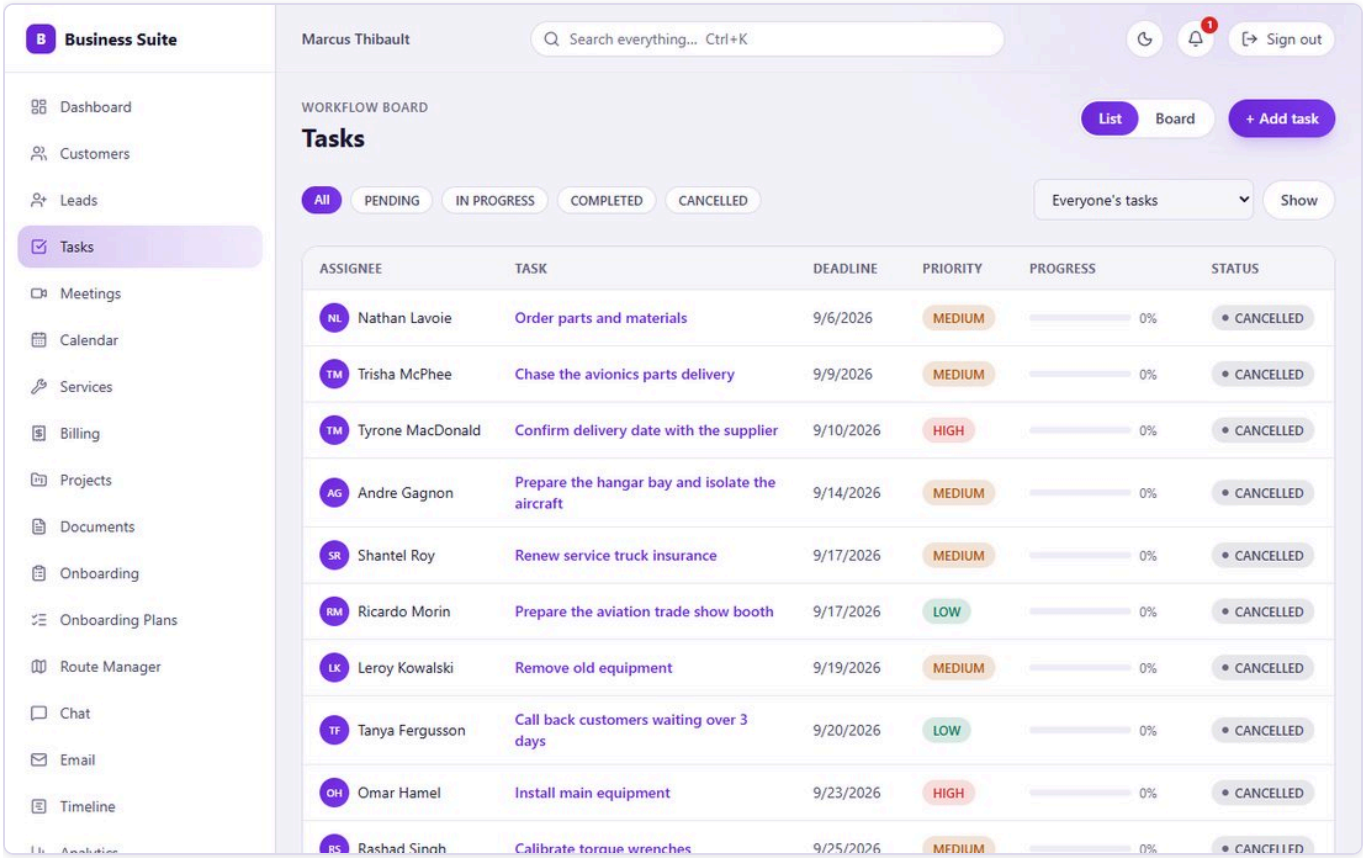
Converting a lead to a customer

On a lead's page press **Convert to customer**. Dunware creates an active customer with the lead's company, contact, email, phone and owner, marks the lead **Converted**, links the two, and takes you to the new customer.

> **CHECK AFTER CONVERTING**
> The source, estimated value, notes and address do **not** carry over, and Dunware does not check whether a customer with that email already exists. Add the address on the new customer page. Deleting a lead (Owner, Manager or Sales) leaves the customer alone.

6 Tasks and the task board

Tasks are the to-do list for the whole team. Each task has an owner, a due date and a priority, and can be linked to a customer and a project.



The task list, with status chips and an assignee filter.

Adding a task

1. Press **+ Add task** (also on the dashboard and on a project page, which pre-selects that project).
2. Enter a **Title** and a **Due date** (today by default). Choose the **Priority** (Low, Medium, High, Urgent) and who it is **Assigned to** (you by default).
3. Optionally link a **Customer** and a **Project** (only projects that are not finished or cancelled are offered) and add a description.

Editing a task adds **Progress (%)** and **Status** (Pending, In progress, Completed, Cancelled). Marking a task Completed sets its progress to 100%. On a task's page you can also change the status from a drop-down, edit it, or delete it (any team member with Tasks can delete).

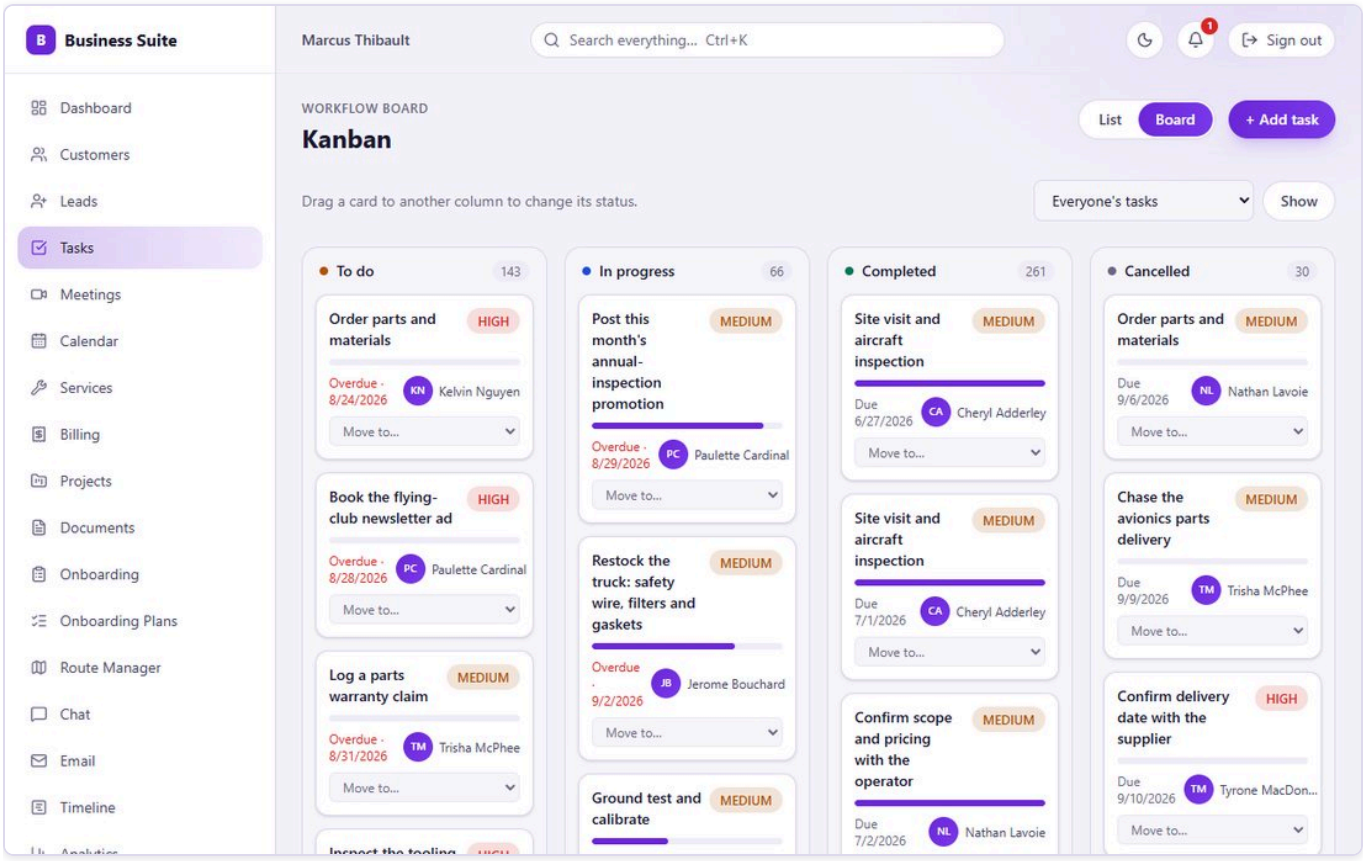
Finding tasks

- Use the status chips (All, Pending, In progress, Completed, Cancelled) and the person drop-down (Everyone's tasks, My tasks, or one person), then press **Show**.

- The list shows up to 200 tasks and the board up to 500. Overdue means the due day has passed and the task is not completed or cancelled.

> **A FIELD TECHNICIAN ONLY EVER SEES THEIR OWN TASKS**
> — on the list, the board and the dashboard's overdue count and active-projects card. There is no person drop-down for them; it isn't a default that can be switched off.

The board

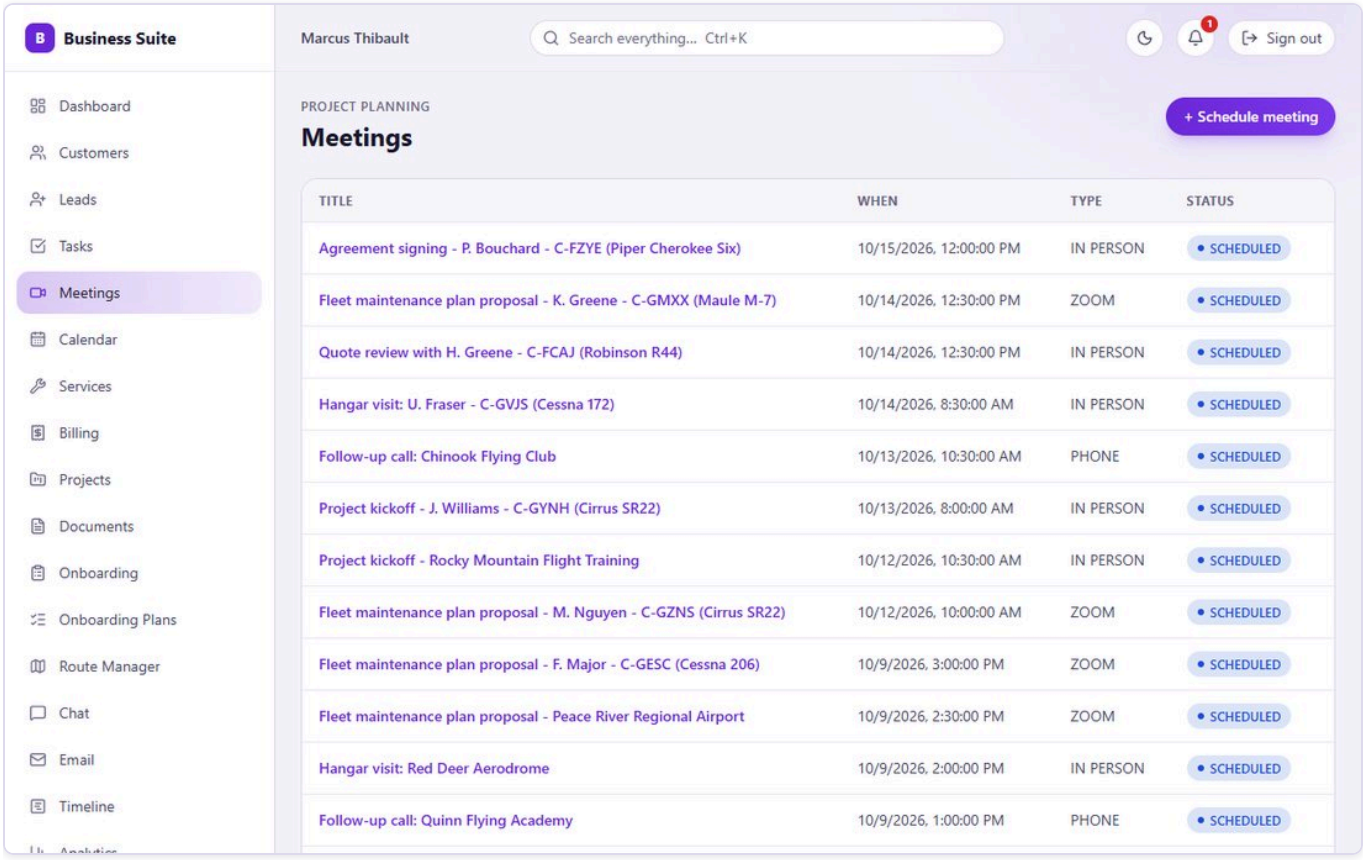


The board: To do, In progress, Completed, Cancelled.

Drag a card to another column to change its status. On a phone or touch screen use the **Move to...** menu on the card. If a move fails the card jumps back and an error is shown. Cards moved to Completed fill their progress bar. Other people's boards update as you work.

> **NOT LINKED TO LEADS**
> A task can be linked to a customer and a project but not to a lead.

7 Meetings and the calendar



The meeting list.

Scheduling a meeting

1. Press **+ Schedule meeting** (in Meetings, or **+ Meeting** on the calendar).
2. Enter a **Title**, **Start** and **End** (the end must be after the start).
3. Choose the **Type** (In person, Video call, Zoom, Teams, Phone, Other), **Priority**, and a **Location** (an address or room).
4. Pick the **Customers**, **Leads** and **Attendees** (team members) involved. Hold `Ctrl` (`⌘` on a Mac) to pick more than one. You are the organiser automatically.

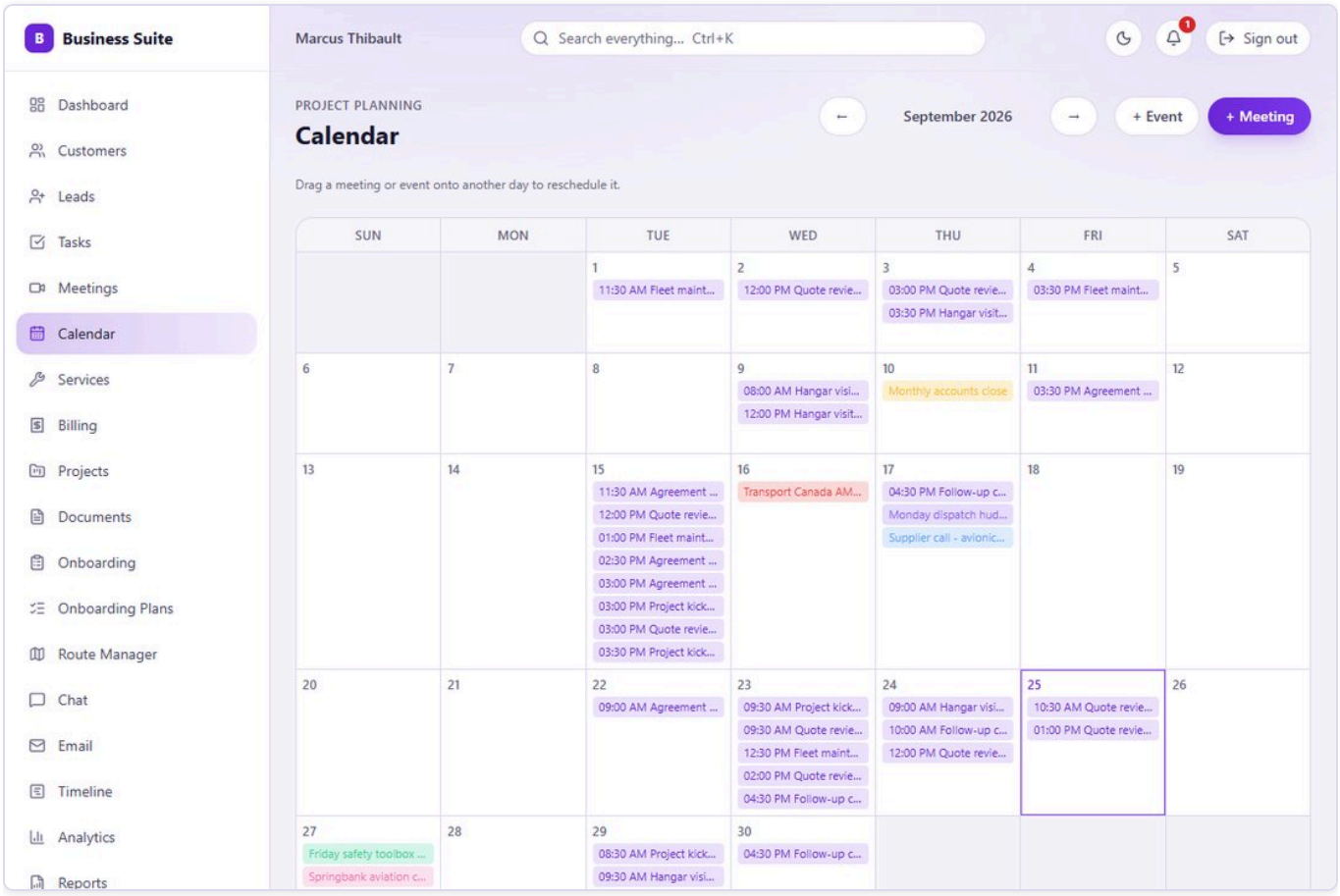
- Change a meeting's status on its page: Scheduled, In progress, Completed, Cancelled or Rescheduled. Editing replaces the lists of customers, leads and attendees with what you choose.
- Dunware emails the organiser and attendees a few minutes before a meeting and puts a reminder in their bell.
- **Dunware does not send meeting invitations** by email, with one exception: a Video call meeting with Jitsi Meet switched on (below) does email every customer attendee the date, time and join link, since they have no bell to put a reminder in. Tell other attendees yourself; they will see it in their calendar.

Video calls (Jitsi Meet)

Choosing **Video call** as the type offers a **Use Jitsi Meet for this call** box — only shown once an administrator has switched Jitsi Meet on under **Settings**. Jitsi Meet is a free, open-source video-calling service; the default server (meet.jit.si) needs no account or software install, so there is nothing extra for the people joining to set up.

- Ticking the box sets up a private room for that meeting's time. Every employee attendee (and you, as organiser) gets a bell notification; every customer attendee gets an email with the date, time and a join link.
- 5 minutes before the call, employee attendees get a reminder to have what they need on hand (never sent to customers).
- 2 minutes before the call, the room opens automatically in each employee attendee's browser (if a pop-up blocker stops this, a "Join now" banner appears instead). Customers use the link from their email.
- A **Join Jitsi Meeting** button is on the meeting's own page too, any time.

The calendar



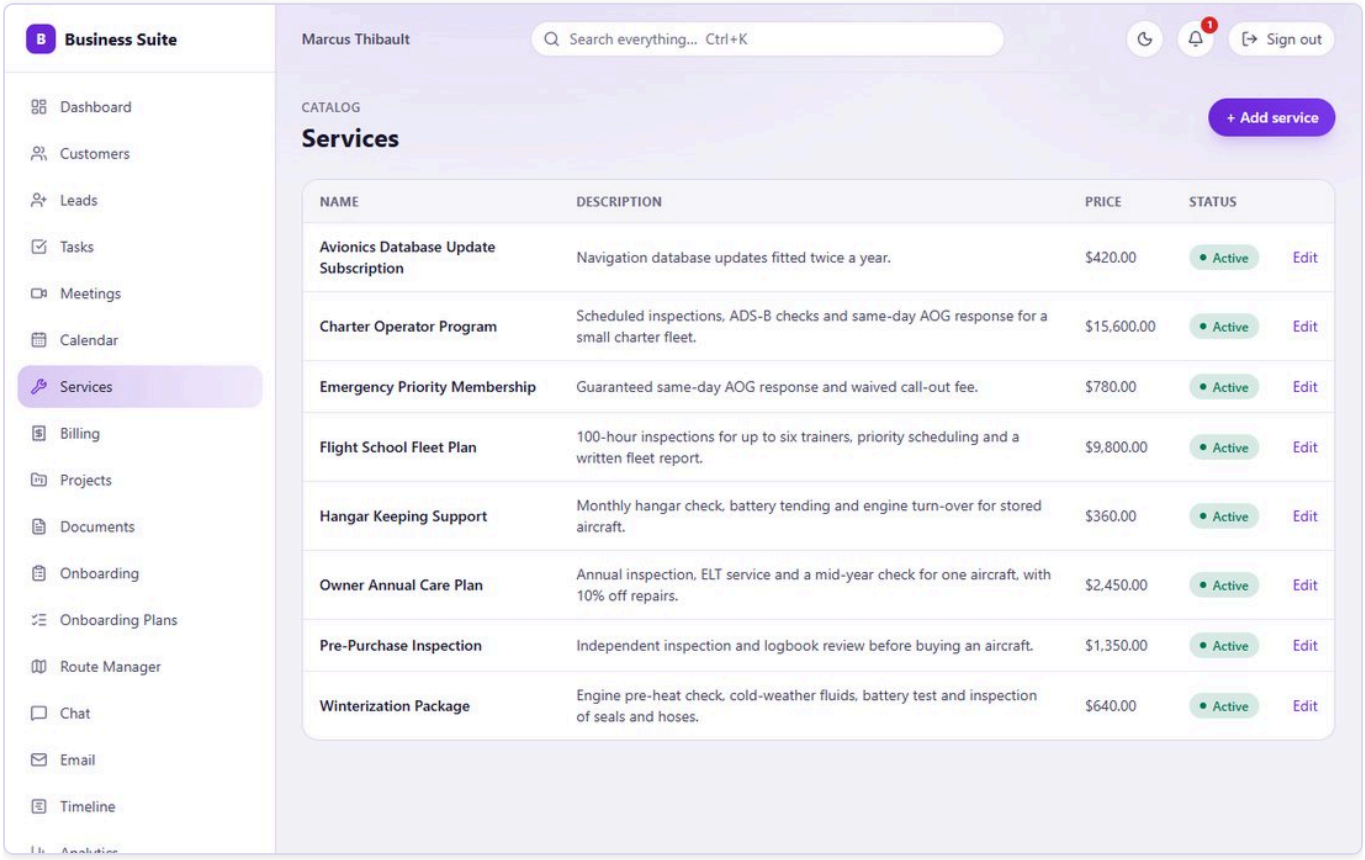
The month calendar with meetings and events.

- One month at a time. Use the arrows to go to the previous or next month.
- It shows **everyone's** meetings and events. It does not show tasks or route stops.

- Press **+ Event** for something that is not a meeting: a title, start and end, a type (Meeting, Task, Call, Reminder, Appointment or Custom), a colour, a location and a description. **Delete event** on its edit page deletes it straight away with no confirmation.
- Drag a meeting or event to another day to move it by whole days. The time and length stay the same. If the move fails the calendar does not put it back, so reload to check.

8 Services (price list)

Services is a simple price list of what you sell. It is a list only: there are no bundled packages.



