Everglow

The manual

Everything the software does, in the order you will need it. Written for people who fix things for a living.

> **Start here if you are new.** Read the first ten pages, do the four things in “Your first hour”, and you will have a working system before lunch. The rest is reference — come back to it when you need it.

Everglow Solutions LLC · Jacksonville, Florida

Questions this book does not answer: help@everglow.app

What’s in here

1 · Your first hour

Four things, in this order. Everything else can wait.

Put your shop details in

Settings → Shop details. Business name, phone, email, address, license number and your logo. This is what prints at the top of every quote and invoice your customers see, so it is worth five minutes.

Bring your customers over

Settings → Import clients from CSV. Export a customer list from QuickBooks, Jobber, Housecall Pro or a spreadsheet and drop the file in. Do not tidy it up first — the importer matches your column names itself and shows you what it will bring in before anything is saved.

Connect payments

Settings → Taking payments → Set up payments. About five minutes, and you will need your EIN and a bank account. The Stripe account is yours, in your name. Money goes to your bank, never ours.

Add your crew

Team → Invite. Each person gets a six-digit code. They go to the sign-in page, choose “I have a code”, and set their own password. Unlimited users, so add everyone — techs, dispatcher, whoever does the invoicing.

> **Then book one real job and run it end to end.** Add a client, put a job on the board, mark it complete, invoice it, and send yourself the link. Fifteen minutes, and you will understand the whole system.

2 · The day

The Board

Today, grouped by tech. This is the screen to leave open. Each job shows the time, the client, the work, and the one button that moves it forward.

A job walks through four states, and the tech taps once for each:

STATE	WHAT IT MEANS	WHAT HAPPENS
Scheduled	On the board, not started	Tech taps Start drive
En route	Driving there	Navigation opens on their phone
On site	Working	The clock starts automatically
Complete	Done	Clock stops. Invoice and Photos appear

Because arrival starts the clock, labour time gets captured whether or not anyone remembers to log it. That is the point.

The Calendar

Day, week or month, and a filter for one tech. On a computer, drag a job to a different day or time to move it. Click an empty slot to book there. On a phone, week view becomes a list because a seven-column grid is unreadable at that size.

Jobs

Every job, filterable and sortable. Click a column heading to sort. Use the filter box to find anything. A job can have one visit or many — a weekly pool route is one job with fifty-two visits, not fifty-two jobs.

3 · Clients, sites and equipment

Three levels, and the distinction matters once you have commercial accounts:

LEVEL	WHAT IT IS
Client	Who pays the bill. One account, one balance.
Property	Where the work happens. A client can have many.
Equipment	What you service. Lives at a property, carries its own warranty.

An HOA with four buildings is one client, four properties, and however many air handlers. Bills go to one place; techs get sent to the right one.

Adding a client

Clients → + Client. If you type an address, the first property is created for you, so you can schedule them straight away. Access notes — gate code, dog, ask for Sheila — show up on the tech's screen when the job is on the board.

Contacts

Open a client and use + Contact for the people at that account: the office manager who books, the bookkeeper who pays. Mark who gets the invoices.

> **Inactive, not deleted.** When you stop working with someone, mark them inactive. Their history stays for warranty questions and last year's numbers, and they disappear from the lists you use daily.

4 · Quotes

A quote is usually how a job starts, and it often comes before the customer exists in your system. That is fine — you can quote a prospect who is not a client yet, and they become one automatically if they say yes.

Building one

1. Quotes → + Quote. Pick an existing client, or switch to New prospect and type their name.
2. Add lines from your price book, or type your own. Anything goes — description, quantity, price.
3. Set a deposit if you take one, and how long the quote is good for.
4. Save. Then Send, which gives you a link.

What the customer gets

A clean page with your logo, your line items, and your terms. They can save it as a PDF, or type their name to accept it there and then. When they accept, the quote flips to approved on your side and you get a one-click Book it.

> **Revising a quote.** If they push back on price, make a revision rather than editing the original. Both stay attached to the same opportunity, so you keep the history of what you offered and when.

Quotes and the pipeline

A quote made from a pipeline opportunity stays linked to it. Send the quote and the opportunity moves to Quoted. The customer accepts and it moves to Won. You do not update two places.

5 · Invoices and getting paid

Finish a job on the board and an Invoice button appears on it. That is the fastest path: the client, job and site are already filled in.

Once an invoice exists, you have four things:

ACTION	WHAT IT DOES
Copy link	The customer’s invoice page. Text it to them.
Open / PDF	Same page, print or save as PDF.
Email it	Opens your own mail app, filled in.
Take payment	Cash, check, or a card payment link.

Cards in the field

Card payment link opens a secure Stripe checkout the customer can pay on the spot. It lands in your bank, usually in two business days. Standard rates, no markup from us. Their statement shows your business name, not ours.

Cash and checks

Take payment → Cash / check, with a reference for the check number. The balance updates immediately, and it shows on the customer’s copy of the invoice.

> **Where the money is hiding.** Reports → Completed but unbilled shows finished work with no invoice attached. Most shops find something on that list the first time they run it.

6 · Recurring work and service plans

Maintenance agreements, weekly pool routes, quarterly pest service — the work that repeats is usually the work that pays the bills, and it is included here rather than sold as an upgrade.

Setting it up

1. Book a job as normal, then tick **Repeats**.
2. Choose weekly, every two weeks, monthly, quarterly or twice a year.
3. Save. The next twelve visits appear on the board and calendar.

It stays one job with many visits. Complete one visit and the rest are untouched. Cancel the job and the future visits clear while completed ones stay, because they happened and the invoices point at them.

