SiteProc Company Admin Guide

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Getting Started

Welcome to SiteProc! As a Company Admin, you have full control over your organization's construction management platform.

Admin Responsibilities

As a Company Admin, you can:

- ☑ Set up and configure company profile
- ☑ Add and manage team members
- ☑ Create and oversee projects
- ☑ Manage supplier relationships
- ☑ Monitor budgets and expenses
- ☑ Generate financial reports
- ☑ Configure system settings
- ☑ Set user permissions and roles
- ☑ Access all company data

Initial Company Setup

Step 1: Complete Company Profile

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

2. **Basic Information**

- Company legal name
- Trading name (if different)
- Business registration number
- Tax ID / VAT number
- Industry classification

3. **Contact Details**

    - Primary email address
    - Phone number (main office)
    - Physical address
    - Postal address (if different)
    - Website URL

4. **Business Information**

    - Year established
    - Number of employees
    - Primary services
    - Service areas/regions
    - Business hours

5. **Branding**

    - Upload company logo (PNG/JPG, 500x500px recommended)
    - Choose brand colors
    - Upload letterhead template (optional)

Step 2: Financial Setup

1. **Banking Details**

    - Bank name
    - Account name
    - Account number
    - Sort code / Routing number
    - SWIFT/BIC (for international)

2. **Accounting Setup**

    - Fiscal year start date
    - Default currency
    - Tax rate
    - Chart of accounts (if applicable)

3. **Payment Terms**

    - Default supplier payment terms (e.g., Net 30)
    - Default client invoice terms
    - Late payment fees (if applicable)

Step 3: Integration Setup

Connect existing tools:

1. **QuickBooks Integration** (Optional)

    - Click "Connect QuickBooks"
    - Authorize access
    - Map accounts
    - Enable auto-sync

2. **Email Integration**

    - Connect Microsoft 365 or Google Workspace
    - Set up email templates
    - Configure automated notifications

3. **Cloud Storage** (Optional)

    - Connect Google Drive, Dropbox, or OneDrive
    - Set default upload location
    - Configure automatic backups

Team Management

Adding Team Members

1. **Go to Team → Add Member**

2. **Enter User Details**

    - Full name
    - Email address
    - Phone number
    - Job title
    - Department

3. **Assign Role**

    - **Admin** - Full system access
    - **Project Manager** - Manage assigned projects
    - **Site Manager** - Site-level operations
    - **Accountant** - Financial access only
    - **Viewer** - Read-only access

4. **Set Permissions**

    - View projects
    - Create orders
    - Approve expenses
    - Manage suppliers

- Access reports
- Modify settings

5. **Send Invitation**

   - User receives email invitation
   - They create their password
   - Account activated upon first login

Managing Existing Members

Edit Member:

1. Find member in team list
2. Click "Edit"
3. Update details/permissions
4. Save changes

Deactivate Member:

1. Select member
2. Click "Deactivate"
3. Confirm action
4. Their access is immediately revoked
5. Data remains intact

Reactivate Member:

1. Filter by "Inactive"
2. Select member
3. Click "Reactivate"
4. Reset password if needed

Roles & Permissions Matrix

Permission	Admin	PM	Site Mgr	Accountant	Viewer
Create projects	☑	☑	✖	✖	✖
Create orders	☑	☑	☑	✖	✖
Approve orders	☑	☑	☑*	✖	✖
View financials	☑	☑	Limited	☑	✖
Add suppliers	☑	☑	✖	✖	✖
Manage team	☑	✖	✖	✖	✖
System settings	☑	✖	✖	✖	✖
Export data	☑	☑	✖	☑	✖

*Within assigned budget

Project Creation & Management

Creating a New Project

1. **Navigate to Projects → Create Project**

2. **Project Details**

   - Project name
   - Project code/number
   - Client name and contact
   - Site address
   - Project type (Residential, Commercial, Infrastructure, etc.)
   - Project description

3. **Timeline**

   - Start date
   - Expected completion date
   - Key milestones
   - Critical deadlines

4. **Budget**

   - Total project budget
   - Budget breakdown by category:
     - Materials
     - Labor
     - Equipment
     - Subcontractors
     - Contingency
   - Payment schedule

5. **Team Assignment**

   - Project Manager
   - Site Manager(s)
   - Team members
   - External contractors

6. **Documents**

   - Upload contracts
   - Plans and drawings
   - Permits and licenses
   - Insurance documents

7. **Create Project**

   - Review all details

    - Click "Create Project"
    - Team receives notification

Project Dashboard

Each project has a central dashboard showing:

