

BroomStix BMS

User & Operations Manual

Version BMS V1.1 — 29 September 2026

Broomstix Management System (BMS) — User & Operations Manual

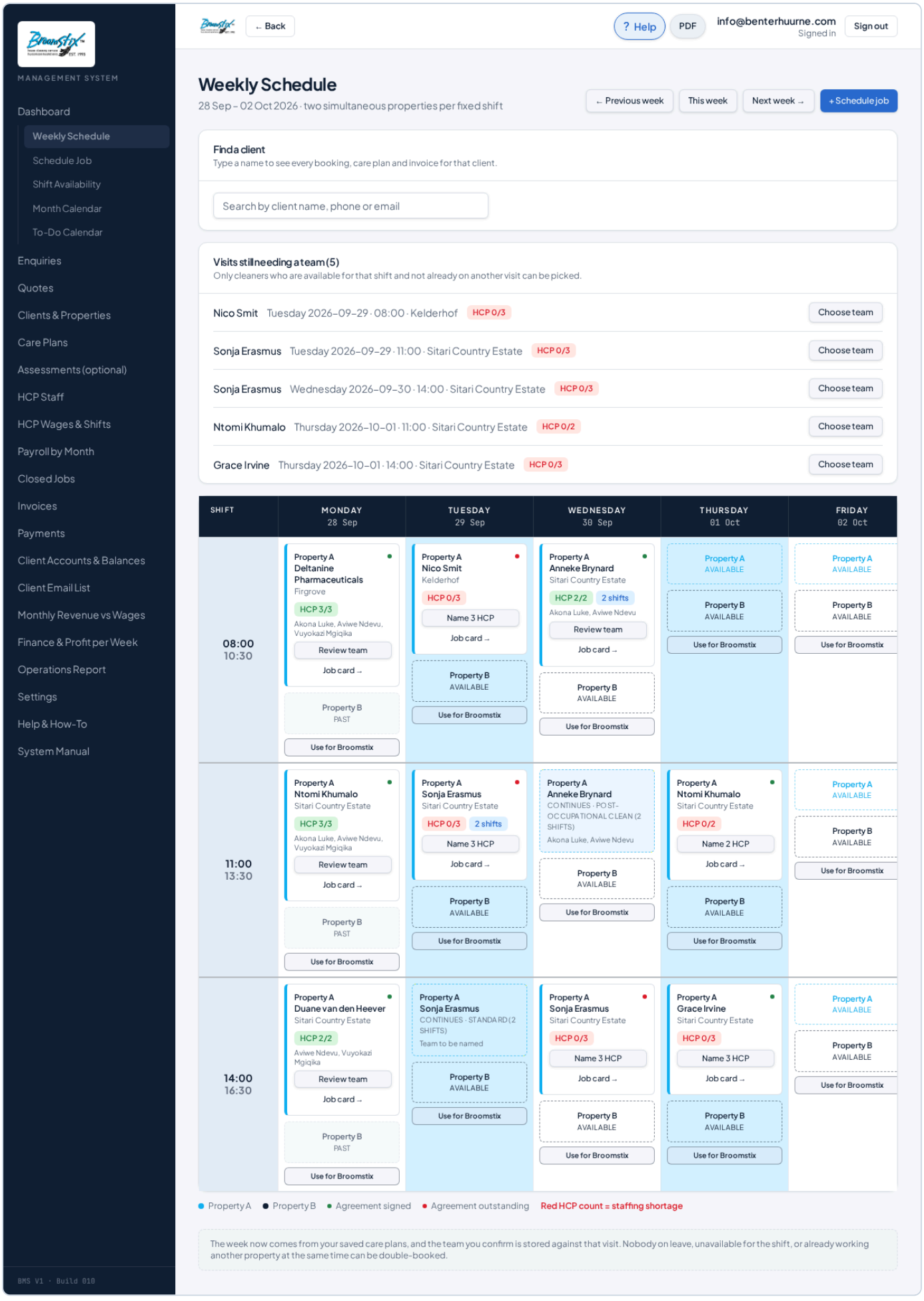
Version: BMS V1.1 (illustrated edition) — updated 29 September 2026 Audience: Operations Administrator (no technical knowledge required)

How to read this manual

Every section follows the same five headings:

- **Purpose** — what this part of BMS is for.
- **When to use it** — the moment in the working week you open it.
- **Step-by-step** — exactly what to click and type.
- **What happens next** — where the information travels to.
- **Rules & warnings** — the business rules BMS enforces, and the traps to avoid.

Screenshot placeholders are marked like this:


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Weekly Schedule
28 Sep – 02 Oct 2026 · two simultaneous properties per fixed shift
← Previous week
This week
Next week →
+ Schedule job
Find a client
Type a name to see every booking, care plan and invoice for that client.
Search by client name, phone or email
Visits still needing a team (5)
Only cleaners who are available for that shift and not already on another visit can be picked.
Nico Smit Tuesday 2026-09-29 · 08:00 · Kelderhof HCP 0/3 Choose team
Sonja Erasmus Tuesday 2026-09-29 · 11:00 · Sitari Country Estate HCP 0/3 Choose team
Sonja Erasmus Wednesday 2026-09-30 · 14:00 · Sitari Country Estate HCP 0/3 Choose team
Ntomi Khumalo Thursday 2026-10-01 · 11:00 · Sitari Country Estate HCP 0/2 Choose team
Grace Irvine Thursday 2026-10-01 · 14:00 · Sitari Country Estate HCP 0/3 Choose team
SHIFT
MONDAY 28 Sep
TUESDAY 29 Sep
WEDNESDAY 30 Sep
THURSDAY 01 Oct
FRIDAY 02 Oct
08:00 10:30
Property A Deltanine Pharmaceuticals Firgrove HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST Use for Broomstix
Property A Nico Smit Kelderhof HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A Anneke Brynard Sitari Country Estate HCP 2/2 2 shifts Akona Luke, Aviwe Ndevu Review team Job card →
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
11:00 13:30
Property A Ntomi Khumalo Sitari Country Estate HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST Use for Broomstix
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 2 shifts Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A Anneke Brynard CONTINUES · POST-OCCUPATIONAL CLEAN (2 SHIFTS) Akona Luke, Aviwe Ndevu
Property B AVAILABLE Use for Broomstix
Property A Ntomi Khumalo Sitari Country Estate HCP 0/2 Name 2 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
14:00 16:30
Property A Duane van den Heever Sitari Country Estate HCP 2/2 Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST Use for Broomstix
Property A Sonja Erasmus CONTINUES · STANDARD (2 SHIFTS) Team to be named
Property B AVAILABLE Use for Broomstix
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A Grace Irvine Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
Property A Property B Agreement signed Agreement outstanding Red HCP count = staffing shortage
The week now comes from your saved care plans, and the team you confirm is stored against that visit. Nobody on leave, unavailable for the shift, or already working another property at the same time can be double-booked.

Weekly Schedule — full week view. Take the screenshot from your own live BMS and paste it in place of the placeholder.

Words used in this manual

Term	Meaning in Broomstix
HCP	Home Care Professional — a cleaner on the staff register.
Shift	One fixed working block (08:00–10:30, 11:00–13:30, 14:00–16:30). Wages are paid per shift, never per hour.
Clean / Visit / Job	One booked cleaning appointment at one property, in one shift.
Job card	The on-screen record of a single clean: rooms, team, sign-off, history.
Care Plan	The recurring service agreement for a property, from which cleans are generated.
Property A / Property B	The two property slots that can run at the same time in the same shift.
TL/QC	Team Leader / Quality Control — an HCP qualified to sign a job off.

A note on two terms in your brief

- **“Issued”** — in BMS V1 an invoice that has been sent to the client carries the status **Sent**. Read “issued” as **Sent** throughout.
- **“Completed With Exception”** — BMS V1 does **not** have a separate status by that name. An exception is recorded as **sign-off notes on the job card** by the team leader (see 12. Quality control and exceptions). The status remains **Completed**; the note is the exception record.

Nothing in this manual describes a feature that is not in the finished V1 application.

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1. Introduction to the Broomstix Management System

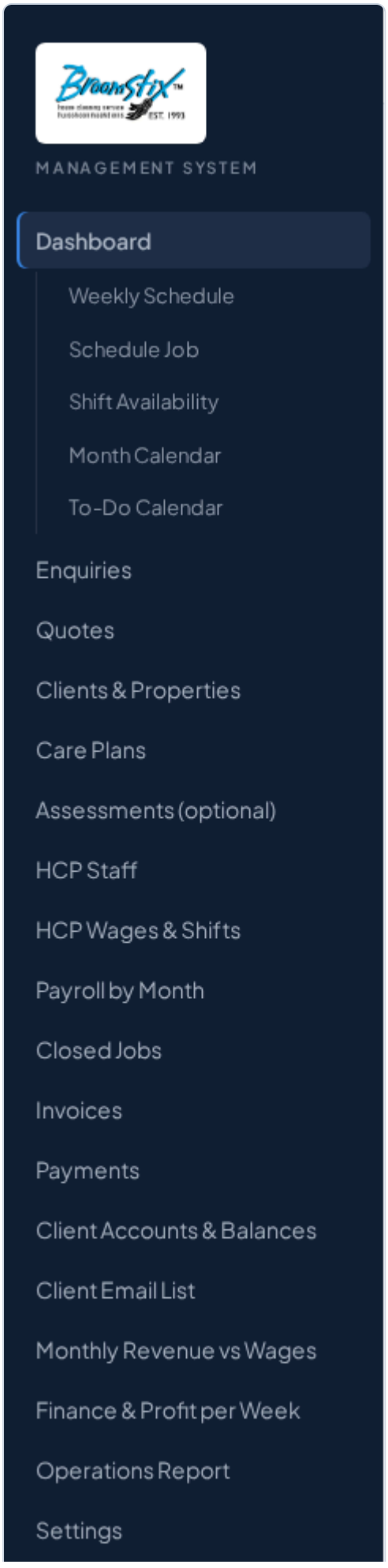
Purpose. BMS is the single operating system for a Broomstix cleaning franchise. It carries a client from the first phone call all the way to money in the bank and cleaners paid:

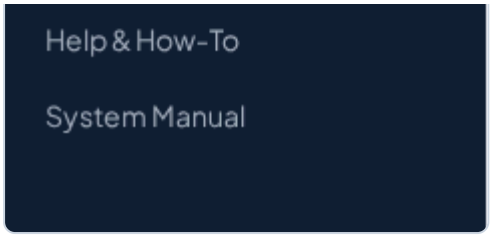
```
Enquiry → Quote (Home Assessment optional) → Care Plan → Cleans in the diary
        → Job card completed & signed off → Revenue earned
        → Invoice → Payment received
        → Shifts → Wages paid → Profit
```

When to use it. Every working day. It is not a filing system you update afterwards — the diary, the wages and the invoices are all built from what you capture as it happens.

Step-by-step (the shape of the system). The left-hand menu follows the business, top to bottom:

- **Dashboard** — Weekly Schedule, Schedule Job, Shift Availability, Month Calendar, To-Do Calendar
- **Enquiries, Quotes, Clients & Properties, Care Plans, Assessments (optional)**
- **HCP Staff**
- **HCP Wages & Shifts, Payroll by Month, Closed Jobs**
- **Invoices, Payments, Client Accounts & Balances, Client Email List**
- **Monthly Revenue vs Wages, Finance & Profit per Week**
- **Operations Report**
- **Settings**


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings



BMS main menu, full sidebar

What happens next. Each screen feeds the next one automatically. You never retype a client name, a price or a shift count from one screen into another.

Rules & warnings.

- Broomstix works **Monday to Friday only**. BMS will not place a clean on a Saturday or Sunday.
- Two properties can run at once in one shift — **Property A** and **Property B** — no more.
- All money is in South African Rand.

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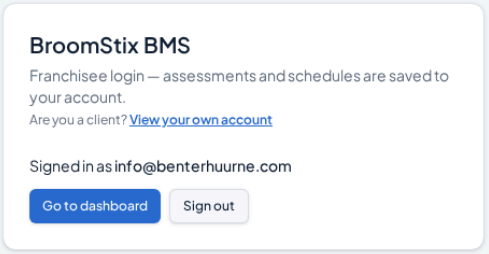
2. Logging in and user access

Purpose. To make sure each person sees and changes only what their role allows.

