CREWBOOK · USER GUIDE

How to use CrewBook.

Every page of the app, step by step — the calendar and Day View your office runs on, WhatsApp briefs to the crews, holidays and wages, expenses and mileage, purchase invoices and Costings, and the sales area built in. Each chapter ends with fixes for the things that trip people up.

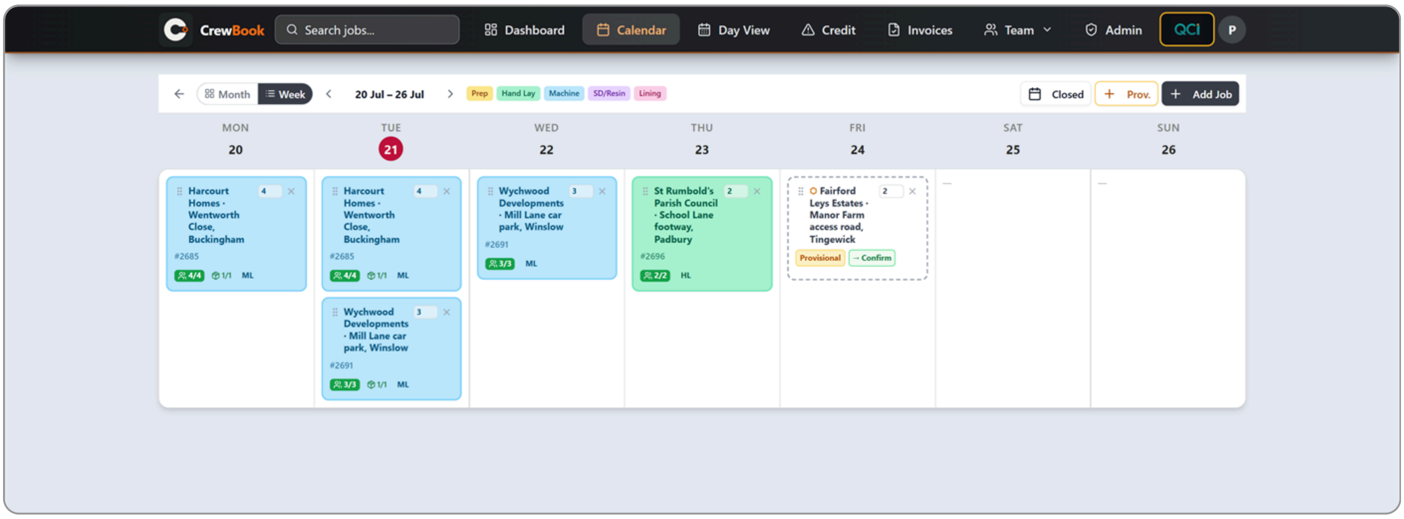
Updated **August 2026** Applies to **CrewBook on the web and installed**

Also available in print — download below

1. What CrewBook is

CrewBook is the day-to-day book your office and site teams work from. Each day has a list of jobs; each job has its crew, materials, plant and subcontractors. The same data drives wages, expenses, purchase invoices, the per-contract P&L and a live map of where tomorrow's work is — and the sales side (leads, quotes, contracts, invoicing and credit control) is built in as its own QCI area.

Everything is shared across every signed-in person in your company, live: when a colleague books a job or approves a claim, your screen catches up by itself. What each person can *see* is controlled by their access tier.



The weekly schedule — the page most of the firm lives on.

READING THIS GUIDE

Names in boxes, like Add Job, are the exact buttons and fields you'll see in the app. Paths like **Admin** → **Users & Access** mean: open Admin in the top navigation, then find that panel. The search box in the contents panel searches everything in this guide, including the troubleshooting entries.

2. Creating your account and signing in

Everyone gets their own personal login. Sign up with an email address and password (verified by a 6-digit emailed code), or in one step with Continue with Google, Microsoft, Facebook or Apple.

1. Go to crewbook.me (https://crewbook.me) and click Start Free Trial — or, if you're joining your firm's existing CrewBook, use the sign-up link and the *exact email address your invite was sent to.*
2. Enter your Email, Password and Confirm Password, and click Create account — or use one of the Continue with... buttons.
3. Type the 6-digit code from the Verify your email screen and click Verify. No code? Click Resend and check spam.

Forgotten password? Click Forgot password? on the log-in page, enter your email, and follow the emailed link to set a new one. If you originally signed up with Google, Microsoft, Facebook or Apple, there's no CrewBook password to reset — use the same Continue with... button every time.

If something's not right

"Invalid email or password" when logging in

Wrong credentials — or the account was created with a social provider rather than a password.

Check the address, try Forgot password?, or log in with the Continue with... button you originally signed up with.

"Invalid verification code" when signing up

The code was mistyped or has expired.

Re-enter it carefully, or click Resend and use the code from the newest email.

"Invalid reset link" when resetting a password

The link was cut short by email software, or has been used or expired.

Click **Request a new link** and use the newest reset email — copy the whole link into the address bar if clicking doesn't work.

"Access Restricted — you are not registered to use this application"

The login you're using isn't registered for the app.

Check you're signed in with the right account, try logging out and back in, or contact your administrator for access.

3. Your company, the setup wizard and subscribing

Every login belongs to exactly one company. The *first* person from your firm creates it — everyone else joins by an administrator's invite and should **never** create a company of their own (that gives them a separate, empty workspace). Creating the company starts the whole team's 14-day free trial, no card needed, and makes you the Owner with Super Admin access.

The setup wizard

After creating the company, a six-step wizard configures it. Progress saves on every **Next**, so you can stop and come back — and you can re-run it any time from **Admin → Re-run Setup**.

1. **Company Details** — company name (required), logo, contact details and address.
2. **Job Types** — the pick-lists offered when creating jobs. It starts with Groundworks, Tarmac, Concrete, Drainage, Roofing and Fencing plus categories (Preparation, Main Works, Finishing, Remedial, Survey); add your own with Enter, remove with the ×. Editable later in Settings.
3. **SharePoint** — optional. Choose **Yes, we use SharePoint / Microsoft 365** and enter your SharePoint site name (how CrewBook finds your Contracts list), or **No, we don't use SharePoint**. You must pick one; you can change it later.
4. **Add Workers** — your first team members (name and phone). The rest can be added later on the Workers page.
5. **Notifications** — who gets emailed about what: holiday approvals and reminders, weekly wages, new suppliers, new clients, photo uploads. Leave a field blank to disable that notification.
6. **Optional Features** — **WhatsApp job briefs** (needs a one-off setup from **Admin → Integrations** afterwards, about 20 minutes) and **Daily Google Drive backups** (nightly export of the whole database — works as soon as it's on).

You can **Skip setup** at any step and finish later in Settings — the app works either way.

The trial and subscribing

When the 14-day trial ends (the last day is included), the app shows a subscribe screen to everyone until someone completes it: **Subscribe now** → secure checkout → "You're subscribed!". It's £99/month per company, unlimited users, cancel anytime — adding staff never raises the price.

If something's not right

You were invited, but you see "Create your company"

The invite hasn't been sent yet, or went to a different email address — invites are matched by email.

Don't create a company. Ask your administrator to (re-)send the invite to the exact address you log in with, then log out and in again — you'll be attached automatically.

