



KleanFlo Workforce and Service Operations Update Guide

Review workforce exceptions, maintain service schedules and apply stronger billing controls

This guide is for KleanFlo administrators, supervisors and operational users. It explains the updated bank-holiday workflow, mobile attendance review, absence-cover recommendations, cleaning specification output, scheduled invoice safeguards, contract invoice generation, consumables handling, quick prospect capture and day-cleaning alert timing.

Scope

Availability depends on the user's permissions, branch access, subscription capabilities and the workflows enabled for the organisation. This guide focuses on the KleanFlo workflows listed below.

Quick reference

Area	What has changed	Main check
Bank holidays	Rolling schedules stay populated and non-working bank holidays create approved absence records.	Confirm branch region, schedule rule and assigned staff.
Attendance	Rejected offline check-ins and check-outs are retained for branch review.	Correct the attendance before marking the item resolved.
Absence cover	Recommendations use branch, cover, workload, conflict and travel context.	Review warnings before assigning or splitting cover.
Cleaning specifications	PDF layout and materials wording are clearer and more consistent.	Review each zone and confirm equipment and chemicals.
Scheduled invoices	Runs are branch-scoped, previewable and continue when one item fails.	Review the draft and any recorded failure before posting.
Contract invoice action	A due individual contract can generate its scheduled draft directly from the contract page.	Save billing changes first, then review the generated draft.
Consumables	Eligible unbilled consumables can be claimed by a scheduled invoice.	Confirm each site or customer uses the intended invoice mode.
Quick prospects	Prospect, main site and primary contact are created together.	Supply a named contact and complete address.
Day cleaning	Missing check-in alerts wait until the end of the day-cleaning window.	Check the shift rule and customer supervisor.

Before you begin

- Confirm that branch access and administrator or supervisor permissions match the records being reviewed.
- Check branch bank-holiday region, schedule working rules, customer supervisors and staff assignments.
- For billing, confirm customer, contract, site, billing month, invoice date, VAT and consumables settings before running automation.
- Treat review queues as operational controls: resolve the underlying record first, then close the review item.
- Keep the relevant customer, staff member, site or contract open while checking generated documents and linked records.

Bank-holiday scheduling

Recurring schedules now maintain a forward-looking planning horizon. When the monthly schedule rollover runs, active schedules whose next generated date falls inside that horizon are extended so future work does not stop simply because an older generation boundary has been reached.

When a schedule is configured not to work on bank holidays, KleanFlo omits the job for the bank-holiday date and creates an approved bank-holiday absence for the assigned staff member. The absence is tied to the schedule and date so the same item is not created repeatedly.

Situation	KleanFlo behaviour
Schedule works on bank holidays	The normal job remains in the schedule.
Schedule does not work on bank holidays	The job is omitted and an approved bank-holiday absence is created for assigned staff.
Manual bank holiday for cover staff	An administrator can add one date with explicit hours; it is approved immediately.
Normal annual leave includes a bank holiday	The usual validation remains in place so bank holidays are handled separately.
Schedule has an end date	Generation stops at the schedule end date even when the rolling horizon extends further.

Add a manual bank holiday

1. Open the staff record and select the Holiday area.
2. Choose Request holiday and change Leave type to Bank holiday.
3. Select one date and enter the bank-holiday hours. Manual bank holidays must be entered one day at a time.
4. Add an optional note and submit. KleanFlo records the item as approved rather than placing it in the normal leave approval queue.

Permission rule

Staff cannot add their own manual bank holidays through the employee app. This route is reserved for administrators managing cover or exceptional staff arrangements.

Request holiday
×

Submit annual leave or add a manual bank holiday for cover staff.

Leave type

Bank holiday

Start date

31/08/2026

End date

31/08/2026

Bank holiday hours

5

Notes

Mobile cleaner bank holiday record

× Cancel

Submit request

Manual bank-holiday entry

Attendance needing review

If a check-in or check-out was saved on a phone but cannot be applied automatically during offline synchronisation, KleanFlo retains the attempted action as an attendance exception. The phone action is not discarded, and the branch receives enough context to investigate the staff member, customer or site, action, recorded time and rejection reason.