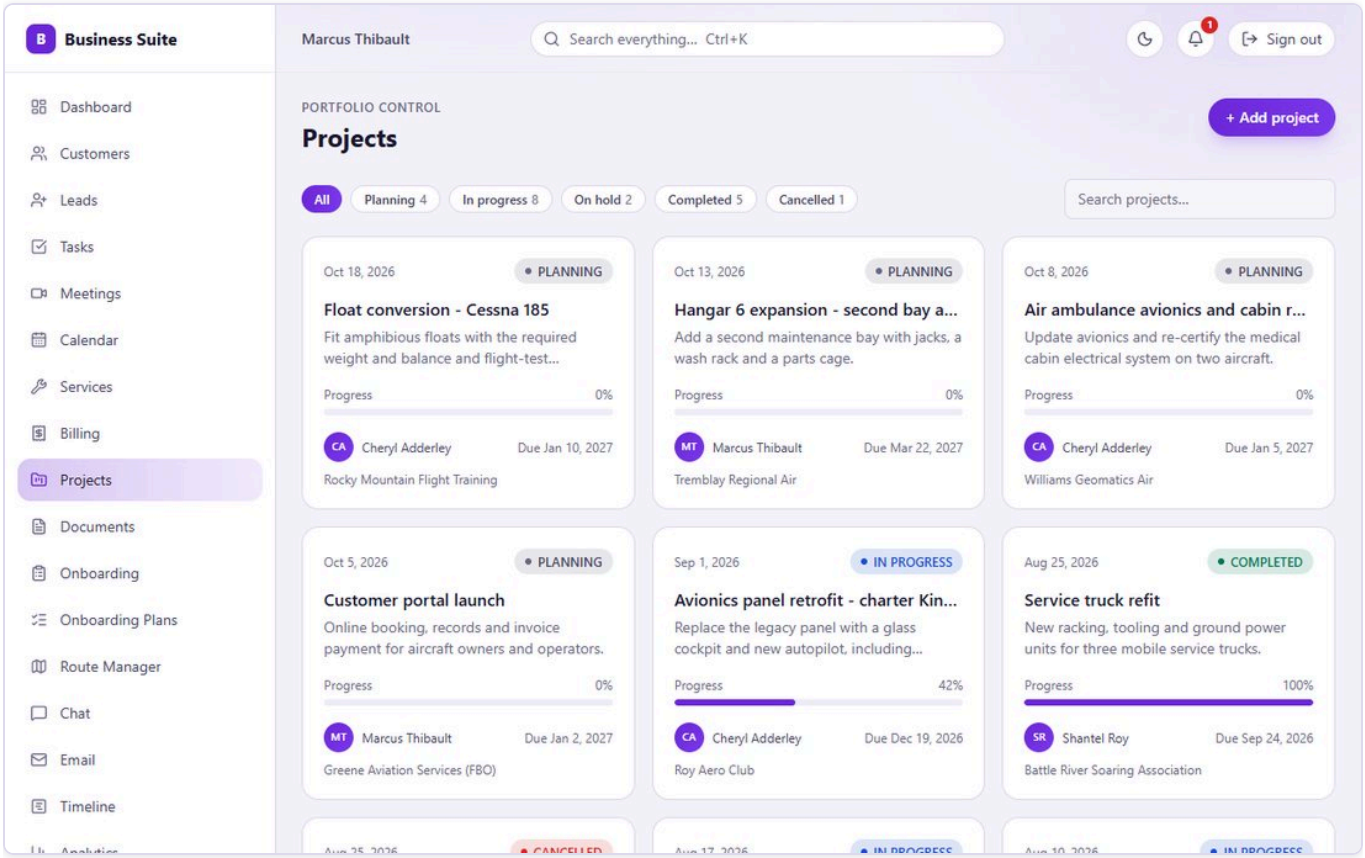
The services list.

Owners, Managers and Dispatchers can add, edit and remove the services you offer with their descriptions and prices, so everyone quotes the same way. (The kinds of visit that dispatch schedules, with their duration and colour, are a separate list: Route Manager, Service Types.)

Owner Manager only. **Import** on the services list bulk-imports the price list from a CSV, TSV, XLSX, JSON or XML file — the same upload/map/preview/commit/undo steps as Customers' own Import, earlier in this guide.

9 Projects

A project tracks a bigger job for a customer: its dates, budget, tasks, the hours worked and notes along the way.



The project list, with a search box.

Creating a project

1. Press **New project**. Enter a unique **Project name**, choose the **Customer**, a **Priority**, and the **Start date** and **Target end date**.
2. Optionally add a **Budget**, an **Hourly rate** and a description. Dunware makes a project code from the name; it never changes. You become the project manager.
3. Editing adds **Status** (Planning, In progress, On hold, Completed, Cancelled), **Progress (%)**, **Actual cost** and **Actual end date**.

PROGRESS TRACKS ITSELF

Once a project has any tasks (other than Cancelled ones), its progress percentage is calculated for you — done tasks divided by all live tasks — every time a task is completed, reopened, added, reassigned to another project or deleted. The **Progress (%)** field on the edit page only matters before a project has any tasks yet; once it does, typing a different number there is overwritten by the calculated figure the moment you save.

The project page

- Cards: progress, schedule (days left or past the target), **budget used** (labour only: hours times the hourly rate), hours logged, tasks done, team.
- A **Tasks** list with **+ Add task**, the **Work done** log and the **Notes** log, plus recent activity and the customer's upcoming meetings and documents.
- **Log work**: what was done, the hours (in quarter-hour steps, more than 0 and at most 24) and the date (no more than 2 days ahead). **Add note**: text and a date. Entries can be edited or deleted by their author, a Manager or an Owner.
- Only an Owner or Manager can delete a project, and only when it has no tasks or other linked records. Set it to Cancelled instead.

Gantt: schedule, milestones and dependencies

Gantt (on a project's page) lays every one of its tasks out on a timeline you can drag to move or resize. Two things live only here:

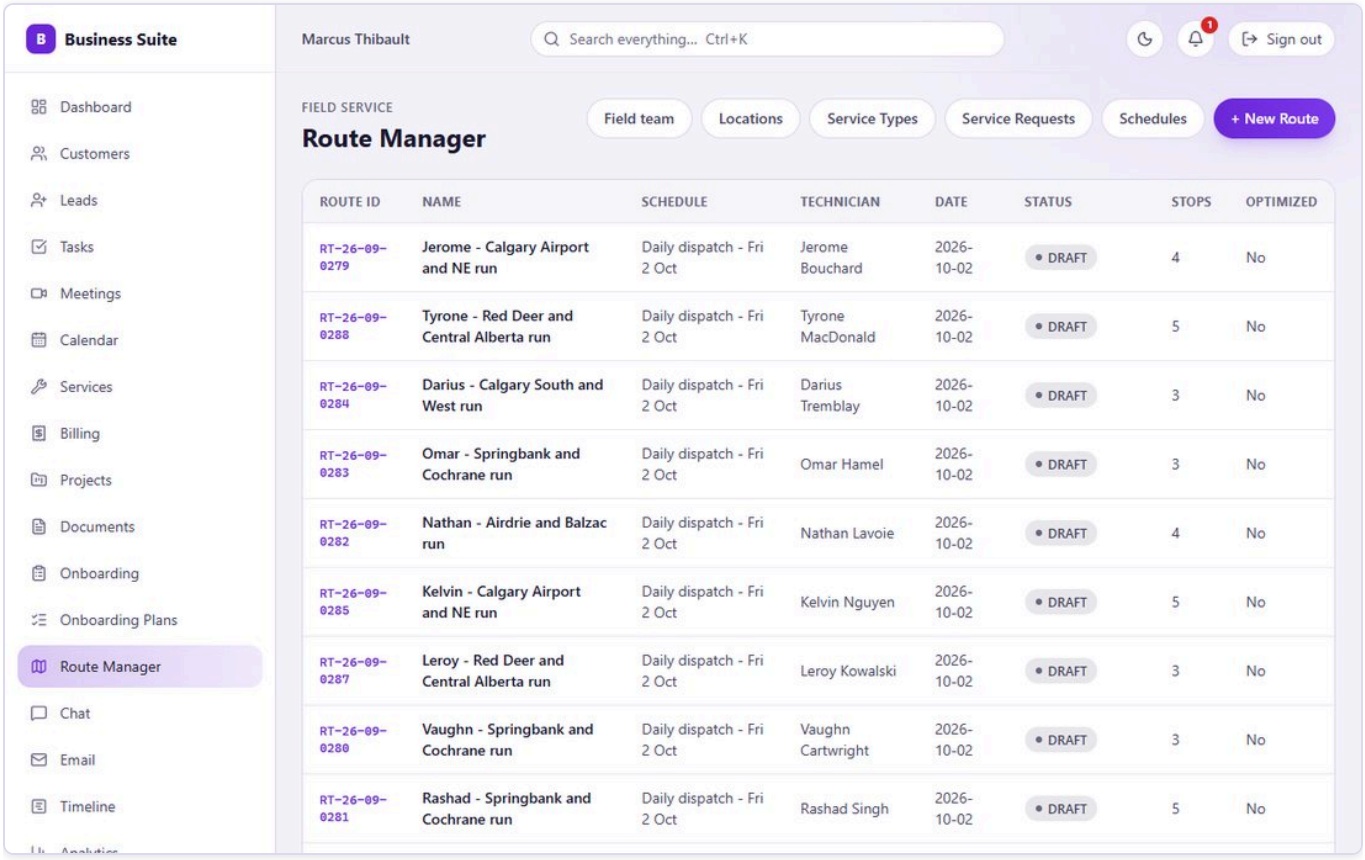
- **Milestones** are zero-duration markers — a date that matters on its own (a sign-off, a delivery) rather than a span of work. Add one with **+ Add milestone** on the Gantt page, or tick **Milestone** when adding an ordinary task.
- **Dependencies** say one task must finish before another can start. Add a "must finish before" pair in the **Dependencies** card; dragging the earlier task's dates on the chart pushes every task downstream of it forward automatically, and Dunware refuses a dependency that would create a loop.

10 Route Manager: service requests, routes and the field team

The Route Manager turns customers' requests for work into daily routes for your technicians, shows where the team is, and records the work done.

Owner Manager Dispatcher plan routes. A technician sees and works only their own route.

> **WHO CAN CHANGE THINGS**
> Owners, Managers and Dispatchers create and edit routes, requests, schedules, locations and service types and put stops on routes. A technician can change the status of stops on their own route and record the completion of those stops while their shift is on. Nobody else can change anything here.



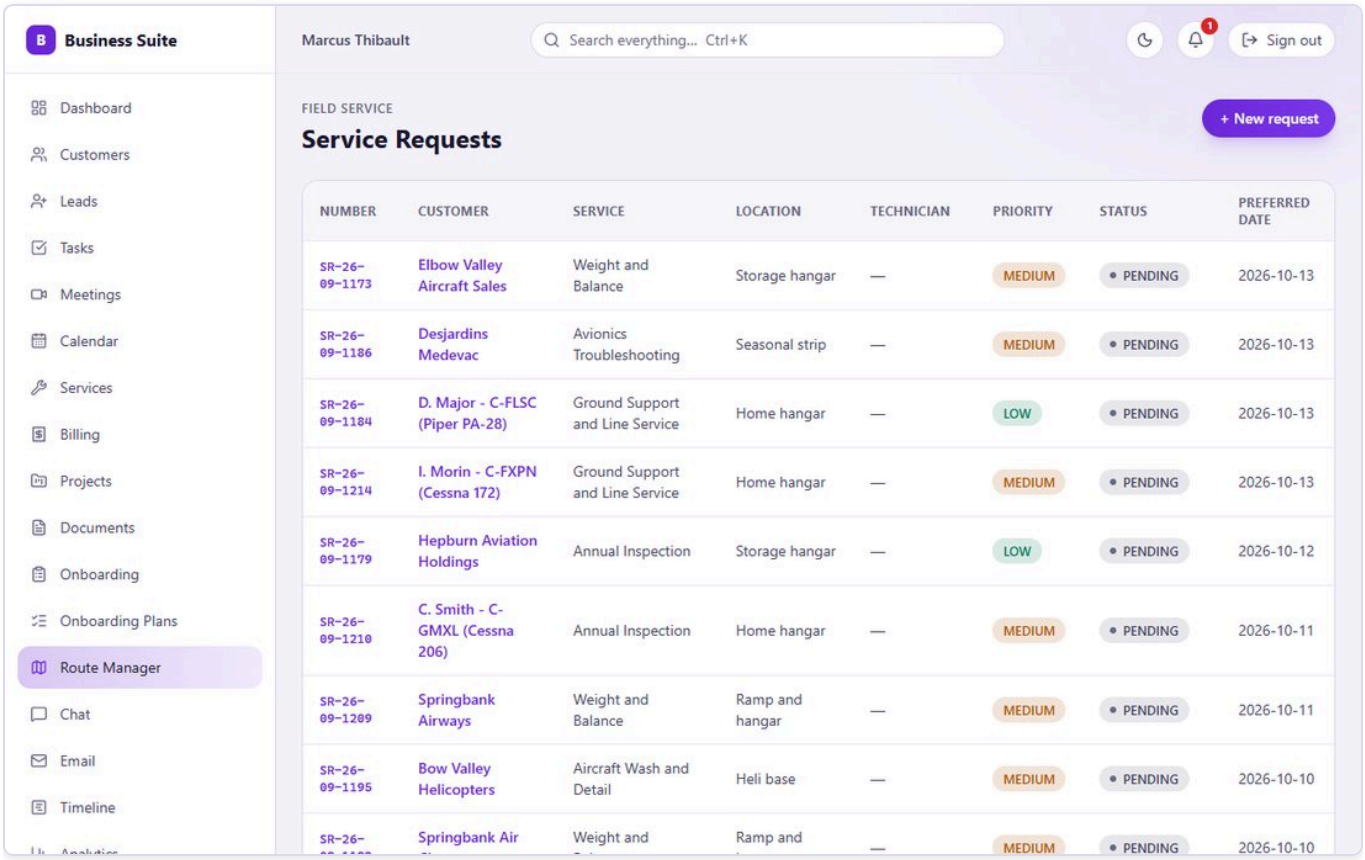
The route list: ID, name, technician, date, status and number of stops.

How work flows

1. Set up your **Service Types** (a name, expected minutes, base price, colour), **Parts & Materials** (anything a technician might add to a job, with its own price) and each customer's **Locations** (their sites, with address and access instructions).
2. A **Service Request** records what a customer needs: customer, location, service type, priority, preferred date and contact details.

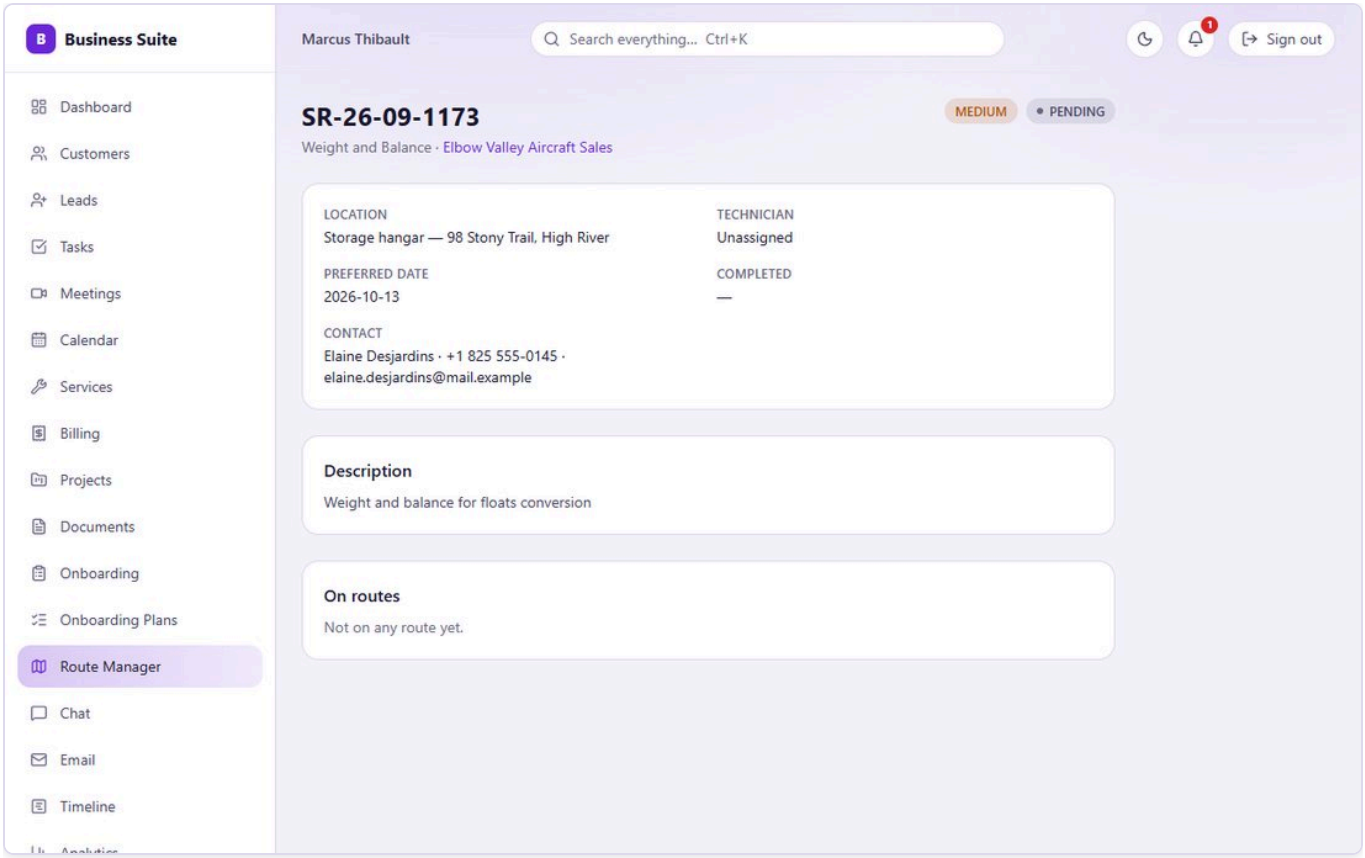
3. Create a **Route** for a technician on a date and add the requests to it as **stops**.
4. The technician works the stops, marking each as they go and recording the completion.

Service requests



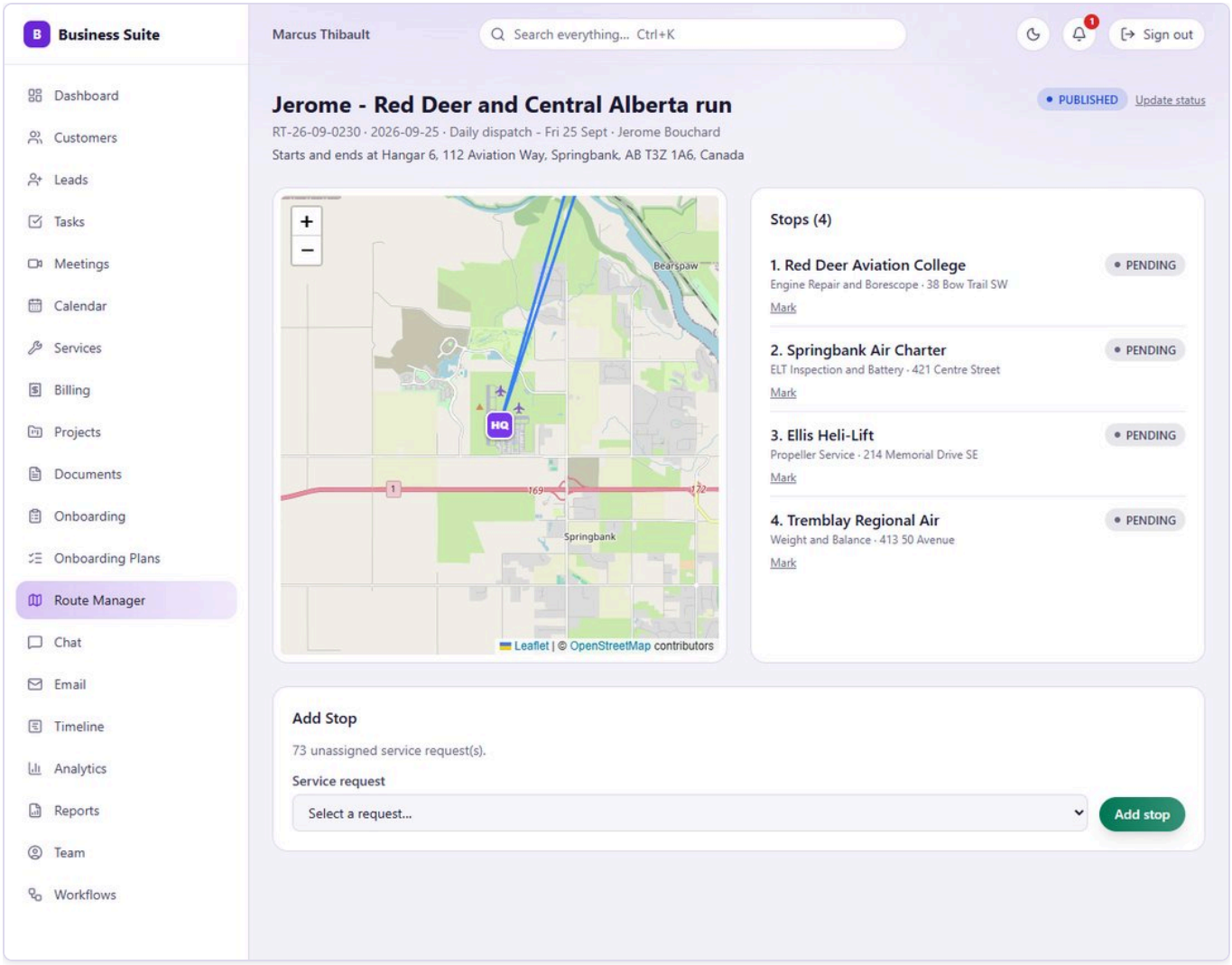
Requests waiting for a route.

- Statuses: Pending, Scheduled, In progress, Completed, Cancelled. You cannot set a request to Completed by hand: it becomes Completed when the technician records the completion on its stop, and a completed request is locked.
- On a request's page you can edit it, **Cancel request** (kept in the list as Cancelled) or delete it (not if it is on a route or has a completion).



A request, with the routes and stops it is on.

Routes and stops



A route with its stops in order.

- A route needs a **name**, **schedule**, **technician** and **date**. Start and end location default to your company address from Settings. Add estimated times and notes if useful. If you haven't set up a schedule or a technician yet, a link on this page lets you add one without losing what you've typed.
- Route status: Draft, Published, In progress, Completed, Cancelled ("Update status"; each change is logged under Recent activity).
- In **Add stop**, choose from requests that are still Pending or Scheduled and not already on a route. Adding a stop does not change the request's status. A request already on a route must be removed from it first; a skipped or cancelled stop frees it again.
- Stops can be moved up or down or removed (not once a completion is recorded).
- Stop statuses (the **Mark** link): Pending, En route, Arrived, In progress, Skipped, Cancelled. Arrived stamps the arrival time. **Completed is not one of the choices here** — a stop only becomes Completed through **Record completion** below, which is what prices the job and creates its invoice.
- **Record completion** appears once a stop is past Pending: work performed (required), start and end times, duration, billable hours, materials used (a free-text note), notes, and a follow-up tick with notes. It marks the stop and the request Completed. Only one completion is allowed per request.

- Deleting a route is refused if it has recorded completions: set it to Cancelled instead.

Pricing a completed job (no typing a total, ever)

The technician never types a price or adds anything up. The **service price** on the completion form is read straight from the job's own Service Type — it's shown, not entered. To bill anything beyond that (a filter, a part, a named extra service), pick it from the **Add a part, material or extra service** list and use the `+` / `−` buttons for how many. Tick **No charge** on an item given away free (say, a damaged part replaced at no cost) — it still shows on the invoice, at $0. The running **Total** at the bottom adds itself up for you to see; saving the completion creates the invoice immediately, matching that total exactly, with the service and every item as its own line.