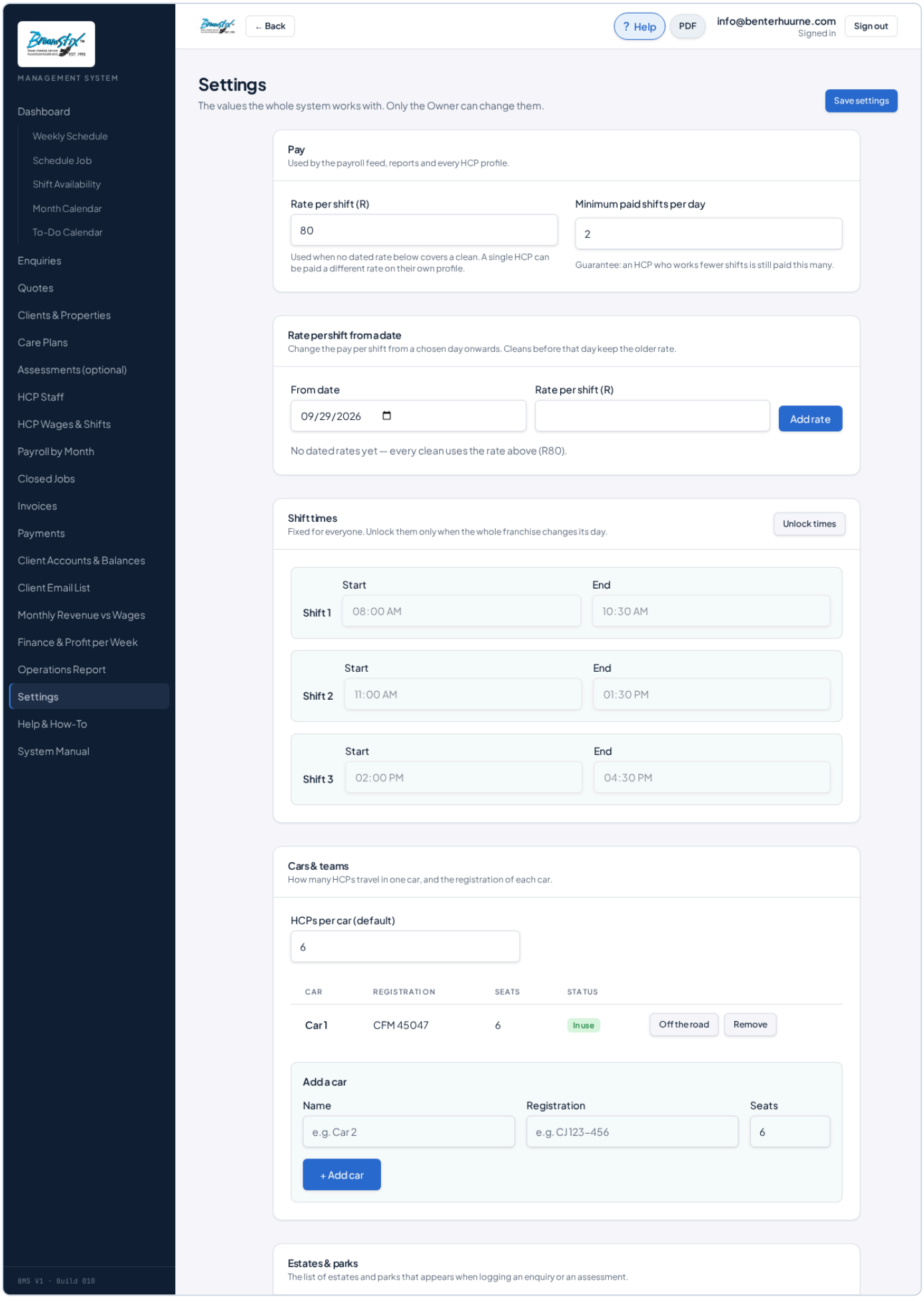
When to use it. At the start of each working session, and whenever a new staff member or client needs access.

Step-by-step.

1. Open the BMS address in your browser. The **Sign in** screen appears.
2. Enter your email address and password, then choose **Sign in**. Google sign-in is also available.
3. Forgotten password: choose the reset option, then follow the link emailed to you to set a new one.
4. To see who has access: **Settings → People & access** and **Who may do what**.


BroomStix BMS
Franchisee login — assessments and schedules are saved to your account.
Are you a client? View your own account
Signed in as info@benterhuurne.com
Go to dashboard
Sign out

Sign-in screen


MANAGEMENT SYSTEM
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Enquiries
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Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
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Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Settings
The values the whole system works with. Only the Owner can change them.
Save settings
Pay
Used by the payroll feed, reports and every HCP profile.
Rate per shift (R)
80
Used when no dated rate below covers a clean. A single HCP can be paid a different rate on their own profile.
Minimum paid shifts per day
2
Guarantee: an HCP who works fewer shifts is still paid this many.
Rate per shift from a date
Change the pay per shift from a chosen day onwards. Cleans before that day keep the older rate.
From date
09/29/2026
Rate per shift (R)
Add rate
No dated rates yet — every clean uses the rate above (R80).
Shift times
Fixed for everyone. Unlock them only when the whole franchise changes its day.
Unlock times
Start
End
Shift 1
08:00 AM
10:30 AM
Start
End
Shift 2
11:00 AM
01:30 PM
Start
End
Shift 3
02:00 PM
04:30 PM
Cars & teams
How many HCPs travel in one car, and the registration of each car.
HCPs per car (default)
6
CAR
REGISTRATION
SEATS
STATUS
Car 1
CFM 45047
6
In use
Off the road
Remove
Add a car
Name
e.g. Car 2
Registration
e.g. CJ 123-456
Seats
6
+ Add car
Estates & parks
The list of estates and parks that appears when logging an enquiry or an assessment.

Settings — People & access

What happens next. Every record you create is stamped with your franchise, so you only ever see your own franchise's clients, staff, cleans and money.

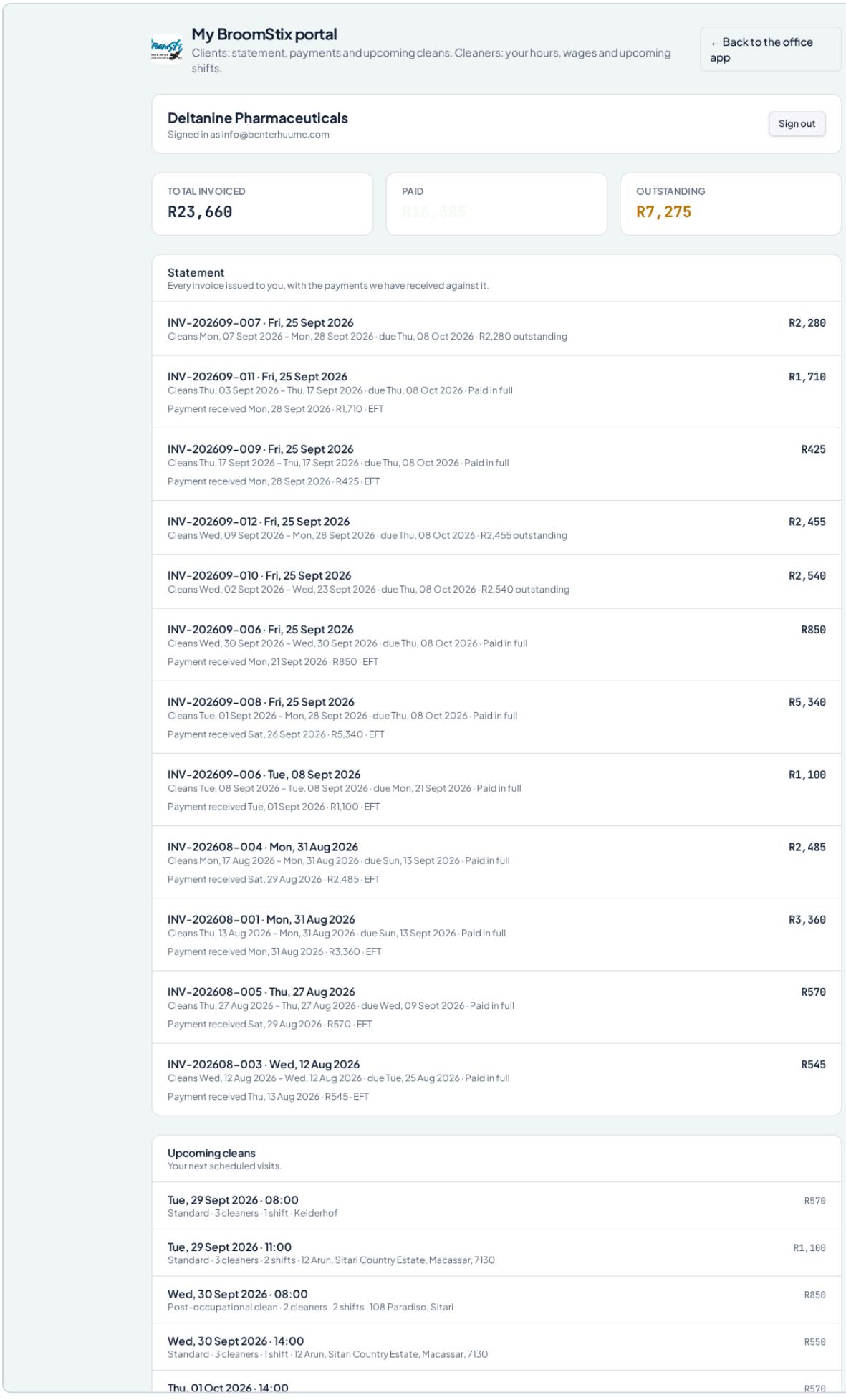
Rules & warnings.

- Roles are **Owner, Manager, Viewer, HCP** and **Demo**.
- Only the **Owner** may change the values in Settings (pay rates, shift times, cars, estates, frequencies).
- A **Demo** account is read-only: it can look at everything and change nothing.
- Deleting a job card requires an **Owner or Manager password** re-entered on the spot.
- Never share a login. The change history records the email address of whoever acted.

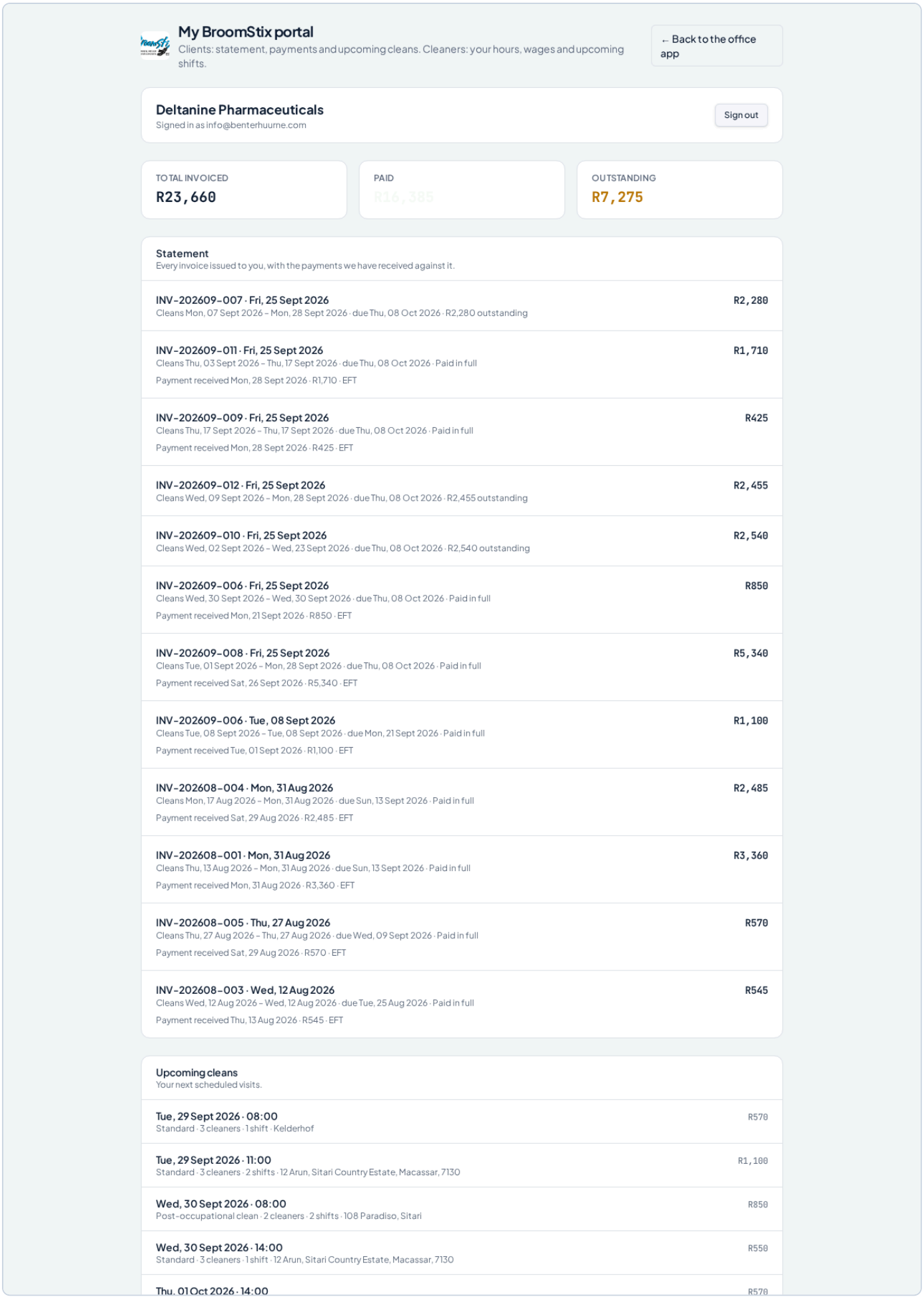
The Client & Cleaner Portal

Purpose. A separate, simple screen for people outside the office.

- A **client** signs in and sees their own statement, what has been invoiced, what has been paid, what is outstanding, their upcoming cleans, and can **request a quote**.
- A **cleaner** signs in and sees their own shifts, logged hours, wage totals, the bank details held on file, and their upcoming allocated cleans.