The setup wizard keeps reopening at every login

Setup was never finished or skipped.

Click through to **Finish**, or click **Skip setup** — both mark it complete.

"Run the setup wizard first to create your company settings..."

The company settings record doesn't exist yet, so the Lists & Options panel has nothing to save to.

Open **Admin** → **Re-run Setup**, complete (or skip) the wizard, then come back.

Everyone suddenly sees the subscribe screen

The trial expired, or the subscription was cancelled.

Have someone click **Subscribe now** and complete the checkout — the whole company's access is restored as soon as payment confirms. Stuck on "Confirming your payment..."? It re-checks every few seconds, and you can safely close the page — activation happens automatically.

4. Your team and who sees what

Staff are invited from **Admin → Users & Access**: type their email, pick a tier, click Invite. If the address already has a CrewBook login it joins your company immediately; otherwise they're attached automatically the first time they sign up with that email.

ACCESS TIER	WHAT THEY SEE BY DEFAULT
Super Admin	Everything, always — page chips can't lock them out. The only tier with the Data Explorer. The company creator starts here.
Admin	Every page, including Admin Settings, Costings, Backup and QCI Sales; can invite and manage users.
Office Staff	Dashboard, Calendar, Day View, Credit, Invoices, Workers, Holidays, Mileage Log, Message Delivery, Guide and Account.
Site Staff	Dashboard, Calendar, Day View, Holidays, Mileage Log, Guide and Account — built for crews checking the day's work from a phone.

Beyond the tier, each user's row has a Permissions expander with **page chips** — blue = visible, grey = hidden — so an Office Staff member can be granted Wages, or QCI Sales, as an exception. The Expenses button toggle lives there too (lets someone submit expenses from the Dashboard without seeing Petty Cash), while the **linked worker** dropdown sits on the user's row itself, next to the tier — it ties a login to its record on the Workers page. Every signed-in user always has their Account page — it can't be revoked.

CHIPS RESET WITH THE TIER

Changing someone's access tier resets their page chips to that tier's defaults. Set the tier first, then re-apply any custom chips.

5. Finding your way around

The header holds the main pages — Dashboard, Calendar, Day View, Credit, Invoices — plus the Team dropdown (Workers, Holidays, Wages, Petty Cash, Mileage Log, Message Delivery). Sales lives in its own QCI area, entered via the **QCI logo button**. Admin (Settings, Costings, Backup) sits at the top right, along with your round initial button for Account and Logout. On a phone, less-used pages tuck behind More in the bottom bar.

- You only see the pages your tier or custom permissions grant — a missing menu item usually means a missing page chip, not a fault.
- The **search box** in the header jumps straight to any contract number, client or site.
- Like CrewQCI, the app installs from the browser: **Account** → **Install App** (on iPhone: Safari's Share → Add to Home Screen).
- The ? button in the header opens this guide at the chapter for the page you're on — and inside the QCI area it opens the CrewQCI guide instead, where the sales side is documented in full. The in-app Guide page is a condensed version, always to hand from the navigation.

6. Dashboard

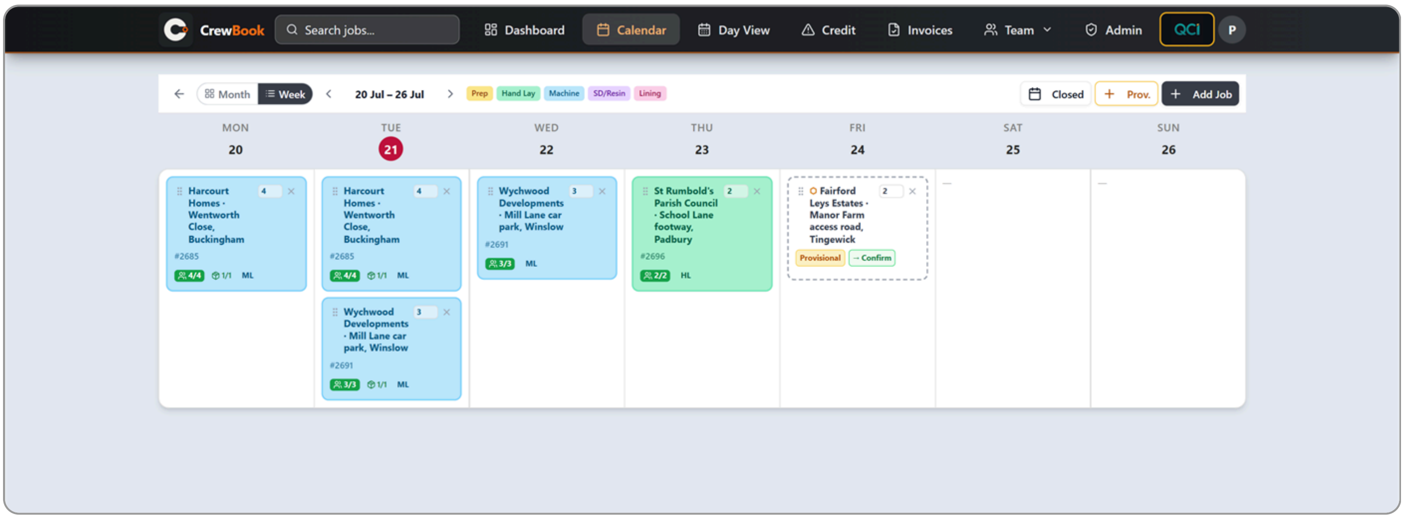
The Dashboard is the "what needs my attention right now" page — a grid of cards summarising today and tomorrow, with a click-through on almost everything. The ones worth a habit:

- **Today's Jobs** / **Tomorrow's Jobs** — each job with its worker, materials, hire and sub counts. Click a job to open it in Day View.
- **Unnotified Tomorrow** — workers on tomorrow's jobs who haven't had their WhatsApp brief yet. "All notified ✓" is the end-of-day goal.
- **Unbooked Items** — every material, hired plant item and subcontractor for this week *and next* that isn't ticked as booked: a forward-looking ordering checklist.
- **Credit Check** — upcoming jobs whose credit status still says "Needs Checking" or "No Credit".
- **Not Yet Invoiced** — jobs dated before the end of this week with no invoice issued (remedial jobs excluded), grouped by client.
- **Worker Status (14 days)**, **Provisional Jobs**, **My Claims** (your own expenses) and **Recent Site Photos** — a month of uploads from site, with a full-screen viewer and **Download all**.

Every card header has an expand icon for the full list, and the top buttons open the **Mileage Log** and a quick **Expenses** claim form (shown to anyone whose Expenses button is enabled).

7. Calendar

The Calendar is the central schedule — Month or Week view, one card per job per day. Cards carry the client and site, the contract number, the coordinator's initials, a worker-count badge ("3/4" — green when full, orange when short) and a materials badge (green once everything's booked). Card colours follow the job category — Prep amber, Hand Lay green, Machine blue, SD/Resin purple, Lining pink — and a red R chip marks remedial work. The green +N pill in a weekday's corner is spare capacity: your available workforce minus everyone off or already spoken for.



Week view — clicking any day opens it in Day View.

Adding a job

1. Click + Add Job and set the Job Date — or click Multi-day? and set start and end dates; the dialog confirms "This will create N working day jobs (weekends & holidays excluded)."

