



KleanFlo Process Builder and Operations User Guide

Build graphical processes, manage linked records, and use the updated quotation and site workflows

This guide is for KleanFlo administrators and operational users. It explains the graphical Process Builder, process activation checks, process instance management, processes linked to customers, vehicles and equipment, vehicle attachments, one-off quotation improvements, and the updated site designation import workflow.

Scope. The features available to each user depend on their role, branch access and subscription capabilities. The guide focuses on the web application and the operational checks needed before a process or imported record is used live.

Quick reference

Area	What is available	Main check
Process Builder	Graphical and guided views for process details, actions, documents, fields and preview.	A process must be complete before it can be activated.
Process instances	Progress, status, action cards, assignments and searchable list fields.	Completed processes are locked against later status changes.
Linked records	Processes can be launched for staff, customers, vehicles and equipment assets.	Open the process from the correct record so its context is retained.
Vehicle attachments	Direct uploads and relevant process-generated files can be kept with a vehicle.	Document capability must be available for the tenant.
One-off quotations	A clearer PDF layout and more consistent VAT calculation.	Check branch details, service areas, additional services and VAT before sending.
Site designations	Excel or CSV import with a generated Excel template and designation lookup list.	Time to clean must be blank or a whole number of minutes.

Before you begin

- Confirm you have permission to manage process forms and access to the branches covered by the process.
- Decide which record area the process belongs to: staff, customers, vehicles, equipment, contracts, schedules, audits or general operations.
- List the actions in the order they should be completed and decide who can perform each action.
- Prepare any PDF or Word templates and decide which signatures, confirmations or evidence are required.
- Agree which captured answers should update the linked record and whether the value should replace or append to existing information.
- For site designation imports, make sure the site has a current contract and that the required template designations already exist.

Process Builder overview

Open Administration and select Process Builder. The process list can be filtered by status, process area and branch. Open an existing process or select Create process. When a process is open, use Graphical builder for visual editing or Wizard for a guided sequence through the same setup.

Processes

Search processes...

All statuses

All areas

All branches

Reset filters

Process	Type	Area	Branch	Description	Scope	Status	
Audit Corrective Actions	Audit Corrective Action	Audits	IMU Software Limited	No description	Own branch	Inactive	...
check field updates	Standard	Staff	IMU Software Limited	No description	Own branch	Active	...
New Starter	Standard	Staff	IMU Software Limited	No description	Own branch	Inactive	...
new starter demo	Standard	Staff	IMU Software Limited	No description	Own branch	Active	...
Return to Work Process (Default)	Return to work	Process board	IMU Software Limited	Default return-to-work workflow for approved absences.	All branches	Active	...
Weekly Cleaning Van Sign Check	Standard	Vehicles	IMU Software Limited	To check the the van is road worthy	Own branch	Active	...

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Graphical Process Builder overview

Step 1 Create the process details

1. Select Create process and enter a clear title and description that explain the outcome.
2. Choose the process area so KleanFlo can offer the process in the correct part of the application.
3. Choose the default owner and the audience visibility required for office users, staff users or both.
4. Set the sector and branch scope. Use own branch, all branches or selected branches according to how the process should be shared.
5. Review the status flow. Required statuses remain available while optional stages can be included where the workflow needs them.
6. Keep the process in Draft while actions, documents and fields are being built.

Setting	What it controls
Process area	Where the process can be selected and which linked record context is available.
Visibility	Whether the process is intended for office users, staff users or both.
Branch scope	Which branches can find and use the process.
Default owner	The office user responsible when a process instance is created.
Status	Draft, active or inactive availability of the process form.
Status flow	The stages available while a process instance is being worked.

Step 2 Add and arrange actions

1. Select Add action and give the step a short, action-based title.
2. Choose Standard for a normal task or Document when the action creates or works with a document.
3. Choose who performs the action and whether evidence, approval, scheduling or notifications are required.
4. Add dependencies where an action must wait for an earlier action to finish.
5. Drag actions into the required order or use the move controls.
6. Save the action before moving to another builder section.

new starter demo

Build the process in order, then select a step to review or change it.

Graphical

Classic

Build

Preview

Workflow

2 steps

Active

+ Add step

Start

Process begins

1

Check details

Supervisor2 fields

2

Sign document

Staff or supervisor3 fields

Supervisor completion

Complete

Process finished

Configure step

Sign document

No instruction has been added yet.