My BroomStix portal
Clients: statement, payments and upcoming cleans. Cleaners: your hours, wages and upcoming shifts.
← Back to the office app
Deltanine Pharmaceuticals
Signed in as info@benterhuurne.com
Sign out
TOTAL INVOICED
R23,660
PAID
R16,385
OUTSTANDING
R7,275
Statement
Every invoice issued to you, with the payments we have received against it.
INV-202609-007 · Fri, 25 Sept 2026
Cleans Mon, 07 Sept 2026 – Mon, 28 Sept 2026 · due Thu, 08 Oct 2026 · R2,280 outstanding
R2,280
INV-202609-011 · Fri, 25 Sept 2026
Cleans Thu, 03 Sept 2026 – Thu, 17 Sept 2026 · due Thu, 08 Oct 2026 · Paid in full
Payment received Mon, 28 Sept 2026 · R1,710 · EFT
R1,710
INV-202609-009 · Fri, 25 Sept 2026
Cleans Thu, 17 Sept 2026 – Thu, 17 Sept 2026 · due Thu, 08 Oct 2026 · Paid in full
Payment received Mon, 28 Sept 2026 · R425 · EFT
R425
INV-202609-012 · Fri, 25 Sept 2026
Cleans Wed, 09 Sept 2026 – Mon, 28 Sept 2026 · due Thu, 08 Oct 2026 · R2,455 outstanding
R2,455
INV-202609-010 · Fri, 25 Sept 2026
Cleans Wed, 02 Sept 2026 – Wed, 23 Sept 2026 · due Thu, 08 Oct 2026 · R2,540 outstanding
R2,540
INV-202609-006 · Fri, 25 Sept 2026
Cleans Wed, 30 Sept 2026 – Wed, 30 Sept 2026 · due Thu, 08 Oct 2026 · Paid in full
Payment received Mon, 21 Sept 2026 · R850 · EFT
R850
INV-202609-008 · Fri, 25 Sept 2026
Cleans Tue, 01 Sept 2026 – Mon, 28 Sept 2026 · due Thu, 08 Oct 2026 · Paid in full
Payment received Sat, 26 Sept 2026 · R5,340 · EFT
R5,340
INV-202609-006 · Tue, 08 Sept 2026
Cleans Tue, 08 Sept 2026 – Tue, 08 Sept 2026 · due Mon, 21 Sept 2026 · Paid in full
Payment received Tue, 01 Sept 2026 · R1,100 · EFT
R1,100
INV-202608-004 · Mon, 31 Aug 2026
Cleans Mon, 17 Aug 2026 – Mon, 31 Aug 2026 · due Sun, 13 Sept 2026 · Paid in full
Payment received Sat, 29 Aug 2026 · R2,485 · EFT
R2,485
INV-202608-001 · Mon, 31 Aug 2026
Cleans Thu, 13 Aug 2026 – Mon, 31 Aug 2026 · due Sun, 13 Sept 2026 · Paid in full
Payment received Mon, 31 Aug 2026 · R3,360 · EFT
R3,360
INV-202608-005 · Thu, 27 Aug 2026
Cleans Thu, 27 Aug 2026 – Thu, 27 Aug 2026 · due Wed, 09 Sept 2026 · Paid in full
Payment received Sat, 29 Aug 2026 · R570 · EFT
R570
INV-202608-003 · Wed, 12 Aug 2026
Cleans Wed, 12 Aug 2026 – Wed, 12 Aug 2026 · due Tue, 25 Aug 2026 · Paid in full
Payment received Thu, 13 Aug 2026 · R545 · EFT
R545
Upcoming cleans
Your next scheduled visits.
Tue, 29 Sept 2026 · 08:00
Standard · 3 cleaners · 1 shift · Kelderhof
R570
Tue, 29 Sept 2026 · 11:00
Standard · 3 cleaners · 2 shifts · 12 Arun, Sitari Country Estate, Macassar, 7130
R1,100
Wed, 30 Sept 2026 · 08:00
Post-occupational clean · 2 cleaners · 2 shifts · 108 Paradiso, Sitari
R850
Wed, 30 Sept 2026 · 14:00
Standard · 3 cleaners · 1 shift · 12 Arun, Sitari Country Estate, Macassar, 7130
R550
Thu, 01 Oct 2026 · 14:00
R570

Portal — client view


My BroomStix portal
Clients: statement, payments and upcoming cleans. Cleaners: your hours, wages and upcoming shifts.
← Back to the office app
Deltanine Pharmaceuticals
Signed in as info@benterhuurne.com
Sign out
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Statement
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R2,280
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R1,710
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R425
INV-202609-012 · Fri, 25 Sept 2026
Cleans Wed, 09 Sept 2026 – Mon, 28 Sept 2026 · due Thu, 08 Oct 2026 · R2,455 outstanding
R2,455
INV-202609-010 · Fri, 25 Sept 2026
Cleans Wed, 02 Sept 2026 – Wed, 23 Sept 2026 · due Thu, 08 Oct 2026 · R2,540 outstanding
R2,540
INV-202609-006 · Fri, 25 Sept 2026
Cleans Wed, 30 Sept 2026 – Wed, 30 Sept 2026 · due Thu, 08 Oct 2026 · Paid in full
Payment received Mon, 21 Sept 2026 · R850 · EFT
R850
INV-202609-008 · Fri, 25 Sept 2026
Cleans Tue, 01 Sept 2026 – Mon, 28 Sept 2026 · due Thu, 08 Oct 2026 · Paid in full
Payment received Sat, 26 Sept 2026 · R5,340 · EFT
R5,340
INV-202609-006 · Tue, 08 Sept 2026
Cleans Tue, 08 Sept 2026 – Tue, 08 Sept 2026 · due Mon, 21 Sept 2026 · Paid in full
Payment received Tue, 01 Sept 2026 · R1,100 · EFT
R1,100
INV-202608-004 · Mon, 31 Aug 2026
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Payment received Sat, 29 Aug 2026 · R2,485 · EFT
R2,485
INV-202608-001 · Mon, 31 Aug 2026
Cleans Thu, 13 Aug 2026 – Mon, 31 Aug 2026 · due Sun, 13 Sept 2026 · Paid in full
Payment received Mon, 31 Aug 2026 · R3,360 · EFT
R3,360
INV-202608-005 · Thu, 27 Aug 2026
Cleans Thu, 27 Aug 2026 – Thu, 27 Aug 2026 · due Wed, 09 Sept 2026 · Paid in full
Payment received Sat, 29 Aug 2026 · R570 · EFT
R570
INV-202608-003 · Wed, 12 Aug 2026
Cleans Wed, 12 Aug 2026 – Wed, 12 Aug 2026 · due Tue, 25 Aug 2026 · Paid in full
Payment received Thu, 13 Aug 2026 · R545 · EFT
R545
Upcoming cleans
Your next scheduled visits.
Tue, 29 Sept 2026 · 08:00
Standard · 3 cleaners · 1 shift · Kelderhof
R570
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Standard · 3 cleaners · 2 shifts · 12 Arun, Sitari Country Estate, Macassar, 7130
R1,100
Wed, 30 Sept 2026 · 08:00
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R850
Wed, 30 Sept 2026 · 14:00
Standard · 3 cleaners · 1 shift · 12 Arun, Sitari Country Estate, Macassar, 7130
R550
Thu, 01 Oct 2026 · 14:00
R570

Portal — cleaner view

Rules & warnings. A portal account only ever shows the records that match that person’s email address. A quote request from a client lands at the top of **Enquiries** for you to action.

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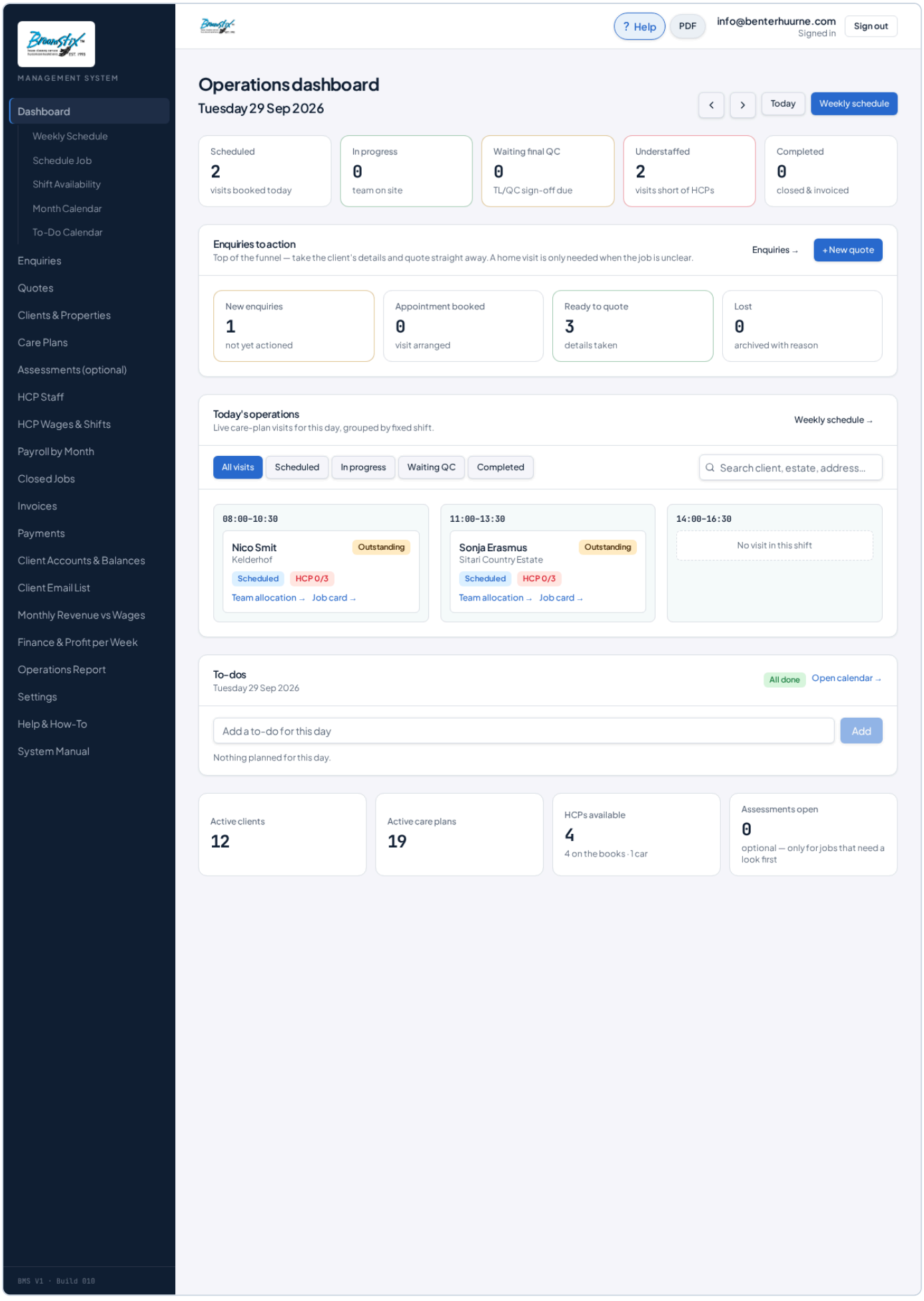
3. Dashboard (Operations dashboard)

Purpose. Your morning picture: what is happening today, and what is stuck.

When to use it. First thing every morning, and again before you leave.

Step-by-step.

1. Open **Dashboard**.
2. Use the arrows beside the date to step backwards or forwards a day.
3. Read the counters: **Scheduled**, **In progress**, **Waiting final QC**, **Understaffed**, **Completed**.
4. Read the enquiry counters: **New enquiries**, **Appointment booked**, **Assessed**, **Lost**.
5. Under **Today’s operations**, search or scroll the day’s visits and open any job card.
6. Check the standing counters: **Active clients**, **Active care plans**, **HCPs available**, **Assessments to do**.
7. Open **Month Calendar** for the whole month at a glance — each day lists its cleans, and a **red flag** marks a client whose payment is late.


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
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Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
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System Manual
BMS V1 · Build 010
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Operations dashboard
Tuesday 29 Sep 2026
Today
Weekly schedule
Scheduled
2
visits booked today
In progress
0
team on site
Waiting final QC
0
TL/QC sign-off due
Understaffed
2
visits short of HCPs
Completed
0
closed & invoiced
Enquiries to action
Top of the funnel — take the client's details and quote straight away. A home visit is only needed when the job is unclear.
Enquiries →
+ New quote
New enquiries
1
not yet actioned
Appointment booked
0
visit arranged
Ready to quote
3
details taken
Lost
0
archived with reason
Today's operations
Live care-plan visits for this day, grouped by fixed shift.
Weekly schedule →
All visits
Scheduled
In progress
Waiting QC
Completed
Search client, estate, address…
08:00–10:30
Nico Smit
Outstanding
Kelderhof
Scheduled
HCP 0/3
Team allocation →
Job card →
11:00–13:30
Sonja Erasmus
Outstanding
Sitari Country Estate
Scheduled
HCP 0/3
Team allocation →
Job card →
14:00–16:30
No visit in this shift
To-dos
Tuesday 29 Sep 2026
All done
Open calendar →
Add a to-do for this day
Add
Nothing planned for this day.
Active clients
12
Active care plans
19
HCPs available
4
4 on the books · 1 car
Assessments open
0
optional — only for jobs that need a look first

Operations dashboard — top counters and Today’s operations

What happens next. The dashboard is a window, not a form — you act from it by opening the job card, the schedule or the enquiry it points you to.

