BroomStix BMS — Help Guide

Short answers to the everyday questions that come up while running the business.

Clients & new work

How do I add a new schedule for a client who already has one (like Ntombi)?

1. For a repeating clean: open Care Plans and press “+ New care plan”.
2. Fill in the same client name and address, choose how often the clean happens (weekly, twice weekly, fortnightly or monthly), then pick the day and shift.
3. Confirm — the diary fills itself for the next 12 weeks alongside her existing plan.
4. For a single extra clean instead: use Schedule Job, pick the client, date, shift, cleaners and price.

Note: A client can have several plans running at the same time, for example a weekly, twice-weekly, fortnightly or monthly clean.

How do I add a brand new client?

1. There is no single “add client” button — a client is created by the first work you record. Whichever road you take, they end up in Clients & Properties.
2. The short way (quotation): open Quotes and press “+ New quote”. Capture the client's details, property kind and size, and the cleans with their own cleaners, shifts, price and notes. A home visit is optional.
3. The middle way (assessment): if a home visit would help you judge the work, start at Assessments → New assessment, then turn it into a quote.
4. The longer way (enquiry): log the call or WhatsApp under Enquiries first — best when the client is still shopping around. Book an assessment or quote from there; the details carry across.
5. For someone you already serve: open their account in Clients & Properties (click the blue name) and press “+ New quote” — the details are pre-filled.

Note: If the name, phone or email already exists you are warned so you don't create the same client twice.

How do I put a new client on the calendar?

1. Easiest — accept their quote: every clean on the quote already has its offered day and shift. Press “Client accepted”, confirm a day and shift for each clean, and BMS creates the care plans and books the cleans into the diary by itself.
2. By hand for repeating work: open Care Plans → “+ New care plan”, choose the frequency, weekday(s) and shift, team size, shifts and price — the diary fills itself from the start date.
3. By hand for a single clean: open the Weekly Schedule and click a cell marked AVAILABLE (the date, shift and slot are filled in for you). Pick the client, then “Which clean?” — Clean 1, Clean 2, … — fills in the price, shifts and number of cleaners automatically.

Note: Accepting a quote is the normal route for a new client — the day, shift, price and team are agreed before anything is booked.

The client wants a deep clean first, then a weekly / fortnightly / monthly clean — how?

1. Make ONE quote with two cleans. Open Quotes → “+ New quote” and capture the client.
2. Clean 1 is the deep clean: choose “Once” with its own cleaners, shifts and price — for example 3 cleaners, 2 shifts.

3. Press “+ Add a clean” for Clean 2: choose Weekly, Fortnightly or Monthly with its own team — for example 2 cleaners, 1 shift.
4. Pick the offered day and shift for each clean, then send the quote.
5. When the client accepts, confirm a day and shift per clean — BMS creates a once-off plan for the deep clean and a repeating plan for the regular clean, each keeping its own team size and price.

Note: Each clean on a quote keeps its own number of cleaners — never merge them into one line.

Where do I see everything about one client?

1. Open Clients & Properties and click the client's blue name, or find them under Client Accounts & Balances.
2. Their account shows quotes, upcoming and completed cleans, invoices, payments and the full account statement.
3. Use Edit contact / address to change their name and surname, phone, email or property address.
4. Use Email quote, Email invoice or Email statement at the top when you need to send a document.

A client asked for a quote through the portal — where does it show?

1. Open Enquiries. Portal quote requests appear at the top of the list.

Diary & job cards

How do I move or cancel one clean?

1. Open the clean from the Weekly Schedule to see its job card.
2. Use the move option and pick the new date, or cancel it.
3. Every move, cancellation and deletion is recorded on the job card with who did it and when.

Note: We only work Monday to Friday, so weekend dates are not allowed.

How do I put a team on a clean?

1. Open the clean from the Weekly Schedule.
2. Choose the cleaners, then press Save team.
3. Cleaners already booked in the same shift, or on leave, cannot be picked.

How do I change how many cleaners a clean needs?

1. Open the clean's job card and find Allocated team.
2. Press Change cleaners needed and enter the new number.
3. An owner or manager must enter their own password to approve and save the change.