1. Open the Workforce check-in report.
2. Review the Attendance needing review panel. Use the branch filter when managing more than one branch.
3. Open or locate the related attendance record and correct the cause shown in the Reason column.
4. Confirm the resulting check-in, check-out or timesheet is correct.
5. Select Mark resolved only after the attendance record has been corrected or deliberately accounted for.

Important

Marking an exception as resolved closes the review item; it does not recreate or apply the attendance action by itself.

Review information	How to use it
Staff and branch	Confirm the action is being reviewed by the correct branch.
Customer or site	Locate the intended job and check whether the mobile action still matches it.
Action	Distinguish check-in from check-out before making a correction.
Recorded time	Use the original phone time when deciding the correct attendance entry.
Reason	Correct the validation, schedule or record issue that prevented automatic application.

Review information	How to use it
Occurrence count	Repeated attempts for the same saved action are grouped rather than creating unrelated review items.

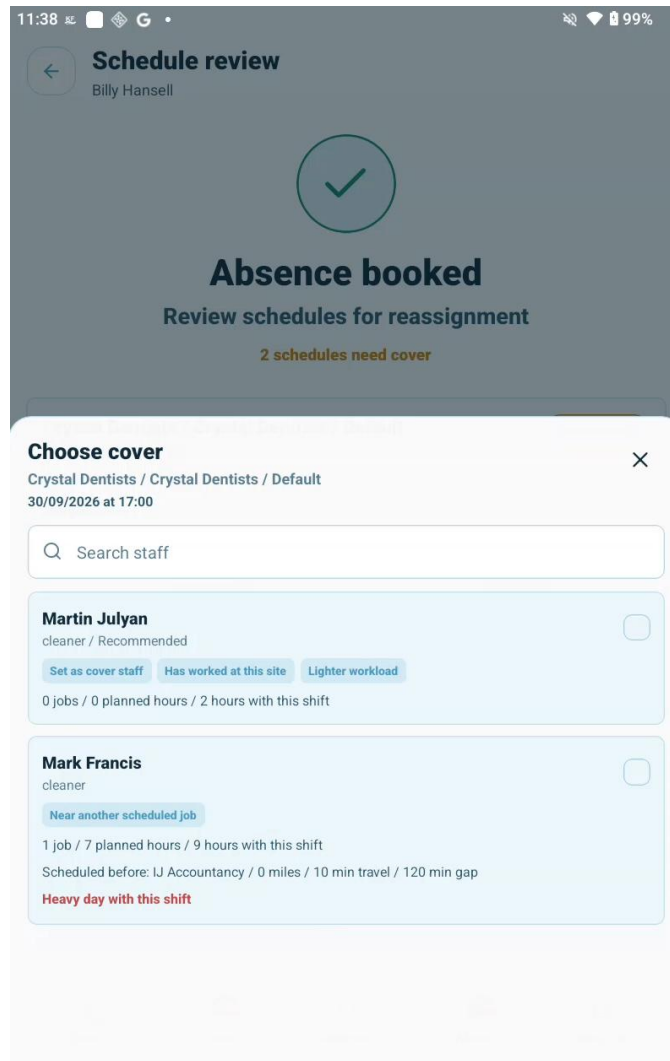
Absence-cover recommendations – On The Move App

Cover recommendations provide more operational context before a replacement is chosen. Suitable staff are ranked using branch allocation, designated cover status, existing work at the same site and projected workload. Conflicts and unrealistic travel gaps are shown as warnings rather than hidden.

Indicator	Meaning
Allocated to branch	The staff member is available within the branch scope for the affected work.
Designated cover	The staff member is configured as a cover option, subject to availability and workload.
Scheduled at same site	Existing work at the site may make the assignment practical.
Low workload	The projected day remains comparatively light after adding the cover work.
Schedule conflict	Existing work overlaps the proposed assignment and requires correction or another person.
Insufficient travel time	The gap between sites is too short for the proposed sequence.
Heavy projected workload	The assignment is possible but should be reviewed before confirmation.