Who can complete this step

Step type

Staff Or Supervisor

Document

Completion requirements

Read confirmation

Staff signature

Supervisor signature

Questions and checks

0 items in this step

+ Add question

No questions, checks, uploads, or signatures yet.

Advanced settings

Action setup and sequence

Step 3 Configure document actions

Document actions can use one or more approved template documents. Configure the output name and folder, map the required merge fields, choose who can generate the document, and select at least one completion requirement.

Completion requirement	Use when
Completer signature	The person completing the action must sign.
Staff signature	The linked staff member must sign.
Supervisor signature	A supervisor must sign before the action is complete.
Read confirmation	The user must confirm that the document has been read.

Activation rule. A document action without a completion requirement is marked incomplete and prevents the process from being activated.

Step details

Configure who completes this step and any questions, checks, uploads, or signatures.

Step 1 of 2 Action basics

Action title

Sign document

Action description

Action type

Document

Linked documents (PDF or Word)

☒ Templates / Terms of Engagement 2026 (Terms of Engagement 2026.docx)

Document merge fields

Terms of Engagement 2026.docx

{{Address Line 1}}	Site address
{{Address Line 2}}	Site address line 1
{{Branch address 1}}	Branch address line 1
{{Branch address 2}}	Branch address line 2
{{Branch address 3}}	Branch address line 3
{{Branch name}}	Branch legal name
{{Branch postcode}}	Branch postcode

Step details

Configure who completes this step and any questions, checks, uploads, or signatures.



Step 2 of 2 Required fields

Action

Sign document

Required signers

Require one signature from the person completing the step, or choose specific roles.



Person completing this step

Require one signature from whichever staff member or supervisor completes the step.



Staff signature

Add a required signature field that only the staff member can sign.



Supervisor signature

Add a required signature field that only a supervisor can sign.

Other completion requirement



Read confirmation

Add a required confirmation that the document was read and understood.

Fields in this action

Select a field to edit it. Use arrows to set the order staff will see.

+ New field

1

I confirm I have read and understood this document

Yes / No indicator

Required

Staff or supervisor



2

Staff signature

Signature

Required

Staff signature



3

Supervisor signature

Signature

Required

Supervisor signature



Select or add a field

Choose an existing field to edit it, or use New field to add another field.

Close

Finish

Document action and completion requirements

Step 4 Add fields and record mappings

Fields collect the information needed to complete each action. Available field types include text, date, memo, list, yes or no, signature, attachment and link. Wider field treatment is used for memo, attachment, signature and link content so these items remain practical to complete.

Field type	Typical use	Important setup
Text	Short names, references or values.	Use a clear label and map only to a compatible record field.
Date	Review, renewal or completion dates.	Confirm the mapped target is a date field.
Memo	Long notes or findings.	Choose replace or append when updating an existing record.
List	A controlled choice.	Configure the allowed dropdown options; mapped lists can use the target field values.
Yes or no	Confirmation or decision.	Use for a single true or false answer.
Signature	Evidence of approval or acknowledgement.	Set which signer role is allowed.
Attachment	Photos or supporting files.	Confirm who may upload and where the file should be retained.
Link	A web or record link.	Provide a meaningful label and valid destination.

Record mappings. Captured values can update supported fields on staff, customer, vehicle and equipment records. Use Replace when the answer should become the current value. Use Append when the answer should be added to existing notes or history-style content.

 **Add question** ✕

Set what the user needs to answer or complete in this step.

Question or instruction

e.g. Can the employee carry out their normal duties?

Answer type

Date

Q Search answer type...

Text

✓ Date

Memo

List

Yes / No indicator

Signature

Attachment

Link

Position in this step

At end

☒ Required before this step can be completed

✕ Cancel

Add question



Add question



Set what the user needs to answer or complete in this step.

Question or instruction

e.g. Can the employee carry out their normal duties?

Answer type

Date



Position in this step

At end



Who can answer

Staff or supervisor



Guidance for the user

Add any guidance the user needs to answer correctly.



Update staff record when this step is completed

Do not update staff record



Search update staff record when this step is completed...

- ✓ Do not update staff record
 - Staff: Date of birth
 - Staff: Start date
 - Staff: End date
 - Staff: TUPE date
 - Staff: Terms of engagement sent
 - Staff: Contract sent
 - Staff: Contract received
 - Staff: DBS issue date
 - Staff: Right to work check date

Field configuration and record mapping

Step 5 Preview and activate

- 1. Open Preview to compare the supervisor and staff views.
- 2. Check that staff users only see fields and actions they can use or complete.
- 3. Check action order, field labels, required answers, document requirements and linked record mappings.
- 4. Resolve every action marked incomplete. Each Standard action needs at least one field, and each Document action needs a completion requirement.
- 5. Change the process status to Active only when the preview and activation checks are complete.