Note: The change applies to that clean and is recorded in its change history.

How do I close a finished job?

1. Open its job card from Closed Jobs → “Jobs still to close”, or from the Weekly Schedule.
2. Tick off the room work, then let the team leader sign it off as completed.
3. Once signed off the clean counts towards revenue and can be invoiced.

How do I delete a job card?

1. Open the job card and press Delete job card.

2. An owner or manager must enter their password to confirm.

Note: A clean that has already been invoiced cannot be deleted.

What does Property A and Property B mean?

1. It only appears when two cleans share the same day and the same shift.
2. It tells the team which of the two homes they are going to.

Money in

How do I invoice cleans?

1. Open Invoices and choose the month, or “Till today”.
2. Under “Every clean, per client”, tick the finished cleans you want on one invoice.
3. Press Invoice selected cleans — one draft invoice is made per client.
4. Or use Invoice all ready-to-bill cleans to create every draft that is ready in one go.

Note: Only finished, signed-off cleans can be invoiced. Undo invoicing removes draft invoices that have no payments and returns their cleans to ready to bill.

How do I see or print an invoice?

1. In Invoices, click the invoice number to open the preview.
2. From there you can print it, save it as a PDF or email it.

How do I record a client payment?

1. Open Payments and find the invoice.
2. Set the date received, the amount and the method, then save.
3. Part payments are allowed — the balance stays outstanding.

Why does the invoice show a payment line and an amount due?

1. Every invoice print-out shows the date and amount of the last payment received, and underneath it the amount still due.
2. If nothing has been paid, the amount due is the same as the total.
3. If it has been paid in full, the amount due shows zero — so nobody pays the same invoice twice.

Note: This is why you should always record a payment as soon as the money reflects: the moment you do, every reprint and re-send of that invoice shows the correct balance.

Staff & wages

How do I pay the cleaners?

1. Open HCP Wages & Shifts and choose the date range.
2. Set the Payment day, then press “Pay X shifts” for a cleaner, or mark single shifts paid.
3. Print or email the payment slip from the same row.

Note: Wages are shifts × the rate per shift. There is no hourly rate.

What is the difference between HCP Wages and Payroll by Month?

1. Use HCP Wages & Shifts to see each cleaner's shifts, record payments, and print or email wage slips.
2. Use Payroll by Month to total what was actually paid in each month and match it against the bank account.
3. Open a month there to see every cleaner and payment day included in its total.

Note: Both use shifts × the rate per shift. Hours never determine wages.

The payment sheet shows a different amount per shift than the rate in Settings — why?

1. A shift that has already been paid keeps the amount you actually paid on the day, exactly as it was recorded.
2. A shift that is still outstanding uses the rate that applied on the date of that clean.
3. So a sheet covering several weeks can show more than one amount per shift — that is correct, not an error.

Note: If a paid amount really is wrong, mark that shift unpaid on HCP Wages & Shifts and pay it again with the right rate in place.

How do I change the rate per shift?

1. Open Settings → rate per shift.
2. Add a new rate with the date it starts from.
3. Older cleans keep the rate that applied on their own date.

Where do I add a cleaner's bank details?

1. Open HCP Staff and edit the cleaner.
2. Fill in bank name, account number, branch code and email address.

Note: Without an email address the system cannot send that cleaner a wage statement.

How do I mark someone off sick or on leave?

1. Open HCP Availability and set the cleaner's status and the dates it applies to.
2. They will then be blocked from being allocated to cleans in that period.

Setup & housekeeping

How do I set the public holidays?

1. Open Settings → Public Holidays and choose this year or next year.
2. Add the dates yourself or take the suggested South African holidays.
3. The affected cleans are listed so you can move, keep or cancel each one.

Nothing is showing on my laptop — what now?

1. Do a hard refresh: Cmd+Shift+R on a Mac, Ctrl+Shift+R on Windows.
2. Check you are signed in with the right account.
3. If it is still empty, sign out and sign back in.

Who changed a clean, and when?

1. Open the job card of that clean and look at its change list.
2. Settings also shows recent changes across all cleans.