After an absence is saved, the supervisor workflow can reopen the linked jobs that still require cover. Weekday and weekend jobs can be reviewed using the appropriate assignment route, and split cover preserves the actual proposed time window when an explicit duration was not supplied.

- Legal staff names are used in the cover picker.
- Jobs linked to the absence remain available for follow-up review after the absence is created.
- Saved absence dates are validated before later cover changes are applied.
- Travel reasoning is shown as practical context without exposing stored coordinates.
- A designated cover worker can be ranked below a better option when travel or projected workload is unsuitable.



Cover recommendations

Cleaning specification output

Cleaning specification PDFs use a redesigned layout with a clear cover page and a consistent structure for each zone. Every zone begins on a new page in the relevant document section, reducing the risk of a heading or task table being separated from its context.

Equipment and chemical information is also clearer. Linked equipment names take priority over stale stored text, blank or 'None' values are omitted, and equipment and chemicals are presented as separate labelled entries without duplicate wording.

Source information	Displayed result
Linked equipment is present	The current linked equipment name is used.
No linked equipment	KleanFlo falls back to the stored equipment wording when it is meaningful.
Equipment and chemical are different	Both appear on separate labelled lines.
Equipment and chemical repeat the same value	The duplicate is removed.
Value is blank or None	The empty value is not printed.
Long specification	Each zone starts cleanly on a new page and the PDF continues without clipping.

Cleaning Specification

Training Site

Floor 3 The Cube, Ballard Way, Torquay, Devon, TQ1 7UU

Issued by

IMJ Software Limited

Contract start

01/09/2026

Issue date

02/10/2026

1 zones | 1 designations grouped into 1 task groups across both parts of this document.

How to use this document

Part 1 - Cleaning Specification

Lists each designation and its tasks with frequency tick columns. Use this as the daily reference for what needs to be done in each area.

Part 2 - Task Detail Reference

Lists equipment, chemical or product, and desired outcome for every task. Use this to check the detail behind a task.

Cleaning specification PDF

Scheduled invoice safeguards

Scheduled invoice generation now applies stronger controls around scope, previews, failures and billing-period movement. Runs can be limited by branch, and preview mode shows whether each item would create an invoice or advance an already protected billing period without changing records.

Control	Behaviour
Branch scope	Due contract and consolidated-customer queries remain inside the selected branch.
Preview	Shows proposed creation or advancement without creating invoices or moving schedule dates.
Duplicate protection	An existing invoice for the billing period prevents another draft and advances the schedule appropriately.
Individual failure	One failed contract or consolidated customer is recorded and skipped; other eligible invoices continue.
No eligible consolidated contracts	The customer schedule advances rather than remaining permanently due.
Contract start validation	Invoice date cannot precede the contract start, and billing month cannot precede the contract start month.
Customer deletion	A customer with active contracts cannot be deleted until those contracts are ended or deactivated.

Review requirement

Automation creates draft invoices. Review the billing period, line items, VAT, due date, consumables and any failed items before posting or sending the invoice.

Generate an invoice from a contract

An eligible individual contract can now create its due scheduled invoice directly from the contract details page. KleanFlo checks the saved contract in preview mode first and only displays Generate invoice when the current billing period is due and a new draft can be created.

Button state	Reason
Generate invoice is available	The saved individual contract is due, belongs to an accessible branch and the preview confirms a new direct invoice can be created.
Button is not shown	The contract is not yet due, its billing window is invalid, an invoice already protects the period, no new chargeable draft can be created, or the customer uses consolidated scheduled invoicing.
Generating...	KleanFlo is creating the draft; wait for the result before selecting another action.
Invoice generated	The draft was created and the confirmation displays its invoice number when available.

Save first

The availability check uses the saved contract record. Save changes to the contract value, dates, billing frequency, next invoice date or current billing month before selecting Generate invoice.