Routes

Pool, pest, cleaning and lawn accounts get a Route tab. Give each property a route day and a stop number, and the day comes out in driving order rather than whatever order it was booked in.

7 · Callbacks and rework

When a customer calls back about work you already did, that is a case, not a new job. Keeping them separate is what lets you answer a question most shops cannot: how much of this week was us fixing our own work, and how much of it was our fault.

Opening one

On the board, a completed job has an **Open a case** button. Use that one — it links the case back to the visit that caused it, which is the whole point.

Priority sets the clock

PRIORITY	DUE WITHIN
Urgent	4 hours
High	1 day
Normal	3 days
Low	1 week

Was it on us?

Tick **This one’s on us** when it was your error, and put a cost on it. Nobody enjoys that, and it is the most useful number in the product. The dashboard shows the running total, and it will tell you things about training and parts quality that nothing else will.

> Schedule the fix from the case and it creates a job linked back to it, so the repair lands on the board without losing the thread.

8 · The pipeline

Work you are chasing but have not won. Six stages: New, Contacted, Estimating, Quoted, then Won or Lost.

Each opportunity carries a value, a probability, an expected close date and a next step. The weighted number at the top is what you can reasonably expect to land, not what you would land if everything came in.

> **Watch the “in stage” column.** Anything sitting more than fourteen days goes red. That is almost always the deal you have quietly stopped working.

Quoting from an opportunity

Use **Quote it** on the row. The client, title and value carry across, and the two stay connected from then on. Once quoted, the button becomes Revise.

9 · Your crew and who sees what

Unlimited users on every plan, so there is no reason not to give everyone a login. What they can see depends on their role:

ROLE	SEES
Owner	Everything, plus settings, payments and AI access
Dispatcher	The whole board, all clients, scheduling
Office	Clients, quotes, invoices, payments
Field	Their own jobs and the clients behind them. No money.

A field tech cannot see your revenue, your pipeline, or the full customer list. That is deliberate, and it applies to search and to AI access as well — a key you create for a tech inherits the tech’s limits.

Forgotten passwords

Team → Reset password gives you a six-digit code and a link. Read them the code over the phone. They go to the reset page, enter their email and the code, and pick a new password. Good for 24 hours, works once.

10 · Reports and the dashboard

The dashboard is the morning screen: today at a glance, thirty days of collections, what is owed and how late, what is booked ahead, and what rework cost you.

The part to look at first is **Outstanding**, split into four buckets. Anything past sixty days is called out, because that is the money that quietly stops being collectable.

The eight reports

REPORT	ANSWERS
Revenue	What we invoiced and what actually got paid
Accounts receivable	Who owes us, how late
Completed but unbilled	Finished work with no invoice
Crew productivity	Logged time against estimates, per tech
Client value	Lifetime jobs, visits and dollars per client
Open pipeline	Everything being chased, weighted
Rework and callbacks	What came back, whose fault, what it cost
Recurring revenue	Active plans and next due dates

Every report downloads as CSV, which opens in Excel, Google Sheets or your accountant’s software.

11 · Connecting your own AI

You can point Claude, ChatGPT or any assistant that speaks MCP at your own shop data, and ask it questions in plain English. Your AI, your key. We do not send your data to a model we chose, because we do not choose one.

Setting it up

1. Settings → AI access → New key.
2. Choose who it acts as. The key can never do more than that person can.
3. Leave “Allow it to make changes” off to start. Read-only answers questions and changes nothing.
4. Copy the key. It is shown once and we cannot show it again.
5. In your AI tool, add a custom connector with the server address on that screen, and paste the key.

Things worth asking it

- “What’s on the board today, and is anyone free this afternoon?”
- “Who owes us the most, and how late are they?”
- “Which completed jobs never got invoiced?”
- “Show me every callback from the last month and what it cost us.”
- “What should I be chasing in the pipeline this week?”

> **Every call is logged.** Settings → AI access shows what the assistant did and when. Revoke a key any time and it stops working immediately.

12 · Settings, passwords, data

Requiring a photo

Settings → Shop details has a switch to require a photo before a job can be marked complete. Shops that turn it on stop arguing about what state a site was left in.

Your password

Settings → Your password to change it. Forgot it entirely? Use “Forgot your password?” on the sign-in page.

Getting your data out

Every report exports as CSV, and Settings → Export transactions gives your bookkeeper amounts, fees, net and tax. Your data is yours, any time, without asking us.

Rearranging the tabs

The gear at the end of the tab bar. Drag them into the order you want — the first one is where you land when you sign in. Saved per person, so your dispatcher and your techs can each have their own.

13 · When something goes wrong

A tech cannot sign in.

Team → Reset password. Read them the six-digit code. If they never set a password, resend the invite instead.

The customer says they never got the quote.

Open the quote, copy the link and text it. The link works in any browser and does not require them to have an account.

A card payment will not go through.

Check Settings → Taking payments. If Stripe still needs details it will list exactly what — usually the bank account or the EIN.

A job is on the wrong day.

Calendar, drag it. On a phone, tap it and change the date. Moving a visit does not affect the rest of a recurring job.

I invoiced the wrong client.

Invoices cannot be reassigned yet. Void it and create a new one, then tell us — if this happens often we will fix it.

The board is empty and it should not be.

The board shows today only. If the work is on another day, use the calendar. If a visit has no tech, it is in “Needs a tech” at the bottom.

Numbers look wrong on the dashboard.

Most figures cover the last thirty days, and outstanding balances only count invoices that have been sent. A draft invoice is not owed yet.

> **Still stuck?** help@everglow.app. A real person reads it, usually the one who can change the software. Tell us your shop name and what you were trying to do.