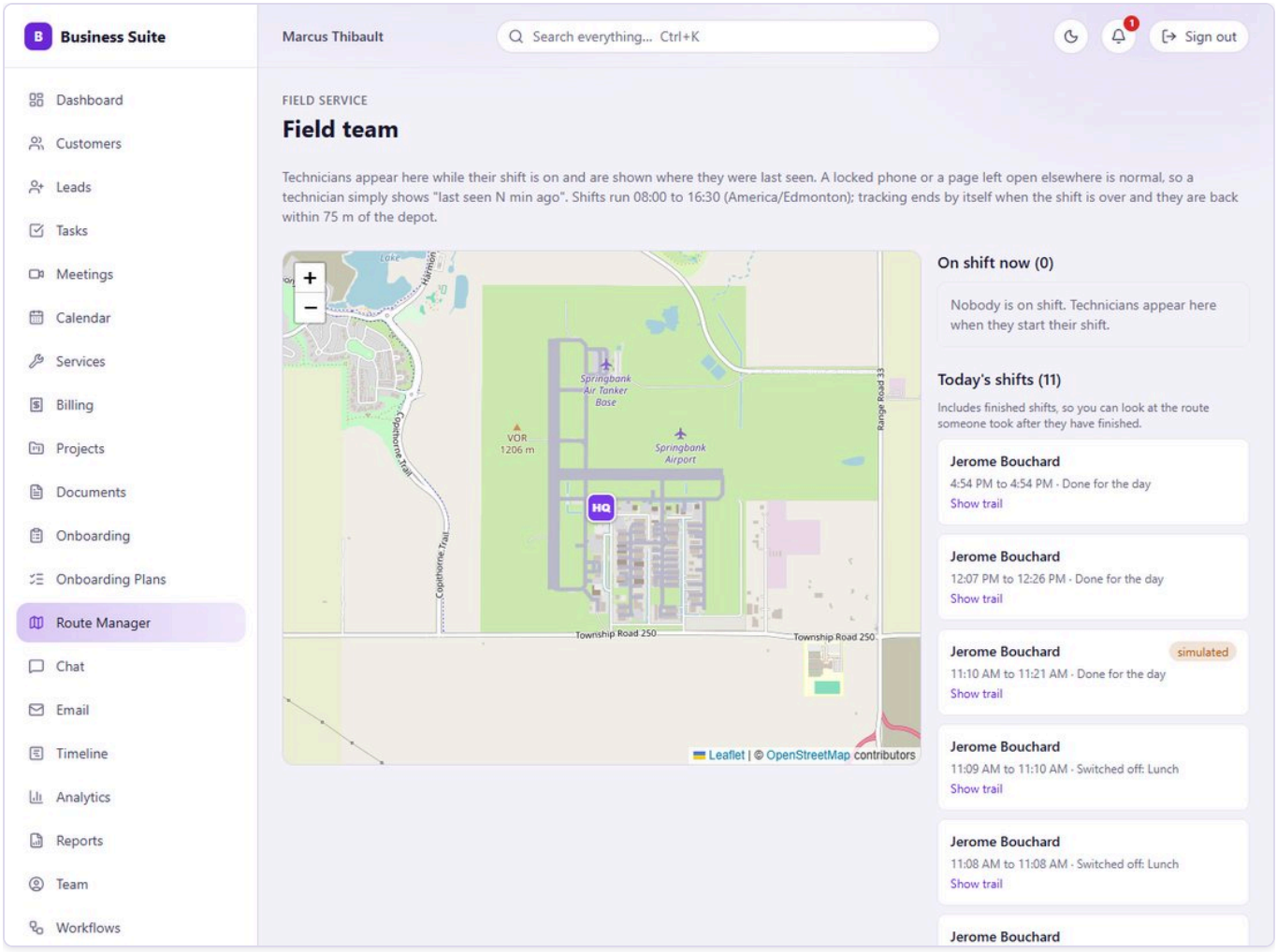
> **EVERY COMPLETED JOB GETS AN INVOICE**
> Even a job with nothing billable (warranty work) creates a $0 invoice, marked paid automatically — so Billing always has a record of every job, nothing to chase down.

Locations, service types, parts & materials, and schedules

- **Locations**: name, customer, address, city, state and ZIP are required. Add latitude and longitude, access instructions and an Active tick. The customer cannot be changed later, and a location in use cannot be deleted.
- **Service types**: name, description, estimated minutes, base price, colour, active. The base price is what shows automatically on a completion for that type of job.
- **Parts & Materials**: name, description, price, active — anything a technician can add to a completed job (a physical item like a filter, or a named extra charge like an additional hour of labour). No stock count is kept; this is pricing only.
- **Schedules**: a named day plan (name and date together must be unique) that routes belong to, either Draft or Published.

Owner Manager only. Each of Locations, Service Types and Parts & Materials has its own **Import** button for bulk-adding them from a CSV, TSV, XLSX, JSON or XML file — the same upload/map/preview/commit/undo steps as Customers' own Import, earlier in this guide. Locations' import matches each row's customer by company name or email against your existing customers, so add the customer first if a row's company isn't found.

The field team



The live map of technicians who are on shift.

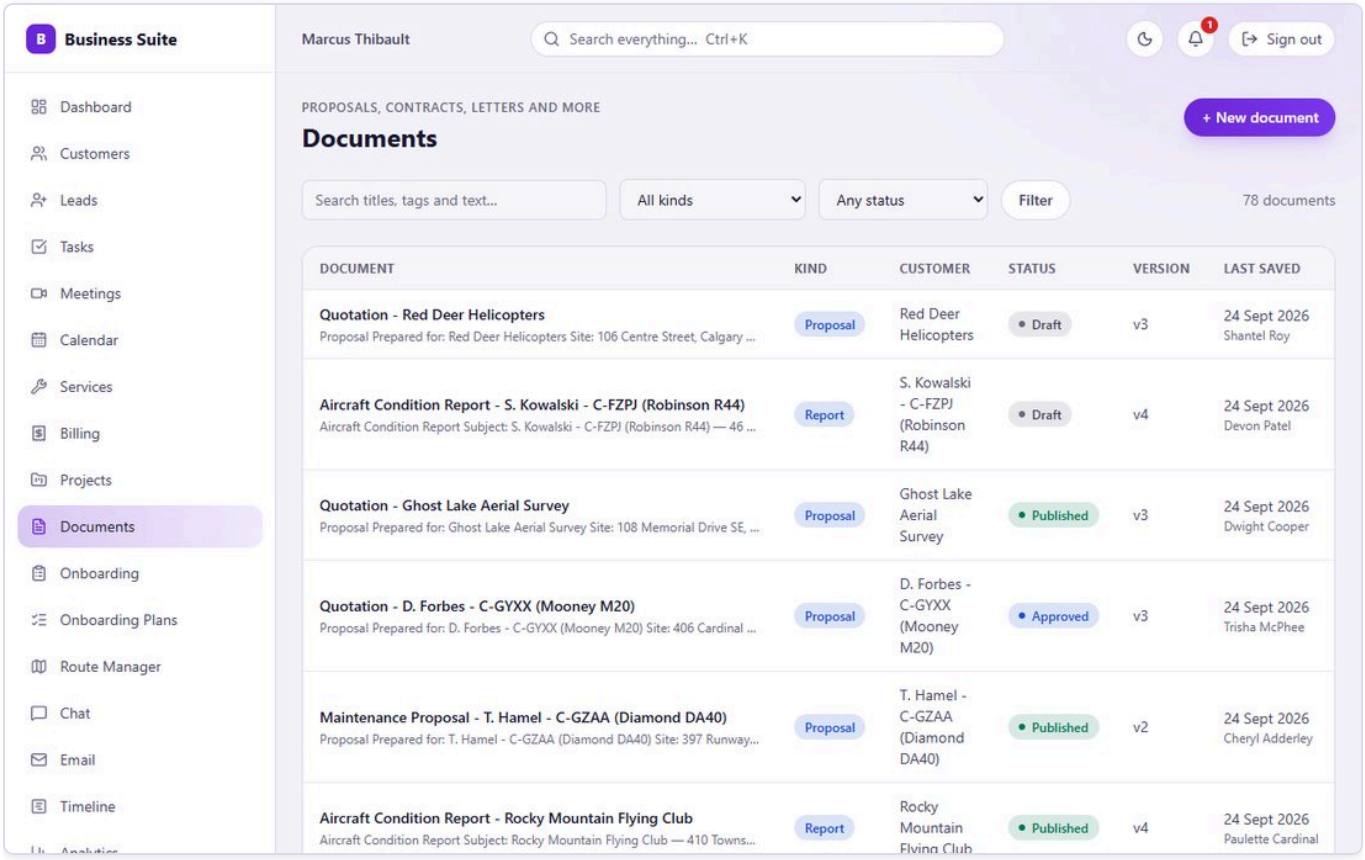
Route Manager, **Field team** shows a live map of technicians who are on shift, with where they were last seen and their trail, plus the shift hours, time zone and depot distance. A warning tells you if the depot has no map position: set the address and coordinates under Settings, Company. Technicians report their position about every 30 seconds, or every 25 metres they move. This needs the secure (https) address and location permission on the phone. A drive simulator is available to Owners, Managers and Dispatchers for testing.

A technician's shift ends by itself when the shift time is over and they are back at the depot. If the day ends first, the shift is closed and flagged for dispatch. A technician sees only their own routes, and nothing until their shift is on.

Records: reviewing every job message and route log

Owner Manager Dispatcher only. Route Manager, **Records** is one searchable screen over everything a single job or route page only shows one of: every customer↔technician message sent on any job, and every route's activity log (status changes, location updates, notes, issues reported and delays), each in its own list with its own search box. Use it to review or audit what was said or logged without opening job after job.

11 Documents



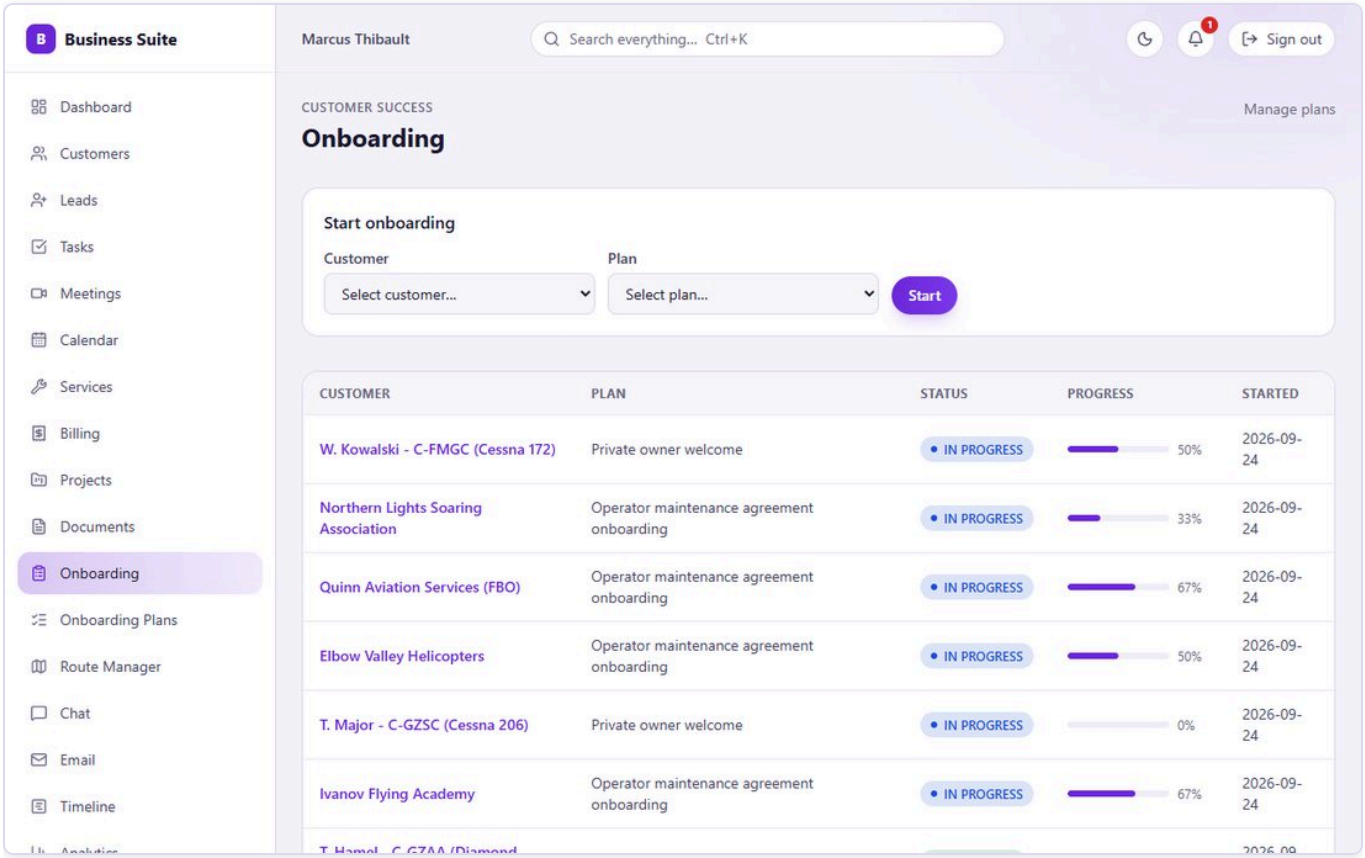
The document list.

Write proposals, contracts, letters, memos and reports, keep every version, and print them as PDFs on your letterhead.

- **Kinds:** Proposal, Contract, Letter, Memo, Report, Invoice, Blank.
- **Status:** Draft, Review, Approved, Published, Archived.
- Each save keeps the earlier version, and a history shows what changed. The **PDF** uses your company logo, name and address from Settings.
- Documents can be linked to a customer, and appear on that customer's page.

12 Onboarding

Onboarding walks a new customer through a checklist of steps from a reusable plan, so nothing is forgotten.



Onboardings in progress.

Starting one

In Onboarding choose a **Customer** (only those with no onboarding yet) and an active **Plan**, then press **Start onboarding**. Each customer can have one. The person who starts it is the default assignee and can be changed on its page.

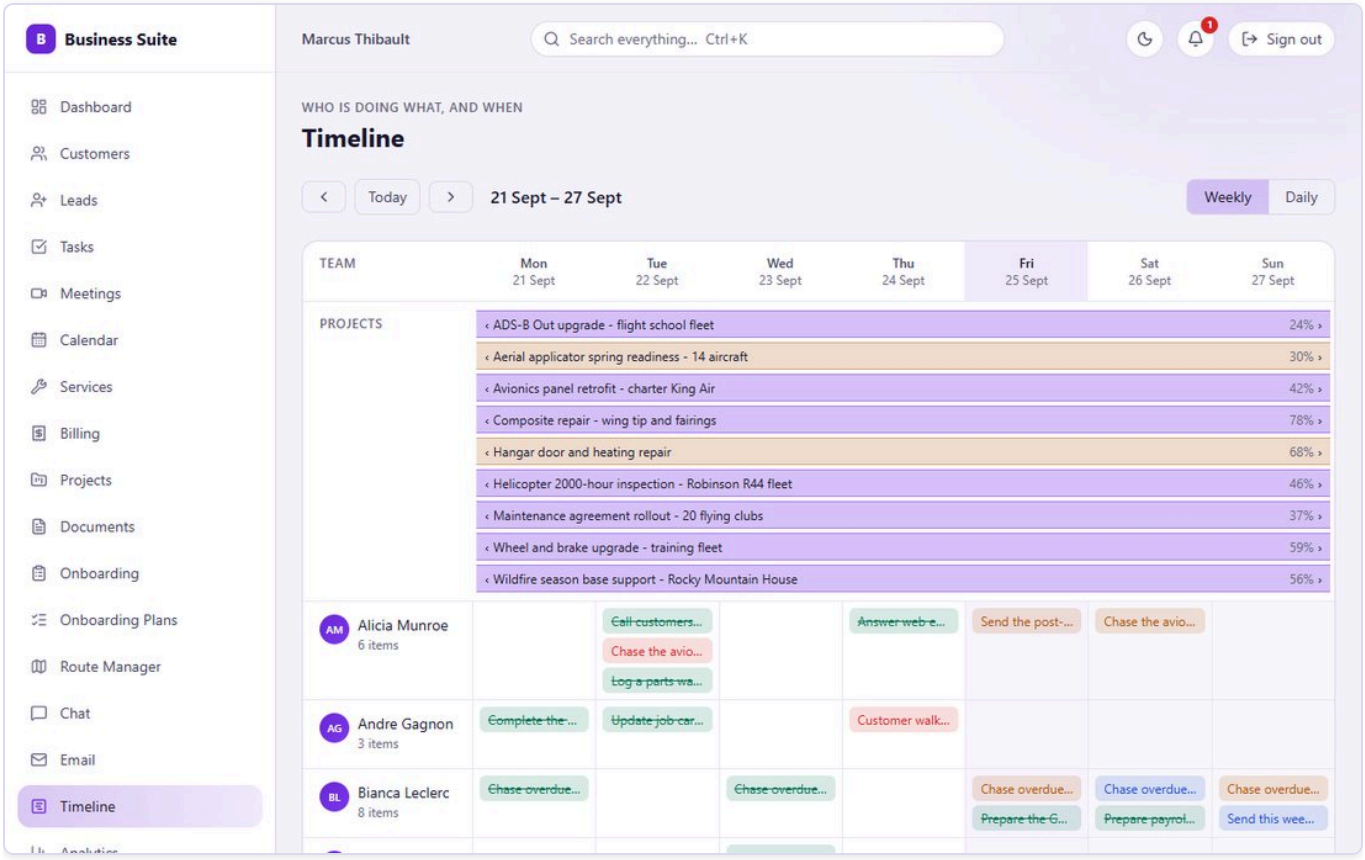
Working through it

- Press **Mark complete** on each step (or **Undo** if it was a mistake). Progress is steps done out of steps total, and it becomes **Completed** by itself when all are done.
- **Pause** (and Resume) or **Abandon** an onboarding. Statuses: Not started, In progress, Completed, Paused, Abandoned. Steps cannot be completed while it is Paused or Abandoned.

Plans (Owner, Manager and HR)

Under **Onboarding Plans** an Owner, Manager or HR person creates a plan: a name, a tier (Starter, Professional, Enterprise), the estimated days, and whether it is active. Each step has a name, order, type (Welcome, Account setup, Data import, Feature configuration, Team setup, Integration, Training, Success check), estimated minutes, whether it is required, help links and a checklist. A plan or step that is in use cannot be deleted, and checklist items are locked while customers are part-way through the plan.

13 Timeline

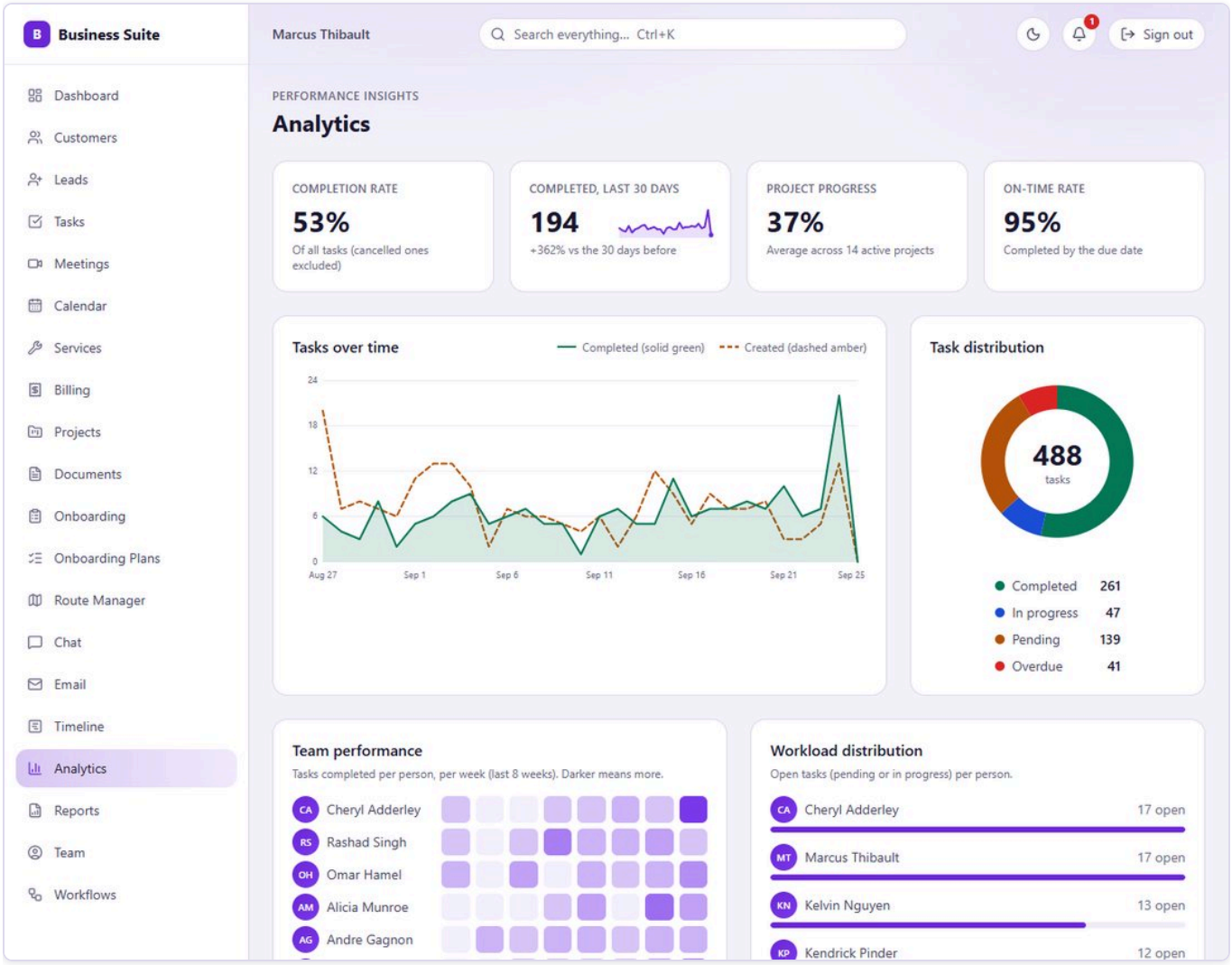


One lane per person, one column per day.

Timeline shows who is doing what. Tasks sit on their due day, meetings at their start time, and live projects (Planning, In progress, On hold) run as bars across the top with a percent complete. Switch between **Weekly** and **Daily**, step with the arrows, or press **Today**. Colours show meetings, pending, in-progress and done tasks, and overdue ones. It shows everyone's tasks and is read-only.

> **A FIELD TECHNICIAN SEES A DIFFERENT TIMELINE.**
> Instead of the team grid above, they see their own route and stops for the current shift as an ordered list, with a **Routes / Projects** toggle that only appears when they have both today — otherwise whichever one they have is shown with no toggle.