2. If SharePoint is connected, type into Select Contract from SharePoint — picking a contract auto-fills the contract number, client, site, coordinator and contacts. Otherwise fill the fields by hand.

3. Add the Full Address (this is what puts the job on the Live Map and behind the Maps links), What3Words and contact details.

4. Pick a Job Category and Job Co-Ordinator, set Desired Workers, tick Remedial Job if it's a return visit, and click Add Job.

Provisional bookings

Work that isn't signed off yet is pencilled in with **+ Prov.** — no contract number needed, just a client and/or site and the dates. Provisionals show as white dashed-border cards with a ⬡ badge. When the job is confirmed, click the green **→ Confirm** button, look up (or type) the contract number, and resolve any differences the dialog flags between what was pencilled in and what SharePoint says. Costs booked on a provisional follow it into Costings once it has its number.

Rescheduling, deleting and closed periods

- **Drag to reschedule** — drag a card (on touch screens, from its ⠿ grip) onto the new day. Workers, materials, hires, subs and plant all move with it, and the toast has an undo.
- **Delete** — the small × on the card, with a confirm; the undo in the toast restores the job and everything attached.
- **Closed periods** — the **Closed** button manages bank holidays (set up automatically) and your own shutdowns. Closed days grey out, are skipped by multi-day bookings, and refuse dropped jobs. Booking a single job on a closed date warns but doesn't block.

If something's not right

The contract search shows "No contracts found" or sits on "Loading contracts..."

The SharePoint contract list hasn't loaded yet, or nothing matches what you typed.

Wait a moment and retype — the list retries automatically — or fill in the Contract No. and the other fields by hand. If it never loads, check the SharePoint connection under Admin.

A job can't be dropped on a particular day

That day is inside a closed period.

Pick another day, or adjust the closure under **Closed → Manage Closed Periods & Holidays**.

"Failed to create job / move job / delete job — please try again."

The save didn't reach the server — usually a connection blip. Nothing half-happened; the screen reverts.

Check your connection and retry.

No green "+N" capacity number on a day

Capacity only shows on open weekdays with active workers set up, and only when there's a surplus to show.

Nothing is wrong — a missing badge means a weekend, a closed day, or no spare workers.

8. Day View

Click any day and you're in Day View: every job on the date, each with its workers, materials, plant, subcontractors and hires shown as chips you can tick, drag and click. This is where the day actually gets run.

Assigning workers

1. The Unassigned Workers pool at the top holds everyone available today who isn't on a job yet.
2. Drag a name onto a job — or click several names to select them, then click + Add N on the target job. Drag chips *between* jobs to move people.
3. Click a worker's name on their chip to set their **shift** (0, ⅓, ½, 1, 1½, 2), their job order for the day, and the Driver tick.

   Shifts drive wages — and a worker on two jobs in one day is split ½ and ½ automatically.

Chip colours carry live information: blue = WhatsApp brief sent, green = brief read, amber = the worker has a day status (sick, holiday...) and probably shouldn't be on the job.

Booking materials, plant and subs

Every material, hired plant item, subcontractor and other cost has a circle icon — click it once the order is actually placed and the chip turns yellow with a tick. The Dashboard's Unbooked Items card is driven by exactly these ticks. Booked material chips grow inline boxes for the order reference and delivered quantities, so tonnages can be trued up after the day. An amber ⚠ triangle on a chip means it carries a note — tap to read it.

Each job card also carries its **credit status** badge (click to change — Needs Checking, OK, No Credit, Percentage Upfront, Special Authority) and its **invoice status** badge (Not Invoiced red, Draft Raised blue, Invoiced green, Proforma amber) — click it to set the status and which job days it applies to. Both feed the Dashboard's checklists.

If something's not right

A worker isn't in the Unassigned Workers pool

They're already on a job today, they have a day status (holiday, sick...), they're marked monthly-paid — or, on a weekend, they haven't been marked available.

Check the Worker Day Status card and, at weekends, the Weekend Availability panel; remove the status or mark them available.

A plant chip has gone red with "⚠ 3/2"

More of that plant item is assigned across today's jobs than the company owns.

It's a warning, not a block — take the plant off one of the jobs, or arrange a hire.

"Failed to save — please try again."

A change didn't reach the server; the screen reverts to the previous value so nothing is half-saved.

Retry once you're connected.

9. The job editor

Click Job Edit on any job card to open the full editor — a large window with tabs across the top, each with a count bubble: Summary, Job Setup, Workers, Own Plant, Materials, Hired Plant, Subcontractors, Other Costs and Media.

The job editor — one window for everything on one job, one day.

- **Summary** — the job at a glance: badges, invoice status bar, the Raise draft document button (see the QCI area), cards for each section with Open tab → shortcuts, and the editable amber Site Notes card — those notes show on the Day Overview and go out in the WhatsApp brief.
- **Job Setup** — click any row to edit the client, contract number, site, coordinator, address, What3Words and contacts. Changing the contract number offers to apply it to the site's other days and stamp it onto linked costs; editing the site or client on a numbered contract syncs across its other days automatically. Job actions live here too: WhatsApp gang, Move day (everything moves with it), Add another day (same details, fresh costs), and the danger zone — Cancel job... with a reason (stays on the calendar, struck through, reinstatable) or a two-step permanent delete.
- **Workers** — the gang with shifts, driver ticks, and subsistence/hotel allowances per worker.
- **Own Plant** — tick the company plant on site (Big Plant, Smaller Plant, Incidentals & Tools). Picking a paver adds its usual rollers and opens the haulage form — movement, quoted cost (auto-filled), from/to, and an invoice check. **Changes here only save when you click Save plant.**

- **Materials** — orders with supplier, quantity, unit and price; From Yard for own stock; Split Load for two materials on one wagon (its charge line is added automatically); delivery times with an auto-fill for multi-load tonnage runs; daywork charges; and a per-item **invoice check** — enter the invoiced figures and the icons tell you green = matches, amber = under, red = over. Contra Charge records a credit note due from the supplier.
- **Hired Plant / Subcontractors** — rates, ordered prices and invoice checks. Setting a hire's from/to dates puts it on every job day it spans; Invoice logged elsewhere and Apply invoice to another day? stop a multi-day invoice being counted twice. Ticking CIS Deductible on a sub shows the 20%-of-labour deduction live.
- **Other Costs** — grab lorries, testing, traffic management, drawings, with the same booking and invoice checks.
- **Media** — photos, videos, sign-off sheets and documents uploaded from site; one batch note, category badges, automatic compression, and one summary email per batch to the office. Uploads surface on the Dashboard for a month.

CANCEL, DON'T DELETE

A rained-off job should be *cancelled* (it keeps its record and history, and can be reinstated) or *moved* — deleting removes the day and everything on it. When you do need to move work, always use Move day or the calendar drag rather than recreating the job: moving carries every linked record with it.

If something's not right

Plant changes disappeared

The Own Plant tab only saves when Save plant is clicked.

Re-select the plant and click Save plant before leaving the tab.

"Updated this day, but N other day(s) on contract #X didn't sync."

A shared detail saved on this day but failed to copy to some of the contract's other days.

Refresh the page and make the same edit again — only the failed days need the retry.

Rows in Job details won't open for editing

The job is cancelled — cancelled jobs are read-only.

