

# Manager Portal

## User Guide

---

Your complete web dashboard — 100+ features covering jobs, estimates, clients, team, inventory, tools, scheduling, service requests, revenue, dispatch, and billing.

### Quick Reference

Command: /portal or visit [app.arklysolutions.com/portal](https://app.arklysolutions.com/portal)

Access: Managers, admins, techs (limited), and clients (free)

Auth: Telegram Login Widget — 24-hour sessions, optional 2FA

Roles: Admin · Manager · Tech · Client (4-tier RBAC)

## Contents

1. Getting Started
2. Dashboard, Revenue & Dispatch
3. Jobs, Estimates & Clients
4. Team, Scheduling & Messaging
5. Service Requests & Client Portal
6. Inventory, Tools & Store
7. Settings, Billing & Notifications
8. Quick Reference

# 1. Getting Started

---

The ArklyTech Portal is a full web dashboard at [app.arklysolutions.com/portal](https://app.arklysolutions.com/portal). Type /portal in the bot or navigate directly. Authentication uses the Telegram Login Widget — one tap, no passwords. Sessions last 24 hours with optional TOTP 2FA.

Four access levels:

- Admin — cross-team visibility, all features
- Manager — full team access: jobs, clients, billing, analytics
- Tech — personal view: own jobs, estimates, stock
- Client — free: sites, devices, service requests, warranty status

Tip: Users who are both a manager and a client see a role switcher in the sidebar.

# 2. Dashboard, Revenue & Dispatch

---

The dashboard shows a real-time snapshot:

<b>Activity metrics</b>	Active techs, total events, top devices, recent timeline
<b>Revenue</b>	This month, outstanding, avg job value, YTD total
<b>Profitability</b>	Per-job margins: revenue vs labor + materials cost
<b>Estimate funnel</b>	Draft → Sent → Approved → Invoiced → Paid pipeline
<b>Client health</b>	Flagged clients: unanswered >48h, expiring warranties, no visit 90+ days
<b>Dispatch map</b>	Live tech locations from active and scheduled jobs
<b>NPS &amp; surveys</b>	Auto-sent 48h after job. Client rates 1-10. NPS tracked over time
<b>Tech performance</b>	Jobs completed, avg hours, AI usage per tech

The notification bell polls every 60 seconds. Click any notification to jump directly to the relevant item. Mark all as read with one tap.

### 3. Jobs, Estimates & Clients

---

<b>Jobs list</b>	Filter by status, tech, date, location. Bulk actions. Map and timeline views
<b>Job photos</b>	Before/after tagging. Techs tag each photo during the job
<b>Estimates</b>	Full materials takeoff with NEC calculations, templates, PDF generation
<b>Quick re-order</b>	/reorder copies materials from a past job into a new estimate
<b>Proposals</b>	Combine estimate + branding + scope. Clients approve from their portal
<b>Invoices</b>	Payment links, mark as paid. Client receives notification
<b>Doc templates</b>	Reusable proposal, report, and email templates with auto-fill
<b>Clients CRM</b>	Contact info, status tags, merge duplicates, linked jobs and estimates
<b>Monthly reports</b>	Auto-generated PDF summary sent to clients on the 1st of each month

### 4. Team, Scheduling & Messaging

---

- Team roster — roles, feature toggles (Estimator/Inventory/Tools), apprentice flags
- Invite members — generate invite link for techs, or invite clients by chat ID
- Schedule — dispatch jobs with date, time, location. Techs accept/decline in Telegram
- Time-off — techs request via bot, managers approve/decline from portal
- Messaging — chat-style UI with message history, photo/file attachments, 3s polling
- Broadcast — send to entire team with saved templates

## 5. Service Requests & Client Portal

---

Clients log into the same portal with Telegram — free, no subscription needed. Managers invite clients from the Team page.

<b>Client management</b>	Add clients, create sites, assign devices from 362-device catalog
<b>Service requests</b>	Clients submit issues. Managers see all requests, assign techs, update status
<b>Emergency requests</b>	Instant Telegram alert to manager + nearest tech. Priority handling
<b>Threaded notes</b>	Both sides add notes. Client sees provider responses in real time
<b>Proposal approval</b>	Clients approve or request changes on proposals from their portal
<b>Asset lifecycle</b>	Timeline showing install date, service history, warranty expiry per device
<b>Device health</b>	Warranty status dots (green/yellow/red). Expiry alerts 30 days before
<b>Scheduled visits</b>	Clients see upcoming maintenance visits on their site pages
<b>Monthly reports</b>	Auto-generated PDF summary delivered to client portal on the 1st
<b>Notifications</b>	Real-time bell with auto-alerts on status, assignment, notes, and payments

## 6. Inventory, Tools & Store

---

- Stock inventory — items across sites, low-stock alerts, barcode scanning, CSV import
- Tool tracker — checkout/checkin with GPS, overdue reminders, site sharing
- Store — 100+ products across 11 categories with Amazon affiliate links

## 7. Settings, Billing & Notifications

---

<b>Company branding</b>	Name, logo, primary color — appears on all PDFs and client portal
<b>2FA</b>	Optional TOTP (Google Authenticator) with 8 backup codes
<b>API keys</b>	Read-only Bearer tokens for Zapier/n8n integrations
<b>Billing</b>	Plan details, seat usage, invoice archive
<b>Audit log</b>	Every role change, permission toggle, and billing event tracked
<b>Notification preferences</b>	/notifications command — toggle morning/evening/weekly

## 8. Quick Reference

---

<b>Open portal</b>	/portal or app.arklysolutions.com/portal
<b>Login</b>	Telegram Login Widget (one-tap, optional 2FA)
<b>Keyboard shortcuts</b>	Cmd-K search, j/c/e/t/o page jumps
<b>Roles</b>	Admin > Manager > Tech > Client
<b>Session</b>	24 hours, invalidated on role change
<b>Client access</b>	Free — invite from Team page