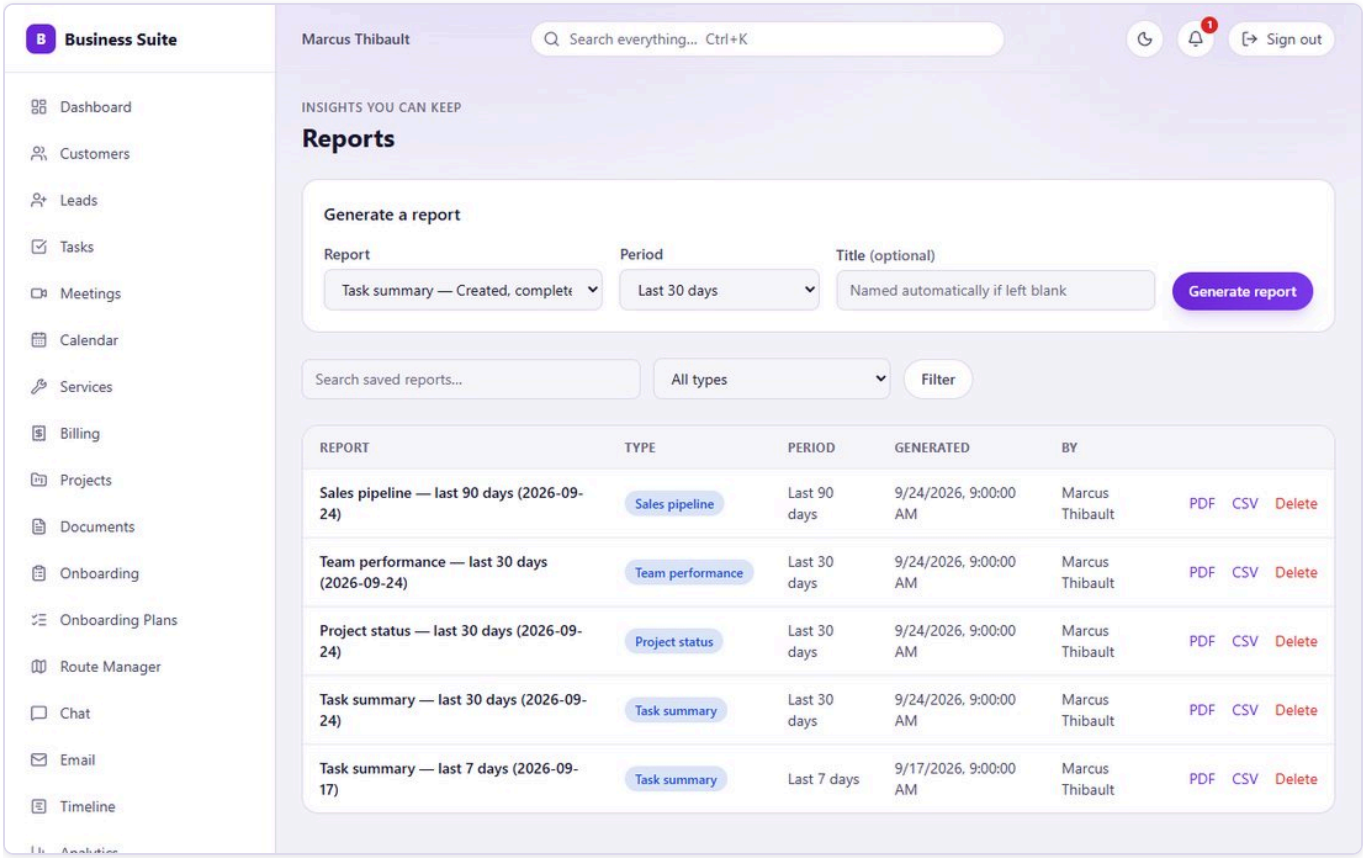
14 Analytics



Charts on the work of the team.

- Cards: **Completion rate** (cancelled tasks are left out), **Completed in the last 30 days** with the trend against the 30 days before, average **Project progress** and the **On-time rate**.
- **Tasks over time** (created and completed each day for 30 days), **Task distribution** (completed, in progress, pending, overdue), **Team performance** (tasks completed per person per week for 8 weeks) and **Workload** (open tasks per person, top 10).

15 Reports

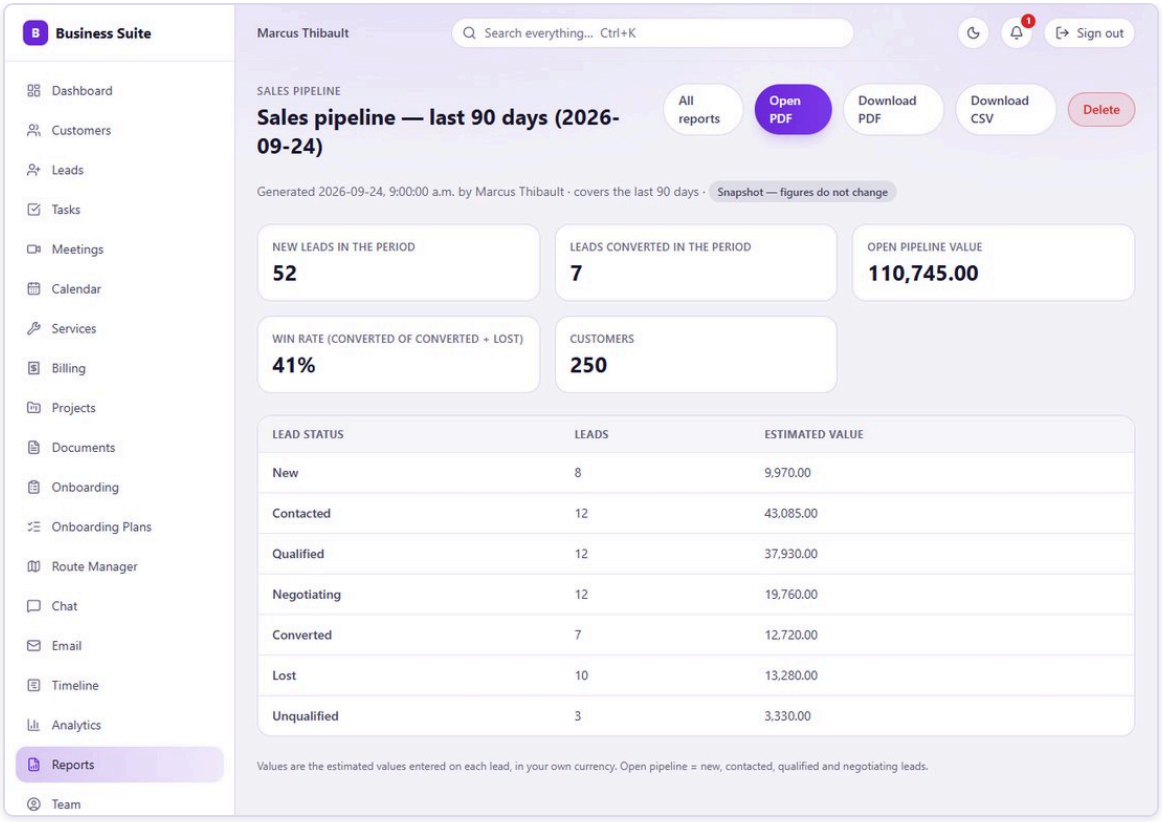


Generate a report and see the saved ones.

Pick a **Report** and a **Period** (last 7, 30 or 90 days), optionally give it a title, and press generate.

REPORT	WHAT IT SHOWS
Task summary	Tasks created, completed, open and overdue, per person.
Project status	Every active project with progress and days late or left.
Team performance	Completions, completion rate and on-time rate per member.
Sales pipeline	Leads by status, open pipeline value and win rate.

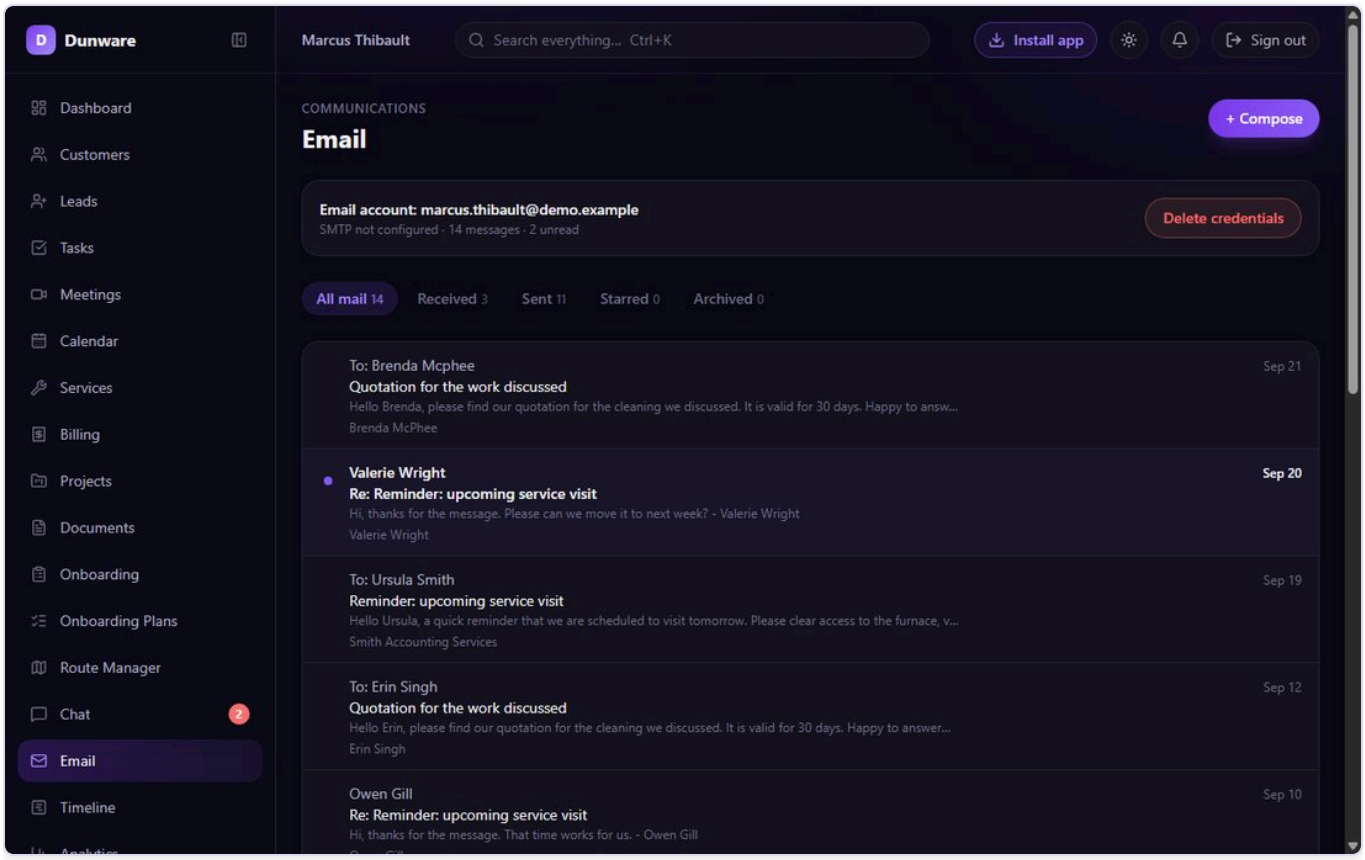
Each report is **saved as a snapshot**: its figures never change later, so you can compare months. Open one to **Open PDF**, **Download PDF**, **Download CSV** (for a spreadsheet) or delete it. The list can be searched and filtered by type.



A saved report.

16 Email and chat

Email

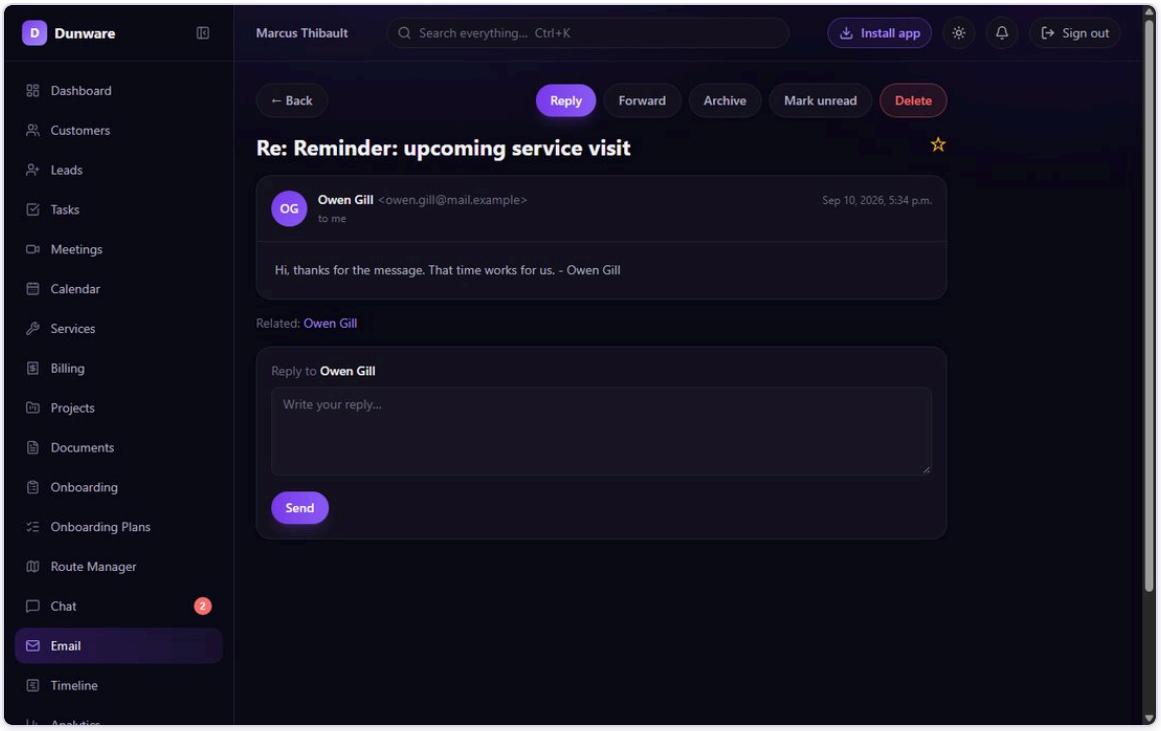


Your mailbox: unread mail in bold, starred mail marked, and a tab for each folder.

Email sends messages from Dunware and keeps a copy of everything you send and receive there, filed under the customer or lead it is about. **It is not a full inbox**: replies from customers arrive in your normal email program.

- The tabs at the top are **All mail**, **Received**, **Sent**, **Starred** and **Archived**. Unread mail is in bold with a dot.
- Press **Compose** to write a new message. **To** and **Cc** take several addresses separated by commas. If an address matches a customer or lead, the message is linked to them and shows on their page.

Reading a message



An open message, with Reply, Forward, Archive and the reply box.

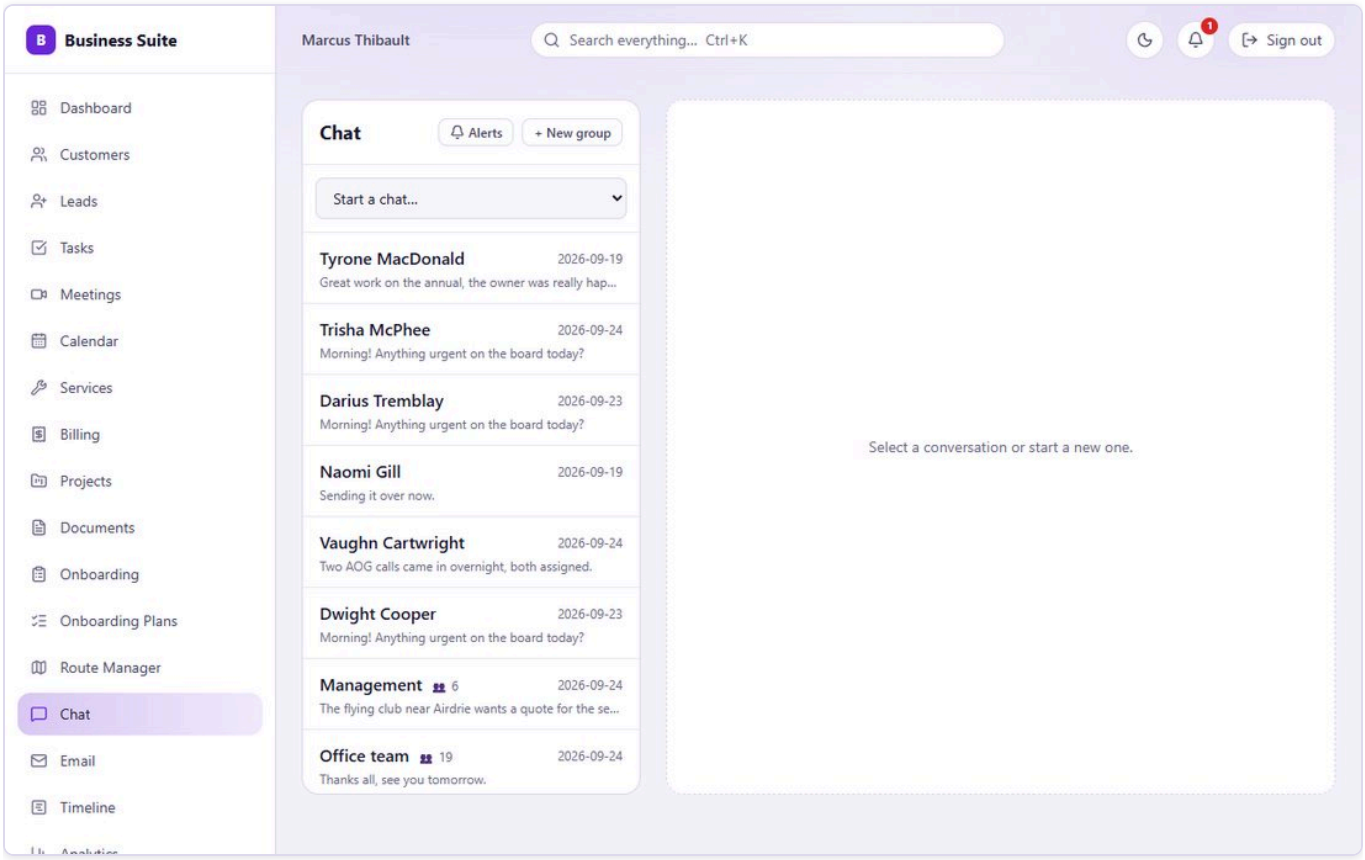
A message opens like a normal email: who it is from, who it went to, the date, and the text (web addresses are links). Along the top:

- **Reply** answers the sender, with their message quoted underneath. **Reply all** also copies everyone else on it (it only appears when there is someone else). **Forward** sends it on to someone new. All three open the compose form already filled in.
- **Archive** moves it out of your main list into the **Archived** tab (**Move to inbox** brings it back). **Mark unread** puts a received message back in bold. The star beside the subject marks it for later.
- At the bottom, the **Reply** box lets you answer without leaving the page.
- **Delete** removes the message from Dunware for good.
- Sending needs the mail server set up by your Owner (Settings, Email) — unless you've connected your own, next. Until a server is set up a message is saved with the status **Failed** and you are told it was not sent; open it and press **Send again** once the settings are right. The same happens if the mail server refuses it.
- Invoices, reminders and automation emails always use the shared company server, never a personal one.
- The email page also shows your email account with a **Delete credentials** button. That removes the account **and every message in it**, so do not press it unless you mean to.

Sending as yourself instead of the shared account

On **My profile**, the **My email account** card lets you connect your own mail account — handy if you'd rather your customers see your own address, not the shared one. Fill in your address, the mail server, port, username and password (for Gmail, an **app password**, not your normal one) and save. From then on, Compose sends through your own account automatically; leave the server, username and password blank (or press **Clear**) to go back to the shared one. Your password is stored encrypted and can't be shown again, only replaced.

Chat



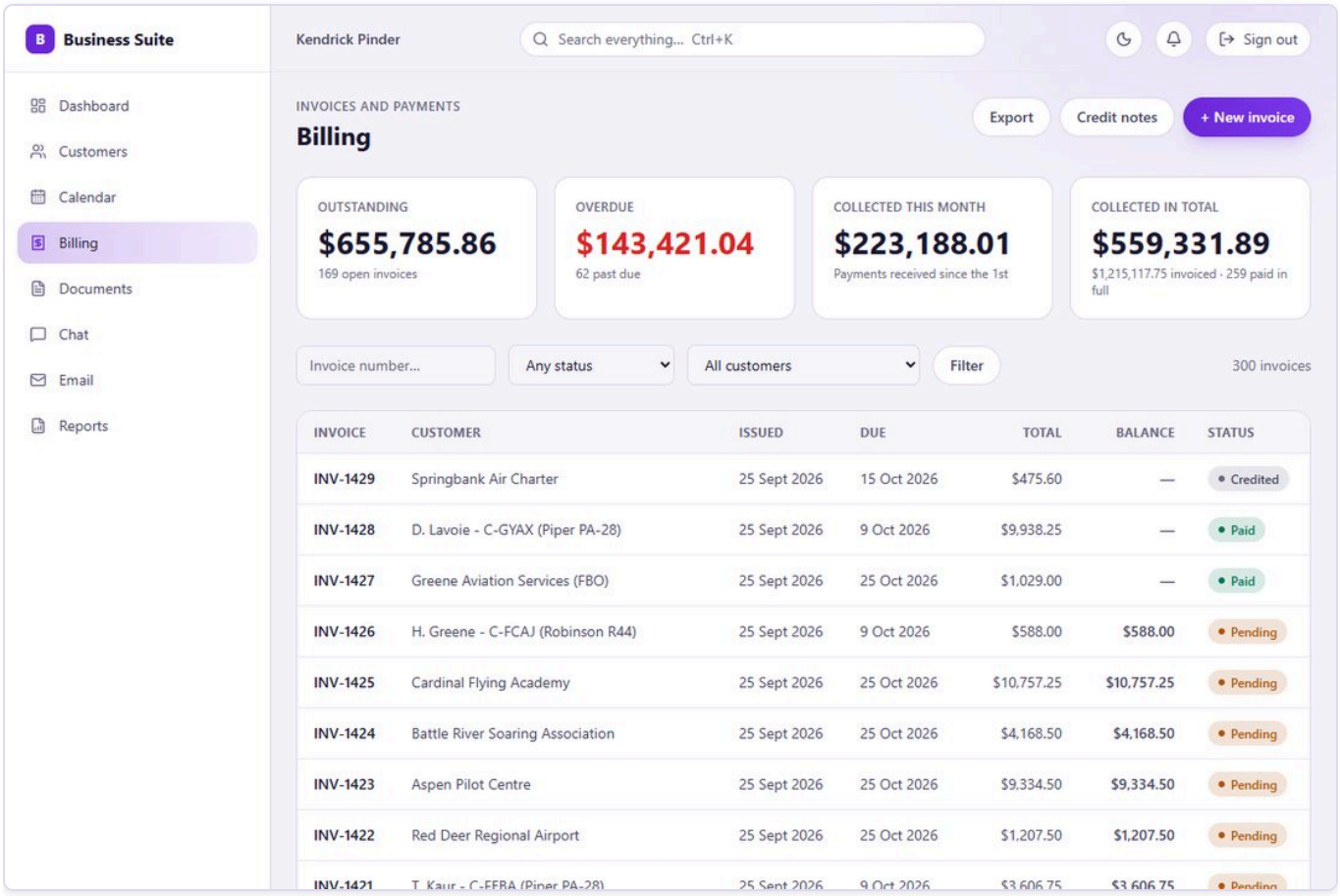
Conversations and groups.