Rules & warnings. Understaffed means fewer cleaners are allocated than the clean requires. Fix it the same day on the Weekly Schedule; an understaffed clean will run short or fail.

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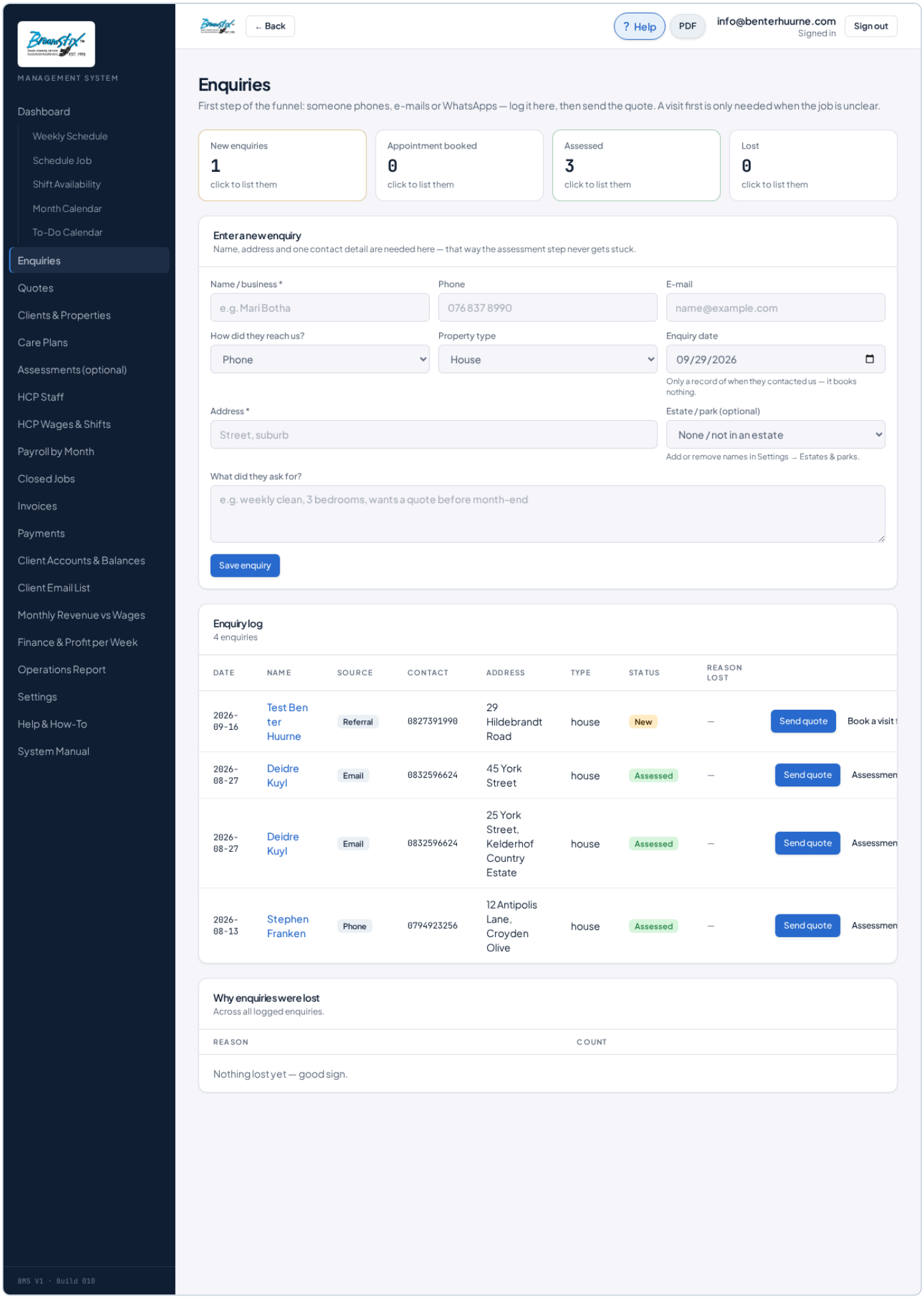
4. Enquiries

Purpose. The first step of the funnel: every phone call, email, WhatsApp or portal quote request is logged here so nothing is lost.

When to use it. The moment somebody makes contact.

Step-by-step.

1. Open **Enquiries → Enter a new enquiry**.
2. Capture the client’s name, phone number, email, address, **Estate / complex** (choose from the list, or *None*), property type and the source of the enquiry.
3. Add notes about what the client asked for. Save.
4. Move the enquiry along as it progresses: **New → Appointment booked → Assessed**, or mark it **Lost** with a reason.
5. **Quote requests from the client portal** appear in their own panel at the top — action these first.


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Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
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HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Enquiries
First step of the funnel: someone phones, e-mails or WhatsApps — log it here, then send the quote. A visit first is only needed when the job is unclear.
New enquiries
1
click to list them
Appointment booked
0
click to list them
Assessed
3
click to list them
Lost
0
click to list them
Enter a new enquiry
Name, address and one contact detail are needed here — that way the assessment step never gets stuck.
Name / business *
e.g. Mari Botha
Phone
076 837 8990
E-mail
name@example.com
How did they reach us?
Phone
Property type
House
Enquiry date
09/29/2026
Only a record of when they contacted us — it books nothing.
Address *
Street, suburb
Estate / park (optional)
None / not in an estate
Add or remove names in Settings → Estates & parks.
What did they ask for?
e.g. weekly clean, 3 bedrooms, wants a quote before month-end
Save enquiry
Enquiry log
4 enquiries
DATE
NAME
SOURCE
CONTACT
ADDRESS
TYPE
STATUS
REASON LOST
2026-09-16
Test Benter Huurne
Referral
0827391990
29 Hildebrandt Road
house
New
—
Send quote
Book a visit
2026-08-27
Deidre Kuyl
Email
0832596624
45 York Street
house
Assessed
—
Send quote
Assessmen
2026-08-27
Deidre Kuyl
Email
0832596624
25 York Street, Kelderhof Country Estate
house
Assessed
—
Send quote
Assessmen
2026-08-13
Stephen Franken
Phone
0794923256
12 Antipolis Lane, Croyden Olive
house
Assessed
—
Send quote
Assessmen
Why enquiries were lost
Across all logged enquiries.
REASON
COUNT
Nothing lost yet — good sign.

Enquiries — register and Enter a new enquiry

What happens next. Booking the assessment carries the client's details into the **Home Assessment**, so you don't retype them.

Rules & warnings. Always record a **lost reason** — the *Why enquiries were lost* panel is your marketing feedback. An enquiry on its own creates no client, no price and no clean.

---

5. Clients & Properties

Purpose. The property register: every client and every property Broomstix knows.

5.1 Adding a new client — one way

There is now **one** way to add a new client: the **+ New client** button on **Clients & Properties**. It opens the same form as **+ New quote** on the Quotes page, because a new client and their first price are captured together.

Step-by-step.

1. Open **Clients & Properties** and press **+ New client**.
2. Fill in name, phone, email and address.
3. Choose the kind and size of the property.
4. Add the clean(s): type of clean, cleaners, shifts, price per clean, and a note such as *cleaning windows*. Use **+ Add a clean** for a deep clean plus a regular clean.
5. Save, then send the quote. The client is on the books immediately, and accepting the quote books the cleans into the diary.

Optional extras (not separate roads).

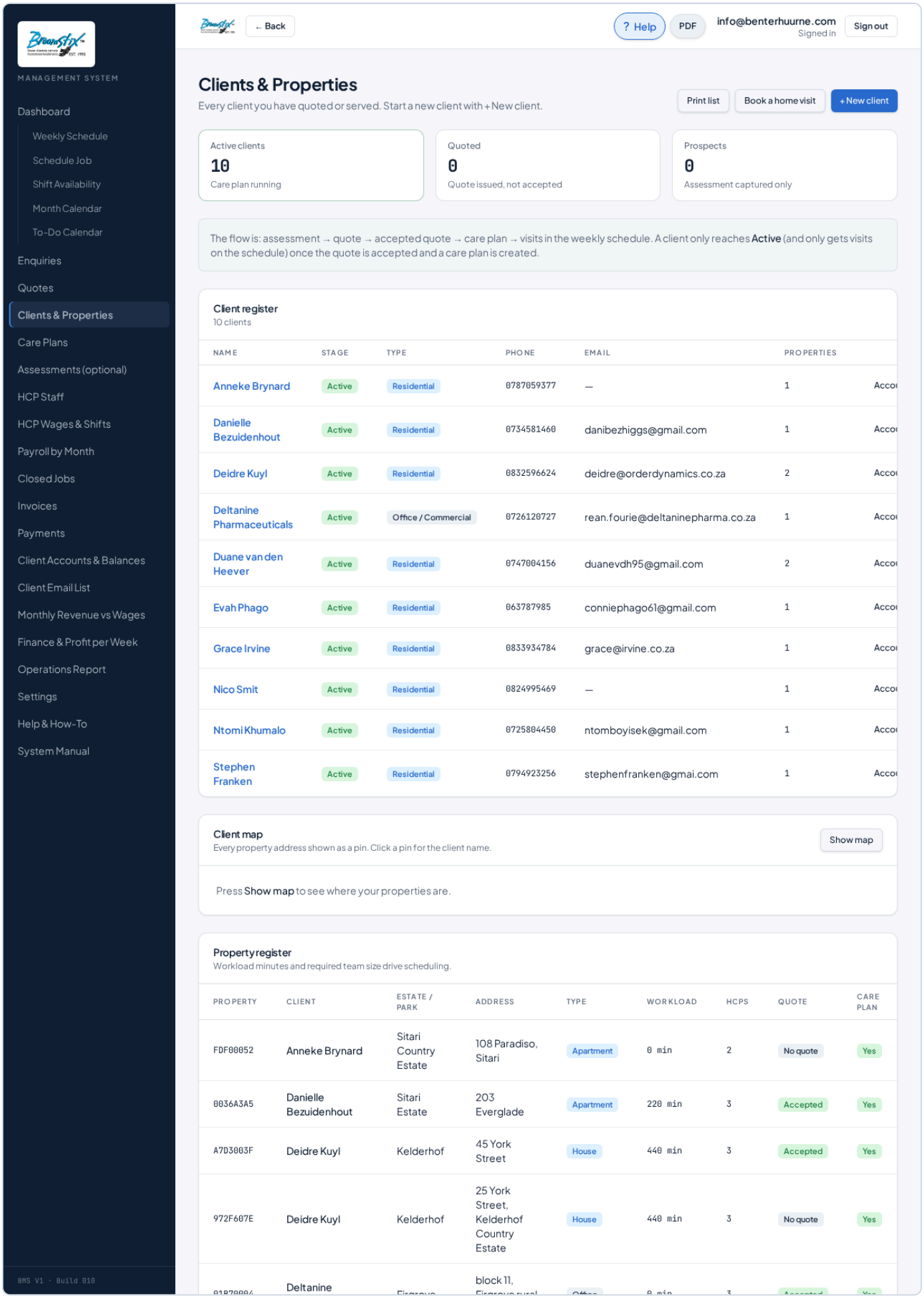
- **Book a home visit** (Assessments, section 6) when you want to measure the work before pricing. Saving it carries the details into the same quote form.
- **Log an enquiry** (Enquiries, section 4) when the client is still shopping around and you only want a record of the call. From the enquiry you send the quote with the same form.
- **For an existing client**, open their account (click the blue name) and press **+ New quote** — details pre-filled.

Rules & warnings. Every route ends in **one** client record. If the name, phone or email matches an existing client, BMS warns you and offers *Use this existing client* — always accept it, so the history, invoices and statement stay together.