1. Open the individual contract and review its saved start date, optional end date, value and billing frequency.
2. Confirm Next invoice date and Current billing month describe the period that should be billed. Check payment terms, VAT, purchase order details and the site's consumables invoice mode.
3. Save any changes. When the saved contract is due and eligible, select Generate invoice beside the contract actions.
4. Wait for the Invoice generated confirmation and note the invoice number shown.
5. Open Invoices, locate the new draft and review its billing period, contract line, additional services, consumables, subtotal, VAT, due date and total.
6. Return to the contract and confirm the next invoice date and current billing month have advanced to the next cycle.

The action follows the same scheduled-billing protections as the automated run. It does not create a second invoice for a protected billing period, and customer-consolidated schedules continue to be generated through the customer-level billing workflow.

The screenshot shows the 'Contract Details' form with the following fields and values:

- Quote Number:** Q-2026-000002
- Purchase Order number:** (empty field)
- Contact:** Alan Humphries
- Start Date:** dd/mm/yyyy
- End Date:** dd/mm/yyyy
- Contract Value (£):** 1000.00
- Billing Frequency:** Monthly
- Next invoice date:** 01/10/2026
- Current billing month:** September 2026
- Payment terms (days):** 0
- Schedule setup:** Standard scheduling

Buttons at the top right: End contract, Generate invoice, Save contract details.

Generate invoice from a contract

Consumables and invoice history

Sites can control whether eligible consumables are added manually or included with scheduled invoicing. When an eligible consumable is selected for a scheduled invoice, KleanFlo links it to that draft in the same transaction so the same item cannot be claimed by another invoice.

- Direct contract invoices use eligible consumables from the contract site.
- Consolidated invoices can include eligible consumables across the customer scope.
- If one of several consumable items has already been claimed, the invoice is not completed with a partial or inconsistent claim.
- Invoice history records meaningful changes such as issue date, due date, status, subtotal and total.
- Submitting an invoice without changing tracked values does not add an unnecessary edit event.

←

Edit Invoice

INV-2026-000042

Q

Search

🕒

🔔

M

Invoice Details

View history

Download invoice

Save invoice details

🕒

Created by Automation on 02 Oct 2026, 08:05

Customer

Alans Offices

Site

Head Office

Issue date

📅

02/10/2026

Due date

📅

02/10/2026

PO number

Status

Draft

⌵

Description	Delivery date	Delivery reference	Qty.	Price	Account code	Tax rate	Tax
Cleaning Services - September 2026		-	1	1000	200 Sales	20% VAT	
Alcohol hand sanitiser - 1L - Code CLN-008 - Head Office	2026-10-02	-	1	43.8	260 Other Revenue	20% VAT	