Click **Reinstate job** first if the details need changing.

The editor closed by itself

A teammate moved the job to another date, or deleted it, while you had it open.

Find the job on its new date via the Calendar and reopen it.

Files uploaded from site but no email reached the office

No photo-upload recipients are configured.

An admin adds recipient addresses in Settings. The files themselves are already safely on the job — the email is only a notification.

10. WhatsApp job briefs

The brief sends each worker their day on WhatsApp: site, client, address with Maps and What3Words links, the crew list, plant, materials and notes. Messages go from your company's own WhatsApp number (see integrations), and delivery feeds back into the app — a worker's chip turns blue when the message arrives and green once it's read.

The WhatsApp preview — check the message and recipients, then send.

1. Get the job right first — workers, materials, notes — because the message is built from what's currently recorded.
2. Click the green **WhatsApp** button on the job card (or **WhatsApp gang** on the Job Setup tab).
3. Check the recipients — every assigned worker plus the coordinator, pre-ticked. Untick anyone, or **Add from personnel**.
   The message itself is the approved template and can't be edited per send.
4. Click **Send** and look for "WhatsApp sent to N recipient(s)".

> **THE HABIT THAT MAKES IT WORK**
>
> Send briefs the afternoon before. The Dashboard's **Unnotified Tomorrow** card is the checklist — when it shows "All notified ✓", everyone knows where they're going in the morning.

If something's not right

"Failed to send to: ..." for some workers

Those individual messages didn't go through — a bad or missing number, or WhatsApp rejected them. The rest were sent.

Check the worker's phone number on the Workers page, then reopen the preview and send to just the failed people.

"No phone numbers found"

None of the assigned workers (or the coordinator) has a phone number recorded.

Add numbers on the Workers page — messages can only go to your own personnel, never to arbitrary numbers.

No WhatsApp buttons anywhere

WhatsApp is switched off for your team, or hasn't been set up yet.

An admin enables it and completes the one-off Twilio setup under **Admin → Integrations** — see integrations.

The preview shows an error with a Retry link

The preview couldn't be generated — a connection or sign-in blip, common on iPhones.

Click **Retry**; the app also retries by itself a few times.

11. Appointments, absences and weekends

Two panels live on the Day View page itself, under the jobs.

Appointments

Non-job visits — quotes, measure-ups, meetings — grouped by the person attending. Click **Add**, fill in the **Site / Location** (required), pick the time type — **Start Off Job** (visits on the way to the job, ordered #1/#2/#3), **AM**, **PM**, a specific time, or any time — and choose the attendees. Drag the ⠿ handle to reorder someone's list, and click the green WhatsApp circle by their name to send them their whole day's appointments in one message.

Worker day statuses and weekend availability

The **Worker Day Status** card records who's off (or in the yard): Holiday, Sick, Compassionate Leave, Training, No Pay or Yard — one status per worker per day. A status takes the worker out of the assignment pool and turns their chip amber if they're accidentally still on a job; all of them except Yard also reduce the calendar's capacity number. On Saturdays and Sundays, the amber **Weekend Availability** panel appears instead: click each worker who's put themselves forward, and only they join that day's worker pool.

12. Live job map

The Live Map plots every upcoming job with an address (next 90 days) on a UK map, one pin colour per coordinator. The legend buttons double as filters — click a name to hide or show their pins — and clicking a pin shows the job summary with an **Open Day View →** button. It's an admin-tier page by default; the address lookup runs one job per second, so a busy diary shows "Geocoding…" for a short while when the page opens.

A job is missing from the map

It has nothing in its **Full Address** field, its address couldn't be found (too vague or misspelt), it's cancelled, or its coordinator is filtered off in the legend.

Check the legend filters first, then tidy the address on the job — town and postcode help the lookup a lot.

13. Workers

The Workers page (**Team → Workers**) is your crew roster. Each worker's card holds their contact details, start date, daily rates, and the role flags the rest of the app runs on.

1. Click **Add Worker** and fill in the **Full name** — the only required field — plus phone, email and **Start Date**.
2. Tick the flags that apply — each one changes how the app treats the person (table below).
3. Click **Save Worker**. To set pay, open the pencil icon on their card and enter **Basic Rate (£/day)** and **Charge Rate (£/day)** — these drive the Wages page and export. Anyone who can open the Workers page can see them here; it's the Wages page's rate columns and the money values in the wage download that are admin-only.

FLAG	WHAT IT DOES
Job coordinator	Purple badge; appears in coordinator dropdowns and receives job briefs.
Foreman	Amber badge; listed at the top of worker lists when planning.
Driver (default)	Blue badge; treated as the driver by default when assigned to jobs.
Monthly paid	Salaried — excluded from the weekly Wages page and the Day View worker pool.
Casual	Orange badge; excluded from the capacity pool count.
Active on workforce	Untick when someone leaves — they grey out, drop out of planning, holidays and closure pay, and can be re-activated any time.

DEACTIVATE, DON'T DELETE

Unticking **Active on workforce** keeps the worker's history and is reversible. Deleting removes them from the active list — past records keep the name, but there's nothing to re-activate.

14. Holidays

The Holiday Tracker (**Team → Holidays**) records every worker's holiday, sickness and other absence days against their annual entitlement, with a per-worker List view and a colour-coded month Calendar — each worker their own bar, pending days faded with a dashed outline, closed days shaded.

The Holiday Tracker — entitlement, taken, pending and sick days per worker.

Recording and approving days

1. In List view, click the worker's row to expand it.
2. Pick a date — or tick Date range for a from/to run; weekend days are skipped automatically, so a Monday-to-Friday week books exactly 5 days.
3. Choose the status — Holiday, Sick, Compassionate Leave, Training or No Pay — and tick Pending Approval for a holiday that still needs sign-off.
4. Click Add. Pending days show an amber clock badge; whoever approves clicks the green Approve button and a confirmation email goes to the configured approver address.

Each row's chips keep score: "12 / 25 hol" against the entitlement (edited inline in the expanded row), "N left" in amber when fewer than 3 days remain, "N over" in red, plus sick and pending counts. A daily "Holiday Approvals Needed" email lists everything still waiting — sent only when something actually is.

Closed days

The Closed Days button manages company-wide closures. The standard England-and-Wales bank holidays are created for you the first time; add your own shutdowns (name, start, end) under Add Custom Closure. Closed weekdays shade the calendars, are skipped by multi-day bookings (a single job on a closed date gets a warning rather than a block), and are *paid automatically* for every active worker with nothing else booked. Download exports the year's records as a CSV.

If something's not right

Approvals work but nobody receives the emails

The Holiday approver / Holiday reminder recipient addresses aren't configured. The approvals themselves are still recorded.

An admin sets both in the setup wizard's Notifications step (**Admin** → **Re-run Setup**).

A pending holiday doesn't show on the Day View

Pending (unapproved) holidays are deliberately hidden from the day's status panel, and don't remove the worker from the pool until approved.

Approve it on **Team** → **Holidays** and it appears everywhere.

The Add button is greyed out

No start date has been picked yet, or a save is still in progress.

Pick a date first, then click Add.

15. Wages

The Wage Summary (**Team** → **Wages**, admin-tier by default) builds each Monday-to-Sunday week automatically from job labour, absences, appointments and closed days — there's no double entry. Each day cell shows a badge per shift (contract numbers for job work, status labels otherwise), the **Shifts** count, and **Total ×** — the sum of multipliers payroll actually pays.