Overview:

- Project status and health
- Current phase
- Days until completion
- Team members
- Recent activity

Financial Summary:

- Budget vs. actual
- Committed costs
- Outstanding payments
- Variance analysis
- Burn rate

Progress Tracking:

- Milestones completed
- Tasks in progress
- Upcoming deadlines
- Issues and risks

Orders & Deliveries:

- Active orders
- Pending deliveries
- Completed deliveries
- Order status breakdown

Managing Projects

Update Project Status:

1. Open project
2. Click "Update Status"
3. Select: Planning, In Progress, On Hold, Completed, Cancelled
4. Add notes
5. Save

Modify Budget:

1. Go to Project → Budget
2. Click "Adjust Budget"

3. Update category amounts
4. Provide justification
5. Requires admin approval if over threshold
6. Save changes

Add Project Documents:

1. Project → Documents
2. Click "Upload"
3. Choose files
4. Add tags and categories
5. Upload

Project Archive:

- Completed projects can be archived
- Archived projects are read-only
- All data retained for compliance
- Can be unarchived if needed

Supplier Management

Adding New Suppliers

1. **Go to Suppliers → Add Supplier**

2. **Company Information**

   - Supplier company name
   - Business registration number
   - Tax ID
   - Category (Materials, Equipment, Services, etc.)
   - Products/services offered

3. **Contact Details**

   - Primary contact name
   - Email address
   - Phone number
   - Physical address
   - Website

4. **Business Terms**

   - Payment terms
   - Delivery terms
   - Minimum order value
   - Lead time
   - Warranty terms

5. **Bank Details** (for payments)
    - Bank name
    - Account details
    - Payment method preference
6. **Documents**
    - Insurance certificates
    - Trade licenses
    - Quality certifications
    - Product catalogs
7. **Send Invitation**
    - Supplier receives portal access
    - Can view and manage their orders

Supplier Categories

Organize suppliers by:

- Materials (concrete, steel, lumber, etc.)
- Equipment rental
- Subcontractors
- Professional services
- Utilities

Supplier Performance

Track supplier reliability:

Metrics:

- On-time delivery rate
- Order accuracy
- Quality ratings
- Response time
- Issue resolution

Rating System:

1. After each delivery
2. Rate 1-5 stars
3. Leave feedback
4. Track over time

Supplier Reports:

- View performance history
- Compare suppliers
- Identify top performers

- Flag problematic suppliers

Supplier Portal Access

Suppliers can:

- View their orders
- Update delivery status
- Upload proof of delivery
- Submit invoices
- View payment history
- Update their profile

Budget Tracking

Budget Setup

Initial Budget Allocation:

1. Set total project budget
2. Break down by category
3. Allocate percentages
4. Set approval thresholds
5. Define contingency reserve

Budget Categories:

- Direct materials
- Labor costs
- Equipment rental
- Subcontractors
- Professional fees
- Permits and licenses
- Insurance
- Contingency (typically 10-15%)

Monitoring Spend

Real-Time Tracking:

- View budget vs. actual at any time
- See committed costs (orders placed)
- Track pending approvals
- Monitor burn rate

Budget Alerts: Configure alerts for:

- 75% budget consumed
- 90% budget consumed
- Budget overrun

- Unusual spending patterns
- Pending approval limits

Variance Analysis:

- Automatic calculation
- Favorable vs. unfavorable variance
- Trend analysis
- Forecast to completion

Change Orders

When scope changes:

1. **Create Change Order**
   - Description of change
   - Reason for change
   - Cost impact
   - Schedule impact
   - Client approval
2. **Budget Adjustment**
   - Automatically adjusts budget
   - Tracked separately from base
   - Audit trail maintained
3. **Approval Workflow**
   - Requires client sign-off
   - Internal approval if needed
   - Updated budget takes effect

Financial Reports

Available Reports

1. Project Financials

- Budget vs. actual summary
- Category breakdown
- Variance analysis
- Forecasted completion cost

2. Cash Flow Report

- Money in (payments received)
- Money out (expenses paid)
- Pending payments
- Cash position

3. Profit & Loss

- Revenue by project
- Costs by category
- Gross profit margin
- Net profit

4. Accounts Payable

- Outstanding supplier invoices
- Payment due dates
- Aging report (30/60/90 days)
- Payment history

5. Purchase Order Report

- All POs issued
- PO status
- Delivered vs. pending
- Value by supplier

6. Expense Report

- All expenses by project
- Category breakdown
- Approval status
- Receipt documentation

