SiteProc FAQ & Troubleshooting

Frequently Asked Questions & Solutions

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Account & Login

I can't log in to my account

Check these first:

1. ☑ Verify email address is correct
2. ☑ Check caps lock is off
3. ☑ Try "Forgot Password" to reset
4. ☑ Clear browser cache and cookies
5. ☑ Try incognito/private mode
6. ☑ Try a different browser

Still can't log in?

- Contact support@siteproc.com
- Include your email address
- Describe the error message

How do I change my password?

1. Click your avatar (top right)
2. Go to **Settings** → **Security**
3. Click **"Change Password"**
4. Enter current password
5. Enter new password (twice)

6. Click **"Update Password"**

Password Requirements:

- Minimum 8 characters
- At least one uppercase letter
- At least one lowercase letter
- At least one number
- At least one special character

What is Two-Factor Authentication (2FA)?

2FA adds an extra layer of security by requiring a code from your phone when logging in.

To enable:

1. Settings → Security → Two-Factor Authentication
2. Click **"Enable 2FA"**
3. Scan QR code with authenticator app (Google Authenticator, Authy, Microsoft Authenticator)
4. Enter verification code
5. Save backup codes in safe place

Lost your 2FA device?

- Use one of your backup codes to log in
- Then disable and re-enable 2FA with new device
- Or contact support with government ID for verification

Can I use SiteProc on multiple devices?

Yes! You can access SiteProc from:

- Multiple computers
- Mobile devices (iOS/Android)
- Tablets
- Simultaneously

Your data syncs across all devices automatically.

How do I delete my account?

Before you delete:

- Export all important data
- Complete outstanding orders
- Notify team members
- Cancel subscription

To delete:

1. Settings → Account → Delete Account
2. Confirm you understand data loss
3. Enter password
4. Type "DELETE" to confirm
5. Account deleted in 30 days

Data retention:

- 30-day grace period (can recover)
- After 30 days, permanently deleted
- Legal/financial records retained per regulations

Orders & Deliveries

How do I create an order?

Quick Steps:

1. Click **"New Order"** button
2. Select **Project**
3. Choose **Supplier**
4. Add **Items** (description, quantity, price)
5. Set **Delivery Date**
6. Add **Delivery Instructions**
7. Review and **Submit**

Detailed Guide: See Site Manager Guide

Can I edit an order after submitting?

Before Supplier Acknowledges:

- Yes, you can edit most fields
- Go to order → Click "Edit"
- Make changes → Save

After Supplier Acknowledges:

- Contact supplier directly
- Or create a Change Order
- Cancelation may incur fees

Best Practice: Always review carefully before submitting!

What do order statuses mean?

Status	Meaning

Status	Meaning
Draft	Order created but not submitted
Pending	Submitted, awaiting supplier response
Acknowledged	Supplier confirmed receipt
Preparing	Items being prepared for delivery
Ready	Order ready for pickup/delivery
In Transit	Currently being delivered
Delivered	Arrived at site
Completed	Delivery confirmed with POD uploaded
Cancelled	Order cancelled
On Hold	Temporarily paused

Supplier hasn't acknowledged my order

Wait Time: Suppliers should acknowledge within 24 hours

If not acknowledged:

1. Check supplier's email address is correct
2. Ask supplier to check spam folder
3. Resend notification: Order → Actions → Resend
4. Call supplier directly
5. If still no response, contact support

How do I track my delivery?