The wage grid — click any badge to open that day in Day View and fix the source record.

- Normal shifts, holidays, compassionate leave, training, yard days, appointments, bank holidays and closures pay ×1; **sick pays ×0.8**; **No Pay** shows on the grid but adds nothing.
- A worker on two jobs in one day shows both badges with the day total underneath — the split (½ + ½) was set automatically when they were assigned.
- Closed weekdays are paid for every active worker automatically — as **Bank Hol** when the date matches the official gov.uk England-and-Wales list, otherwise as **Holiday**. Workers who started after the closure date are skipped.
- **Download** saves the payroll spreadsheet (wages_*date*.xlsx) in the batch-timesheet format, with absences coded so payroll can post them. Rate figures fill in only for admins. The same file is emailed automatically each week to the configured **Weekly wages recipients** — the link in that email lasts 7 days.

FIX THE SOURCE, NOT THE SHEET

The grid rebuilds live from the underlying records every time you open it. If a day looks wrong, click its badge — you land on that date's Day View — fix the labour or status there, and come back.

If something's not right

A worker is missing from the wage grid

They're flagged `Monthly paid (exclude from wages)`, or they had nothing recorded that week.

Check their flags on **Team** → **Workers** and their entries on the Day View.

A bank holiday shows as "Holiday" — or isn't paid at all

A date is only paid when it's in the Closed Days list; it only shows as "Bank Hol" when it also matches the official gov.uk list.

Open **Holidays** → **Closed Days** and add or correct the closure dates.

Rate columns are missing, or blank in the download

Basic and charge rates are admin-only — everyone else gets the same sheet with the money columns blank.

Ask an admin to run the download if payroll needs the rates filled — and check the rates are set on the Workers page, or even an admin's sheet shows £0.

The link in an old wages email doesn't work

Emailed download links expire after 7 days.

Open **Team** → **Wages**, navigate to that week with the arrows, and click `Download`.

16. Petty cash and expenses

Anyone with the Expenses button submits a claim from the Dashboard — description, amount, receipt photos, an optional contract number — and it lands as Pending under their name. Admins manage the full register on the Petty Cash & Expenses page: approve or reject, record the payment, and export the monthly summary. Claims flow through four statuses: Pending (amber) → Approved (green) → Paid (blue), or Rejected (red); claimants can watch their own progress on the Dashboard's My Claims card.

The claims list — receipts attached, VAT split out, statuses at a glance.

1. **Submit** — from the Dashboard's Expenses button (any user) or New Claim on the Petty Cash page (admins). Add a receipt per item — camera photo or file — each with its own category, so one claim can carry a whole handful of receipts.
2. **Amounts** — type the Exc VAT or Inc VAT figure and the rest fills in at 20% (adjusting the VAT box just updates the total); all three stay editable for zero-rated items.
3. **Approve** — the approver gets an email per new claim; on the row, the green tick approves, the red cross rejects (and an undo arrow moves an accidental approval back).
4. **Pay** — the blue Pay button records who was paid, how (bank transfer, cash, cheque) and when.
5. **Month end** — the Monthly Summary tab totals the month's approved and paid claims by category, with a styled Export Excel download.

PUT CONTRACT NUMBERS ON JOB SPEND

A claim with a contract number flows into that contract's costs on the Costings page — approved and paid Small Tools claims especially. Allocate at claim time and the P&L takes care of itself.

"Admin Only" screen instead of the Petty Cash page

The full register is restricted to administrators.

Submit and track your own claims from the Dashboard instead — the Expenses button and My Claims card are there for exactly this.

No approval emails are going out

No `Expense approver email` is configured.

An admin sets it in Settings — and optionally an `Expense payer email` for payment notifications (blank means the approver gets those too).

"No petty cash claims to export for this month"

The month has no Approved or Paid claims — Pending and Rejected are excluded from the summary.

Approve the claims first, or pick a different month.

17. Mileage log

Workers log business journeys and turn them into expense claims. Journeys are valued at the HMRC 45p/mile personal-car rate, or at the quarterly HMRC Advisory Fuel Rate matching the worker's company vehicle and engine size (set on their worker record). Everyone logs their own; admins see and log for anyone.

Journeys ready to claim — tick several and convert them into one expense claim.

1. Click **Log Journey**. Capture the route with **Locate** at each end (GPS, with road-distance lookup), type both addresses and use **Calculate Road Distance from Addresses**, or just type the miles.

2. Tick **Return journey** for there-and-back (miles are doubled) and fill in the **Purpose**.

   The form auto-saves as a draft while you type, so closing it mid-trip loses nothing.

3. Check the **Claim Rate**. An **Extra** p/mile can be added where agreed — the amber panel then requires photo evidence.

4. Click **Log Journey**, then later **Claim** on the row — or tick several and **Claim Selected** for one batch claim.

   Either way a Pending expense claim is created in the Private Vehicle Use category, and the journeys move to "claimed". Deleting that claim later puts the journeys back, so no miles are ever lost.

"Location access denied. Please allow in browser settings."

The browser blocked GPS for the site.

Allow location access for CrewBook in the browser settings and press Locate again — or type the addresses and use the road-distance calculator instead.

No standard rate fills in for a company vehicle

The worker's engine size is missing from their record, the vehicle is electric (no advisory rate), or the rates haven't been fetched.

Set the vehicle type and engine size on the worker record; an admin can pull the latest rates via **Settings → Fetch Fuel Rates** (a failed fetch never wipes the existing rates).

"Could not find one of the addresses"

The address couldn't be located, or no driving route was found.

Use a fuller address with the postcode — or type the miles in yourself.

18. Invoice checking

The Invoice Checking page has four tabs that together make sure nothing goes unbilled and no supplier overcharge slips through.

Purchase invoices — ordered against invoiced, differences in red, queries in purple.

Jobs to Invoice

Every contract with days of work not yet billed to the client, one amber card each. Click Mark as Invoiced, tick the date chips the invoice covers, set the date and save — those days flip to Invoice Issued and drop off. Or send the paperwork to the office instead: Raise draft document sends a draft invoice, credit note, proforma or application to the front desk, who add the detail, check the VAT and issue it with the next document number (see the QCI area).

Purchase Invoices

Line-by-line reconciliation of supplier invoices against what was ordered — materials, hired plant, dayworks, subs and haulage. The Diff column tells the story: a green tick is matched, an amber clock means no invoice received yet, a red figure is an overcharge, purple means a query is open. Filter with Differences only, No invoice received and Queries Pending; clicking a row jumps to that day's record.

1. Work the Differences only list: for each red figure, either tick Invoice OK to accept it, or click + Raise Query.

2. A query records the date, who raised it, the reason (price, quantity, quality, delivery, wrong job...) and the details — and can be emailed straight to the supplier's **Queries To** contact, copy to you.
3. If the query isn't resolved within 7 days, whoever raised it is emailed a reminder — repeating weekly until it's marked **Resolved**. When the credit note lands, click **Credit Received**.

Suppliers

The supplier list behind all of this: account code, legal and display names, the **Queries To** email, and the CIS toggle (CIS suppliers export with reverse-charge VAT code T21). Click any cell to edit in place. Suppliers created in a hurry carry the code PENDING, highlighted amber, until the real code from your accounting system is entered.