Builder check	Result
Standard action has no field	The action is incomplete and activation is blocked.
Document action has no completion requirement	The action is incomplete and activation is blocked.
All actions satisfy their checks	The process can be changed from Draft to Active.
Unsaved changes exist	KleanFlo prompts before moving to another builder section.

new starter demo

Build the process in order, then select a step to review or change it.

GraphicalClassicBuildPreview

Workflow3 steps

DraftAdd step

StartProcess begins

1Check detailsSupervisor2 fields

2Sign documentStaff or supervisor3 fieldsSupervisor completion

3demo stepStaff or supervisor0 fields

CompleteProcess finished

Configure step

demo step

No instruction has been added yet.

Who can complete this stepStaff Or Supervisor

Step typeStandard

Questions and checks0 items in this step

Add at least one field to complete this step.

Add questionAdd first field

Advanced settings

Process preview and activation checks

KleanFlo process builder and operations user guide

Working with a process instance

A launched process opens with a clear header, progress summary, status controls and action cards. The progress count shows completed actions against the total. Required work, scheduled work, documents, signatures, attachments and links are shown within the action that owns them.

Assign the process

Assignment	Use
No assignment	Keep the process available without naming a responsible person or team.
Staff assignment	Assign the process to a staff record.
User assignment	Assign the process directly to an office platform user.
Team assignment	Assign the process to an operational team.

- List fields with configured options appear as searchable selections rather than free text.
- Staff-facing actions are filtered so staff only see fields and work they can act on.
- When a process is completed, its status cannot be changed and rejection or later status changes are blocked.
- Review the progress and outstanding action requirements before marking the final action complete.

Processes					
Track action status across selected processes.					
Processes	Search	Branch	Supervisor	Process status	Search
Weekly Cleaning Van Sign Check	Search records	All branches	All supervisors	All statuses	Search
● Complete ● In progress ● Not started ● Rejected ● Blocked					
Record	Process status	Supervisor	Start date	Complete weekly van check	Action 2 Review
W221 HSF Vehicle Weekly Cleaning Van Sign Check	Not started	Martin Judson	01 Oct 2024	Not started	Not started

Process instance progress and assignment

Processes linked to operational records

Processes can be launched from customer, vehicle and equipment records as well as existing staff workflows. Launching from the record keeps the process tied to that customer, vehicle or asset so users can return to the correct context and retain relevant outputs.

Record	What the link provides
Customer	The process remains associated with the customer record.
Vehicle	The process retains vehicle context, including the registration where it is used in document output.
Equipment asset	The process remains associated with the selected equipment record.
Staff	The process remains associated with the staff record and staff-facing actions follow the configured access.

1. Open the required customer, vehicle, equipment or staff record.
2. Open its Processes area and choose an active process for that record type.
3. Launch the process and confirm the linked record shown in the header.
4. Complete or assign the process using the normal instance workflow.
5. Review any generated document or uploaded evidence from the linked record after completion.

Vehicle attachments

Vehicles include an Attachments tab when document capability is available. The tab can hold files uploaded directly to the vehicle and relevant files created or uploaded through a vehicle-linked process action.

- Open the vehicle and select Attachments to review its document area.
- Upload files directly when they belong to the vehicle record rather than one process step.
- Use a vehicle-linked process when the attachment is evidence or an output from a controlled workflow.
- Confirm that generated documents use the correct vehicle details before they are retained or shared.

Uploaded files

Current folder WF23 HGF Ford Transit

 Refresh

 Search files...

New folder...

 Create folder

Name	Modified	Size	Actions
 documents		Folder	...
 signature-1789719531025.png	18/09/2026	7 KB	...
 20260624_151944386_iOS.png	18/09/2026	1.0 MB	...
 IMG_5946.PNG	18/09/2026	577 KB	...

Upload to current folder



Upload files to this folder

Drag and drop files to upload them, or [browse](#)

Up to 20 files, 20 MB each, 100 MB per batch.

Vehicle Attachments tab

One-off quotation PDF and VAT

One-off quotation PDFs use a clearer compact layout. The PDF brings together the quote header, client details, scope, service areas, one-off services, pricing, terms and company details. Longer service lists continue onto another page instead of being clipped.