Generating Reports

1. **Go to Reports**
2. **Select Report Type**
3. **Set Parameters:**
    - Date range
    - Projects to include
    - Filters (supplier, category, status)
4. **Choose Format:**
    - View on screen
    - Export to PDF
    - Export to Excel/CSV
    - Schedule automated email
5. **Generate**

Scheduled Reports

Automate Regular Reports:

1. Configure report settings
2. Set schedule (daily, weekly, monthly)
3. Add recipients

4. Report auto-emails on schedule

Common Scheduled Reports:

- Weekly cash flow (every Monday)
- Monthly P&L (1st of month)
- Daily order summary
- Weekly project status

System Settings

General Settings

Company Settings:

- Company name and details
- Time zone
- Date format
- Currency
- Language

Notification Settings:

- Email notification templates
- SMS settings (if enabled)
- Push notification preferences
- Notification frequency

Display Settings:

- Dashboard layout
- Default views
- Color theme
- Chart preferences

Approval Workflows

Configure Approvals:

1. **Order Approvals**
    - Set threshold amounts
    - Define approval chain
    - Automatic vs. manual approval
2. **Expense Approvals**
    - Approval limits by role
    - Multi-level approvals
    - Automatic routing

3. **Change Order Approvals**
    - Client approval required
    - Internal approval workflow
    - Documentation requirements

Example Workflow:

```
Order Value < $1,000: Auto-approved
Order Value $1,000-$5,000: Site Manager approval
Order Value $5,000-$20,000: Project Manager approval
Order Value > $20,000: Admin approval required
```

Email Templates

Customize automated emails:

1. **Order Confirmation**
2. **Delivery Notification**
3. **Payment Reminder**
4. **Team Invitation**
5. **Project Update**

Template Editor:

- Add company branding
- Include dynamic fields
- Preview before saving
- Test send to yourself

Backup & Data Export

Automatic Backups:

- Daily automatic backups
- 30-day retention
- One-click restore

Manual Export:

1. Go to Settings → Data Export
2. Select data to export
3. Choose format (CSV, JSON, Excel)
4. Download file

Data Includes:

- Projects
- Orders
- Suppliers

- Team members
- Financial records
- Documents

Security & Permissions

Security Settings

Password Policy:

- Minimum 8 characters
- Require special characters
- Password expiration (optional)
- Password history (prevent reuse)

Two-Factor Authentication:

- Require for all admins
- Optional for other users
- SMS or authenticator app
- Backup codes

Session Management:

- Auto-logout after inactivity
- Maximum session duration
- Concurrent session limits

IP Whitelisting:

- Restrict access by IP address
- Useful for office-only access
- Add trusted IPs

Audit Logs

Track all system activity:

Logged Events:

- User logins/logouts
- Permission changes
- Order creation/modification
- Budget adjustments
- Document uploads/deletes
- Setting changes

View Audit Logs:

1. Settings → Audit Logs
2. Filter by:

  - User
  - Action type
  - Date range
  - Project
3. Export for compliance

Data Privacy

GDPR Compliance:

- Data processing agreements
- User consent management
- Right to access data
- Right to deletion
- Data portability

Data Retention:

- Active project data: Indefinite
- Completed projects: 7 years default
- Audit logs: 5 years
- Deleted user data: 30-day grace period

Integration & API

API Access

Enable API:

1. Settings → Integrations → API
2. Generate API key
3. View API documentation
4. Test endpoints

API Capabilities:

- Create/read/update projects
- Manage orders
- Access reports
- Webhook notifications
- User management

API Documentation:

- Base URL: https://api.siteproc.com
- Authentication: Bearer token
- Rate limits: 1000 requests/hour
- Full docs: https://docs.siteproc.com/api

Webhooks

Set Up Webhooks:

1. Settings → Webhooks
2. Add webhook URL
3. Select events to monitor:
   - Order created
   - Order delivered
   - Payment received
   - Project status changed
4. Test webhook
5. Save

Webhook Payload:

```
{
  "event": "order.created",
  "timestamp": "2025-11-07T10:30:00Z",
  "data": {
    "order_id": "ORD-12345",
    "project_id": "PRJ-001",
    "supplier_id": "SUP-789",
    "total_amount": 5000.00
  }
}
```

Third-Party Integrations

Available Integrations:

- QuickBooks Online
- Xero
- Sage
- Microsoft 365
- Google Workspace
- Slack
- Microsoft Teams
- Dropbox
- Google Drive

Setup Process:

1. Go to Integrations
2. Select app to integrate
3. Click "Connect"
4. Authorize access
5. Configure sync settings
6. Test connection