Export

Downloads invoiced purchase costs as a CSV in your accounts import layout, then stamps each record so it's never sent twice. Set the date range, check the preview ("Ready" rows go in the file), and click **Download CSV**. Only costs with an invoice reference *and* a contract number matching a live job export — anything blocked is listed in red with "needs a contract number", stays unstamped, and gets picked up automatically once fixed.

If something's not right

"No query contact set for this supplier"

The supplier record has no **Queries To** email, so the query can't be emailed (it's still saved on the item).

Add the address on the Suppliers tab, then reopen the query and send it.

"N invoiced costs were left out of the CSV — needs a contract number"

Those costs have no contract number, or theirs doesn't match any live job.

Open the red list, add a valid contract number to each item's job, and run the same date range again — only the previously blocked rows will be new.

"CSV downloaded, but N records were NOT marked as exported..."

The file downloaded but some rows failed to get their exported stamp — they'll show as "Ready" again next run.

Those rows ARE in the CSV you just downloaded. Don't export them again blindly, or your accounting system gets them twice — exclude them from the next file, or de-duplicate on import.

"Draft saved. No notify email is set in QCI → Settings..."

The draft reached the front desk's queue, but nobody was emailed about it.

Tell the front desk directly this time, and set the draft notifications email in the QCI Settings so future drafts announce themselves.

19. Credit checks

The Credit page lists every upcoming, non-provisional job whose credit status is still Needs Checking or No Credit — soonest first, each card showing the contract's estimated value against the client's live Available Credit (their limit minus outstanding invoices; red means already over). A similar tally appears on the Dashboard's Credit Check card.

1. Wait for the Available Credit figure to load (it shows a spinner rather than a possibly-wrong number).
2. Pick the outcome under Update credit status: OK, No Credit, Percentage Upfront (with the %), or Special Authority (with who authorised it).
3. Click Save Status — the status copies to every other day of the same contract automatically.
4. Need more headroom instead? Request Credit raises a credit limit request to whoever decides — its progress then shows on the card.

20. Costings — the monthly P&L

Costings (admin only) is the per-contract profit and loss: every job's subcontractors, materials, hired plant, own plant, small tools and labour against its sales — live from the QCI invoicing, updating automatically. Pick Monthly, FY YTD (from 1 April) or CY YTD (from 1 January); click any row to drill into the contract's full cost breakdown, down to the individual items and the days they sit on.

The month's P&L — amber figures are accrued costs still waiting for their supplier invoice.

- **Overheads** — enter Plant Depreciation (£/month) (divided across the period's paver days for the Own Plant rate) and Small Tools & Plant Repairs (£/month) (spread across every job day). Both save as you type, per period.
- **Reading the Sales column** — green is invoiced; purple includes proforma/application revenue or an adjustment (marked *); a "← Prev mth" / "Next mth →" badge means the invoice was issued in a different month; a red REMEDIAL badge means no sales are expected.
- **Moving revenue between months** — the Income Deferrals & Accruals panel records a deferral (push revenue later) or an accrual (pull it earlier) per contract, and both months' figures adjust with the * marker.
- **Exports** — CSV or a styled Excel workbook including the overhead inputs and the adjusted revenue summary; Report opens the matching profitability report for the same period.

Month-end accruals and the Accrual Log

Amber figures are **accrued costs** — recorded on jobs but with no supplier invoice yet. At month end, enter the date the management accounts were prepared and click Freeze accruals at this date: a snapshot of everything accrued is frozen, with the total, line count and who took it. The **Accrual Log** page then compares that frozen list against reality, month by month: green Invoiced lines arrived in time, blue Came in late lines landed after the cut-off (normal — they hit a later month in your accounts), and red Still open · Nd lines have had no invoice at all — your chasing list, exportable as a CSV for the accountant.

If something's not right

Sales and profit columns show "Loading sales..." or dashes

The live sales figures haven't finished loading from the invoicing module.

Wait for the green "Sales live from QCI" bar before reading profit; if it shows an error, reload the page.

The Own Plant column is all dashes

Plant Depreciation (£/month) is empty, there were no paver days in the period, or no paver plant types are configured.

Enter the monthly depreciation figure, and check the paver plant types in the company settings.

"Freeze accruals at this date" is greyed out

No prepared-on date has been entered, or there are zero accrual lines.

Fill in Management accounts prepared on first; if nothing is accrued, there's nothing to freeze.

An Accrual Log line shows "Record deleted"

The cost record that was accrued has since been deleted from its day.

Check with whoever manages that job's records — the accrued amount may need reversing in the accounts. The frozen snapshot deliberately keeps the evidence.

21. The QCI sales area

Sales lives in its own area — QCI — with its own dark teal-and-gold look: leads, quotes, contracts, invoicing, proformas and applications, retentions, credit control, prospecting, insights and reports. It's the same sales pipeline as the standalone CrewQCI product, woven into your schedule — so this chapter covers how the two sides join, and the CrewQCI user guide covers every sales page in full detail. The ? Help button in the QCI header takes you straight there, at the chapter for the page you're on.

The QCI area — its own navigation, its own look, one login.

Getting in and out

Click the **QCI logo button** (the dark pill with a gold border) in the top navigation — or the bottom bar on a phone. You land on the QCI Overview with its own pill bar: Overview, Leads, Quotes, Contracts, Invoicing, Proformas/Applications, Retentions, Credit Control, Prospecting and Insights. Three areas sit off that bar, and all three are tiles on the QCI Overview: **Settings** is also the ⚙ cog in the QCI header, next to the ? button; **Reports** also opens from Insights via Reports & exports at the top right; and the client register is the Clients tile. ← CrewBook at the top left brings you back. The button only appears for users with the QCI Sales page permission (Admin and Super Admin tiers have it by default). The QCI search box reads "Search QCI and planned works..." — results include a "The Book job days" section, so one search spans sales *and* the schedule.

Drafts: from the job to the front desk

The flagship join. A coordinator on a job can send the billing to the office without ever entering QCI:

1. On the job's Summary tab, click Raise draft document (under the invoice status bar) — no QCI access needed.
2. Pick the type — Invoice, Credit Note, Proforma or Application for Payment — and check the Job days covered: un-invoiced days start ticked, remedial days unticked, already-billed days show an Invoiced badge.
3. Optionally add a net amount (the front desk can fill it in), check the printed customer address, write Notes for the front desk, and Send to front desk.
4. The ticked days flip to Draft Invoice Raised (blue), the job gains a Draft with front desk chip, and the office is emailed — to the Draft notifications email set in QCI Settings.
5. At the front desk, the draft waits in the Draft documents panel at the top of the QCI register. Opening it shows the coordinator's note; the office adds line items, checks the VAT, and clicks the green Issue — which is the moment the next document number is allocated. A prompt then offers to mark the job days Invoice Issued in the schedule, closing the loop.

> **WHY DRAFTS ARE SAFE**
>
> A draft has no number and is excluded from every figure, report and export until issued — its preview even prints with a DRAFT watermark. Deleting a draft frees its job days back to Not Invoiced. And numbers are never wasted: they only exist once the office presses Issue.