Multiple Ways:

1. **Dashboard**
   - "Today's Deliveries" widget
   - Shows expected time and status
2. **Orders Page**
   - Filter by "Out for Delivery"
   - Click order for details
3. **Notifications**
   - Email alerts
   - SMS (if enabled)
   - Push notifications (mobile)

4. **GPS Tracking** (if available)
    - Live map showing driver location
    - Updated every 5 minutes

Delivery was damaged or incorrect

For Damaged Items:

1. **DON'T sign delivery note as "received in good condition"**
2. Take detailed photos of damage
3. Note damage on delivery slip
4. Get driver to acknowledge
5. Reject damaged items
6. Update order status in system
7. Contact supplier immediately

For Wrong Items:

1. Check against order details
2. Photo the wrong items
3. Note discrepancy on delivery note
4. Don't accept wrong items
5. Contact supplier for replacement
6. Update order in system

For Partial Delivery:

1. Accept what arrived
2. Note what's missing
3. Update system as "Partial Delivery"
4. Contact supplier for balance
5. Create new order if needed

How do I confirm a delivery?

1. Open the order
2. Click **"Confirm Delivery"**
3. Enter details:
    - Who received it
    - Date and time
    - Condition of items
4. Upload photos (minimum 2):
    - Overall view
    - Close-up of items
5. Add notes (if any issues)
6. Rate the delivery
7. Submit confirmation

Why it's important:

- Triggers payment to supplier
- Closes the order
- Provides proof of receipt
- Needed for audits

Can I reorder the same items?

Yes! It's easy:

1. Find the previous order
2. Click **"Reorder"** button
3. All details pre-filled
4. Adjust quantities if needed
5. Update delivery date
6. Submit

Saves time vs. creating new order!

Projects & Budget

How do I create a project?

1. Go to **Projects → New Project**
2. Enter project details:
   - Name
   - Client
   - Site address
   - Start/end dates
   - Budget
3. Assign team members
4. Upload documents (optional)
5. Click **"Create Project"**

Tip: Create projects before ordering to enable budget tracking.

Can I have multiple projects active?

Yes! No limit on active projects.

Plans differ:

- **Free:** 3 projects
- **Standard:** 10 projects
- **Professional:** 50 projects
- **Enterprise:** Unlimited

Check your plan in Settings → Billing.

How do I track my budget?

Real-Time Tracking:

1. Go to **Project → Budget**
2. See breakdown:
    - Total budget
    - Spent (paid orders)
    - Committed (pending orders)
    - Remaining

Budget Alerts:

Set alerts for:

- 75% budget consumed
- 90% budget consumed
- Budget exceeded

Settings → Notifications → Budget Alerts

What if I go over budget?

Options:

1. **Increase Budget**

    - Project → Budget → Adjust
    - Requires admin approval
    - Document justification

2. **Create Change Order**

    - If scope changed
    - Get client approval
    - Adjusts budget automatically

3. **Review Spending**

    - Identify savings
    - Defer non-critical items
    - Negotiate with suppliers

4. **Use Contingency**

    - If you set aside contingency
    - Typically 10-15% of budget

How do I close a completed project?

1. **Ensure all orders completed**

    - All deliveries confirmed
    - All PODs uploaded
    - No outstanding items

2. **Final Budget Reconciliation**

    - Review all expenses
    - Resolve any discrepancies
    - Generate final report

3. **Upload Final Documents**

    - Completion certificates
    - Final inspections
    - As-built drawings

4. **Change Status**

    - Project → Status → Completed
    - Add completion notes
    - Archive project

Completed projects:

- Read-only access
- Reports still available
- Can reopen if needed

Suppliers

How do I add a supplier?

1. Go to **Suppliers → "Add Supplier"**
2. Fill in details:
    - Company name
    - Contact person
    - Email and phone
    - Category (materials, equipment, etc.)
    - Payment terms
3. Add banking details (for payments)
4. Upload documents (insurance, licenses)
5. Save supplier
6. Send portal invitation (optional)

Do suppliers need an account?

Optional but recommended:

Without Account:

- You can still order from them
- Updates via email/phone
- Manual status updates

With Account:

- Supplier can view their orders
- Update delivery status
- Upload proof of delivery
- Submit invoices
- Better communication

To invite: Supplier → Click "Invite to Portal"

How do I rate suppliers?

