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