Contract numbers: the thread between the two sides

- On a job, the small QCI button next to the red #contract chip jumps straight to that contract in QCI (shown when the job is genuinely linked and you have QCI access).

- In QCI, a contract's **Jobs in The Book** panel lists every scheduled day on that number — click one to open it in Day View.
- On an invoice, the **Job days invoiced** section ticks the real scheduled days the invoice bills — and warns "⚠ N ticked days are already invoiced on #..." if you're about to double-bill.
- A day's billing status can always be set by hand from the job's Summary tab — Not Invoiced (red), Draft Raised (blue), Invoice Issued (green), Proforma/Application (amber) — for one day, specific days, or the whole contract.

One client register for both sides

The names booked on jobs and the accounts invoices are raised against are the same register. A green building icon next to a client name on a job means it's linked to an account; an amber warning triangle means no account matches — tap it and the Clients page opens with the setup form pre-filled. The Clients page also collects **new-client requests** raised from the field for approval, and its red panel lists any booked names with no account. Renaming an account carries the new name across jobs, contracts, quotes and invoices automatically.

If you've used standalone CrewQCI

Everything central works the same — registers, document numbering, credit control, retentions, prospecting, reports, Sage exports, settings. The differences: you enter with the QCI button rather than a separate login; access is CrewBook's **QCI Sales** permission; search also covers the schedule; invoices tick real job days instead of a typed date list; the draft-from-job flow exists; and there is no workbook Import page.

If something's not right

There's no QCI logo button in my navigation

Your account doesn't have the **QCI Sales** page permission.

Ask an admin to turn on the QCI Sales chip in **Admin → Users & Access** — Admin and Super Admin tiers have it automatically.

"Draft saved. No notify email is set in QCI → Settings..."

The Draft notifications email in QCI Settings is blank, so no email went to the office. The draft itself is safely in the drafts panel.

Tell the front desk directly this time, and fill in the address under **QCI → Settings → Bank & document text**.

The green Issue button is greyed out on a draft

The net amount is zero — a document can't be issued for nothing.

Add the line items or a net amount first; for proformas, a "Needed before issuing: ..." toast lists exactly what's missing.

"⚠ N ticked days are already invoiced on #..."

Another issued invoice already claims those job days — you may be about to double-bill.

Untick the days unless you genuinely mean to bill them again. Drafts never claim days, so they never trigger this.

A client's balance looks split across two accounts

The client has been invoiced under two names and one became its own account instead of an alias.

On the Clients page, use Link to roll the extra name into the real account — balances and history combine.

22. Settings

The Admin button (top right) opens the settings page — "System settings, backups and admin tools". Changes save automatically as you leave each field; there's no Save button. The cards, top to bottom:

- **Quick links** — Costings, Backup & Restore, the in-app User Guide, Re-run Setup (walk the setup wizard again), Data Explorer (Super Admins only) and Your account.
- **Integrations** — WhatsApp, email, SharePoint and the backup destination: covered in the next chapter.
- **Users & Access** — invites, tiers, page chips and linked workers: covered under your team.
- **Recipients** — who gets emailed about credit limit requests, new client requests and approvals, plus the Expense approver email and Expense payer email. An empty list means "saved but not emailed", so fill these in early.
- **Lists & Options** — the dropdown lists used across the app: sectors, lead sources, payment terms, quote statuses, credit authorisers, job titles, plant/equipment types, the Dashboard tonnage suppliers and paver plant types, and the Day View heavy plant list. Type and press Enter to add; × to remove.
- **Suppliers → Sage** — exports supplier records in the Sage template, stamping what's been sent.
- **Backup & Restore** and **HMRC Fuel Rates** — below.

> **TIP**
>
> Several dashboard widgets hide themselves until configured here: the Supplier Tonnage strip needs tonnage suppliers, and the paver widgets need paver plant types. An "missing" widget usually just means an empty list.

23. Integrations: WhatsApp, email, SharePoint

WhatsApp job briefs (Twilio) — the one-off setup

Briefs go out from *your* company's own WhatsApp number via your own Twilio account, so replies come to you. The setup takes about 20 minutes plus WhatsApp's approval time:

1. Create a free account at twilio.com and add WhatsApp to a number (Twilio Console → Messaging → Senders → WhatsApp senders).
   WhatsApp's approval of your business can take a day or two.
2. Copy your **Account SID** (starts AC) and **Auth Token** from the Twilio Console home page into the WhatsApp card on **Admin → Integrations**, plus your **WhatsApp number** (e.g. +447123456789).
3. Open **How to set this up** on the card and create the two message templates in Twilio — one for job briefs, one for appointments. The exact bodies are provided word-for-word with Copy buttons, so approval is usually straightforward (minutes to a few hours).
4. Paste each approved template's Content SID (starts HX) into **Job brief template SID** and **Appointment template SID**.
5. For delivery ticks on the Message Delivery page, set the status callback URL from step 5 of the walkthrough on your Twilio WhatsApp sender.
6. Turn on **Enable WhatsApp sending**, then use **Send test** with your own number — "Test message sent — check your WhatsApp."

Email

No setup needed — notifications, wage summaries and sales documents are emailed automatically under your company name. If you'd rather sends came from your own mailbox, set the **Preferred connected mailbox** (Outlook or Gmail) and the **Sender name on emails**.

SharePoint

Optional. Enter your **SharePoint site name** — part of the site's name is enough; this is the field that makes the connection work — and turn on **Use SharePoint**. CrewBook can then pre-fill jobs from your Contracts list as you type a contract number.

If something's not right

"No Twilio credentials are configured..." on a test send

One or more of the three credential fields is empty.

Fill in the Account SID, Auth Token and WhatsApp number on the Integrations card, then retry.

"WhatsApp is connected but the message template SID is missing."

The template's Content SID hasn't been pasted in yet.

Copy the SID (starts HX) from Twilio's Content Template Builder into the template SID field. If the template is brand new, WhatsApp may still be reviewing it — a few hours' wait is normal.

A test send fails with a raw Twilio error

Twilio rejected the send — unapproved template, unverified number, or wrong credentials.

The toast shows Twilio's own error text, code and link — follow it in the Twilio Console.

Delivery status never updates on Message Delivery

The status callback URL isn't set on your Twilio WhatsApp sender, so Twilio has nowhere to report to.

Copy the callback URL from step 5 of "How to set this up" into the sender's settings in Twilio.

24. Backups and restore

Backups write a complete snapshot of every data table to *your own* Google Drive — under "CrewBook Backups / your company / date /", one file per table plus a manifest listing exactly what was taken. CrewBook can only see the backup files it creates, not the rest of your Drive, and your Twilio auth token is deliberately never written to a backup file (re-enter that one field after a restore).

1. One-off: under **Admin** → **Integrations** → **Backups**, set `Where backups are written` to `My Google Drive` and click `Connect Google Drive`.
2. On the Backup page, click `Back Up Now` and wait for "Backup complete — N records across N tables saved to your Google Drive".
3. To restore, expand a snapshot and run the safe two-step flow: `Check what would be restored` first (a dry run reporting "N missing" or "✓ All present" per table, changing nothing), then `Restore N records`.

   Restores only ever add back missing records — existing records are never overwritten.