◀

▶

+ Add row

Amounts are tax exclusive

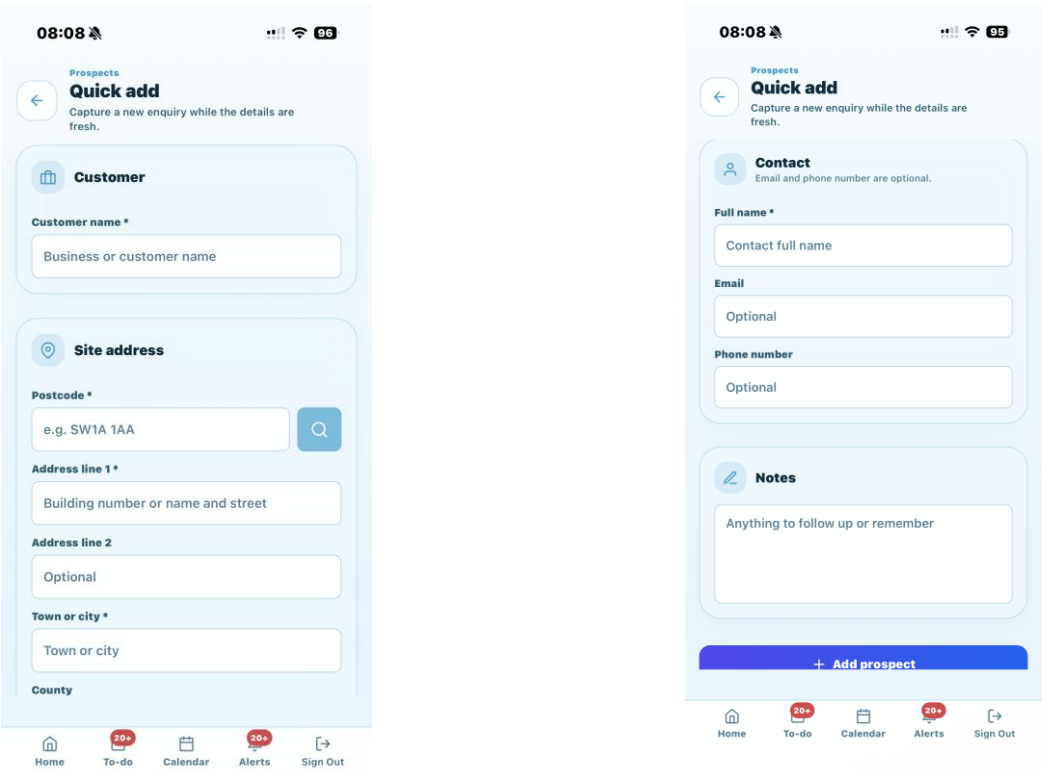
Scheduled invoice review

Quick prospect capture – On The Move App

The quick prospect workflow creates the prospect, its main site and a site-linked primary contact together. This reduces partial customer records and keeps the contact associated with the correct location from the start.

Required information	Validation
Prospect name	Must be supplied and is trimmed before the record is created.
Address	The first address line, town or city and postcode must be complete enough to create the main site.
Contact full name	A named contact is required even when an email address is not available.
Email	Optional, but it must be valid when supplied.
Branch	Must be within the current user's permitted branch scope.
Phone or mobile	Can be retained on the primary contact and linked to the main site.

The records are created together. If required information fails validation, KleanFlo does not leave behind only part of the prospect, site or contact structure.



Quick prospect

Day-cleaning alerts

Missing check-in monitoring now treats day cleaning as a working window rather than alerting shortly after the planned start. A missing day-cleaning check-in alert is held until the end of the 09:00 to 17:00 window, reducing premature notifications where staff may attend at a flexible time during the day.

- No missing check-in alert is sent before 17:00 for the day-cleaning rule.

- After the window closes, the alert includes the day-cleaning window so the recipient understands the timing rule.
- The customer supervisor receives the alert when configured; branch owners remain the fallback when no customer supervisor is assigned.
- Other shift rules continue to use their own configured timing behaviour.

Operational checks

What you see	What to check
Future schedules stop too early	Schedule is active, next generation date is valid, end date has not passed and the branch bank-holiday region is correct.
Bank-holiday absence is missing	Schedule does not work bank holidays, the staff assignment exists and the correct regional holiday is available.
Attendance exception remains open	Underlying attendance has been corrected before selecting Mark resolved.
Recommended cover looks unsuitable	Read workload, conflict and travel warnings; compare another eligible staff member.
Cleaning specification repeats a material	Check the linked equipment and chemical values on the source task.
Scheduled invoice is skipped	Review billing dates, active contracts, duplicate period protection and the recorded failure.
Generate invoice is not visible	Save the contract, then check that it is due, uses individual billing, has valid billing dates and belongs to an accessible branch.
Consumable is absent from the invoice	Check site invoice mode, customer and site scope, and whether it is already linked to another invoice.
Quick prospect cannot be created	Confirm named contact, complete address, valid optional email and permitted branch.
Day-cleaning alert arrives unexpectedly	Confirm the shift uses the day-cleaning rule and check the branch time zone and customer supervisor.

Recommended use policy

- Review automated records before relying on them for payroll, invoicing or customer communication.
- Resolve the cause of an attendance exception before closing the review item.
- Use cover recommendations as decision support and always review conflicts, travel and projected workload.
- Preview scheduled billing after configuration changes and inspect every first draft before posting.
- Keep branch bank-holiday regions, schedule rules and customer supervisors current so automated decisions reach the correct records and users.

When to ask for help

Contact KleanFlo support if a schedule horizon, bank-holiday absence, saved mobile attendance action, cover recommendation, cleaning specification or scheduled invoice does not match its source records. Include the branch, affected record, date and expected result.