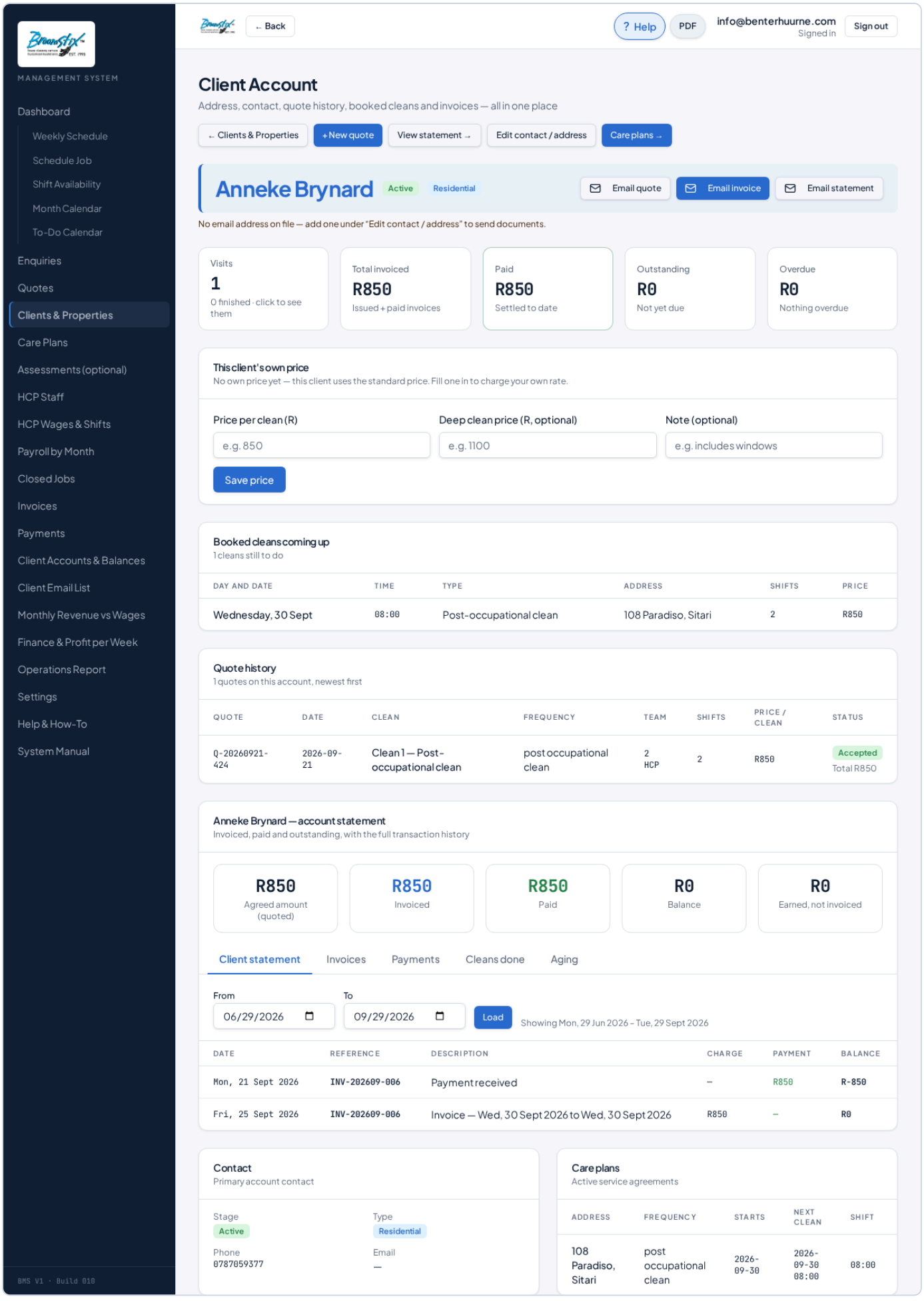
When to use it. To look someone up, check their history, or see who is still only a prospect.

Step-by-step.

1. Open **Clients & Properties**.
2. Click the counters at the top to filter: **Active clients**, **Quoted**, **Prospects**.
3. Search the **Property register** and click the client's blue name to open their account. You can also find all balances under **Client Accounts & Balances**.
4. On the client's account, use the **Visits** block to open **every clean for this client** — date, shift, type, address, amount, status and whether it is invoiced. Click any line to open its job card.
5. Use **Edit contact / address** to change the client's **name and surname**, phone, email or property address. A name change follows through to their quotes, cleans and invoices.
6. Scroll to the account statement to see total invoiced, paid, outstanding and overdue, with invoice and payment history. Use **Email quote**, **Email invoice** or **Email statement** at the top when needed.


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Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
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← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Clients & Properties
Every client you have quoted or served. Start a new client with + New client.
Print list
Book a home visit
+ New client
Active clients
10
Care plan running
Quoted
0
Quote issued, not accepted
Prospects
0
Assessment captured only
The flow is: assessment → quote → accepted quote → care plan → visits in the weekly schedule. A client only reaches Active (and only gets visits on the schedule) once the quote is accepted and a care plan is created.
Client register
10 clients
NAME
STAGE
TYPE
PHONE
EMAIL
PROPERTIES
Anneke Brynard
Active
Residential
0787059377
—
1
Danielle Bezuidenhout
Active
Residential
0734581460
danibezhiggs@gmail.com
1
Deidre Kuyl
Active
Residential
0832596624
deidre@orderdynamics.co.za
2
Deltanine Pharmaceuticals
Active
Office / Commercial
0726120727
rean.fourie@deltaninepharma.co.za
1
Duane van den Heever
Active
Residential
0747004156
duanevdh95@gmail.com
2
Evah Phago
Active
Residential
063787985
conniephago61@gmail.com
1
Grace Irvine
Active
Residential
0833934784
grace@irvine.co.za
1
Nico Smit
Active
Residential
0824995469
—
1
Ntomi Khumalo
Active
Residential
0725804450
ntomboyisek@gmail.com
1
Stephen Franken
Active
Residential
0794923256
stephenfranken@gmai.com
1
Client map
Every property address shown as a pin. Click a pin for the client name.
Show map
Press Show map to see where your properties are.
Property register
Workload minutes and required team size drive scheduling.
PROPERTY
CLIENT
ESTATE / PARK
ADDRESS
TYPE
WORKLOAD
HCPS
QUOTE
CARE PLAN
FDF00052
Anneke Brynard
Sitari Country Estate
108 Paradiso, Sitari
Apartment
0 min
2
No quote
Yes
0036A3A5
Danielle Bezuidenhout
Sitari Estate
203 Everglade
Apartment
220 min
3
Accepted
Yes
A7D3003F
Deidre Kuyl
Kelderhof
45 York Street
House
440 min
3
Accepted
Yes
972F607E
Deidre Kuyl
Kelderhof
25 York Street, Kelderhof Country Estate
House
440 min
3
No quote
Yes
Deltanine
block 11,

Clients & Properties — counters and property register


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Client Email List
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Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Client Account
Address, contact, quote history, booked cleans and invoices — all in one place
← Clients & Properties
+ New quote
View statement →
Edit contact / address
Care plans →
Anneke Brynard
Active
Residential
Email quote
Email invoice
Email statement
No email address on file — add one under "Edit contact / address" to send documents.
Visits
1
0 finished · click to see them
Total invoiced
R850
Issued + paid invoices
Paid
R850
Settled to date
Outstanding
R0
Not yet due
Overdue
R0
Nothing overdue
This client's own price
No own price yet — this client uses the standard price. Fill one in to charge your own rate.
Price per clean (R)
e.g. 850
Deep clean price (R, optional)
e.g. 1100
Note (optional)
e.g. includes windows
Save price
Booked cleans coming up
1 cleans still to do
DAY AND DATE
TIME
TYPE
ADDRESS
SHIFTS
PRICE
Wednesday, 30 Sept
08:00
Post-occupational clean
108 Paradiso, Sitari
2
R850
Quote history
1 quotes on this account, newest first
QUOTE
DATE
CLEAN
FREQUENCY
TEAM
SHIFTS
PRICE / CLEAN
STATUS
Q-20260921-424
2026-09-21
Clean 1 — Post-occupational clean
post occupational clean
2 HCP
2
R850
Accepted
Total R850
Anneke Brynard — account statement
Invoiced, paid and outstanding, with the full transaction history
R850
Agreed amount (quoted)
R850
Invoiced
R850
Paid
R0
Balance
R0
Earned, not invoiced
Client statement
Invoices
Payments
Cleans done
Aging
From
06/29/2026
To
09/29/2026
Load
Showing Mon, 29 Jun 2026 – Tue, 29 Sept 2026
DATE
REFERENCE
DESCRIPTION
CHARGE
PAYMENT
BALANCE
Mon, 21 Sept 2026
INV-202609-006
Payment received
–
R850
R-850
Fri, 25 Sept 2026
INV-202609-006
Invoice — Wed, 30 Sept 2026 to Wed, 30 Sept 2026
R850
–
R0
Contact
Primary account contact
Stage
Active
Type
Residential
Phone
0787059377
Email
—
Care plans
Active service agreements
ADDRESS
FREQUENCY
STARTS
NEXT CLEAN
SHIFT
108 Paradiso, Sitari
post occupational clean
2026-09-30
2026-09-30 08:00
08:00

Client account — Visits expanded

What happens next. A client appears after an assessment or direct quote, becomes **Quoted** when a quote exists and **Active** once a care plan is running. Contact and address corrections made here update the linked records.

Rules & warnings. BMS warns you when a new assessment looks like an **existing client** (matching name, phone digits or email) and offers *Use this existing client*. Always accept it — duplicate clients split the history, the invoices and the statement.

