Revitalize SaaS Handbook

Welcome to Revitalize

- Revitalize is a white-label SaaS platform designed for service businesses in plumbing, HVAC, and water filtration.
- It streamlines scheduling, technician management, billing, and customer engagement under one powerful system.

Platform Setup (Admins)

- Company Profile Setup
- Team Member Management
- Service Customization
- Feature Toggles

Service Flow (All Users)

- Email/Phone verification flow
- Step-by-step diagnostics
- Emergency scheduling & verification
- Review and approval

Technician Dashboard

- Assigned jobs view
- Route optimization + navigation
- Job completion & incident reporting
- Gamified metrics and badges

Dispatcher Tools

- Assign & monitor techs
- View live tracking and dispatch queue
- Customer notification system
- Smart job recommendations

Accounting & Finance Tools

- Transparent commission tracker

- Invoicing + financing fee adjustments

- Digital wallet payment support

- Tiered billing control

Analytics & Reporting

- Heatmaps by zip code

- Repeat customer trends

- Incident summaries

- CSV/PDF export support

Community & Second-Chance Programs

- Role-based permission onboarding

- Supervisor verification for restricted techs

- Badge + certification tracking

- Internal chat and bulletin board

Fraud Protection & Privacy

- Honesty pledge for emergency calls

- Signature and proof log enforcement

- Customer profile history tracking

FAQ + Support

- Access support channels

- Reset login issues

- Submit feature requests