PDF area	Information shown
Client and scope	Customer, site, contact and the description of the proposed work.
Service areas	Areas taken from the designations linked to the quotation.
Services	The main one-off service and any additional one-off services.
Pricing	Subtotal, VAT where applicable, and total including tax.
Company details	Branch contact details, company number and VAT registration number where VAT applies.

VAT behaviour

- A new quotation starts with the VAT rate configured for the branch rather than a zero rate.
- Changing the quotation value, additional services total or VAT rate recalculates the VAT value and total including tax.
- When the PDF is produced, KleanFlo uses the stored tax values where available, then the quotation tax rate, then the branch VAT rate as the fallback.
- Check the branch VAT registration number and company number before producing customer documents.



QUOTATION

IMJ Software Limited

Quote Q-2026-000004

Prepared for ABC Legal at ABC Legal, 66 Lulworth Drive, Plymouth, PL6 7DU

Issued
28/09/2026

Valid until
28/10/2026

Service type
One-off

ONE-OFF SERVICE TOTAL

£187.20

Fixed price for the agreed work

Client Details

Client

Martin Julyan

Email

mj@example.com

Service address

ABC Legal, 66 Lulworth Drive, Plymouth, PL6 7DU

Company

ABC Legal

Phone

0791882 72772

Pricing Summary

One-off service **£156.00**

VAT **£31.20**

Total £187.20

Scope Overview

This quotation is for a one-off cleaning service at the service address shown, including the agreed scope and any listed additional one-off services.

One-Off Service

Service	Estimated time	Price
Completely clean the ground floor. Clean the carpets with carpet cleaner	2h 0m	£156.00

Terms Summary

Valid until 28/10/2026.

This one-off service is charged once only.

Additional or ad-hoc work will be quoted separately.

Company Details

66 Lulworth Drive, Widewell, Plymouth,
Devon, PL6 7DU

07917 838539

VAT no. GB653635553

One-off quotation PDF

Customer site and zone navigation

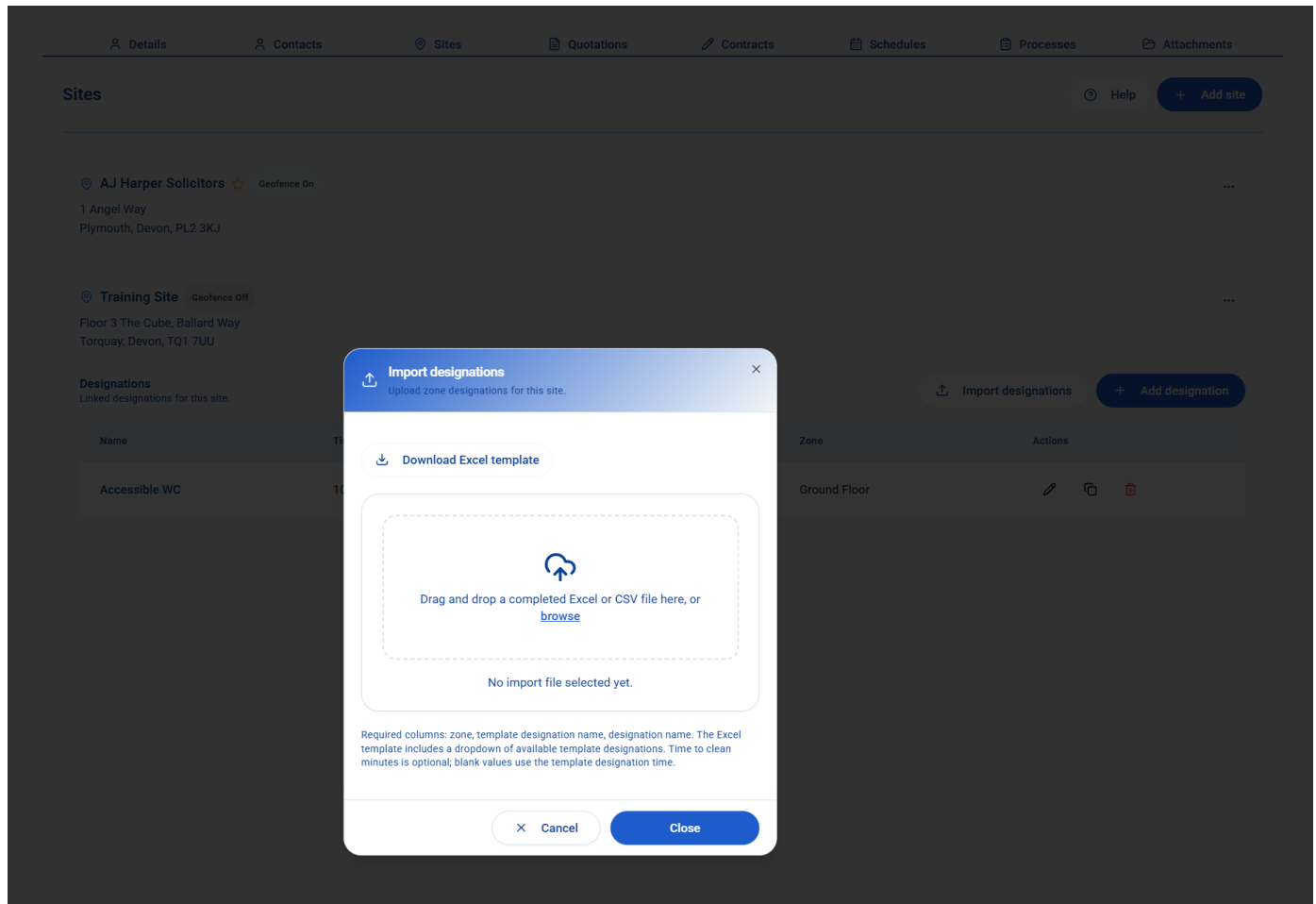
The customer Sites list is more focused and no longer expands a full schedule table inside each site. Site actions retain the return path more consistently, equipment opened from a site can return to the customer site tab, and the zone editor can open directly in the Zones view.

