



KleanFlo Service Update

Customer notice - Aug 1 release

Summary

An update has been released as the Aug 1 release. This document includes the full 11-30 July release pack and the later hotfix and release-readiness work completed before release.

The release covers KleanFlo web, KleanFlo On the Move, and KleanFlo Staff changes from 11 July to 1 August 2026, so the update can be applied and tested as one release.

The main areas covered are staff mobile attendance, phone and NFC check-in setup, process actions and documents, Insights reporting, customer schedules, quotation survey reliability, site attendance controls, absence cover planning, and mobile app release preparation.

What has changed

- Staff mobile attendance now follows the selected attendance mode more consistently, including QR code check-in and the full time and attendance schedule flow.
- Office users can set a staff mobile check-in mode for individual staff members where a different flow is needed from the branch default.
- KleanFlo On the Move now includes NFC tag setup and check support for customer sites.
- The Staff App now gives clearer NFC and GPS check-in/check-out options based on the attendance methods enabled for the site.
- Customer sites now support GPS app check-in settings, landline phone check-in settings, and NFC card check-in settings.
- GPS geofence behaviour can now be set to warn and flag outside-geofence activity or only allow check-in/out inside the geofence.
- Check-in and check-out records can now be flagged for review where the device clock differs significantly from the server time.
- Telephone check-in and check-out calls now end with clearer guidance so users know when they can hang up.
- Office users can generate phone check-in staff IDs and site IDs from the relevant staff and site screens.
- Process actions now give clearer prompts and notifications when work is ready for the next staff member or supervisor.
- Process actions now save entered field values before completion checks run, reducing re-entry.
- Generated process documents now handle signatures more reliably, including documents that need more than one signature.
- Process signatures can now be directed to the correct signer, including staff, supervisors, or selected named users where required.
- Staff can open process documents from the Staff App, including PDF and Word document formats where available.

- Staff process actions now give clearer prompts for document review, document creation, photos, unsaved changes, and completion states.
- My processes now shows clearer statuses for unavailable actions, actions waiting for approval, and actions where the staff member has completed their part.
- Staff process actions now give clearer reasons when an action is not yet available, such as waiting for supervisor work or a document to be prepared.
- Insights users can create ready-made KPI chart packs for operations, quotations, audits, absence, incidents, processes, timesheets, and customer reporting.
- Insights now includes Staff Data reporting for staff status, pay grades, mobile setup, compliance dates, branch coverage, and supervisor coverage.
- Insight charts now give clearer drilldown prompts, and smaller trend charts are easier to read.
- Network branch colours are now controlled from the head office branch to keep branding consistent.
- School term-time setup has clearer school-year guidance and can read suitable uploaded term-date PDF calendars before fallback lookup is used.
- New staff setup and contract designations now show zone and supervisor information more consistently.
- Ending a customer schedule now checks for future linked holiday entries and cancels future schedule-linked holidays where the schedule no longer exists.
- Customer records now keep tabs responsive after opening a customer record from a contract link or returning from contract details.
- The scheduling screen now lets users choose which later related jobs should move when dragging a job within the same schedule.
- Quotation designation setup now handles auto-pricing options more clearly when sector information is available.
- KleanFlo On the Move screens now use more consistent sign-in storage and app address handling across quotations, documents, staff records, customer sites, contacts, attachments, notifications, and calendar areas.
- The mobile calendar now filters office tasks for the signed-in user where that information is available.
- Schedule start dates, end-date shortening, planned work start dates, and schedule hour warnings now have clearer checks to reduce unexpected historic or future planned work.
- Fast contract setup now gives clearer confirmation when a schedule starts before today and planned work will be created from a later date.
- Future-dated schedules are handled more safely when planned work and schedule warnings are calculated.
- The absence cover planner now works by week, shows work needing cover, and displays draft cover alongside the weekly schedule.
- Office users can drag work needing cover to available staff, review daily cover plans, see workload totals, and use on-site cover suggestions.
- Absence recording has been simplified so the dialog focuses on the information needed to plan cover.
- Phone check-in and IVR-related updates have been brought into the release for customer-site attendance flows.
- KleanFlo On the Move and KleanFlo Staff have been prepared for release version 1.0.8.

What this means for users

- Staff should have clearer guidance when checking in, checking out, completing process actions, reviewing documents, signing documents, and adding evidence.
- Office teams can control attendance methods, geofence rules, process handovers, and signer responsibilities more clearly.
- Managers can build useful Insights dashboards faster and include staff-related reporting in the same reporting area.
- Schedule ending, schedule shortening, and holiday handling should be safer where future planned work and staff holiday records are linked.
- Quotation, customer, staff, document, and attachment screens in KleanFlo On the Move should behave more consistently after the update.
- Customer record navigation, scheduling moves, contract setup, and planned work checks should require less manual refresh or follow-up.
- Managers can plan staff absence cover with better visibility of unassigned work, draft allocations, and daily workload.
- Attendance, phone check-in, and mobile app release readiness are aligned with the wider update pack.

What to do

1. Apply the Aug 1 release as one update, then test staff attendance flows for GPS, NFC, QR code, and phone check-in where those methods are used.
2. Review customer site settings for attendance methods and geofence behaviour, especially sites that must block outside-geofence check-in/out.
3. Test Staff App process actions that include required fields, documents, photos, signatures, named signers, and supervisor handover steps.
4. Review Insights workspaces and add the ready-made KPI packs or Staff Data reporting where required.
5. When ending or shortening schedules, check any notice about future linked holidays or planned work before confirming the change.
6. Test schedule creation, schedule editing, planned work start dates, and schedule hour warnings on contracts with overlapping or future schedules.
7. Review absence cover planning for a week with staff absence, unassigned work, manual allocations, and daily approval.
8. Test KleanFlo On the Move quotation survey, documents, customer sites, contacts, staff records, attachments, notifications, and calendar screens after sign-in.
9. Confirm KleanFlo On the Move and KleanFlo Staff version 1.0.8 before wider user testing.
10. Ask users to refresh the browser or fully reopen the mobile app if a new option is not visible immediately after the update.

Support

Contact KleanFlo support if something does not look as expected. Please include the app area, staff member, customer, site, contract, process, schedule date, document or quotation reference, phone check-in details where relevant, and what the user expected to see.