After Each Delivery:

1. Confirm delivery
2. Rate 1-5 stars on:
    - On-time delivery
    - Quality of items
    - Communication
    - Driver professionalism
3. Add optional feedback
4. Submit rating

View Supplier Performance:

- Suppliers → [Supplier Name] → Performance
- See average rating
- View all reviews
- Compare with other suppliers

Can I block a supplier?

Yes:

1. Go to Suppliers
2. Select supplier
3. Click **"Deactivate"**
4. Choose reason
5. Confirm

What happens:

- Can't create new orders to them
- Existing orders still active
- They lose portal access
- Can reactivate later

Documents & Photos

What file types are supported?

Documents:

- PDF
- Microsoft Office (Word, Excel, PowerPoint)
- Images (JPG, PNG, GIF)
- CAD files (DWG, DXF)
- Archives (ZIP, RAR)

Maximum size: 10MB per file

For larger files:

- Compress before uploading
- Split into multiple files
- Or use cloud storage link

How do I upload documents?

Project Documents:

1. Project → Documents
2. Click **"Upload"**
3. Choose files (or drag & drop)
4. Add tags/categories
5. Upload

Order Documents:

1. Open order
2. Attachments section
3. Click **"Add Attachment"**
4. Select file
5. Upload

Proof of Delivery:

1. Order → Confirm Delivery
2. Upload photos
3. Add delivery documents
4. Submit

Can I organize documents?

Yes! Multiple ways:

Folders:

- Create folder structure
- Drag & drop to organize

Tags:

- Add multiple tags per document
- Search by tag
- Filter by tag

Categories:

- Contracts
- Plans & Drawings
- Permits
- Insurance
- Invoices
- Photos
- Other

Search:

- Search by filename
- Search within document content (PDFs)
- Filter by date, type, project

Photos are taking forever to upload

Speed up uploads:

1. **Compress Images**
    - Use photo compression app
    - Reduce resolution (1920x1080 is sufficient)
    - Most phones take 4K+ photos (unnecessarily large)
2. **Upload via WiFi**
    - Mobile data may be slow
    - WiFi much faster
3. **Upload Fewer at Once**
    - Instead of 20 photos at once
    - Upload in batches of 5

4. **Check Internet Speed**
    - Test at speedtest.net
    - Minimum: 5 Mbps upload

SiteProc automatically compresses images without quality loss.

Where are my documents stored?

Secure Cloud Storage:

- AWS S3 (industry standard)
- Encrypted at rest (AES-256)
- Encrypted in transit (TLS 1.3)
- Daily backups
- 99.9% uptime guarantee

Data Centers:

- Primary: US East
- Backup: US West
- EU region (for GDPR compliance)

Your data is:

- ☑ Private and secure
- ☑ Backed up daily
- ☑ Encrypted
- ☑ Compliant (SOC 2, GDPR)

Team & Permissions

How do I add team members?

1. Go to **Team → "Add Member"**
2. Enter details:
    - Name
    - Email
    - Role
    - Job title
3. Set permissions
4. Send invitation
5. They receive email to join

What roles are available?

Role	Description	Permissions

Role	Description	Permissions
Admin	Full access	Everything
Project Manager	Manage projects	Create projects, manage budget
Site Manager	Site operations	Create orders, confirm deliveries
Accountant	Financial only	View reports, manage payments
Viewer	Read-only	View only, no edits

Custom Roles:

- Enterprise plan only
- Define your own roles
- Granular permissions

Can I limit what people see?

Yes! Project-Based Permissions:

1. Go to Team member
2. Click **"Manage Access"**
3. Select specific projects they can see
4. Set permissions per project:
    - View only
    - Can create orders
    - Can approve
    - Full access

Example:

- Site Manager A: Only sees Project X
- Site Manager B: Only sees Project Y
- Project Manager: Sees all projects

How do I remove a team member?