- Start a one-to-one chat by choosing a name in the **Start a chat** list: the conversation opens straight away. Or press **+ New group** to make a group with a name and members. Members can be added, removed, and the group renamed; people can leave.
- Your own messages can be edited or deleted; anyone can add an emoji reaction.
- A red number on Chat in the menu counts unread messages. Under **Alerts** you choose how this device is told about new messages (see the technician chapter).
- Messages from an automation are marked **Automation**.

17 Billing: estimates, quotes, invoices, payments, refunds and credit notes

Billing is where you give a customer a ballpark figure or a firm price, invoice them, record and take payments, give money back, issue credit notes and hand your accountant a file for QuickBooks or Xero. Money is always calculated to the cent.

Owner Manager Billing / accounts by default.



Billing: totals up top, then every invoice with its status.

Estimates: a ballpark figure before the work starts

An estimate is not a promise of a final price — it is a figure you give a customer to decide whether to go ahead. Open **Billing, then Estimates**.

1. Press **+ New estimate**. Choose the customer, add lines the same way as an invoice, and choose whether your prices already **include** tax, have it **added**, or **no tax applies** — this is printed on the estimate so nobody has to guess.
2. Optionally set how long it stays **valid for**.

3. Save, then press **Mark as sent** once it has gone to the customer. When they answer, press **Mark approved** or **Mark declined** — this just records their answer, it is not a signed acceptance.

An approved (or still open) estimate can go two ways:

- **Lock it in as a quote** — turns it into a binding, time-limited price (below). The estimate itself is never changed; it is kept exactly as issued and marked **Converted**, with a link to the quote it became.
- **Convert straight to an invoice** — skips the quote step, for simple jobs. If the real total comes out well over the estimate (more than the percentage set in Settings, 10% by default), Dunware stops and shows you the two figures side by side; press the button a second time to confirm the overage and go ahead. The estimate is then marked **Converted** with a link to the invoice.

> **AN ESTIMATE EXPIRES ON ITS OWN**
> Once its valid-until date has passed, an open estimate changes to **Expired** by itself — nothing more to do.

Quotes: a firm price, for a set time

A quote is a binding offer at a fixed price, good until a date you choose. It either starts from an estimate (above) or is made on its own for a customer. Open **Billing, then Quotes**.

1. Press **+ New quote** (or **Lock in as a quote** from an estimate's page). Choose the customer, the lines, the tax treatment, and how long the price is **valid for** — this is required, since a quote without an expiry is not really firm.
2. Press **Mark as sent**, and once the customer answers, **Mark accepted** (you can note who accepted it) or **Mark declined**.
3. Once accepted, press **Convert to invoice** and choose the due date. The invoice copies the quote's lines and total exactly — a quote already promised a price, so nothing is re-priced at this step.

A quote past its valid-until date, never accepted, changes to **Expired** by itself, the same as an estimate.

> **EITHER ONE, A REAL PDF**
> Both estimates and quotes have their own PDF on your letterhead, with the tax treatment printed and a one-line note explaining what kind of document it is (non-binding, or a firm price good until a date).

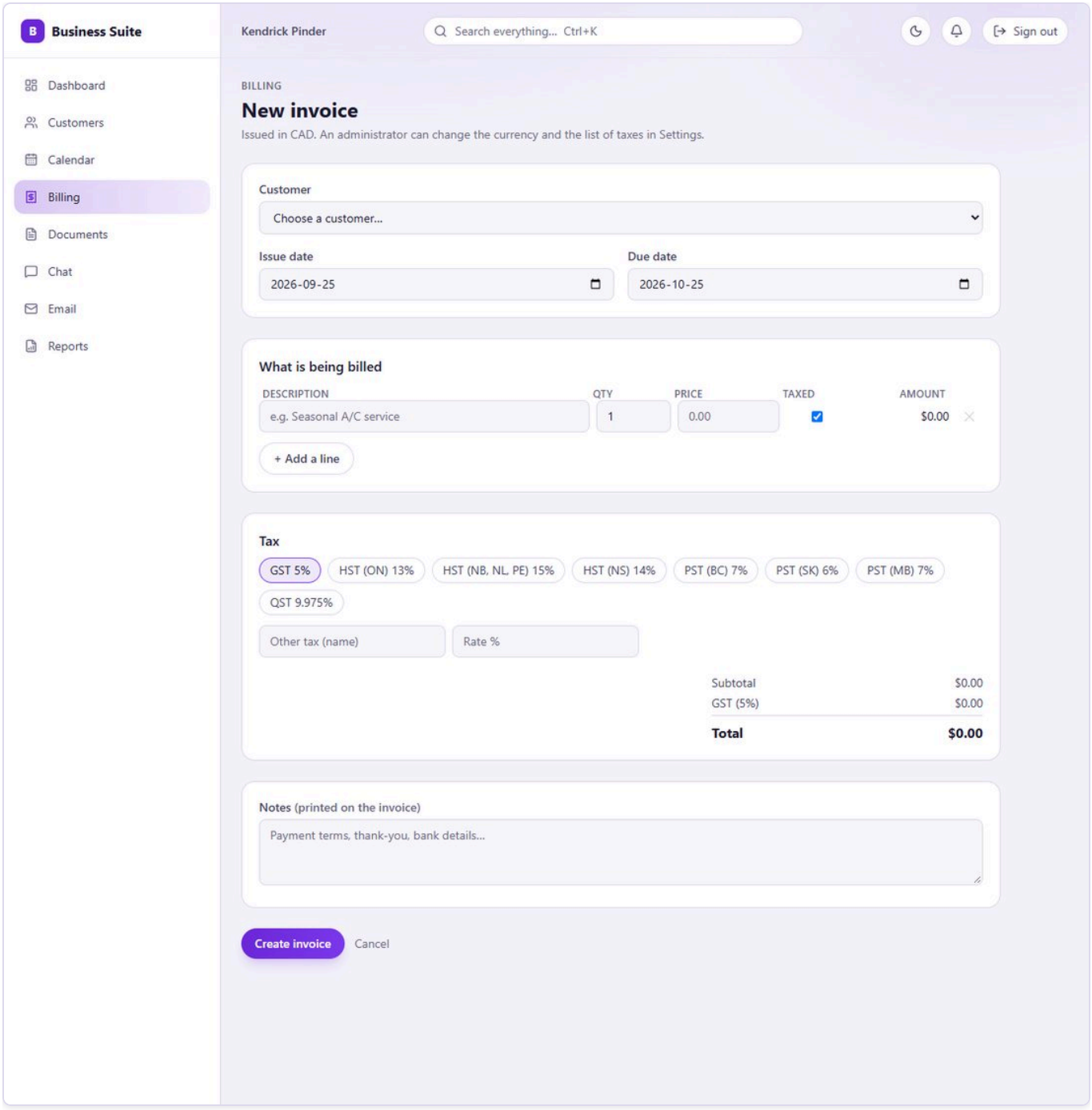
Invoice statuses

STATUS	MEANING
Pending	Issued, nothing paid yet.
Partial	Some paid, some still owed.
Paid	Nothing owed.
Overdue	Past its due date and still owed. Dunware marks this itself each day.

Credited	Fully cancelled out by credit notes.
Canceled	Cancelled, no longer owed.

Creating an invoice

1. In Billing press **New invoice**.
2. Choose the customer, the issue and due dates, and add lines (a description, a quantity and a price each). A line can be marked **not taxable**.
3. Tick the taxes that apply. Each tax is worked out and shown on its own line (for example GST and PST separately). The totals update as you type.
4. Save. The invoice gets its number automatically.

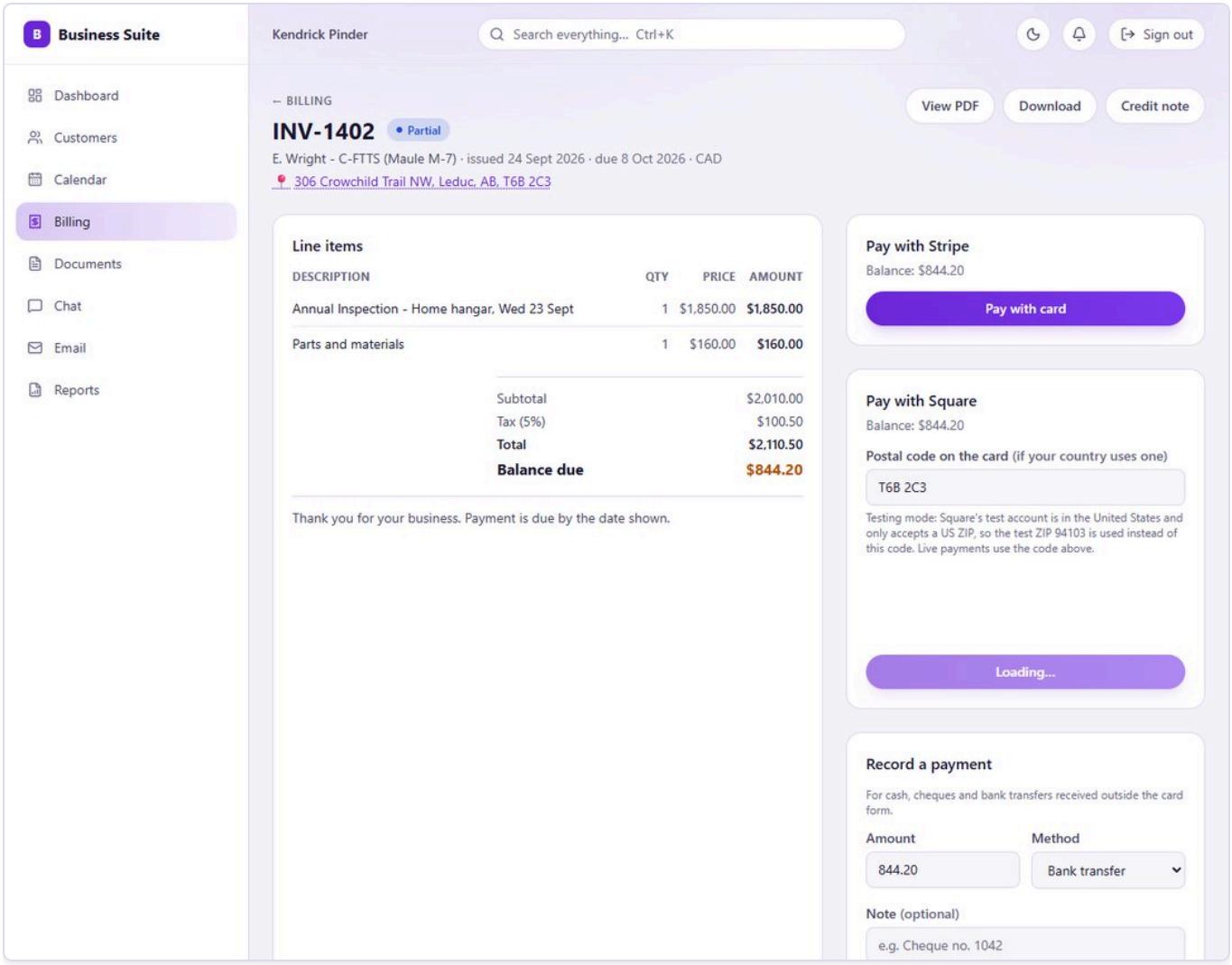


A new invoice with lines, taxes and live totals.

TAXES

The list of taxes (GST, PST, HST, QST and so on, with their rates) is kept in Settings, where the Owner can change it and choose which are ticked automatically. A customer marked **tax exempt** starts with no taxes. Your own tax registration number (Settings, Company) and the customer's tax number are printed on the invoice.

The invoice page



An invoice: lines, taxes, payments, refunds and credits.

From here you can download the **PDF** (with your logo and letterhead), record a payment, take a card payment, refund a payment, or issue a credit note.

Recording and taking payments

- **Record a payment** you received another way (cash, cheque, bank transfer, card machine): enter the amount, the method and a reference. The status updates by itself.
- **Card payments** appear when your Owner has connected Stripe or Square (Settings). The customer's card is charged and the payment is recorded automatically.
- You cannot record more than what is owed.

Any payment can be printed or downloaded as a **receipt** on your letterhead — it is not a separate record, just a confirmation view of the payment already on the invoice.

Sending a customer a link to pay

Open an invoice and press **Get payment link**. Dunware makes a page on Stripe's or Square's own site (whichever you have set up; Stripe is used first if you have both) where the customer enters their card, with no

need to sign in to Dunware. Copy the link, or press **Email invoice** to send the customer the amount, due date and this link in one message. The invoice updates itself once the customer pays.

- A Stripe link stops working after 24 hours; press **Get a fresh link** for a new one. A Square link keeps working.
- **Email invoice** needs email set up in Settings (the same as any other email Dunware sends). It works even with no payment service connected — it just leaves the pay link out.
- A recurring plan's invoices (below) include this pay link automatically, when **Email the customer a notice** is ticked on the plan.

Refunds

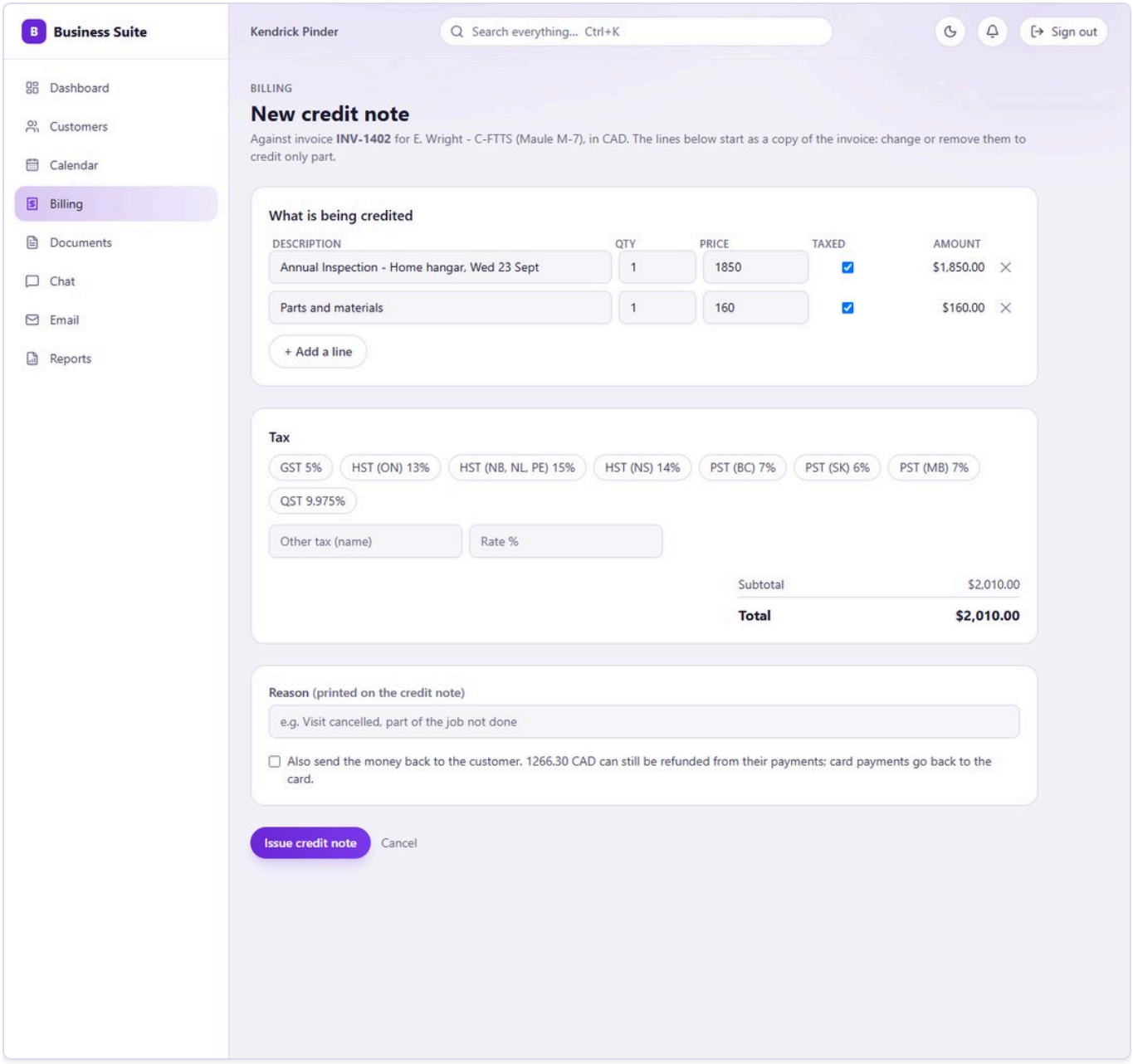
A refund gives money back on a payment that was already made.

1. Open the invoice and find the payment. Press **Refund**.
2. Enter the amount (up to what is left of that payment) and a reason.
3. For a card payment made through Stripe or Square, Dunware asks the card company to return the money and shows the refund as **Pending** until they confirm, then **Succeeded** (or **Failed**). For cash, cheque or bank transfer, you hand the money back yourself and Dunware records it.

> **BE CAREFUL**
> A refund cannot be undone, and one payment cannot be refunded for more than it was. Refunds are also recorded when you refund from inside Stripe or Square directly.

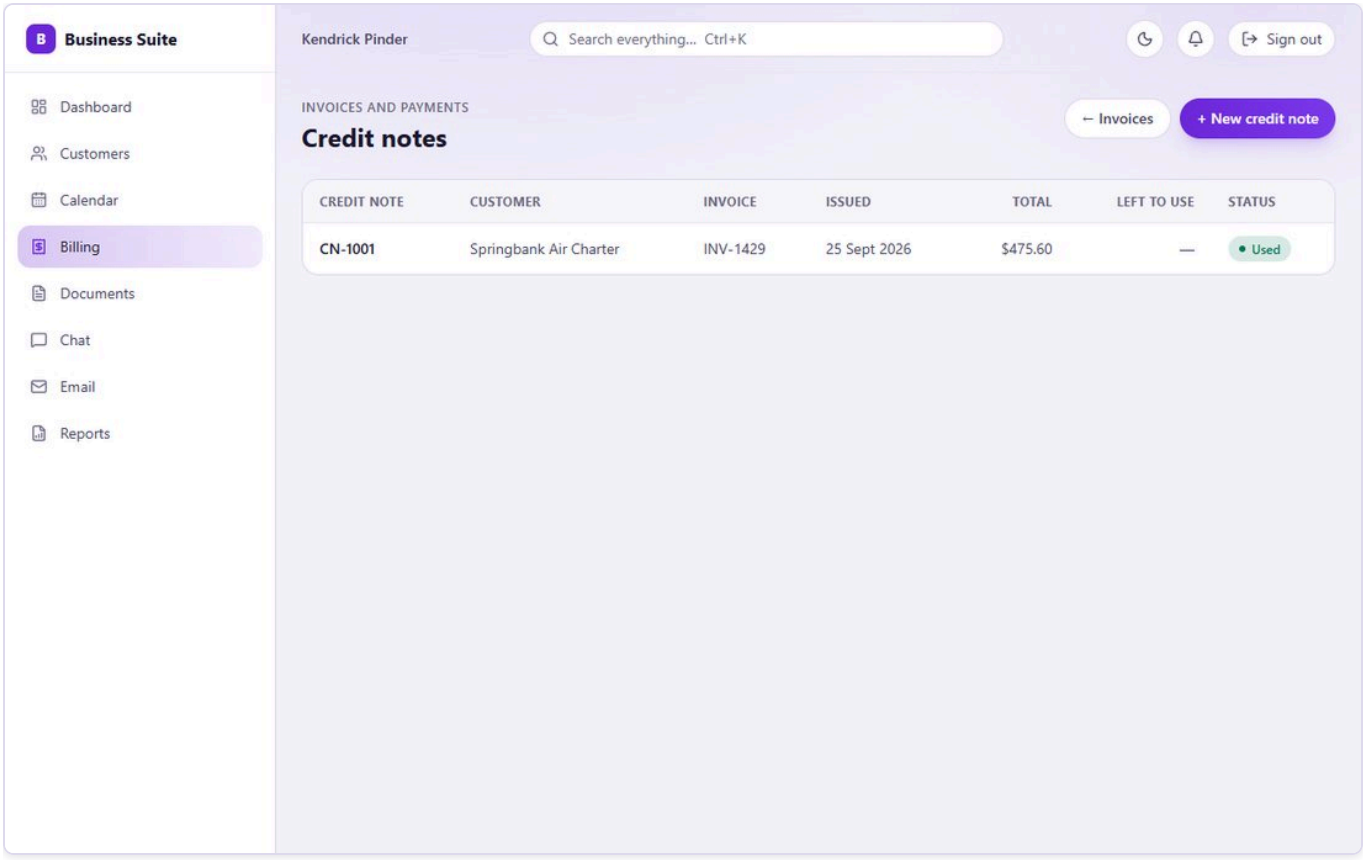
Credit notes

A credit note is a document that reduces what a customer owes (for example for a cancelled job or a price correction). It is numbered `CN-1001` and up.



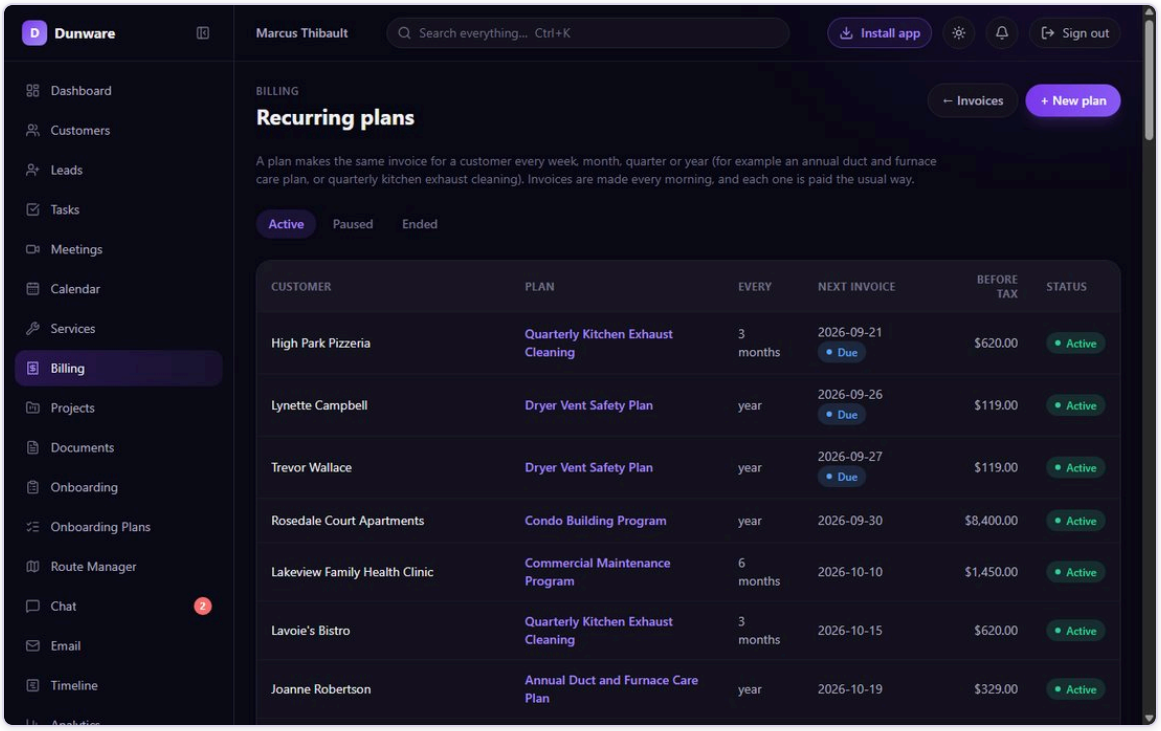
Issuing a credit note from an invoice.