---

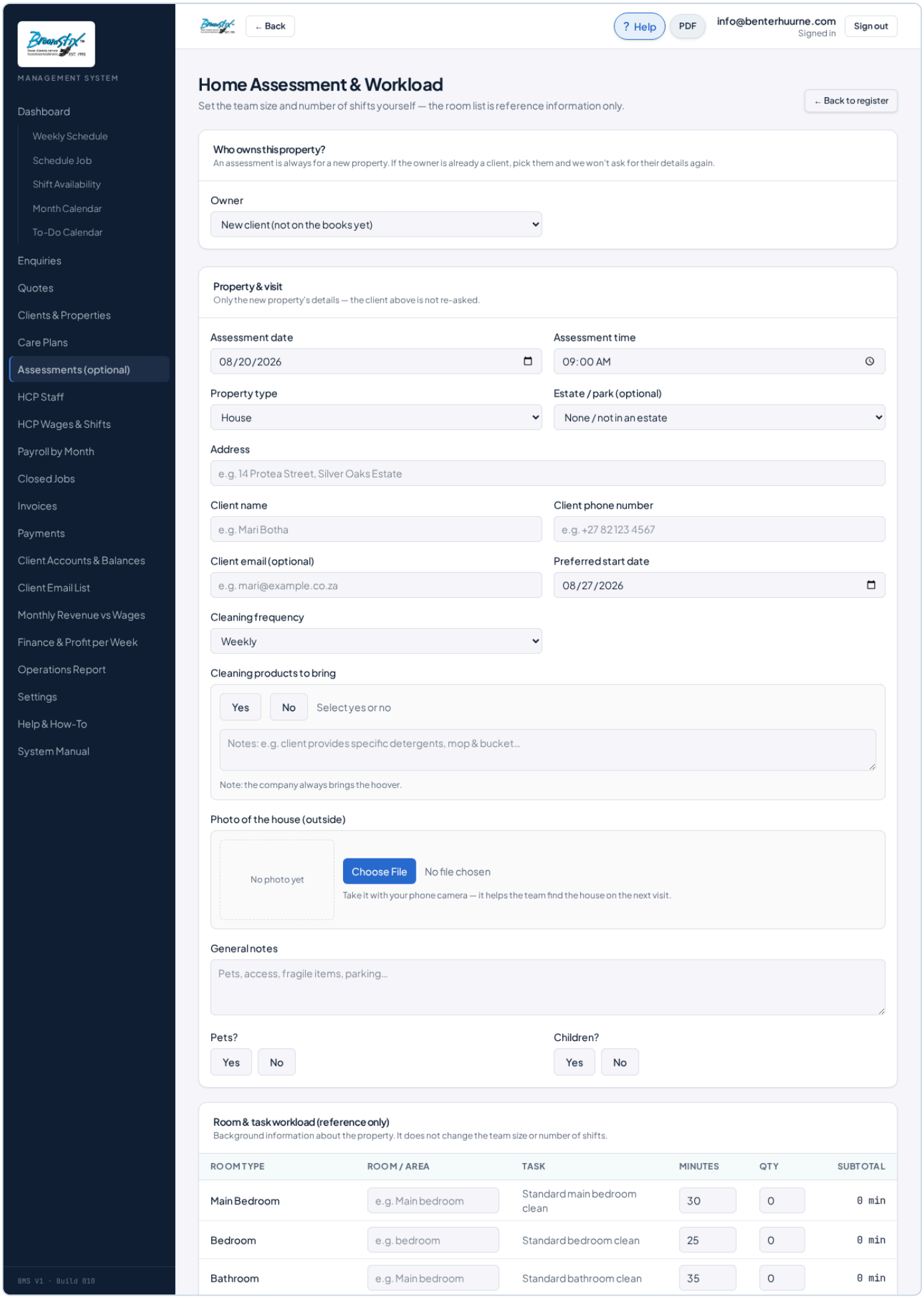
6. Home Assessment

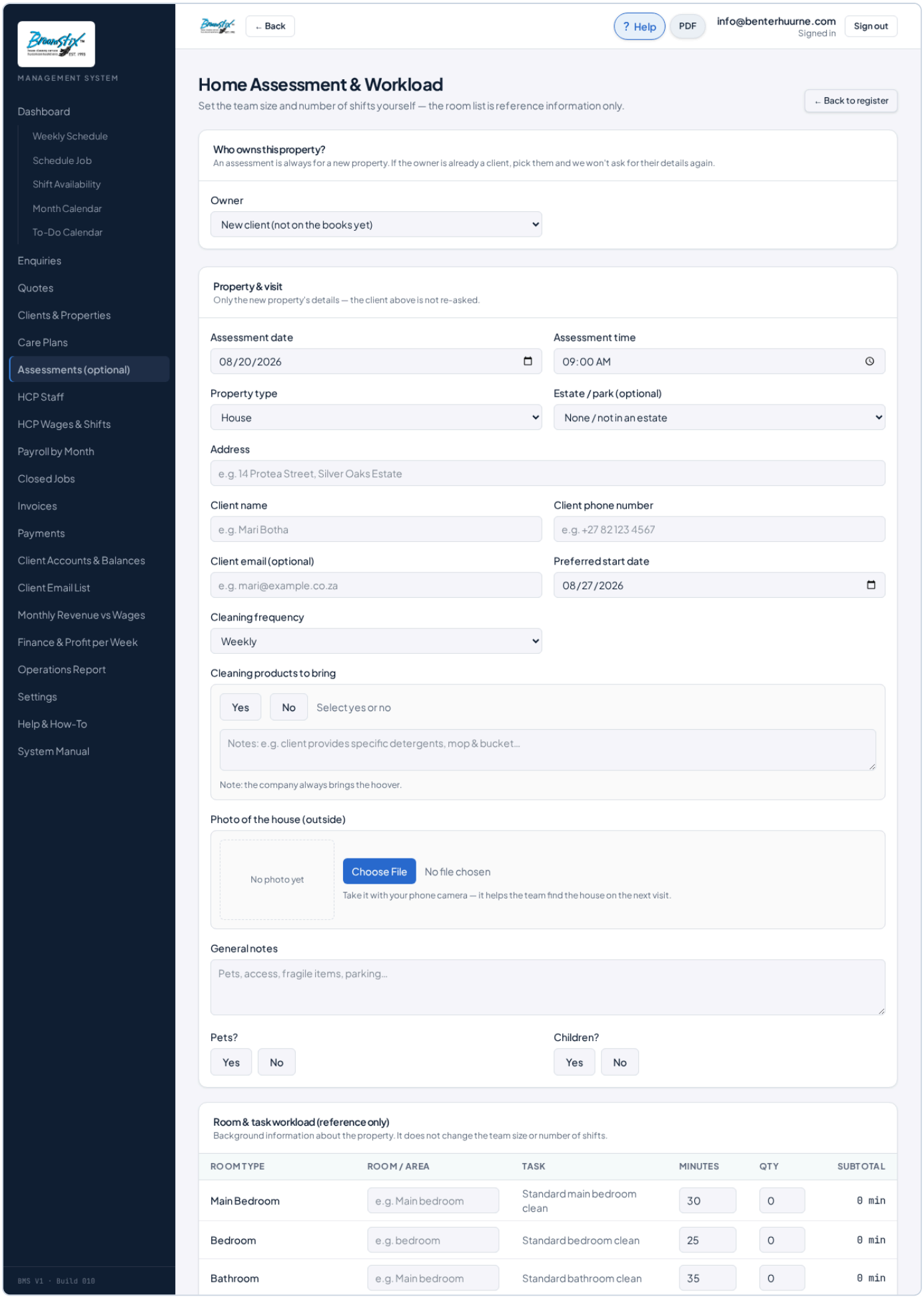
Purpose. An optional aid for pricing the work and deciding the team when a home visit would be useful.

When to use it. After a site visit when you need room-by-room detail before quoting. For a straightforward enquiry, quote directly without an assessment.

Step-by-step.

1. Open **Assessments → new assessment** (*Home Assessment & Workload*).
2. **Who owns this property?** — choose the existing client, or capture a new owner.
3. **Property & visit** — assessment date and time, property type, **Estate / complex** (dropdown, with *Other* for free text), address, client name, phone, email.
4. Capture the **preferred start date**, **cleaning frequency**, whether the **first clean is a deep clean**, and whether Broomstix brings the cleaning products.
5. Note pets, children, product notes and general notes.
6. Work through the **Room & task workload** list. This is **reference information only** — it helps you judge the size of the job.
7. In **Team & shifts**, set **HCPs required** and **Shifts required** yourself.
8. Save the assessment.


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System Manual
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← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Home Assessment & Workload
Set the team size and number of shifts yourself — the room list is reference information only.
← Back to register
Who owns this property?
An assessment is always for a new property. If the owner is already a client, pick them and we won't ask for their details again.
Owner
New client (not on the books yet)
Property & visit
Only the new property's details — the client above is not re-asked.
Assessment date
08/20/2026
Assessment time
09:00 AM
Property type
House
Estate / park (optional)
None / not in an estate
Address
e.g. 14 Protea Street, Silver Oaks Estate
Client name
e.g. Mari Botha
Client phone number
e.g. +27 82 123 4567
Client email (optional)
e.g. mari@example.co.za
Preferred start date
08/27/2026
Cleaning frequency
Weekly
Cleaning products to bring
Yes
No
Select yes or no
Notes: e.g. client provides specific detergents, mop & bucket…
Note: the company always brings the hoover.
Photo of the house (outside)
No photo yet
Choose File
No file chosen
Take it with your phone camera — it helps the team find the house on the next visit.
General notes
Pets, access, fragile items, parking…
Pets?
Yes
No
Children?
Yes
No
Room & task workload (reference only)
Background information about the property. It does not change the team size or number of shifts.
ROOM TYPE
ROOM / AREA
TASK
MINUTES
QTY
SUBTOTAL
Main Bedroom
e.g. Main bedroom
Standard main bedroom clean
30
0
0 min
Bedroom
e.g. bedroom
Standard bedroom clean
25
0
0 min
Bathroom
e.g. Main bedroom
Standard bathroom clean
35
0
0 min


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← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Home Assessment & Workload
Set the team size and number of shifts yourself — the room list is reference information only.
← Back to register
Who owns this property?
An assessment is always for a new property. If the owner is already a client, pick them and we won't ask for their details again.
Owner
New client (not on the books yet)
Property & visit
Only the new property's details — the client above is not re-asked.
Assessment date
08/20/2026
Assessment time
09:00 AM
Property type
House
Estate / park (optional)
None / not in an estate
Address
e.g. 14 Protea Street, Silver Oaks Estate
Client name
e.g. Mari Botha
Client phone number
e.g. +27 82 123 4567
Client email (optional)
e.g. mari@example.co.za
Preferred start date
08/27/2026
Cleaning frequency
Weekly
Cleaning products to bring
Yes
No
Select yes or no
Notes: e.g. client provides specific detergents, mop & bucket…
Note: the company always brings the hoover.
Photo of the house (outside)
No photo yet
Choose File
No file chosen
Take it with your phone camera — it helps the team find the house on the next visit.
General notes
Pets, access, fragile items, parking…
Pets?
Yes
No
Children?
Yes
No
Room & task workload (reference only)
Background information about the property. It does not change the team size or number of shifts.
ROOM TYPE
ROOM / AREA
TASK
MINUTES
QTY
SUBTOTAL
Main Bedroom
e.g. Main bedroom
Standard main bedroom clean
30
0
0 min
Bedroom
e.g. bedroom
Standard bedroom clean
25
0
0 min
Bathroom
e.g. Main bedroom
Standard bathroom clean
35
0
0 min

Home Assessment — Team & shifts

What happens next. The assessment appears in the **Assessment Register** (*Awaiting approval → Approved*), the client appears under Clients & Properties, and you can raise a **Quote** from it. The **shift count you set here carries through to the care plan and to every clean generated from it.**

Rules & warnings.

- The room list does **not** decide the team size — you do.
- Get **Shifts required** right. If a clean later shows fewer shifts than the assessment, BMS asks *"Is this a new, separate job?"* — answer **No** to restore the assessed shift count unless it genuinely is a different job.
- Sample assessments marked *demo only* are illustrations; they never reach the schedule.

---

7. Quotes

Purpose. The written price offered to the client. One quote can contain several different cleans.

When to use it. As soon as you know the kind and size of the property. A home assessment is optional.

Step-by-step.

1. Open **Quotes → + New quote**. You can quote a new client directly, open it pre-filled from a client account, or raise it from an assessment.
2. Confirm the client's name, email, phone, estate and address, then capture the property kind and size.
3. In **Cleaning requirements**, write what the client needs — for example pets, children, bathrooms, allergies, busy rooms and how quickly dirt returns. Press **Recommend frequency with AI**.
4. Read the suggested frequency and its plain-language reason. Press **Use this frequency** to apply it, or keep your own choice. This is advice only; franchise staff make the final decision.
5. Add every clean included in the offer. Each clean has its own frequency, HCPs required, shifts, price and optional note (for example, *cleaning windows*).
6. The register and quotation show a simple clean label — **Once, Weekly, Twice weekly, Fortnightly** or **Monthly** — so the type of clean is always clear.
7. Set the preferred start date, **valid until** date and notes for the client, then save the draft.
8. Before acceptance, use **Edit details** to correct the client's name, email, phone or address and to change the cleans on the quote.
9. Use **Review** to check the quote, **Quotation** to print or save one quote, or **Export PDF** beside the client to print all their grouped quotes together. You can also email the quote.
10. Use the status legend: **Draft** means not sent, **Sent** means awaiting an answer, **Accepted** means agreed and booked, and **Declined** means lost work. Hover over a status for the same explanation.
11. When the client accepts, BMS asks you to choose a day and shift for **each clean** on the quote, then creates the care plans and diary visits.

7.1 A deep clean first, then a regular clean (different team sizes)

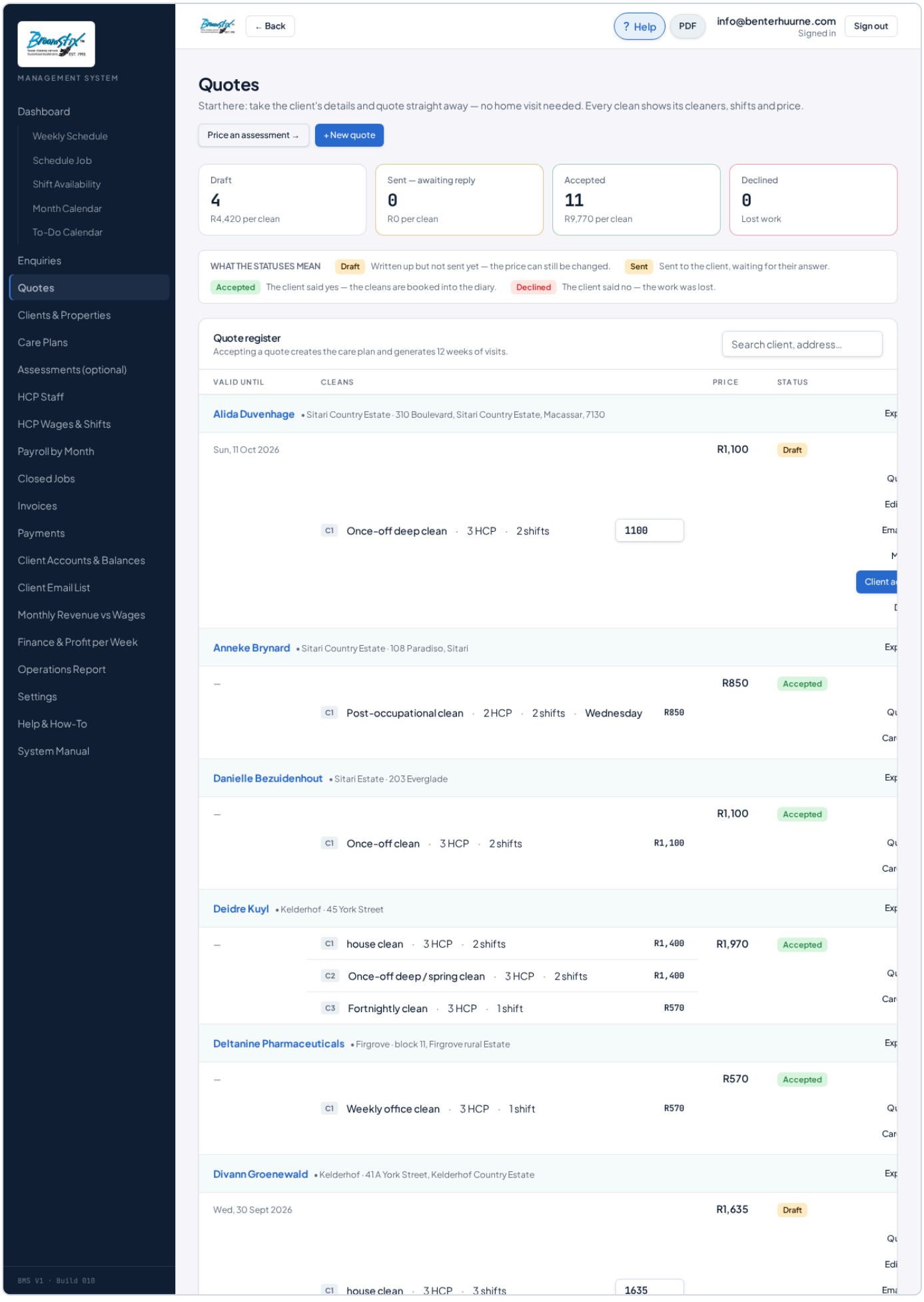
A very common agreement: the first visit is a **once-off deep clean**, and after that the client continues with a **weekly, fortnightly or monthly** clean. This is **one quote with two cleans** — do not create two quotes.

1. Open **Quotes → + New quote** and capture the client as usual.
2. **Clean 1** is the deep clean: choose **Once**, set its own **cleaners, shifts and price** — for example **3 HCPs, 2 shifts, R1 100** — and add a note like *first deep clean*.
3. Press **+ Add a clean** for **Clean 2**: choose the regular frequency (**Weekly**, **Fortnightly** or **Monthly**) with **its own** team — for example **2 HCPs, 1 shift, R425**.