Best Practices

Company Setup

✅ **Complete Profile Fully**

- Fill in all company details
- Upload logo and branding
- Configure all settings before inviting team

✅ **Set Up Approvals Early**

- Define clear approval limits
- Document approval workflows
- Train team on process

✅ **Organize Suppliers**

- Use categories consistently
- Maintain up-to-date contact info
- Rate supplier performance regularly

Team Management

✅ **Clear Role Definition**

- Assign appropriate permissions
- Document responsibilities
- Regular permission audits

✅ **Onboarding Process**

- Create welcome email template
- Provide training materials
- Assign mentor for first week

✅ **Regular Reviews**

- Quarterly permission review
- Remove inactive users promptly
- Update team structure as needed

Project Management

✅ **Consistent Naming**

- Use standard project codes
- Clear, descriptive names
- Include client name or location

✅ **Budget Discipline**

- Review budget weekly
- Address variances immediately
- Keep contingency for emergencies

☑ **Documentation**

- Upload all key documents
- Use clear file naming
- Tag documents for easy search

Financial Management

☑ **Regular Reconciliation**

- Reconcile weekly minimum
- Review outstanding payments
- Address discrepancies quickly

☑ **Cash Flow Monitoring**

- Review cash position daily
- Plan for upcoming large expenses
- Maintain reserve fund

☑ **Supplier Payments**

- Pay on time to maintain relationships
- Take early payment discounts
- Communicate delays in advance

Troubleshooting

Common Issues

"Cannot add team member"

Check:

- Email address is correct
- User doesn't already exist
- You have admin permissions
- Email domain isn't blocked

Solution: Try inviting from different admin account

"Budget not updating"

Check:

- Orders are approved
- Refresh dashboard

- Clear browser cache

Solution: Go to Project → Refresh Data

"Report not generating"

Check:

- Date range has data
- All required fields selected
- Internet connection stable

Solution: Try narrowing date range or clearing filters

"Integration failing"

Check:

- Third-party service is online
- API credentials still valid
- Token hasn't expired

Solution: Disconnect and reconnect integration

"Can't upload documents"

Check:

- File size under limit (10MB)
- File format supported
- Storage quota not exceeded

Solution: Compress file or archive old documents

Advanced Features

Custom Fields

Add custom fields to projects:

1. Settings → Custom Fields
2. Add field (text, number, date, dropdown)
3. Choose where it appears
4. Make required/optional

Automated Workflows

Create automation rules:

- When order is delivered → send notification
- When budget reaches 80% → alert admin

- When payment overdue → send reminder

Mobile App

Features:

- Full dashboard access
- Create orders on-site
- Approve expenses
- Upload photos
- Receive push notifications

Download:

- iOS: App Store
- Android: Google Play

Advanced Reporting

Custom Reports:

1. Reports → Create Custom
2. Select data sources
3. Choose metrics
4. Add filters
5. Save for reuse

Dashboard Widgets:

- Drag-and-drop customization
- Choose metrics to display
- Set refresh intervals

Support & Resources

Help Center

📚 https://help.siteproc.com

- Video tutorials
- Step-by-step guides
- FAQ database

Contact Support

📧 **Email:** support@siteproc.com 📞 **Phone:** Available 24/7 💬 **Live Chat:** In-app support

Training

🎓 **Free Training Sessions**

- Weekly webinars
- One-on-one training
- Certification program

Community

👥 User Community

- Forum discussions
- Best practice sharing
- Feature requests

Keyboard Shortcuts

Action	Shortcut
Quick search	`Ctrl + K`
New project	`Ctrl + Shift + P`
New order	`Ctrl + Shift + O`
View notifications	`Ctrl + N`
Settings	`Ctrl + ,`
Help	`F1`
Dashboard	`Ctrl + H`
Reports	`Ctrl + R`

Appendix

Glossary of Terms

Change Order - Modification to original project scope **POD** - Proof of Delivery **Variance** - Difference between budgeted and actual cost **Committed Cost** - Orders placed but not yet paid **Burn Rate** - Rate at which budget is being consumed **RFQ** - Request for Quote

Compliance Requirements

Ensure your use of SiteProc complies with:

- Local construction regulations
- Data protection laws (GDPR, CCPA)
- Industry standards (ISO 9001)
- Tax reporting requirements
- Safety regulations

Data Security

Your Data:

- Encrypted at rest and in transit (AES-256)
- Regular security audits
- SOC 2 Type II certified
- GDPR compliant
- Regular backups
- 99.9% uptime SLA

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For support: support@siteproc.com Latest docs: https://docs.siteproc.com