Deactivate (Recommended):

1. Team → Select member
2. Click **"Deactivate"**
3. Choose reason
4. Confirm

What happens:

- Immediate loss of access
- All data retained
- Can reactivate later

- Audit trail preserved

Permanent Delete:

- Contact support
- 30-day waiting period
- Removes from audit logs

Billing & Payments

What does SiteProc cost?

Plans:

Free - $0/month

- 1 user
- 3 projects
- 50 orders/month
- Email support

Standard - $49/month

- 5 users
- 10 projects
- 500 orders/month
- Chat support

Professional - $149/month

- 20 users
- 50 projects
- Unlimited orders
- Priority support
- API access

Enterprise - Custom pricing

- Unlimited everything
- Dedicated support
- Custom integrations
- SLA guarantee

How do I upgrade my plan?

1. Settings → **Billing**
2. Click **"Upgrade Plan"**
3. Choose new plan
4. Enter payment details

5. Confirm upgrade

Prorated billing:

- Only pay difference for remainder of month
- New rate starts next billing cycle

What payment methods are accepted?

☑ **Credit/Debit Cards**

- Visa
- Mastercard
- American Express
- Discover

☑ **ACH Bank Transfer** (US only)

☑ **Wire Transfer** (Enterprise only)

❌ **Not accepted:**

- PayPal
- Cryptocurrency
- Cash
- Checks

Can I get a refund?

30-Day Money-Back Guarantee:

- New customers only
- First month only
- Full refund, no questions asked
- Cancel within 30 days

After 30 Days:

- Prorated refunds at our discretion
- Contact billing@siteproc.com
- Explain reason for refund

No refunds for:

- Data overage charges
- SMS charges
- Third-party integration costs

Mobile App

Where can I download the app?

📱 **iOS (iPhone/iPad)** App Store → Search "SiteProc" Or: https://apps.apple.com/siteproc

🤖 **Android** Google Play → Search "SiteProc" Or: https://play.google.com/store/apps/siteproc

Requirements:

- iOS 14.0 or later
- Android 8.0 or later

App isn't syncing

Troubleshooting:

1. **Check Internet Connection**
   - WiFi or mobile data working?
   - Try opening a website
2. **Force Sync**
   - Pull down on screen to refresh
   - Or: Settings → Sync Now
3. **Check Storage**
   - Free up phone storage
   - Need at least 500MB free
4. **Update App**
   - Check for app updates
   - Install latest version
5. **Restart App**
   - Close completely
   - Reopen
6. **Reinstall** (last resort)
   - Uninstall app
   - Reinstall from store
   - Log back in
   - Data restored from cloud

Does the app work offline?

Yes! Offline Mode Features:

You CAN:

- ☑ View existing orders
- ☑ View projects
- ☑ Create new orders (saved locally)
- ☑ Take photos
- ☑ Add notes
- ☑ Update task status

You CANNOT:

- ❌ Submit orders to suppliers
- ❌ See real-time updates from others
- ❌ Upload photos to cloud
- ❌ Generate reports

Auto-Sync:

- When back online, everything syncs automatically
- You'll see sync icon
- Notification when complete

How do I take better photos with the app?

Tips for Great Photos:

☑ **Lighting**

- Use natural light when possible
- Avoid direct sun (causes harsh shadows)
- Turn on lights for indoor shots

☑ **Stability**

- Hold phone steady
- Lean against something
- Use burst mode if shaky

☑ **Composition**

- Fill frame with subject
- Multiple angles
- Include something for scale

☑ **Focus**

- Tap screen to focus
- Wait for focus confirmation
- Avoid blurry shots

App Features:

- Grid lines for alignment

- Auto-focus
- Auto date/location stamp
- Compression (faster upload)

Integrations

What apps integrate with SiteProc?