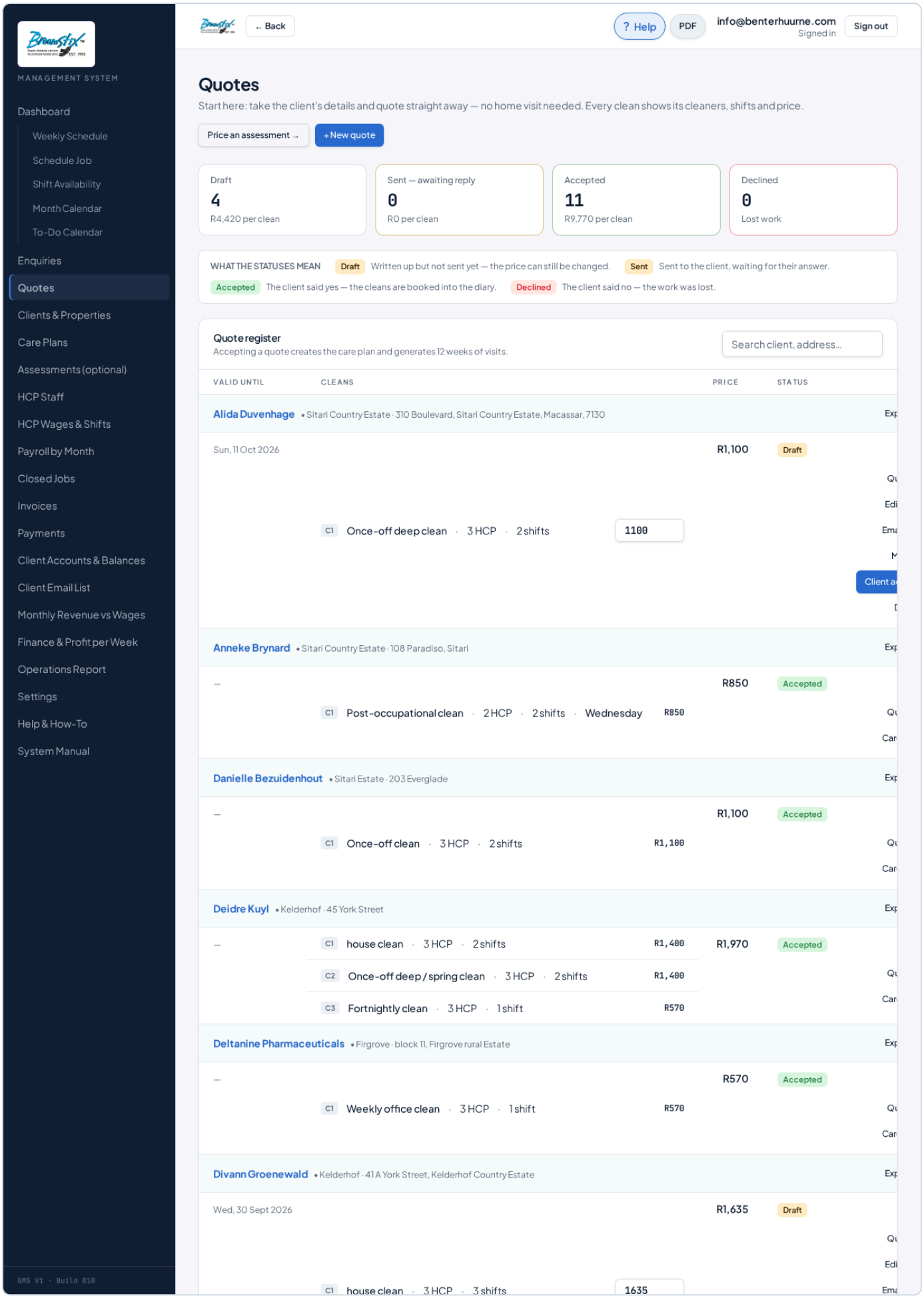
4. Choose the offered **day and shift** for each clean (the calendar shows what is free), then save, review and send.

What happens on acceptance. When the client accepts, BMS asks for a day and shift for **each clean separately** and creates **two care plans**: a once-off plan for the deep clean (3 cleaners) and a repeating plan for the regular clean (2 cleaners). Each clean keeps its own team size, shifts and price all the way to the invoice — the deep clean is billed once, the regular clean every month. For a clean that runs two shifts, you pick the day and the starting shift once — the next shift of that same day is booked with it, and the picker only offers days where **both** shifts have enough cleaners free.

Rules & warnings. Every clean on a quote has its **own** cleaners, shifts and price — never average them into one line, or the diary and wages will be wrong. Changing a clean’s price in the quote editor updates the quote’s own price, its totals and everything already booked from it, so they always stay in step. A single clean quoted on its own is labelled **Once-off clean**.


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Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Quotes
Start here: take the client's details and quote straight away — no home visit needed. Every clean shows its cleaners, shifts and price.
Price an assessment →
+ New quote
Draft
4
R4,420 per clean
Sent — awaiting reply
0
R0 per clean
Accepted
11
R9,770 per clean
Declined
0
Lost work
WHAT THE STATUSES MEAN
Draft
Written up but not sent yet — the price can still be changed.
Sent
Sent to the client, waiting for their answer.
Accepted
The client said yes — the cleans are booked into the diary.
Declined
The client said no — the work was lost.
Quote register
Accepting a quote creates the care plan and generates 12 weeks of visits.
Search client, address…
VALID UNTIL
CLEANS
PRICE
STATUS
Alida Duvenhage
• Sitari Country Estate · 310 Boulevard, Sitari Country Estate, Macassar, 7130
Sun, 11 Oct 2026
R1,100
Draft
C1
Once-off deep clean
· 3 HCP · 2 shifts
1100
Anneke Brynard
• Sitari Country Estate · 108 Paradiso, Sitari
—
R850
Accepted
C1
Post-occupational clean
· 2 HCP · 2 shifts · Wednesday
R850
Danielle Bezuidenhout
• Sitari Estate · 203 Everglade
—
R1,100
Accepted
C1
Once-off clean
· 3 HCP · 2 shifts
R1,100
Deidre Kuyl
• Kelderhof · 45 York Street
—
R1,970
Accepted
C1
house clean
· 3 HCP · 2 shifts
R1,400
C2
Once-off deep / spring clean
· 3 HCP · 2 shifts
R1,400
C3
Fortnightly clean
· 3 HCP · 1 shift
R570
Deltanine Pharmaceuticals
• Firgrove · block 11, Firgrove rural Estate
—
R570
Accepted
C1
Weekly office clean
· 3 HCP · 1 shift
R570
Divann Groenewald
• Kelderhof · 41 A York Street, Kelderhof Country Estate
Wed, 30 Sept 2026
R1,635
Draft
C1
house clean
· 3 HCP · 3 shifts
1635

Quotes — register and counters


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HCP Staff
HCP Wages & Shifts
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Finance & Profit per Week
Operations Report
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Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Quotes
Start here: take the client's details and quote straight away — no home visit needed. Every clean shows its cleaners, shifts and price.
Price an assessment →
+ New quote
Draft
4
R4,420 per clean
Sent — awaiting reply
0
R0 per clean
Accepted
11
R9,770 per clean
Declined
0
Lost work
WHAT THE STATUSES MEAN
Draft
Written up but not sent yet — the price can still be changed.
Sent
Sent to the client, waiting for their answer.
Accepted
The client said yes — the cleans are booked into the diary.
Declined
The client said no — the work was lost.
Quote register
Accepting a quote creates the care plan and generates 12 weeks of visits.
Search client, address…
VALID UNTIL
CLEANS
PRICE
STATUS
Alida Duvenhage
• Sitari Country Estate · 310 Boulevard, Sitari Country Estate, Macassar, 7130
Sun, 11 Oct 2026
R1,100
Draft
C1
Once-off deep clean
· 3 HCP · 2 shifts
1100
Anneke Brynard
• Sitari Country Estate · 108 Paradiso, Sitari
—
R850
Accepted
C1
Post-occupational clean
· 2 HCP · 2 shifts · Wednesday
R850
Danielle Bezuidenhout
• Sitari Estate · 203 Everglade
—
R1,100
Accepted
C1
Once-off clean
· 3 HCP · 2 shifts
R1,100
Deidre Kuyl
• Kelderhof · 45 York Street
—
R1,970
Accepted
C1
house clean
· 3 HCP · 2 shifts
R1,400
C2
Once-off deep / spring clean
· 3 HCP · 2 shifts
R1,400
C3
Fortnightly clean
· 3 HCP · 1 shift
R570
Deltanine Pharmaceuticals
• Firgrove · block 11, Firgrove rural Estate
—
R570
Accepted
C1
Weekly office clean
· 3 HCP · 1 shift
R570
Divann Groenewald
• Kelderhof · 41A York Street, Kelderhof Country Estate
Wed, 30 Sept 2026
R1,635
Draft
C1
house clean
· 3 HCP · 3 shifts
1635

Printable quotation document

What happens next. Each clean on an **Accepted** quote becomes its own booked plan. Its agreed frequency, team size, shifts, price and notes carry into the work that follows.

Rules & warnings. Set **Valid until** — an expired price should be re-quoted, not honoured. Once a quote is accepted, this date is no longer relevant and is hidden in the register; the accepted price is locked in.

---

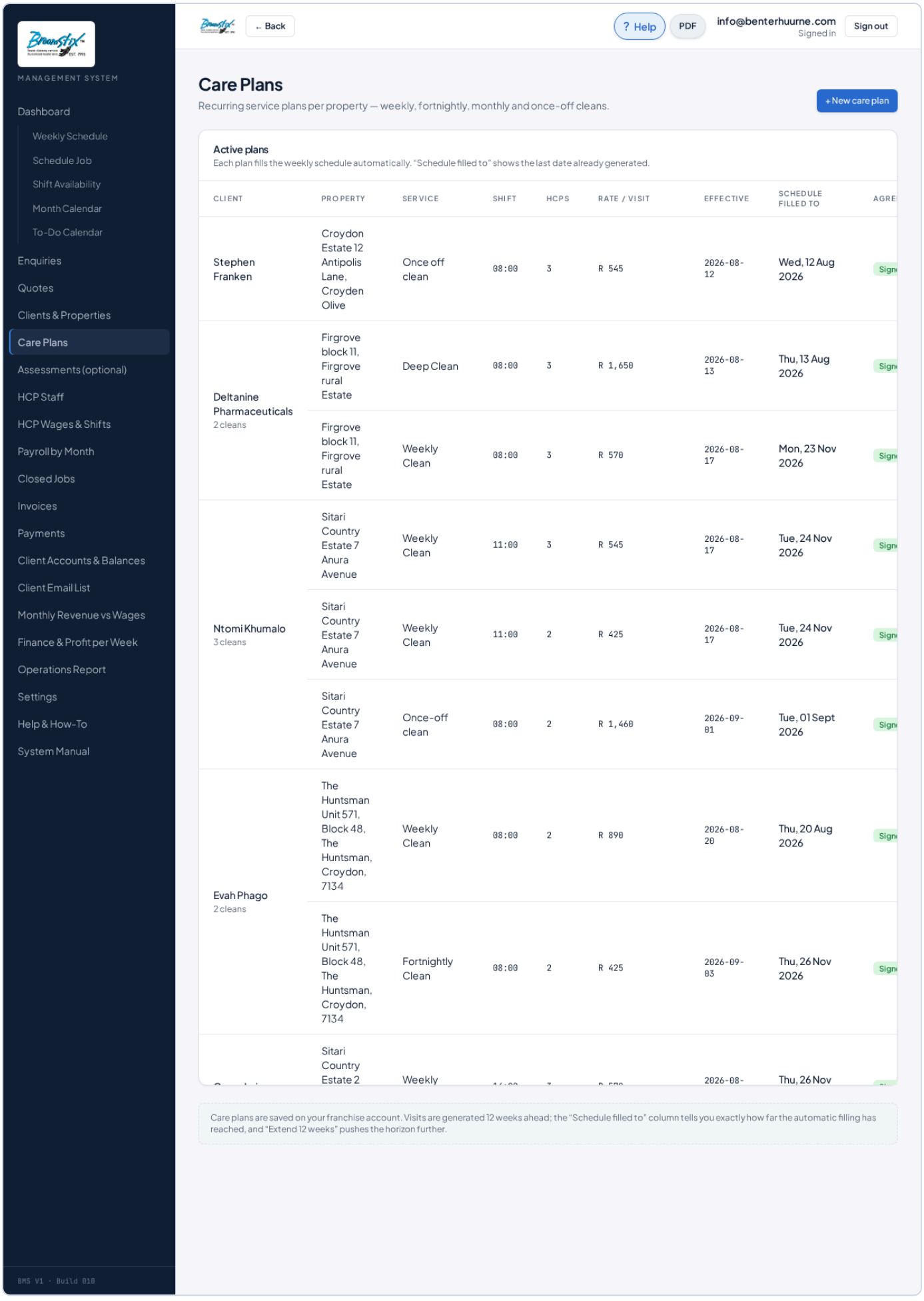
8. Creating a New Home Care Plan

Purpose. The care plan is the engine of the diary. It holds the agreement for one property and generates the recurring cleans.