> **MAKE IT A ROUTINE**
>
> A backup to your own Drive needs your own Google sign-in, so it can't run itself — the page shows when the last one ran, and a stale date is your cue. If any table can't be read, the backup deliberately writes nothing rather than leave a folder that looks complete but isn't.

"Backups aren't set up yet"

No backup destination has been chosen, or the Google account isn't connected.

Admin → **Integrations** → **Backups**: pick `My Google Drive` and click `Connect Google Drive`. If the sign-in popup won't open, allow pop-ups for CrewBook.

"Backup stopped before writing anything: some of your data could not be read."

One or more tables failed to download, so no partial backup was written — deliberately.

Try again; if it persists, email Peter. Nothing misleading was saved to Drive.

"No backups found yet" even after backing up

The on-page snapshot list shows operator-managed snapshots; your own manual backup went to your Google Drive.

Check Drive under "CrewBook Backups / your company /" — the files are there. For a restore from the on-page list, ask the operator.

25. Message delivery

The Message Delivery page (**Team → Message Delivery**) is the audit trail for every WhatsApp brief: grouped by job, with per-job counts of delivered, read and failed. Each message shows the worker (matched from their phone number), the status — **Queued**, **Sent**, **Delivered** (green tick), **Read** (blue eye), **Failed** / **Undelivered** (warning) — and, for failures, Twilio's exact error text in red. Filter by status to list only the failures; anyone not on delivered or read is worth a phone call.

A message shows "Unknown" instead of the worker's name

The number the brief went to doesn't match any phone number on the Workers page.

Fix the number on the worker's record — future messages will match.

Messages stay on "Sent" and never show Delivered or Read

Twilio isn't reporting status back — the status callback URL isn't configured on your WhatsApp sender.

See integrations, step 5 of the WhatsApp walkthrough.

26. Data explorer

For Super Admins only: a read-only browser over every data table in the app, grouped by area — the raw records behind every page. Pick a table, search the loaded rows, click a row to see every stored field. It answers "what exactly is stored?" — all changes still happen on the normal pages, and company settings (which hold your Twilio credentials) are deliberately not browsable. The search only covers rows already loaded, so click **Load more** first when hunting something old.

27. Troubleshooting index

Every fix in this guide, gathered in one place. Each entry links to the full answer in its chapter — or type what you're seeing into the search box in the contents panel.

Creating your account and signing in

Your company, the setup wizard and subscribing

Calendar

Day View

The job editor

- Rows in Job details won't open for editing
- The editor closed by itself
- Files uploaded from site but no email reached the office

WhatsApp job briefs

- "Failed to send to: ..." for some workers
- "No phone numbers found"
- No WhatsApp buttons anywhere
- The preview shows an error with a Retry link

Live job map

- A job is missing from the map

Holidays

- Approvals work but nobody receives the emails
- A pending holiday doesn't show on the Day View
- The Add button is greyed out

Wages

- A worker is missing from the wage grid
- A bank holiday shows as "Holiday" — or isn't paid at all
- Rate columns are missing, or blank in the download
- The link in an old wages email doesn't work

Petty cash and expenses

- "Admin Only" screen instead of the Petty Cash page
- No approval emails are going out
- "No petty cash claims to export for this month"

Mileage log

- "Location access denied. Please allow in browser settings."
- No standard rate fills in for a company vehicle
- "Could not find one of the addresses"

Invoice checking

- "No query contact set for this supplier"
- "N invoiced costs were left out of the CSV — needs a contract number"
- "CSV downloaded, but N records were NOT marked as exported..."
- "Draft saved. No notify email is set in QCI → Settings..."

Costings — the monthly P&L

- Sales and profit columns show "Loading sales..." or dashes
- The Own Plant column is all dashes
- "Freeze accruals at this date" is greyed out
- An Accrual Log line shows "Record deleted"

The QCI sales area

- There's no QCI logo button in my navigation
- "Draft saved. No notify email is set in QCI → Settings..."
- The green Issue button is greyed out on a draft
- "⚠ N ticked days are already invoiced on #..."
- A client's balance looks split across two accounts

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- "No Twilio credentials are configured..." on a test send
- "WhatsApp is connected but the message template SID is missing."
- A test send fails with a raw Twilio error
- Delivery status never updates on Message Delivery

Backups and restore

- "Backups aren't set up yet"
- "Backup stopped before writing anything: some of your data could not be read."
- "No backups found yet" even after backing up

Message delivery

- A message shows "Unknown" instead of the worker's name
- Messages stay on "Sent" and never show Delivered or Read

Questions people ask

- Do my workers need their own logins?
- A page my colleague has is missing from my menu
- A job's been rained off — cancel, move or delete?
- Whose number do WhatsApp briefs come from?
- I've heard about Fleet, Training and Personnel pages — where are they?
- Can I get my data out?
- Where's the detail on leads, quotes, invoicing and credit control?

28. Questions people ask

What does CrewBook cost, and how does the trial work?

Every new company gets 14 days free from the day it's created — no card needed, and the last day is included. After that it's £99/month for the whole company, unlimited users, cancel anytime. Adding office or site staff never raises the price.

Do my workers need their own logins?

Only people who *use* the app need one. Crews can simply receive their WhatsApp job briefs on their phones — no login involved. For workers who do log in (to check their day, upload photos, log mileage), invite them as Site Staff and link the login to their record on the Workers page.

A page my colleague has is missing from my menu

Navigation only shows the pages your access tier and page chips grant. An Admin can fix it in **Admin** → **Users & Access** — your row → Permissions → turn on the chip. Nothing has been lost; it's just not shown to you.

A job's been rained off — cancel, move or delete?

If it will happen another day, **move** it (Move day , Reschedule or drag on the Calendar) — everything booked moves with it. If the day is simply lost, **cancel** it with a reason — it stays on the record, and can be reinstated. **Delete** only when the day should never have existed: it removes the job and everything on it.

Whose number do WhatsApp briefs come from?

Your company's own WhatsApp business number, via your own Twilio account — so replies come to you, not to CrewBook. The one-off setup takes about 20 minutes: see integrations.

I've heard about Fleet, Training and Personnel pages — where are they?

They're built but not yet released — they don't appear in anyone's navigation in the current version, whatever their tier. They'll show up as page chips in Users & Access when they launch.

Can I get my data out?

Yes. Wages, holidays, petty cash, costings and invoices all export to spreadsheets; the QCI area exports Sage-ready CSVs; and nightly Google Drive backups (switched on in the setup wizard or Settings) export the whole database — restorable from the Backup page.

Where's the detail on leads, quotes, invoicing and credit control?

The sales area inside CrewBook is QCI — the same product as standalone CrewQCI. The QCI area covers how it joins onto your jobs; the full page-by-page detail lives in the CrewQCI user guide.

29. Getting help

The ? button in the app's header brings you back to this guide from any page — straight to that page's chapter. Inside the QCI area it opens the CrewQCI guide, where the sales pages are documented in full.

Stuck on something this guide doesn't cover, or found a snag? Email peter@edwardsapps.co.uk — you'll be talking to the person who builds CrewBook, and the answer usually ends up in this guide for the next person. The exact wording of any error message, and the page you were on, make a fix much quicker.

There's also a condensed Guide page inside the app itself, and the legal pages (Privacy Policy, Terms of Service) live on the **Account** page behind your round initial button.