- **Issue** one from an invoice (or on its own for a customer), with lines and taxes like an invoice.
- If the invoice was already paid, choose whether to **refund the money** at the same time. Otherwise the credit stays on the customer's account.
- **Apply** unused credit to a customer's other invoices, or **pay it out** as a refund later.
- **Void** a credit note issued by mistake (only when it has not been used).
- Each credit note has its own PDF.



All credit notes, with what is left to use.

Recurring plans



Recurring plans: what is billed, how often, and when the next invoice is made.

For work you bill on a schedule (an annual duct and furnace care plan, quarterly kitchen exhaust cleaning, a monthly building program), make a **recurring plan** once and Dunware makes each invoice for you. Open **Billing, then Recurring plans**.

1. Press **+ New plan**. Choose the customer, give the plan a name (it is printed on every invoice), choose **how often** (every week, 2 weeks, month, 3 months, 6 months or year) and the **first invoice date**.
2. Fill in what is billed each period, exactly as on a normal invoice, and choose the taxes. Set the **payment terms** (days until due) and, if the plan has a finish, the last invoice date.
3. Tick **Email the customer a notice** to send them the amount and due date (needs email set up), and **Add a visit request to the queue** if each period also needs a visit; dispatch then schedules it like any other request.
4. Press **Create plan**.

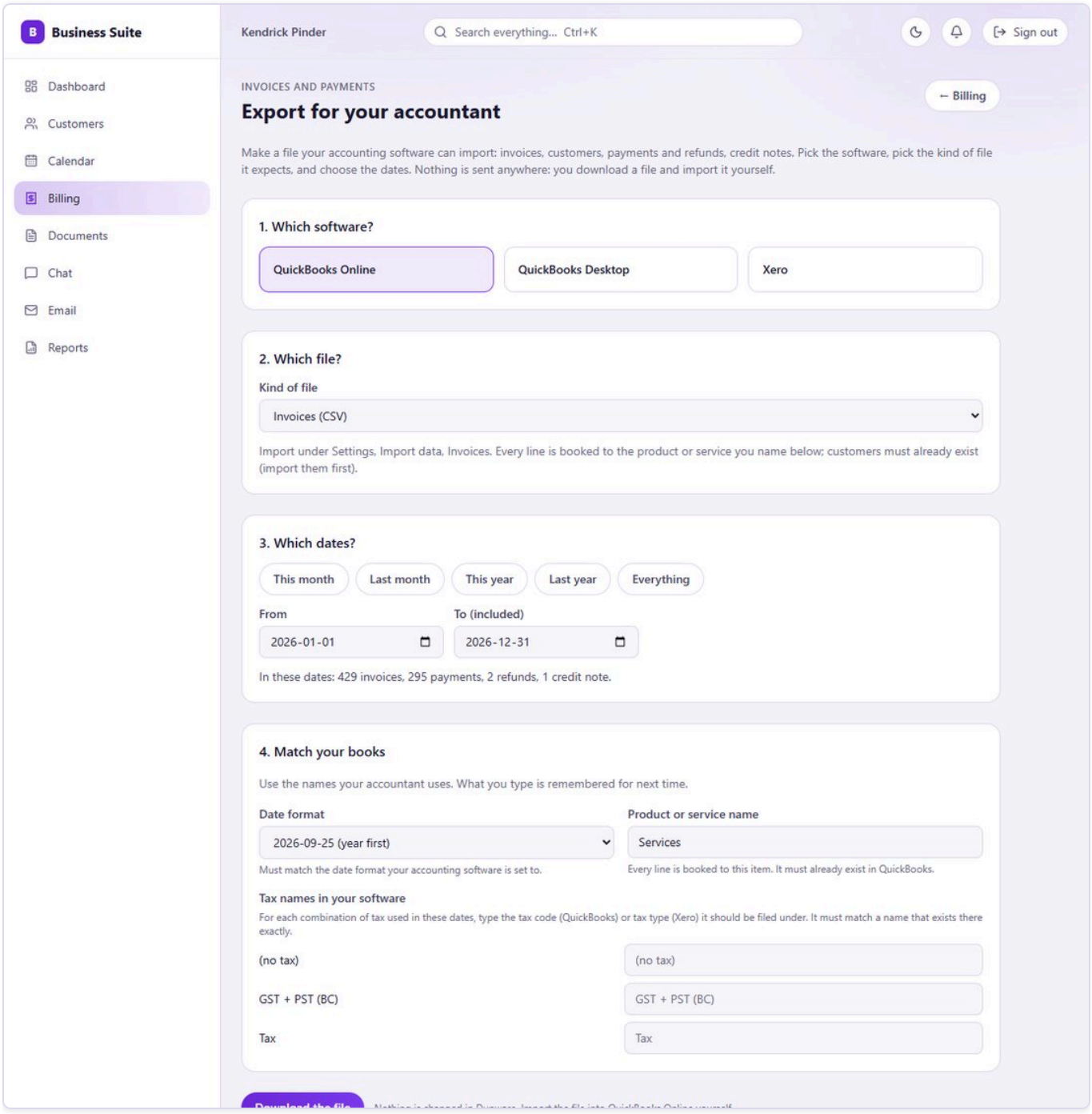
- Every morning Dunware makes the invoices that are due, dated for their period, and tells the customer's account owner. If the computer was off for a while, it catches up one invoice per missed period. A period can never be invoiced twice.
- Each invoice is then paid in the usual way (card, transfer, cheque). **Nothing is charged to a card automatically.**
- The tax rate comes from Settings each time, so a change of rate is followed. A tax-exempt customer is never charged tax.
- On the plan's page: **Invoice now** makes the next period straight away, **Pause** and **Resume** stop and restart it (periods missed while paused are invoiced on resume), **End plan** finishes it, and **Change** edits the amounts, terms, dates and options. The customer, frequency and first date cannot be changed; end the plan and make a new one instead. **Delete** removes the plan and its history but keeps the invoices already made.
- The **History** table lists every period with its invoice, total, payment status and a note (for example "Customer emailed" or "Visit request added"). If an invoice cannot be made, the plan stays due, the account owner is told, and it is tried again the next morning.

Exporting to QuickBooks or Xero

Dunware does not connect to your accounting software. It makes files in the format that software expects, so your accountant or you can import them. Nothing is sent anywhere.

1. Open **Billing, then Export**.
2. Choose **QuickBooks Online**, **QuickBooks Desktop** or **Xero**, then the **format** from that program's list:
    - QuickBooks Online: Customers (CSV), Invoices (CSV), Credit memos (CSV), Estimates and quotes (CSV), Payments and refunds (bank upload CSV).
    - QuickBooks Desktop: Customers (IIF), Invoices/credit memos/payments (IIF), and Estimates and quotes (IIF).
    - Xero: Contacts (CSV), Sales invoices (CSV), Payments and refunds (bank statement CSV), a Credit notes list and an Estimates and quotes list, both to enter by hand.

3. Pick the dates (this month, last month, this year, last year, or everything) and the date style your program uses.
4. Fill in the names your accountant uses for your income account, receivables account and each tax (they are remembered for next time), then press **Download**.



Choose the program, the format and the dates.

ESTIMATES AND QUOTES, ONE FILE

QuickBooks has only one concept for both ("Estimate"), and Xero has only one ("Quote"). Dunware's estimates and quotes both go into that one file; the document's own number (`EST-...` or `QT-...`) tells you which is which. Anything already converted into an invoice is left out of this file, since it is exported as that invoice instead. QuickBooks Online cannot import estimates, credit memos or payments from a file by itself, and Xero cannot import quotes or sales credit notes — those files are for an import tool (such as SaasAnt) or for keying in by hand; QuickBooks Desktop's IIF format is the one place estimates genuinely import directly.

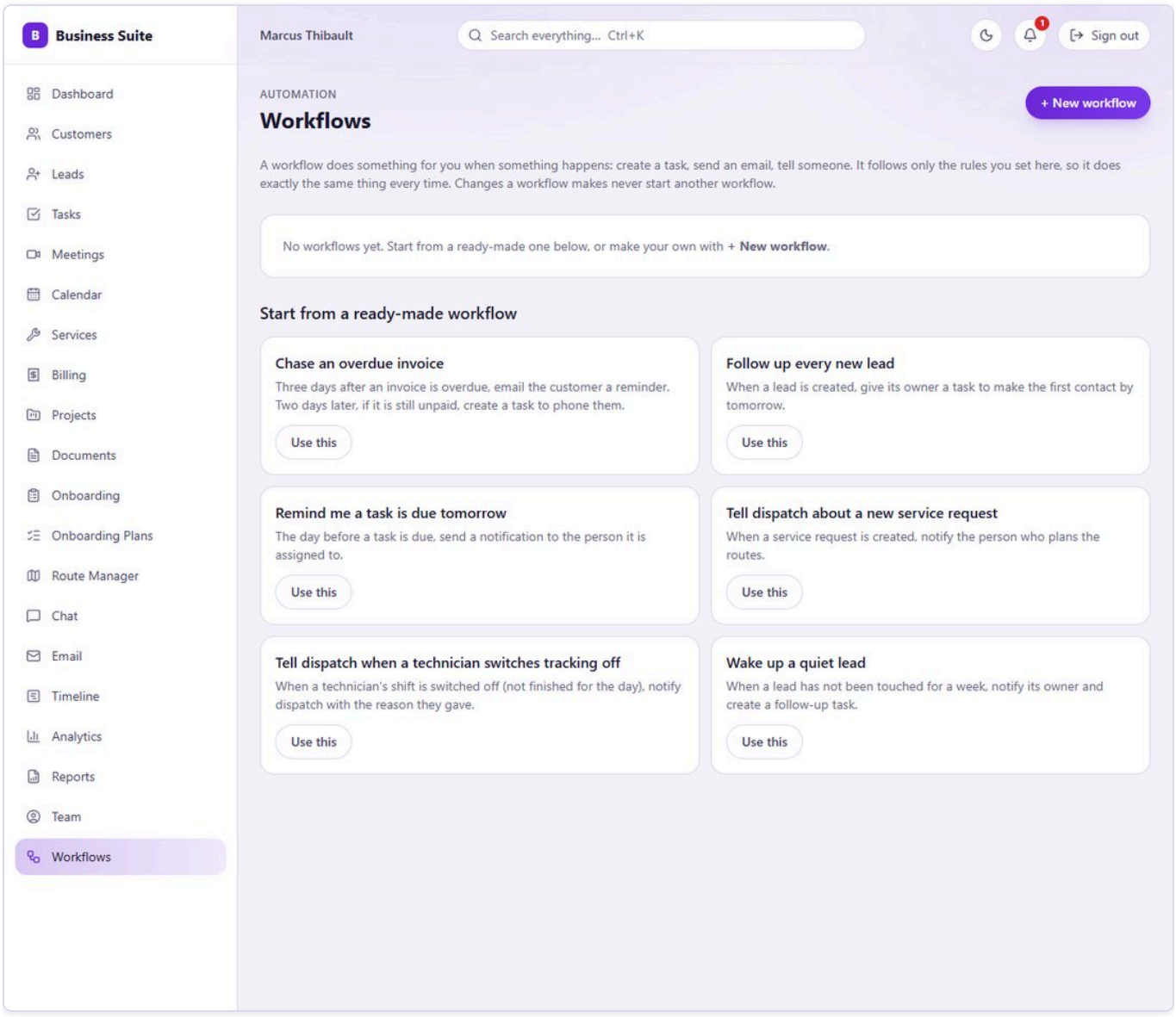
ASK YOUR ACCOUNTANT TO CHECK THE FIRST FILE

The files follow each program's published import layout, but they have not been test-imported into a live QuickBooks or Xero here. Import the first one into a test company, or send it to your accountant to confirm your account and tax names match before relying on it.

18 Workflows: let Dunware do the routine follow-ups

A workflow is a rule you write once: *when this happens, and only if this is true, do these things*. For example: "When an invoice has been overdue for 3 days, email the customer, then wait 4 days and create a task for Accounts." Workflows follow exactly the rules you set. There is no guessing and no artificial intelligence.

Owner Manager by default.



The list: switched on or off, how often each has run, and when it last ran.

The three parts

PART	WHAT YOU CHOOSE

When (trigger)	A record is **created** or **changes status** (a task, lead, customer, invoice, estimate, quote, service request, meeting or technician shift; optionally "only when it becomes" a chosen status). **Time passes:** an invoice is overdue by N days, a task is due within N days or overdue N days, a lead has not been touched for N days. **A schedule:** every day, or every week on a day, at a time on your company clock.
Only if (conditions)	Optional checks on the record ("priority is Urgent", "total is more than 500"). Match all of them, or any of them.
Then (steps, up to 10)	Each step is one action, with an optional wait before it (minutes, hours or days).

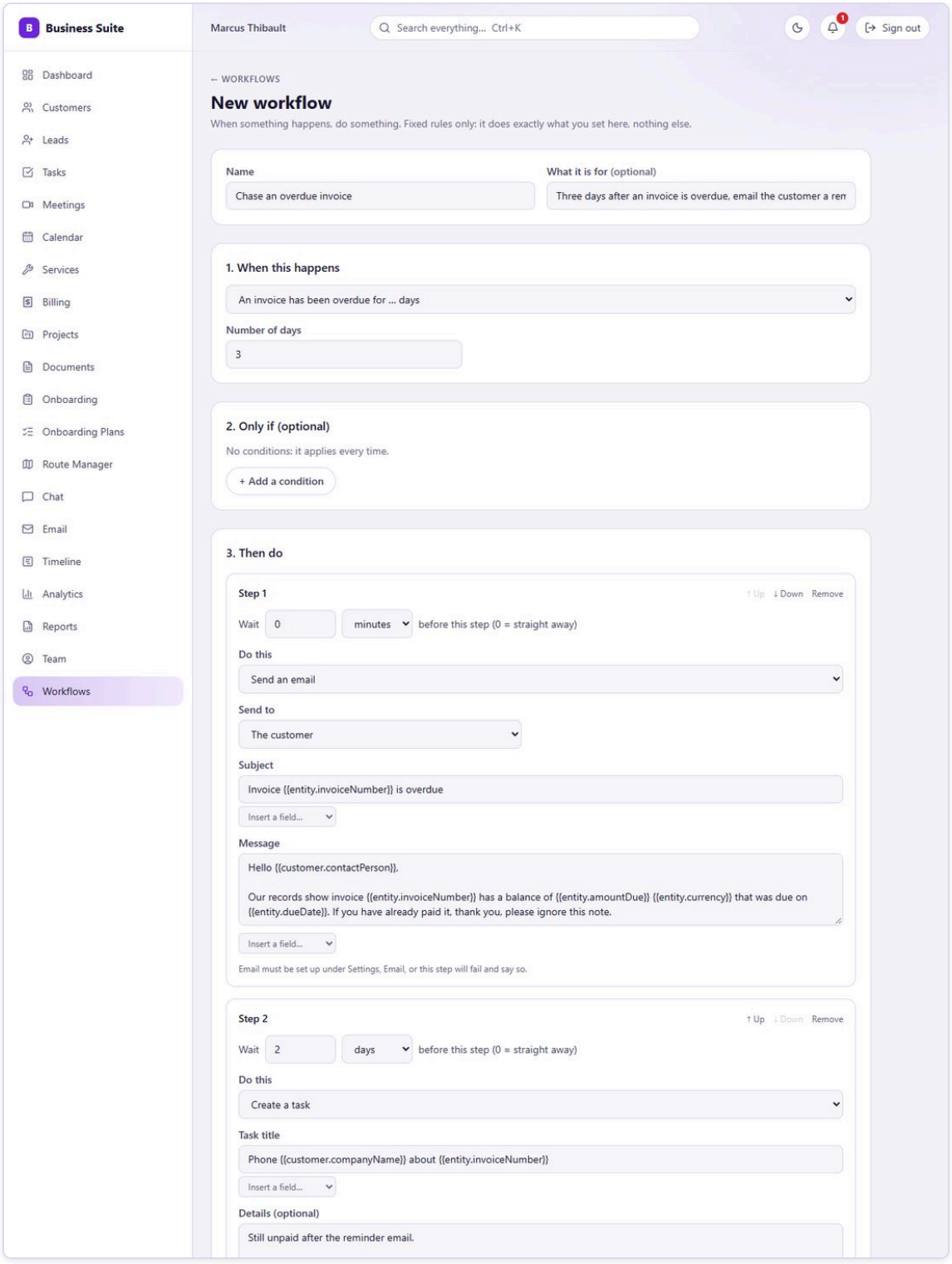
What a step can do

- **Create a task** with a title, details, due date (days from now), priority and who it is for.
- **Send an email** to the customer, the contact on the record, whoever owns the record, or a fixed address.
- **Send a notification** that appears in the person's bell at the top of the screen.
- **Change its status** or **assign it** to someone (tasks, leads and service requests).
- **Create a lead**, with company, contact, email, phone, source, priority and an optional owner.
- **Create a service request** for the customer on the record, at their first active service location, for a service type you pick, with an optional technician. (If the customer has no service location, the step fails and says so.)
- **Post a chat message** to a person or to a group you belong to. It arrives as an alert marked "Automation", sent as the person who made the workflow. If that person is also the recipient, it is sent as a bell notification instead.

Text in emails, tasks and messages can include fields from the record, such as `{{entity.title}}`, `{{customer.email}}` or `{{assignee.name}}`. Use the **Insert a field** list under a text box so you do not have to type them.

Building one

1. Open **Workflows** and press **New workflow**, or start from one of the six ready-made ones: *Chase an overdue invoice*, *Follow up every new lead*, *Remind me a task is due tomorrow*, *Tell dispatch about a new service request*, *Tell dispatch when a technician switches tracking off*, *Wake up a quiet lead*.
2. Give it a name. Choose the **When**, add any **Only if** checks, then add steps.
3. Read the **In plain words** box: it describes the workflow as a sentence. If the sentence is not what you meant, change it.
4. Use **Try it on a record**: pick a real record and Dunware shows what would happen. Nothing is sent or changed.
5. Leave **Switched on** ticked and press **Save workflow**.



The editor, opened from the "Chase an overdue invoice" template.

Safety built in

- **No loops.** Something a workflow changes never starts another workflow.
- **Once per record.** A workflow does its job once for each record (each invoice, each lead), not again and again.

- **Waits are remembered** even if the computer restarts, and after a wait Dunware checks the record still qualifies (a paid invoice stops its reminders). You can turn that check off, but it is recommended.
- **An emergency brake.** A workflow that starts more than 100 times in one hour is switched off automatically, with a note explaining why, and its creator is told in the bell. Fix what it was watching, then switch it back on.
- **Nothing deletes anything.** Workflows can create and change things, never delete.
- Every run keeps a plain log on the workflow's page: what started it, each step, and any step that failed and why (for example "email is not set up yet").

> **GOOD TO KNOW**
> A change of status is noticed from the moment a workflow is switched on: records that already had a status are treated as they are now, so "becomes Qualified" fires only for leads that become Qualified after that. Email steps need email set up under Settings.

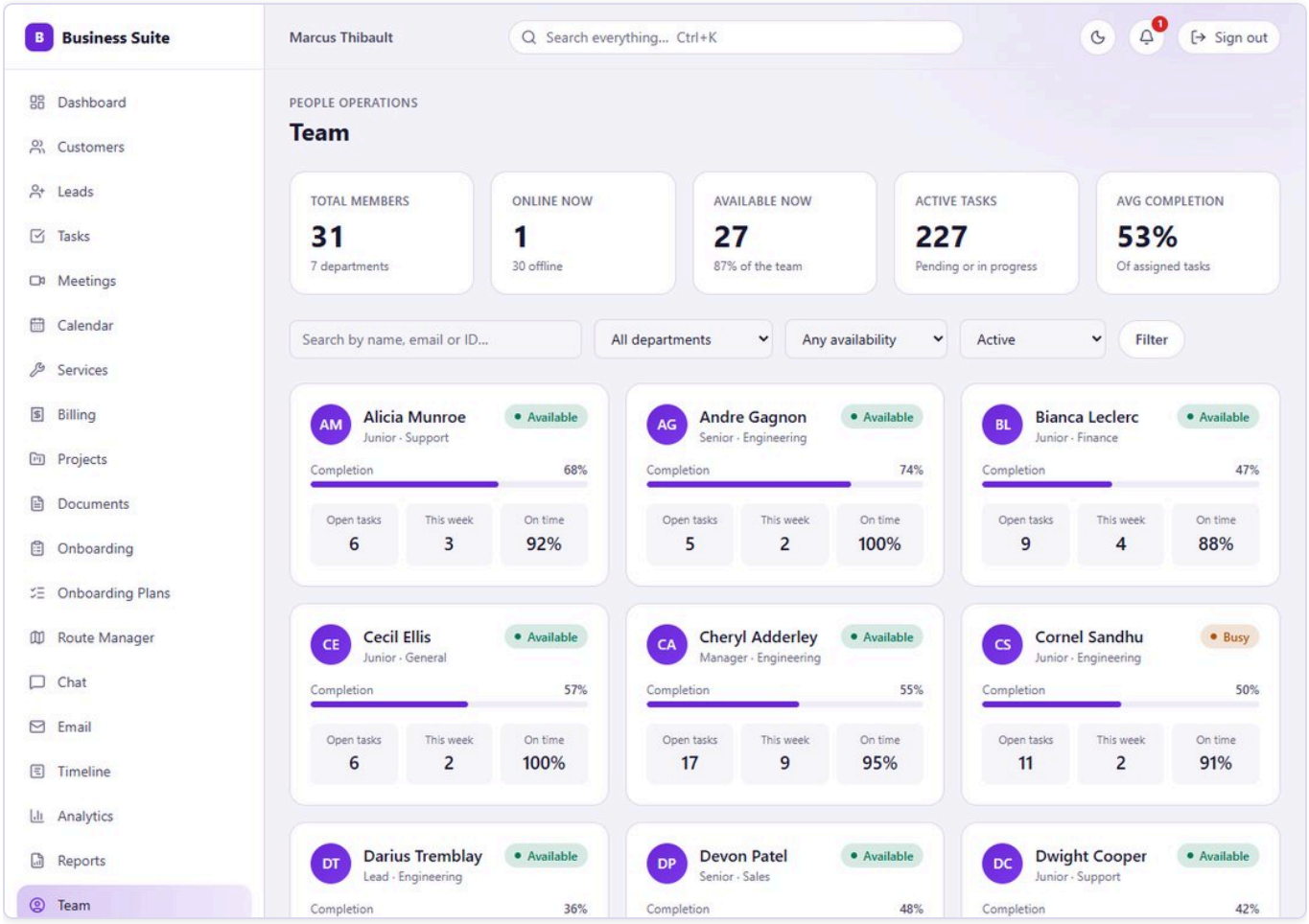
Other automatic reminders (no setup needed)

Separately from workflows, Dunware does some routine jobs on its own:

- Emails a person a day ahead about tasks due, and a few minutes ahead of meetings they organise or attend.
- Shows notifications in the bell for meetings and events within the hour and for tasks due today.
- Marks invoices overdue each day, tells you which just became overdue, warns of invoices due within three days, and reminds you at 1, 3, 7, 14 and 30 days overdue.
- Keeps an eye on customer health: a customer nobody has been in touch with, that pays late, or that has had no recent work gets a task and a notice for their owner, and long-quiet ones get a check-up task.
- Tidies old notifications and finished automation runs weekly, and closes technician shifts that ran past the end of the day and the depot.