Accounting:

- QuickBooks Online
- Xero
- Sage
- FreshBooks

Communication:

- Microsoft Teams
- Slack
- Discord

Cloud Storage:

- Google Drive
- Dropbox
- OneDrive
- Box

Project Management:

- Asana
- Trello
- Monday.com

See all: https://siteproc.com/integrations

How do I connect QuickBooks?

1. Settings → **Integrations**
2. Find **QuickBooks Online**
3. Click **"Connect"**
4. Log in to QuickBooks
5. Authorize SiteProc access
6. Map accounts:
   - Expenses → QB Expense account
   - Orders → QB Bills
   - Suppliers → QB Vendors
7. Choose sync frequency
8. Save settings

What syncs:

- Orders → Bills in QuickBooks
- Suppliers → Vendors
- Payments → Bill payments
- Expenses → Expense transactions

Sync frequency:

- Real-time (instant)
- Every hour
- Daily
- Manual only

Integration stopped working

Troubleshooting:

1. **Check Connection Status**
    - Settings → Integrations
    - Look for error icons
    - Click for details
2. **Reconnect**
    - Click integration
    - "Disconnect"
    - Wait 30 seconds
    - "Connect" again
    - Re-authorize
3. **Check Permissions**
    - May need to reauthorize
    - Check third-party app permissions
    - Ensure API access enabled
4. **Contact Support**
    - If still not working
    - Provide error message
    - Support will investigate

Technical Issues

Site is loading slowly

Quick Fixes:

1. **Check Internet Speed**
    - speedtest.net
    - Need: 5+ Mbps
2. **Clear Browser Cache**
    - Chrome: Ctrl+Shift+Delete
    - Select "Cached images and files"
    - Clear
3. **Disable Extensions**
    - Try incognito mode
    - Disable ad blockers
    - Some extensions conflict
4. **Try Different Browser**
    - Chrome (recommended)
    - Firefox
    - Edge
    - Safari
5. **Check Status**
    - status.siteproc.com
    - See if there's an outage

I see an error message

Common Errors:

"Session Expired"

- Log out and log back in
- Clear cookies
- Check system time is correct

"Permission Denied"

- You don't have rights for this action
- Contact your admin
- Check your role

"Network Error"

- Check internet connection
- Firewall blocking?
- VPN issues?

"Something Went Wrong"

- Generic error
- Try refreshing page
- Check browser console (F12)
- Send screenshot to support

How do I report a bug?

Best Way to Report:

1. **Take Screenshot**
    - Show the error/issue
    - Include URL
2. **Open Browser Console**
    - Press F12
    - Click "Console" tab
    - Screenshot any errors
3. **Note What You Did**
    - Steps to reproduce
    - What were you trying to do?
    - What happened vs. what expected?
4. **Send to Support**
    - Email: bugs@siteproc.com
    - Or: Help → Report Bug
    - Include all info above

We usually respond within:

- Critical bugs: 1 hour
- Major bugs: 4 hours
- Minor bugs: 24 hours

Where can I see system status?

🔍 **Status Page:** https://status.siteproc.com

Shows:

- ☑ Operational status
- ⚠ Degraded performance
- ❌ Outages
- 🔧 Scheduled maintenance

Subscribe for Alerts:

- Email notifications
- SMS (premium)
- Slack/Discord webhooks

Uptime Guarantee:

- 99.9% uptime SLA
- Credits for downtime (Enterprise)

Still Need Help?

Contact Support

📧 **Email** support@siteproc.com Response: Within 24 hours

💬 **Live Chat** Click chat icon in app Available: 9 AM - 6 PM EST Mon-Fri

📞 **Phone** (Enterprise only) Available 24/7

Help Resources

📚 **Help Center** https://help.siteproc.com

- Tutorials
- Video guides
- Articles

🎓 **Training**

- Weekly webinars
- Video library
- Certification program

👥 **Community** https://community.siteproc.com

- User forum
- Share tips
- Request features

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For the latest FAQ, visit: https://help.siteproc.com/faq