- Use the customer Schedules area when you need the full schedule rather than expecting it inside the Sites list.
- Open Equipment from the site when the asset context matters; use Back to return to the same customer site area.
- Choose the zone action from a site to open Designations and Zones directly in the Zones view.
- Designation headings use a quieter layout so names and task information are easier to scan.

Import site designations

1. Open the customer, expand the required site, and open its designations.
2. Select Import designations. If requested, choose the current contract whose zones should receive the imported designations.
3. Select Download Excel template and open the downloaded workbook.
4. Complete the Import sheet. Choose the template designation name from the supplied dropdown and enter the required zone and designation name.
5. Optionally enter Time to clean minutes as a whole number. Leave it blank to use the time from the template designation.
6. Save the workbook, return to KleanFlo and upload the XLSX file. CSV remains available as a fallback.
7. Review the result showing designations added, rows skipped, zones created and any row errors.

Import item	Rule
Import sheet	The Excel workbook must keep this sheet name.
Zone	Required. An existing zone is used or a new zone can be created through the import.
Template designation name	Required. Choose from the workbook dropdown to avoid mismatches.
Designation name	Required. This is the site-specific designation created by the import.
Time to clean minutes	Optional. Use a whole number only; blank uses the template default.
File type	XLSX is recommended. CSV is still accepted.



Site designation import

Operational checks

What you see	What to check
Process cannot be activated	Every Standard action has a field and every Document action has a completion requirement.
User cannot find a process	The process is Active, belongs to the correct area, and its branch scope and visibility include the user.
Staff sees the wrong work	Field and action visibility, performer, editing access and staff read-only settings.
Process cannot change status	Confirm whether the process is already completed; completed instances are locked.
Generated document lacks context	Launch from the correct linked record and check the document mappings and output name.
Vehicle attachment is missing	Document capability, vehicle link, action attachment and generated document destination.
Quotation VAT is unexpected	Branch VAT rate, quotation VAT rate, stored tax value and additional services total.
Import row fails	Required columns, template designation name and whole-number time to clean minutes.

What you see	What to check
Zone editor opens in the wrong place	Open it from the site zone action so the Zones view and return path are retained.

Recommended use policy

- Keep new or substantially changed processes in Draft until both supervisor and staff previews have been checked.
- Use controlled list options for information that must be reported or mapped consistently.
- Map only information that should become part of the permanent linked record, and choose Append where existing notes must be retained.
- Use the record-specific process launcher whenever the workflow belongs to a customer, vehicle, equipment asset or staff member.
- Review one-off quotation totals and branch details before sending the PDF to a customer.
- Use the generated Excel designation template for routine imports and keep CSV for simple fallback imports.

When to ask for help

Contact KleanFlo support if a complete process remains blocked from activation, a linked process opens against the wrong record, an attachment is not retained with its vehicle, a quotation total does not match the saved values, or a valid designation workbook cannot be imported. Include the branch, process or record name and a short description of the expected result.