19 Team, roles and who can see what

Dunware gives each person a **role**, and each role opens the areas that job needs. Owners can add or remove areas for any one person.



The team directory.

The roles

ROLE	WHAT THEY CAN OPEN
Owner	Everything, including Settings. Cannot be restricted. There is always at least one active Owner.
Manager	Everything except Settings (company, payments, email accounts).
Dispatcher / office admin	Customers, tasks and route planning (with the service catalog and the timeline).
Sales / CRM	Customers, leads and meetings, with documents for proposals and agreements, and tasks for follow-ups.

Billing / accounts	Invoices and payments, with the customers and documents they relate to, and reports.
HR	The team directory, onboarding and staff documents.
Field technician	Their route, tasks and the projects they work on.
General staff	Only the basics: dashboard, chat, email and calendar.

Everyone always has the Dashboard, Chat, Email and Calendar.

Who may change what inside an area

Being able to open an area is not the same as being able to change everything in it. Dunware gives the changes to the roles whose job it is:

WHAT	WHO
Plan routes: create and edit routes, stops, schedules, service requests, locations and service types (and delete them)	Owner, Manager, Dispatcher
Record the completion of a stop	Owner, Manager, Dispatcher, and the technician on that route while their shift is on
Change the services price list	Owner, Manager, Dispatcher
Onboarding plans and steps, and deleting an onboarding	Owner, Manager, HR
Delete a lead	Owner, Manager, Sales
Delete a customer or a project; change someone else's work log or note	Owner, Manager
Settings, adding and editing team members, resetting passwords and sign-in	Owner only

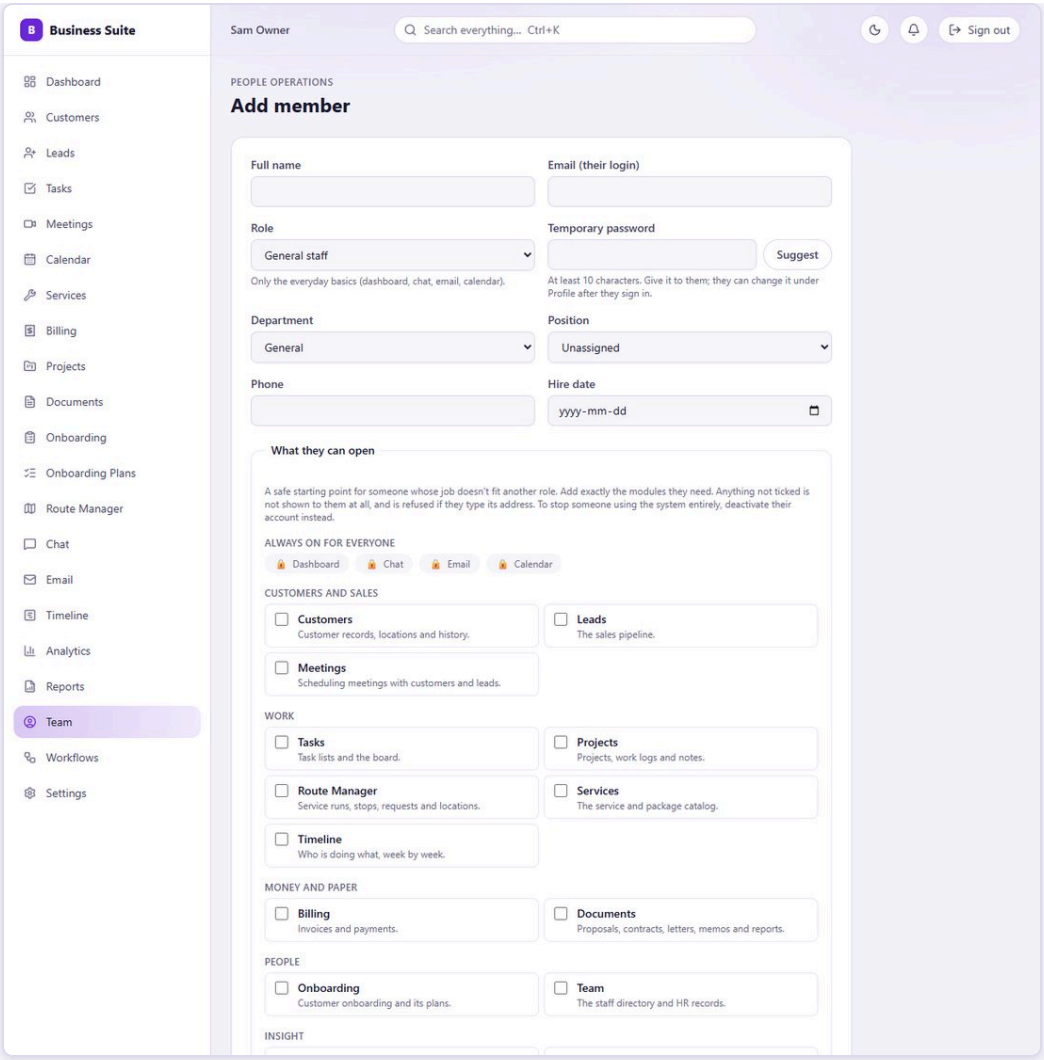
A person without the right sees a plain message ("Your role cannot do that...") and nothing changes. An Owner can always do all of it.

HIDDEN, AND ALSO REFUSED

> **HIDDEN, AND ALSO REFUSED**
> An area you cannot use is not shown in your menu, and typing its address does not get you in either. You are shown a "no access" page instead.

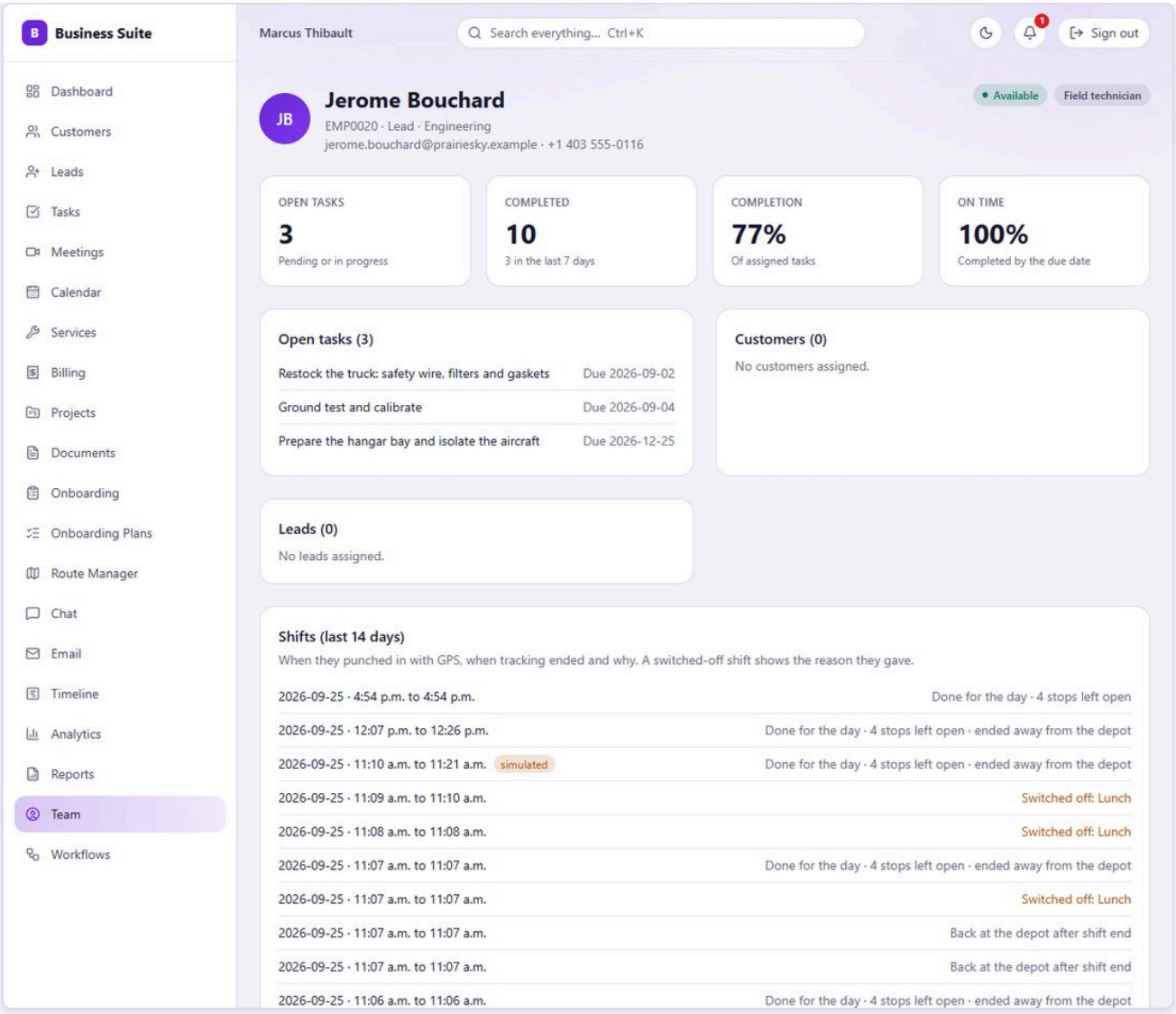
Adding a team member (Owner or Manager with Team access)

1. Open **TEAM** and press **Add member**.
2. Enter their name, their email (this is their login), a role and a temporary password of at least 10 characters (the **SUGGEST** button makes one). Add department, position, phone and hire date if you wish.
3. Under **WHAT THEY CAN OPEN**, tick extra areas beyond the role's defaults, if needed.
4. Save, then give them the email and temporary password. They should change the password in My profile.



Adding a member: role, temporary password and the areas they can open.

A team member's page



Workload numbers, what is assigned to them, and (for Owners) their access and sign-in controls.

It shows their open and completed tasks, completion and on-time rates, and the customers and leads assigned to them (only the parts you may see yourself). For field technicians it also lists their recent shifts with the reason for any that were switched off.

Owners can also:

- **EDIT**
  their details, role and areas. They are signed out so the change applies at once.
- **RESET PASSWORD**
  : set a new temporary password. They are signed out everywhere.
- **REMOVE FINGERPRINT / FACE SIGN-IN**
  if a phone was lost or stolen, and **Reset two-step sign-in** if they lost their authenticator phone and recovery codes. Both sign them out everywhere.
- **DEACTIVATE**

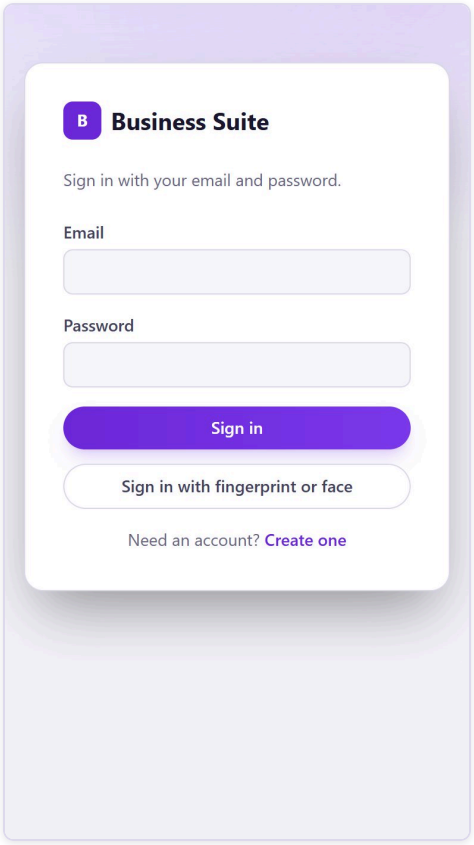
> someone who has left: they are signed out and cannot sign in, but their tasks, meetings and history stay. You can reactivate them later. You cannot deactivate yourself or the only Owner.

20 Field technician guide (on your phone)

This chapter is for people out on the road. Everything here works on a phone in the browser.

Signing in fast

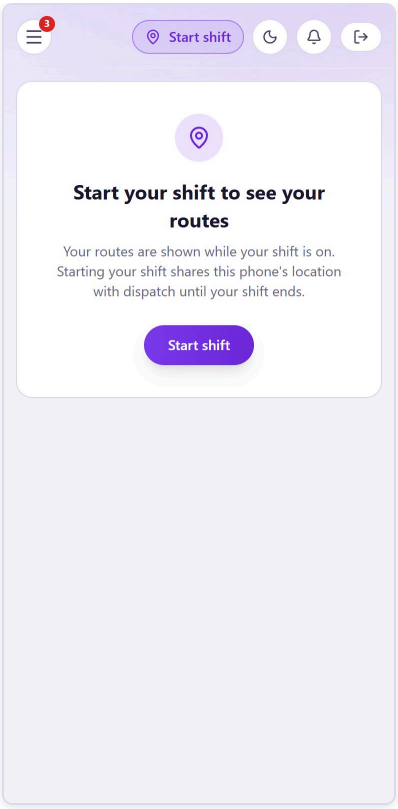
Add your phone for fingerprint or face sign-in once (see *Getting started and signing in safely*) and you never need to type your password again.



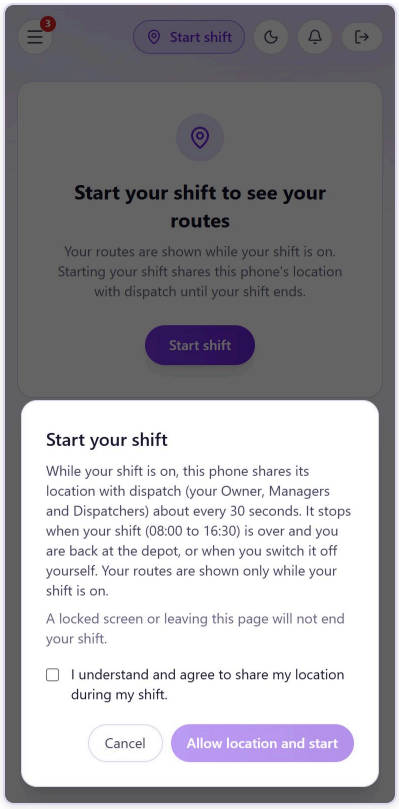
Sign in with your fingerprint or face.

Starting your shift

When you start work, open Dunware and press **Start shift** at the top. You will see a short explanation of what is shared, and you tick **I understand and agree to share my location during my shift**. Then press **Allow location and start** and allow location when the phone asks.



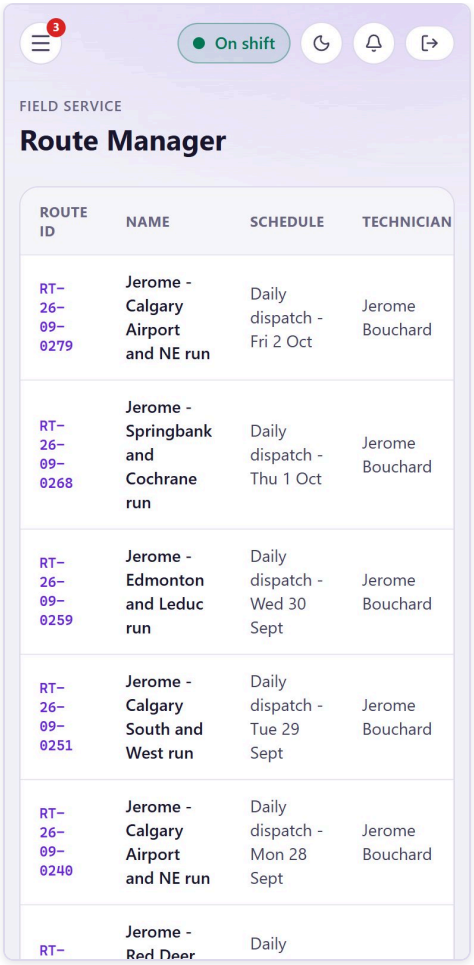
Before your shift, your routes are hidden.



Agree to share your location.

- While your shift is on, your phone shares its location with dispatch (Owner, Managers and Dispatchers) about every 30 seconds.
- A locked screen, or leaving the page, does **not** end your shift. Keep the browser page open while you work; a phone may pause sharing if the screen is off for a long time, so glance at it when you can.
- Your routes show only while your shift is on.
- If Location is blocked, a red message tells you how to fix it: tap the lock icon by the address, open Permissions, and set Location to Allow.

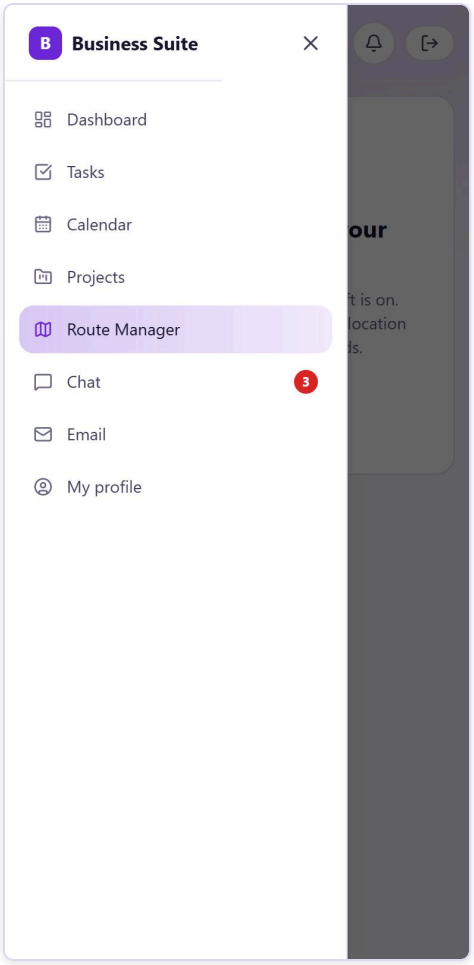
> **A CUSTOMER CAN SEE YOU TOO, BRIEFLY.**
> Once you've finished the stop before theirs and until their own job is marked done, the customer you're heading to can see your live position (just a dot, no trail) on their own portal page — never before you've actually left the previous address, so one customer's property is never shown to the next. Ask your Owner or Manager for the written policy that explains this (shipped with Dunware).



"On shift" appears at the top while you are being tracked. Your routes are listed below.

Your routes and stops

Open **Route Manager** from the menu to see your runs. Open a run to see its stops in order, with each customer, address and the job. Mark stops done as you complete them so dispatch can see progress.



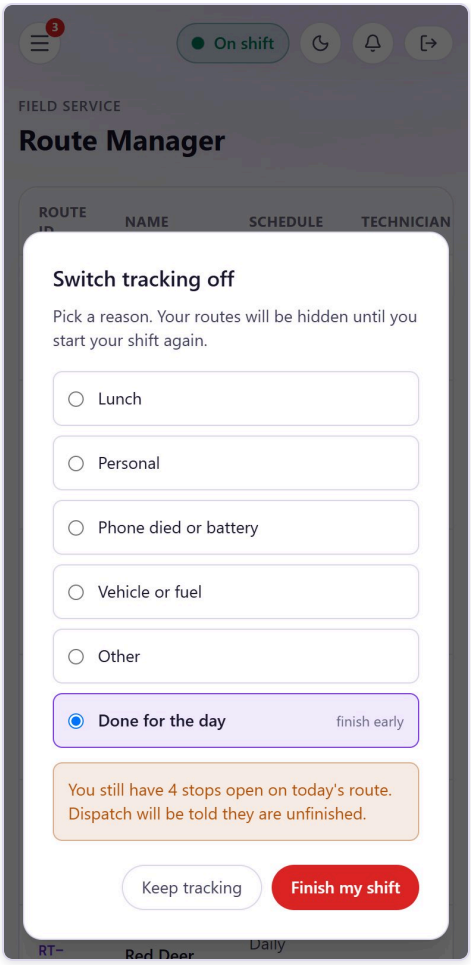
The menu holds your routes, tasks, chat and My profile.

While you're on the way to a stop (the one before it is done, yours isn't yet), a **Message customer** panel appears on that stop's page — handy for a lockbox code or a note about parking. It's a direct line to that customer only, separate from Chat, and the customer can message you back the same way.

Ending your shift

Press **On shift** at the top, choose a reason and confirm.

- **Done for the day** finishes your shift. If stops are still open you are shown how many, and dispatch is told they are unfinished.
- **Lunch, Personal, Phone died or battery, Vehicle or fuel, Other** switch tracking off for now. Dispatch sees that it was switched off and why. Start your shift again when you are back.



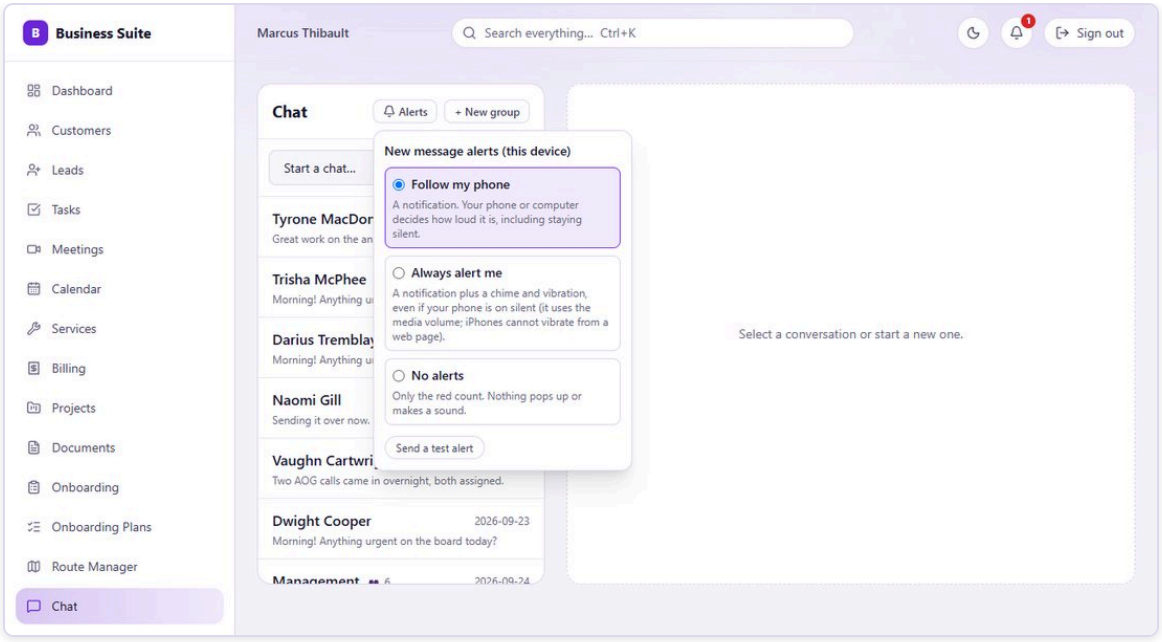
Choosing why you are switching tracking off.

AUTOMATIC END

If you forget, your shift ends by itself once the working day is over and you are back at the depot. Being at the depot in the middle of the day does not end it.

Chat alerts

Open **Chat** and press **Alerts** to choose how this device tells you about new messages.

