SERVICE BUSINESS APPS

Getting Started Guide

How to choose, configure and launch your private business Workbench.

A practical guide for service businesses
Understand what is included, what you provide, where the app is kept and how support works.

Sales and walkthroughs
sales@servicebusinessapps.com

Existing customer support
support@servicebusinessapps.com

No payment is taken through the public website. Work begins only after written approval and the required initial payment.

1. Choose your starting point

Cleaning Workbench

Detailed residential and commercial cleaning estimates, visit information, service checklists, scheduling, invoicing and reporting.

Painting & Wallpapering Workbench

Room and surface estimating, labor and material pricing, wallpaper calculations, stock, projects, photos, invoicing and reports.

Website or custom app

Add a public website, commission a standalone site, or request a separate scope for a different trade or workflow.

2. Five stages from demo to launch

1. Explore	Use fictional sample data in the public demos and request a private walkthrough.
2. Confirm	Receive a written proposal with scope, price, monthly charge, delivery time and exclusions.
3. Prepare	Provide branding, users, services, rates, wording and any approved data for import.
4. Review	Check the private installation using test or copied records before live use.
5. Launch	Receive access, onboarding and support information after the agreed checks are complete.

3. What setup means

Where is the app kept?

Your Workbench is hosted online at a private web address. Each customer receives a separate installation, configuration and database.

Do I download it?

No traditional software download is normally needed. Sign in through a modern browser on a computer, tablet or phone. Supported devices can save a home-screen shortcut.

What do I provide?

Business details, logo, users, services, rates, document wording and any records approved for import. The exact list is confirmed before setup.

What does monthly service cover?

Private hosting, standard maintenance, routine backup procedures and fault support at the level stated in the proposal. New functionality is quoted separately.

How are existing records handled?

Original source files are preserved. Backups are created and copied records are tested before an approved live import. Large or inconsistent imports may require a separate quote.

4. Information to prepare

Have the following available after approving the proposal:

- Business name, logo and contact details
- Initial users and required access levels
- Services, rates, labor settings, taxes and document wording
- Scheduling and payment preferences
- Client, estimate, job, invoice or inventory data approved for review
- A primary contact for setup decisions and launch approval

5. Review, launch and support

Before launch, the core workflow is checked with test or copied data:

- Create or select a customer
- Save an estimate and produce its PDF
- Reopen the estimate and confirm all details remain
- Save again and produce a second PDF
- Schedule the visit or accepted job
- Create an invoice and record a test payment
- Confirm customer history and reports update once
- Check desktop, tablet and phone layouts

Getting help

Existing customers email support@servicebusinessapps.com with the business name, page involved, expected result, what happened, approximate date and time, and a screenshot when useful. Never email a password.

Changes after launch

Standard maintenance keeps the approved Workbench operating. New calculators, modules, integrations, reports or workflows are reviewed and quoted separately.

Cancellation and data

Notice, access, final exports and retention are governed by the signed customer service agreement and explained before payment.

Ready to discuss your business?
Request a walkthrough at servicebusinessapps.com or email sales@servicebusinessapps.com.