SiteProc Quick Start Guide

Get Up and Running in 5 Minutes

Version 1.0 | November 2025

Welcome to SiteProc! 🚀

This quick start guide will get you from signup to your first completed order in just 5 minutes.

Step 1: Create Your Account (1 minute)

Sign Up

1. **Go to:** https://siteproc1.vercel.app
2. **Click:** "Get Started" or "Sign Up"
3. **Enter:**
   - Your email address
   - Create a strong password
   - Your full name
   - Company name
4. **Click:** "Create Account"

Verify Email

1. **Check your inbox** for verification email
2. **Click** the verification link
3. **You're in!** 🎉

Step 2: Complete Your Profile (1 minute)

Company Profile

1. **Navigate to:** Settings → Company Profile

2. **Fill in:**
   - Company legal name
   - Phone number
   - Physical address
   - Business type

3. **Optional (but recommended):**
   - Upload company logo
   - Add tax ID

- Banking details

4. **Click:** "Save Profile"

Personal Settings

1. **Go to:** Your Avatar → Settings
2. **Set:**
   - Your role (Admin, Manager, etc.)
   - Time zone
   - Notification preferences
3. **Enable:** Two-Factor Authentication (highly recommended)

Step 3: Create Your First Project (1 minute)

New Project

1. **Click:** "Projects" → "New Project"

2. **Essential Details:**

```
Project Name: Downtown Office Renovation
Client: ABC Company
Start Date: [Today's date]
Budget: $50,000
```

3. **Add Location:**

   - Site address
   - GPS coordinates (optional)

4. **Assign Team:**

   - You (as Project Manager)
   - Add other members later

5. **Click:** "Create Project"

Step 4: Add Your First Supplier (1 minute)

Add Supplier

1. **Navigate to:** Suppliers → "Add Supplier"

2. **Quick Setup:**

```
Supplier Name: ABC Building Supplies
Contact Person: John Smith
```

```
Email: john@abcsupplies.com
Phone: (555) 123-4567
Category: Materials
```

3. **Payment Terms:**

```
Payment Terms: Net 30
Delivery: 2-3 business days
```

4. **Click:** "Save Supplier"

5. **Send Invitation:**

   - Toggle "Invite to Portal"
   - They'll get email access
   - Can view their orders

Step 5: Create Your First Order (1 minute)

New Purchase Order

1. **Go to:** Orders → "New Order"

2. **Fill in Order:**

   Project: Downtown Office Renovation

   Supplier: ABC Building Supplies

   Items:

```
Item 1:
Description: Portland Cement
Quantity: 20
Unit: 50kg bags
Unit Price: $15.00
Total: $300.00

Item 2:
Description: Steel Rebar 12mm
Quantity: 100
Unit: meters
Unit Price: $5.50
Total: $550.00

ORDER TOTAL: $850.00
```

3. **Delivery Details:**

```
Delivery Date: [Tomorrow]
Delivery Address: [Project site address]
Contact: [Your name and phone]
Instructions: Call 30 min before delivery
```

4. **Review & Submit:**

   - Check all details
   - Verify budget
   - Click "Submit Order"

What Happens Next?

- ☑ Supplier receives instant notification
- ☑ You get confirmation email
- ☑ Order appears in dashboard
- ☑ Supplier can update status
- ☑ You track delivery in real-time

Congratulations! 🎉

You've just:

- ☑ Created your account
- ☑ Set up your company profile
- ☑ Created your first project
- ☑ Added a supplier
- ☑ Placed your first order

What's Next?

Level Up Your Setup

Add Team Members (5 minutes)

1. Go to Team → Add Member
2. Invite your project managers
3. Assign roles and permissions

Customize Settings (5 minutes)

1. Settings → Notifications
2. Choose email/SMS preferences
3. Set approval workflows

Upload Documents (5 minutes)

1. Project → Documents
2. Upload contracts, plans, permits
3. Organize with tags

Start Using Daily

Morning Routine:

1. Check dashboard
2. Review today's deliveries
3. Check pending approvals
4. Respond to messages

As Orders Arrive:

1. Confirm delivery
2. Upload proof of delivery
3. Rate supplier
4. Update project progress

End of Day:

1. Update site diary
2. Review budget status
3. Plan tomorrow's orders

Key Features to Explore

📊 Dashboard

Your command center showing:

- Today's deliveries
- Budget status
- Active orders
- Team activity
- Recent updates

📦 Order Management

- Create orders quickly
- Track in real-time
- Get status updates
- Manage approvals
- View history

🚛 Delivery Tracking

- Real-time status
- Driver contact info

- GPS tracking
- Photo documentation
- Digital signatures

💰 Budget Control

- Live budget tracking
- Spend vs. budget
- Variance alerts
- Forecast reports
- Category breakdown

👥 Team Collaboration

- In-app messaging
- Task assignment
- Document sharing
- Activity feed
- Notifications

📱 Mobile App

- iOS and Android
- Create orders on-site
- Confirm deliveries
- Upload photos
- Works offline

Quick Tips for Success

🎯 Best Practices

Order Management:

- Place orders 3-5 days in advance
- Always add delivery instructions
- Include contact phone number
- Review before submitting

Delivery Confirmation:

- Confirm within 24 hours
- Take clear photos
- Note any issues immediately
- Rate supplier performance

Budget Tracking:

- Check budget before ordering

- Review weekly spending
- Address variances quickly
- Keep contingency for emergencies

Communication:

- Respond to messages promptly
- Update status regularly
- Be proactive with issues
- Keep notes detailed

⚡ Productivity Hacks

Keyboard Shortcuts:

- `Ctrl + K` - Quick search
- `Ctrl + N` - New order
- `Ctrl + ,` - Settings
- `Esc` - Close any modal

Quick Actions:

- Reorder from history
- Duplicate orders
- Bulk upload items
- Export to Excel

Time Savers:

- Create order templates
- Set default suppliers
- Use mobile app on-site
- Enable notifications

Common First-Time Questions

"Do I need to create projects first?"