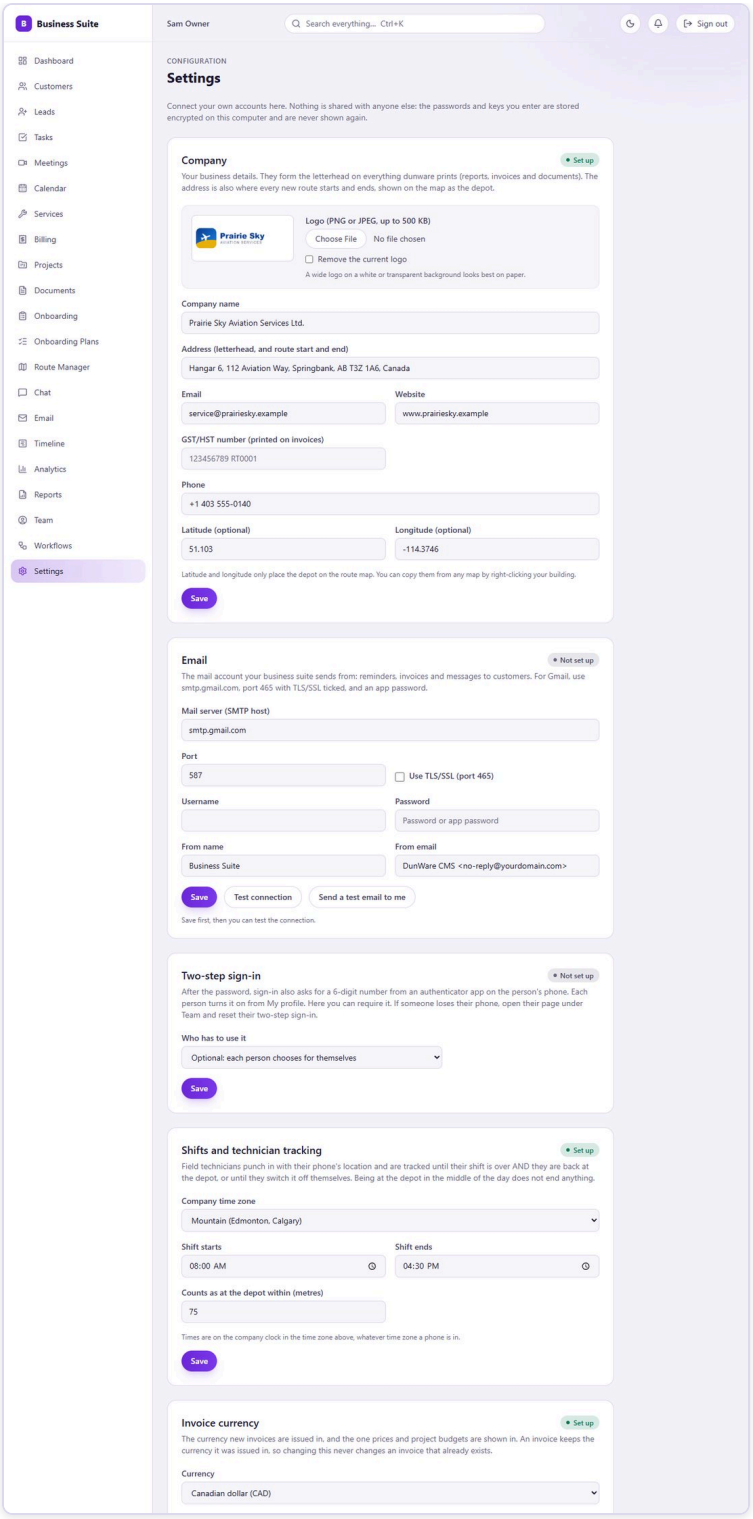


Follow my phone, Always alert me, or No alerts.

- **Follow my phone**: a normal notification; the phone decides how loud it is, including silent.
- **Always alert me**: a notification plus a chime and vibration, even on silent (it uses the media volume; iPhones cannot vibrate from a web page).
- **No alerts**: only the red count.

21 Settings and the Owner's guide

Settings is where the Owner connects the business's own accounts and sets its rules. Only Owners can open it. Passwords and keys you type here are stored encrypted on your own computer and are never shown again; a blank secret box means "keep what is saved".



Settings: company details, email, two-step sign-in and shifts (payments and taxes continue below).

Company

Your logo (PNG or JPEG up to 500 KB), name, address, phone, email, website and your **GST/HST number**. These make the letterhead of everything Dunware prints: invoices, credit notes, documents and reports. The

address is also the **depot**: where every route starts and ends. Add its latitude and longitude (copy them by right-clicking your building on any map) so the field-team map and "back at the depot" work.

Email

The mail account Dunware sends from: reminders, invoices, workflow emails and Email compose. Enter the mail server, port, username, password and the From name and address. For Gmail use `smtp.gmail.com`, port 465 with TLS/SSL ticked, and an **app password** (not your normal password). Save, then use **Test connection** and **Send a test email to me**.

Two-step sign-in

Choose whether it is optional, required for Owners, or required for everyone. Anyone it applies to is asked to set it up before they can use Dunware. If someone loses their phone, open their page under Team and reset it.

Jitsi Meet video calls

Switch on to offer a free Jitsi Meet video-call room on Meetings. The default server, `meet.jit.si`, needs no account or key — leave it as is unless you run your own Jitsi server. See *Meetings and the calendar* for how it's used.

Shifts and technician tracking

Your **company time zone**, the **shift start and end** times, and how close (in metres) to the depot counts as "back at the depot". All times follow the company clock whatever time zone a phone is in.

> **WRITTEN POLICY**
> Tracking a technician's location is a form of employee monitoring. A one-page template policy (covering what's collected, why, and that a customer can see it too during their own job — see *Customers*) ships in `docs` next to this guide and on the Start Menu, as **Dunware - Employee Monitoring Policy Template**. In Ontario it's a legal requirement at 25 or more employees and good practice at any size; it is a starting point, not legal advice.

Invoice currency

The currency new invoices are issued in. An invoice keeps the currency it was issued in, so changing this never alters old invoices.

Taxes

The kinds of tax you charge (GST, PST, HST, QST...), each with its rate (up to three decimals, for example Quebec's QST 9.975) and a **Compound** tick for a tax that is charged on top of another. Tick **Automatic** for the ones every new invoice should start with (for Ontario, tick **HST (ON)** and leave GST unticked).

Estimate overage confirmation

Only affects converting an estimate **straight** to an invoice (never a quote, which is already a firm price). Switch it on and set a percentage (10% by default): a resulting invoice more than that much over the estimate's own total asks whoever is converting it to confirm before going ahead. Switch it off to convert at any total with no confirmation asked.

Card payments: Stripe and Square

1. Choose which services customers can pay with: Stripe, Square or both.
2. **Stripe:** enter the publishable key (starts `pk_`), the secret key (`sk_` or `rk_`) and the webhook signing secret (`whsec_`). In your Stripe account, point a webhook at your Dunware address followed by `/api/stripe/webhook`, and choose the payment and refund events, so Dunware learns when a payment or refund completes.
3. **Square:** choose Sandbox (testing) or Production and enter the access token, location ID and application ID.
4. Try a small test payment in test mode before going live.

> **KEEP THE ENCRYPTION KEY WITH YOUR BACKUPS**
> The saved passwords and keys can only be read with the program's encryption key file. If a backup is restored without it, Settings shows "some saved credentials can no longer be read" and you must enter them again.

Owner's checklist for a new business

1. Fill in **Company** (logo, address, tax number, depot position) and the **time zone and shift hours**.
2. Set up **Email** and send yourself a test.
3. Check the **currency** and the **tax list**.
4. Add your team under **Team** with the right roles.
5. Decide on **two-step sign-in** and ask everyone to add fingerprint or face sign-in on their phone.
6. Add your **service types**, any **parts & materials** technicians might add to a job, and each customer's **locations**, then connect **Stripe or Square** if you take cards.
7. Turn on the workflows you want (start from the six templates).
8. If technicians will be tracked, fill in and share the **Employee Monitoring Policy Template** (above), and switch on **Jitsi Meet** if you'd like free video calls on Meetings.

22 Installing, remote access and backups

This chapter is for whoever looks after the computer Dunware runs on. It covers installing, letting your team reach Dunware from outside the office, backing up, and moving to a new computer.

Installing

1. On the Windows computer that will run Dunware (it should stay switched on during working hours, and ideally be a desktop or a small server), run **Dunware-Setup.exe** and allow it to make changes.
2. When asked for the **address**, keep the name already filled in: it is this computer's own name (for example `office-pc`), which every device on your network can find. This is what your team types in their browser. A different name (for example `dunware-office`) only works on this computer, because the rest of the network does not know it; Setup tells you if that is the case and how to fix it.
3. Wait a few minutes. Setup picks a free port for the application, installs its own database, sets up a secure (https) front door, and starts Dunware as background services, so it is running whenever the computer is on, with nobody signed in.
4. Open **https://your-address/**. The first visit asks you to create the **Owner** account. Then add your team under **Team**.

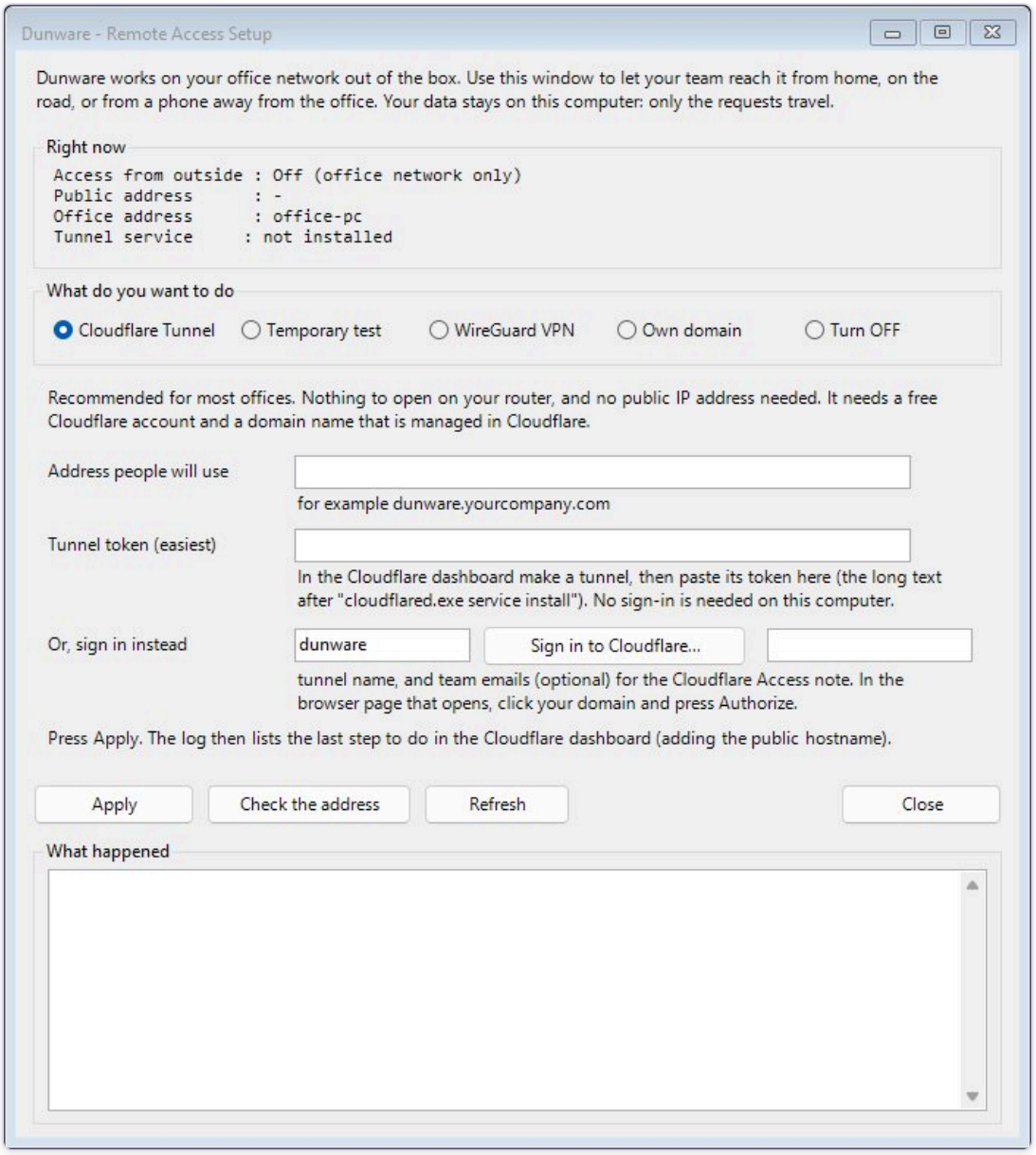
> **WHAT SETUP PUTS ON THE COMPUTER**
> Dunware lives in `C:\ProgramData\Dunware`. It adds four Windows services (Dunware PostgreSQL, Dunware App, Dunware Proxy, and later Dunware Remote if you use remote access) and opens ports 80 and 443 on private and domain networks only. The database only listens on this computer itself.

Opening Dunware from other computers and phones

- On the office network, type the address (for example `https://office-pc/`). If a computer cannot find the name, ask whoever manages your network to add it, or add a line to that computer's hosts file with this computer's network address followed by the name.
- Dunware makes its own security certificate, and Setup makes this computer trust it. Other computers and phones show a warning until they trust it too. Copy `C:\ProgramData\Dunware\dunware-local-ca.crt` to them and install it as a trusted certificate. On a phone, open the file and follow the prompts (iPhone: Settings, then Profile Downloaded, then Certificate Trust Settings).
- Fingerprint and face sign-in, and location sharing for technicians, need this secure address to work, so trusting the certificate on phones matters.

Remote Access Setup: reaching Dunware from outside the office

Dunware only works on your office network until you turn remote access on. Open **Start, then Dunware, then Dunware - Remote Access Setup** (it asks for administrator rights). Your data stays on this computer in every option: only the requests travel.



Remote Access Setup: pick an option, fill in the address, press Apply.

OPTION	BEST FOR	WHAT YOU NEED
Cloudflare Tunnel	Most offices. Nothing to open on the router; works even without a fixed public IP address.	A free Cloudflare account and a domain name managed in Cloudflare.
Temporary test	Trying Dunware from a phone away from the office, and demos.	Nothing: no domain, no account. The address changes each time and stops when the computer restarts.
WireGuard VPN	Your own team's phones and laptops, over a private connection.	One router setting: forward one UDP port to this computer. A free WireGuard app on each device.
Own domain	Offices that own a domain name and can forward ports 80 and 443.	A domain name, an email for the free Let's Encrypt certificate, and router port forwarding.

Turn OFF	Back to office-network access only.	Nothing.

Cloudflare Tunnel, step by step (using a token)

1. In your Cloudflare account open **Zero Trust, then Networks, then Tunnels**, choose **Create a tunnel**, pick **Cloudflared** and give it a name. Cloudflare shows a command that ends in a very long piece of text: that text is the **token**. Copy it. (You do not need to run Cloudflare's own install command; Dunware does that.)
2. Open **Dunware - Remote Access Setup**, choose **Cloudflare Tunnel**, type the address people will use (for example `dunware.yourcompany.com`, on a domain you manage in Cloudflare) and paste the token into **Tunnel token**. Press **Apply**.
3. Dunware installs the tunnel as a Windows service and makes the new address the main one. The log then lists the **last step**: back in the Cloudflare tunnel page open **Public Hostname, Add**, enter your address, choose service type **HTTP** and the URL shown in the log (for example `localhost:3010`), and save. The tunnel's status turns to Healthy within a minute.
4. Press **Check the address**. It can take a few minutes the first time. Recommended: in Cloudflare add an Access policy so only your team's email addresses can reach the address at all.

> **SIGNING IN FROM THIS COMPUTER INSTEAD**
> If you would rather not copy a token, leave the token box empty and press **Sign in to Cloudflare**. A browser page opens: click your domain in the list and press **Authorize**, and the Dunware window carries on by itself. This route needs a domain in your Cloudflare account. If a tunnel with the same name already exists in your account (for example one made in the dashboard), use the token route or a different tunnel name.

No domain yet? The temporary test address

1. Open **Dunware - Remote Access Setup** (as administrator), choose **Temporary test** and press **Apply**.
2. After a few seconds the log shows an address ending in `trycloudflare.com`. It is also copied to the clipboard. Open it on your phone or any computer, anywhere, and sign in with your password.
3. When you are done, choose **Turn OFF**. Dunware returns to the office address.

> **ONLY FOR TESTING**
> The address is different every time and stops when the computer restarts (press Apply again for a new one). Fingerprint and face sign-in do not carry over. For daily use, get a domain name and use Cloudflare Tunnel, or use the VPN.

WireGuard VPN

1. Choose **WireGuard VPN** and press **Apply** to set up the VPN on this computer. Forward the shown UDP port on your router to this computer.
2. For each phone or laptop: type a device name and your office's public IP address (or dynamic-DNS name) and press **Create the device file**. A file opens in its folder: install the WireGuard app on the

device and import that file.

3. With the VPN on, the device opens Dunware at the VPN address shown in the log (for example `https://10.55.0.1/`).

> **TWO THINGS TO KNOW ABOUT ADDRESSES**
>
> - When you turn remote access on, the **NEW PUBLIC ADDRESS BECOMES THE MAIN ADDRESS**. The office address keeps working. Fingerprint and face sign-ins belong to one address, so people add their device again on the new address (their password and two-step sign-in are unaffected).
> - Fingerprint and face sign-in cannot work on a numeric VPN address; on the VPN people use their password (and two-step number).

Installing Dunware as an app on a phone

On an Android phone (and in Chrome or Edge on a computer) Dunware can be installed like an app, with its own icon and full-screen window. It still runs on your office computer: the app is the same web page in a window of its own. **iPhones are not supported yet**; use the website in the browser.

1. On the phone, open Dunware's **secure (https) address** in Chrome and sign in. The address must be one the phone can reach: the office address on the office Wi-Fi, or your remote address away from the office. The phone must trust the certificate (see above), or use a remote address that has its own certificate.
2. Press **Install app** in the top bar, or use Chrome's menu, **Add to Home screen** / **Install app**.
3. Open it from the new icon. Long-press the icon for shortcuts to **My routes**, **Chat** and **Calendar**.

- The app keeps only its own files (screens and icons) on the phone, never your customers' or the company's information, so there is nothing private to lose if the phone is lost. Everything you see comes live from the server.
- With no connection you see a short **You are offline** page and can try again.
- The temporary test address changes each time, so an app installed from it stops working when the address changes. Install from a permanent address.

Backups

Back up regularly. A backup is one file holding the database, the **encryption key** (without it, the passwords and keys saved in Settings cannot be read after a restore) and the remote-access settings.

1. Open an administrator PowerShell and run: `powershell -ExecutionPolicy Bypass -File "C:\ProgramData\Dunware\scripts\backup.ps1" -Passphrase "a long phrase you will remember"`
2. The file appears in `C:\ProgramData\Dunware\backups`, encrypted with your phrase. Copy it to a USB drive or a cloud folder kept somewhere else. Store the phrase somewhere else again.
3. To make it automatic, create a daily task in Windows Task Scheduler that runs the same command. Dunware keeps the newest 14 backups.

Restoring, or moving to a new computer

1. Install Dunware on the new computer with **Dunware-Setup.exe** (you do not need to create the Owner account).
2. Copy the backup file over and run: `powershell -ExecutionPolicy Bypass -File "C:\ProgramData\Dunware\scripts\restore.ps1" -BackupFile "D:\path\dunware-backup-....zip.gpg" -Passphrase "your phrase"` and type YES when asked.
3. Everyone is signed out and signs in again with their usual password. Saved email and payment settings work again because the encryption key came with the backup.

Updating, repairing and uninstalling

- **Update:** run the newer Dunware-Setup.exe over the top. Your data, settings and secrets are kept; the database is brought up to date automatically.
- **Repair:** if something stopped working, run `scripts\repair-dunware.ps1` as administrator. It re-applies setup without touching your data.
- **Logs** for support are in `C:\ProgramData\Dunware\logs`.
- **Uninstall:** Windows Settings, Apps, Dunware. It asks whether to keep your data. Choose Yes to keep the database for a reinstall; No deletes it for good.

23 Troubleshooting and questions

WHAT YOU SEE	WHAT TO DO
"Registration is closed. Ask your administrator to add you."	There is no self sign-up. Ask your Owner to add you under Team.
I cannot find an area in my menu.	It is not switched on for your role. Ask your Owner (Team, your page, Edit).
"You don't have access to that."	Same: the area is not part of your role.
"This account has been deactivated."	Your Owner switched your login off. Ask them if it is a mistake.
Forgot my password.	Ask your Owner to reset it (Team, your page, Reset password). Then change it in My profile.
The 6-digit number is refused.	Check the time on your phone is set automatically, then use the next number. Or use a recovery code.
Lost my phone.	Sign in with a recovery code, or ask your Owner to reset two-step sign-in and remove your fingerprint / face sign-in.
"Sign in with fingerprint or face" is missing.	Your browser needs a secure (https) address and a screen lock set up on the device. Ask your Owner for the https address.
Fingerprint sign-in stopped working after the address changed.	Add the device again in My profile. A device belongs to the address it was added on.
An email step or reminder says "email is not set up".	The Owner needs to fill in Settings, Email (mail server, user and password), then use "Send a test email to me".
Card payment option is missing on an invoice.	The Owner needs to connect Stripe or Square in Settings.
A workflow was switched off by itself.	It started more than 100 times in an hour. Read the note on its page, fix what it watches, and switch it back on.
A saved password or key in Settings "can no longer be read".	The program's encryption key file is missing or was replaced (for example after restoring a backup without it). Enter those details again.
Location is blocked on my phone.	Tap the lock icon by the address, Permissions, Location, Allow. Then reload.
An email says "Email was saved but not sent".	Email is not set up, or the mail server refused it. The message is kept in the Email log marked Failed. Check Settings, Email and use "Send a test email to me".
The page looks out of date.	Reload it. Lists normally update by themselves.

Things Dunware deliberately does not do

- The Customers and Leads lists have no search box or filters: use the top search (Ctrl+K on a computer).

- Only an Owner or Manager can delete a customer; archive it instead if you are in Sales.
- Converting a lead to a customer copies the company, contact, email, phone and owner only.
- Services is a simple price list; there are no bundled packages.
- There is no email inbox and no live accounting connection.

24 Glossary

WORD	MEANING
Authenticator app	A phone app (Google Authenticator, Microsoft Authenticator, Authy) that shows a 6-digit number that changes every 30 seconds.
Balance due	What a customer still owes on an invoice.
Credit note	A document that reduces what a customer owes or gives them credit.
Depot	Your business address on the map, where every route starts and ends.
Dispatch	The people who plan routes and watch the field team: Owner, Managers and Dispatchers.
Estimate	A non-binding ballpark figure given before work starts (`EST-...`). Converts into a quote or an invoice.
Passkey	The technical name for signing in with your fingerprint, face or screen lock.
Quote	A binding, time-limited fixed price (`QT-...`), either standalone or locked in from an estimate. Converts into an invoice.
Receipt	A printable confirmation of one payment against an invoice. Not a separate record.
Recovery code	A one-time code that signs you in if you lose your authenticator phone.
Role	A job type that decides which areas of Dunware you can open.
Route / run	A technician's list of stops for a day.
Service request	A customer's request for work, which dispatch turns into a stop on a route.
Shift	The time a technician is on the clock and sharing location.
Trigger	What starts a workflow.
Workflow	A saved rule: when something happens, and only if..., do these steps.