Yes. Always create a project before placing orders. Orders must be linked to projects for budget tracking.

"Can I have multiple users?"

Absolutely! Invite unlimited team members. Assign different roles and permissions.

"What if I make a mistake on an order?"

No problem! Contact the supplier immediately. If order not yet processed, you can cancel/modify. Otherwise, create a change order.

"How do I know when my delivery is coming?"

Multiple ways:

- Email notification
- SMS alert (if enabled)
- Push notification on mobile
- Check dashboard "Today's Deliveries"

"What if something arrives damaged?"

1. DON'T sign as received
2. Take photos of damage
3. Note on delivery slip
4. Reject damaged items
5. Contact supplier immediately
6. Log issue in system

"Can suppliers see my budget?"

No. Suppliers only see:

- Their orders
- Delivery information
- Payment status

They cannot see:

- Your budget
- Other suppliers' orders
- Project financial details

"How do I track spending?"

Easy! Go to Project → Budget

- See real-time spending
- Compare to budget
- View by category
- Check trends
- Export reports

Troubleshooting

"I can't log in"

- Check email/password are correct
- Click "Forgot Password" to reset
- Check caps lock is off
- Try incognito/private window

"I don't see my order"

- Refresh the page (F5)
- Check you're viewing correct project
- Search by order number
- Check filters aren't hiding it

"Supplier didn't receive order"

- Check their email address
- Look in spam folder
- Resend from Order → Actions → Resend
- Contact them directly

"Can't upload photos"

- Check file size (max 10MB)
- Use JPG or PNG format
- Check internet connection
- Try one photo at a time

Get Help

🗐 Learning Resources

Video Tutorials Short videos covering every feature → https://help.siteproc.com/videos

Help Center Searchable knowledge base → https://help.siteproc.com

Webinars Free weekly training sessions → Register in app

Blog Tips, updates, best practices → https://blog.siteproc.com

💬 Contact Support

Live Chat (Fastest) Click chat icon in app Available 9 AM - 6 PM EST

Email support@siteproc.com Response within 24 hours

Phone 24/7 Emergency hotline [See app for number]

Community Forum Ask questions, share tips → https://community.siteproc.com

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Mobile App

Download Now

🔲 **iOS** App Store → Search "SiteProc"

🔳 **Android** Google Play → Search "SiteProc"

Mobile Features

- Create orders from site
- Scan barcodes
- Take and upload photos
- Get push notifications
- Works offline
- GPS location tagging

First-Time Mobile Setup

1. Download and install app
2. Log in with same credentials
3. Allow notifications
4. Enable camera access
5. Enable location (for geotagging)

Next Steps Checklist

Now that you're set up, complete these to master SiteProc:

Week 1

- ☐ Invite your team members
- ☐ Add all your suppliers
- ☐ Create current projects
- ☐ Set up budget tracking
- ☐ Place 3-5 orders
- ☐ Confirm first delivery
- ☐ Upload project documents

Week 2

- ☐ Customize notification settings
- ☐ Set up approval workflows
- ☐ Try the mobile app
- ☐ Generate your first report
- ☐ Explore advanced features
- ☐ Join a training webinar
- ☐ Give us feedback!

Month 1

- ☐ Review all features
- ☐ Optimize your workflow
- ☐ Train your team
- ☐ Set up integrations
- ☐ Create templates
- ☐ Achieve full adoption

Success Metrics

Track Your Progress

After 30 days, you should see:

⊞ Time Saved

- 15+ hours per month
- Faster order processing
- Less time on phone/email

💰 Cost Savings

- Better budget control
- Reduced errors
- Early payment discounts

☑ Improved Accuracy

- 90% reduction in order errors
- Complete delivery records
- No lost paperwork

🤝 Better Communication

- Instant notifications
- Clear audit trail
- Improved supplier relationships

Feedback Welcome!

We're constantly improving SiteProc. Share your thoughts:

💡 **Feature Requests** What would make your life easier? → feedback@siteproc.com

🐛 **Bug Reports** Found an issue? → bugs@siteproc.com

⭐ **Success Stories** Love SiteProc? Tell us! → stories@siteproc.com

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Quick Reference Card

Most Used Features

Action	How To
New Order	Dashboard → + New Order
Check Deliveries	Dashboard → Today's Deliveries
View Budget	Project → Budget

Action	How To
Confirm Delivery	Orders → [Order] → Confirm
Add Supplier	Suppliers → + Add Supplier
Invite Team	Team → + Add Member
Generate Report	Reports → Select Type
Upload Documents	Project → Documents → Upload

Support Quick Dial

Need	Contact
How-to question	Live chat in app
Technical issue	support@siteproc.com
Billing question	billing@siteproc.com
Emergency	24/7 hotline in app

🎉 You're Ready to Go!

Remember: The best way to learn is by doing. Don't worry about making mistakes—you can always edit, cancel, or get help from our support team.

Welcome to smarter construction management!

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🔗 Links:

- App: https://siteproc1.vercel.app
- Help: https://help.siteproc.com
- Support: support@siteproc.com
- Status: https://status.siteproc.com