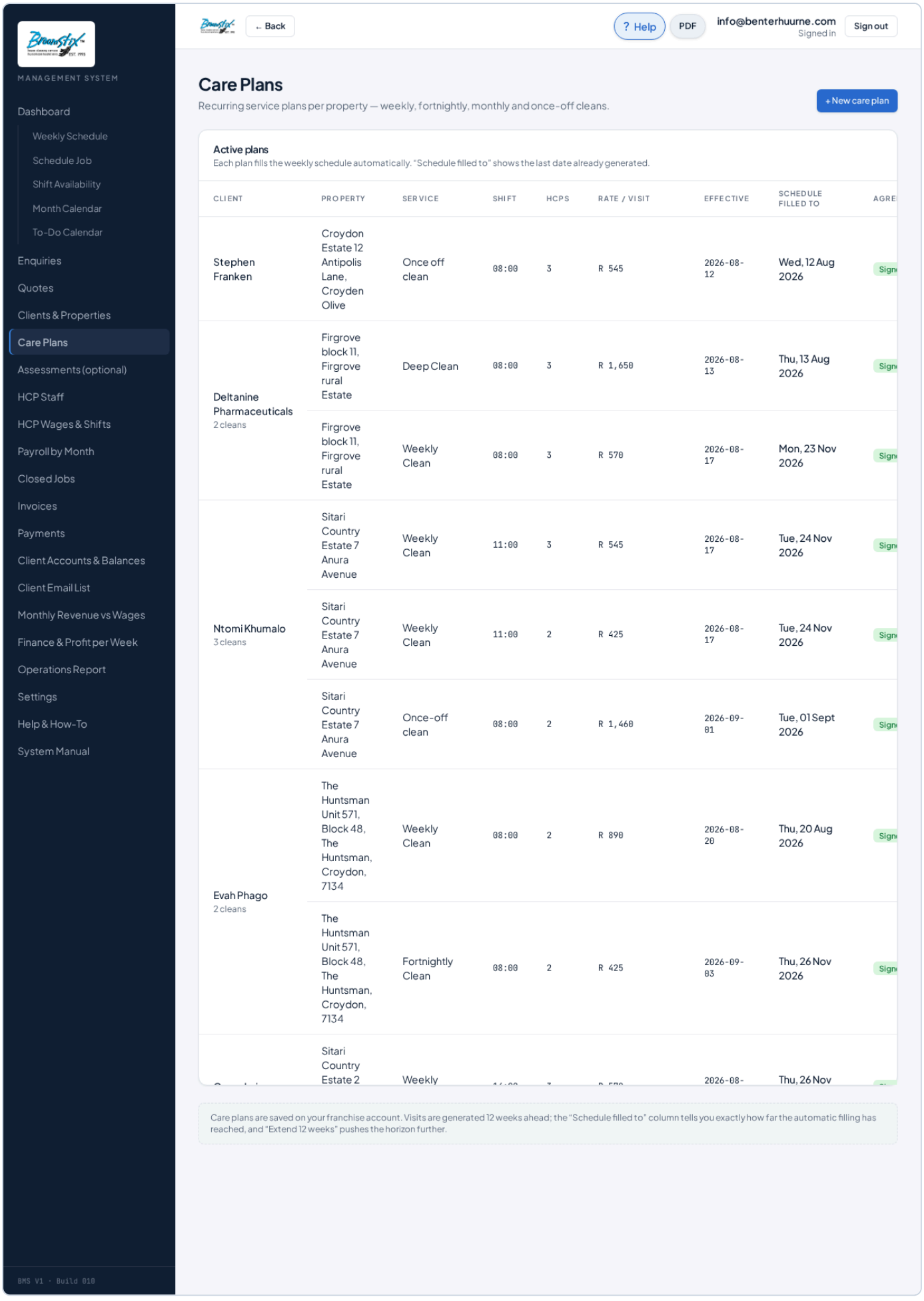
When to use it. As soon as a quote is accepted and the client confirms a start date.

Step-by-step.

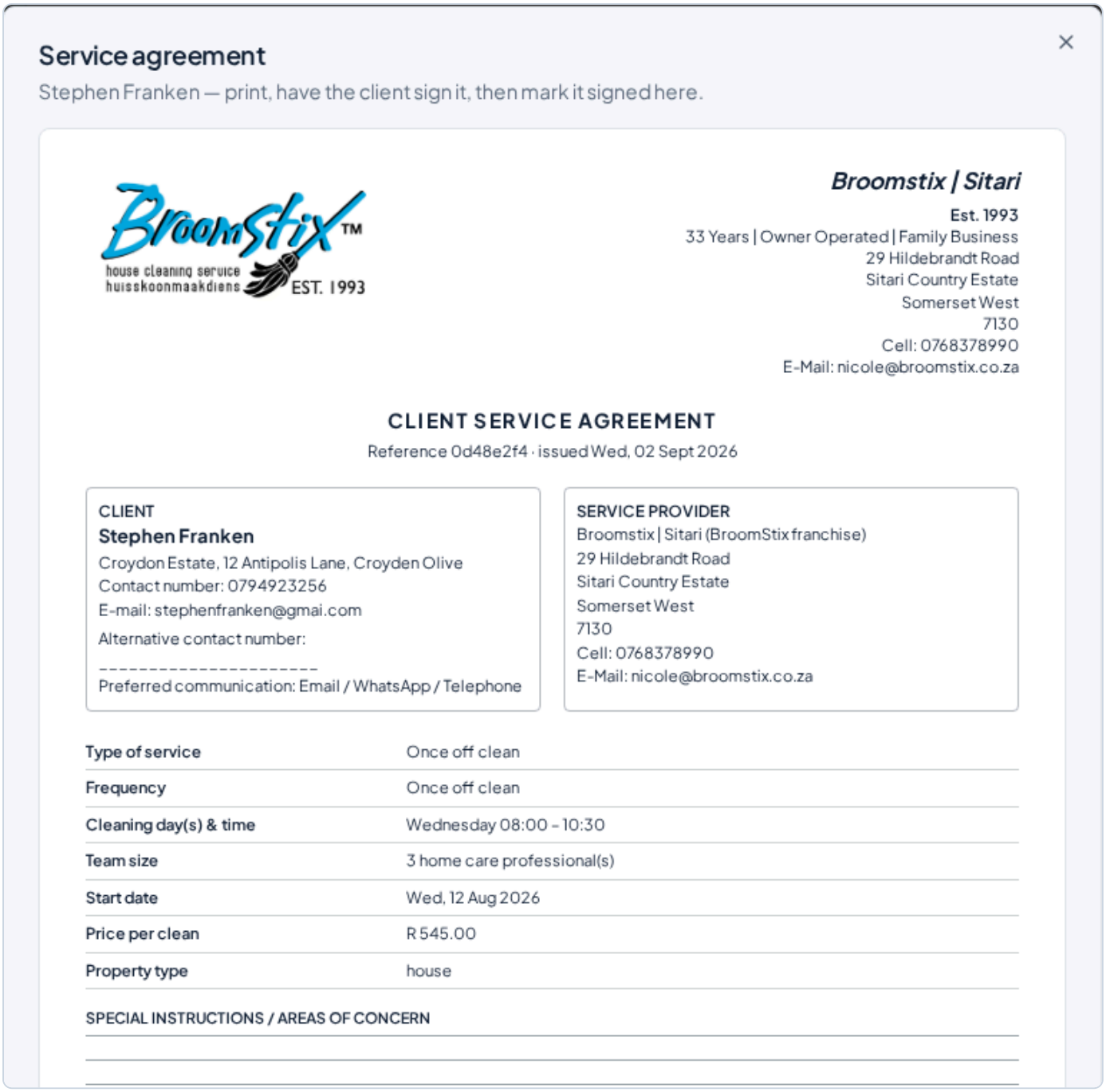
1. Open **Care Plans → New care plan** (or create it from the accepted quote).
2. Capture client name, phone, email, **estate / complex**, address, **service type** and **frequency** (weekly, fortnightly, monthly, once-off).
3. Set the **shift start** time. For two cleans per week, set the **first day of the week** and its shift, and the **second day** and its shift.
4. Set **HCPs required**, the **shift count**, and the **team car**.
5. Set the **effective date** — the date the plan starts working from.
6. Set **price per clean** and, if the first clean is a deep clean, the **deep clean price** and its shift count.
7. Choose the **Agreement** state and capture **scope / special notes**.
8. Save. BMS then generates the cleans forward into the diary.
9. Open **Agreement** to print or save the client service agreement as a PDF for signature.


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Care Plans
Recurring service plans per property — weekly, fortnightly, monthly and once-off cleans.
+ New care plan
Active plans
Each plan fills the weekly schedule automatically. "Schedule filled to" shows the last date already generated.
CLIENT
PROPERTY
SERVICE
SHIFT
HCPS
RATE / VISIT
EFFECTIVE
SCHEDULE FILLED TO
AGRE
Stephen Franken
Croydon Estate 12 Antipolis Lane, Croyden Olive
Once off clean
08:00
3
R 545
2026-08-12
Wed, 12 Aug 2026
Deltanine Pharmaceuticals
2 cleans
Firgrove block 11, Firgrove rural Estate
Deep Clean
08:00
3
R 1,650
2026-08-13
Thu, 13 Aug 2026
Firgrove block 11, Firgrove rural Estate
Weekly Clean
08:00
3
R 570
2026-08-17
Mon, 23 Nov 2026
Ntomi Khumalo
3 cleans
Sitari Country Estate 7 Anura Avenue
Weekly Clean
11:00
3
R 545
2026-08-17
Tue, 24 Nov 2026
Sitari Country Estate 7 Anura Avenue
Weekly Clean
11:00
2
R 425
2026-08-17
Tue, 24 Nov 2026
Sitari Country Estate 7 Anura Avenue
Once-off clean
08:00
2
R 1,460
2026-09-01
Tue, 01 Sept 2026
Evah Phago
2 cleans
The Huntsman Unit 571, Block 48, The Huntsman, Croydon, 7134
Weekly Clean
08:00
2
R 890
2026-08-20
Thu, 20 Aug 2026
The Huntsman Unit 571, Block 48, The Huntsman, Croydon, 7134
Fortnightly Clean
08:00
2
R 425
2026-09-03
Thu, 26 Nov 2026
Sitari Country Estate 2
Weekly
2026-08-
Thu, 26 Nov
Care plans are saved on your franchise account. Visits are generated 12 weeks ahead; the "Schedule filled to" column tells you exactly how far the automatic filling has reached, and "Extend 12 weeks" pushes the horizon further.

New care plan dialog


MANAGEMENT SYSTEM
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Each plan fills the weekly schedule automatically. "Schedule filled to" shows the last date already generated.
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PROPERTY
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08:00
2
R 425
2026-09-03
Thu, 26 Nov 2026
Sitari Country Estate 2
Weekly
2026-08-
Thu, 26 Nov
Care plans are saved on your franchise account. Visits are generated 12 weeks ahead; the "Schedule filled to" column tells you exactly how far the automatic filling has reached, and "Extend 12 weeks" pushes the horizon further.

Care Plans — Active plans table **Example — Client Service Agreement.**



Service agreement

Stephen Franken — print, have the client sign it, then mark it signed here.

Broomstix | Sitari
Est. 1993
33 Years | Owner Operated | Family Business
29 Hildebrandt Road
Sitari Country Estate
Somerset West
7130
Cell: 0768378990
E-Mail: nicole@broomstix.co.za

CLIENT SERVICE AGREEMENT

Reference 0d48e2f4 · issued Wed, 02 Sept 2026

CLIENT
Stephen Franken
Croydon Estate, 12 Antipolis Lane, Croyden Olive
Contact number: 0794923256
E-mail: stephenfranken@gmai.com
Alternative contact number:
_____
Preferred communication: Email / WhatsApp / Telephone

SERVICE PROVIDER
Broomstix | Sitari (BroomStix franchise)
29 Hildebrandt Road
Sitari Country Estate
Somerset West
7130
Cell: 0768378990
E-Mail: nicole@broomstix.co.za

Type of service	Once off clean
Frequency	Once off clean
Cleaning day(s) & time	Wednesday 08:00 - 10:30
Team size	3 home care professional(s)
Start date	Wed, 12 Aug 2026
Price per clean	R 545.00
Property type	house

SPECIAL INSTRUCTIONS / AREAS OF CONCERN

Example Client Service Agreement — first part


Property type House

SPECIAL INSTRUCTIONS / AREAS OF CONCERN

PROPERTY INFORMATION

Pets on the property: ☐ Yes ☐ No — specify:

Alarm system: ☐ Yes ☐ No

Gate access instructions:

CARE & RESTRICTIONS

Special items requiring care:

Furniture that may not be moved:

Appliances / areas staff should avoid:

IMPORTANT NOTES

- Our team works carefully and efficiently to achieve the highest standard possible within the allocated cleaning time. Clients are welcome to prioritise specific areas before each visit.
- Larger homes or additional tasks may require extra cleaning time, which can be quoted separately.
- For weekly, fortnightly and monthly cleaning we use the client's cleaning products and equipment. For once-off, ad-hoc, deep/spring cleaning and pre- and post-occupational cleans we use our own professional products and equipment.
- Some stains, hard water marks, mould, grout discolouration and permanent damage — especially in showers and bathrooms — cannot always be completely removed.
- For safety reasons our team does not climb ladders higher than a standard stepladder and does not move heavy furniture. Staff are not responsible for moving heavy kitchen appliances such as fridges or dishwashers; cleaning behind them is only possible if they have been moved before our arrival.
- Window cleaning is quoted and carried out separately. Once done, interior windows are included in the regular clean on a rotating schedule, so that all interior windows are cleaned over approximately two months, depending on frequency and the size of the home.

Thank you for choosing Broomstix. We look forward to providing you with a reliable, professional and friendly cleaning service, helping you enjoy a beautifully maintained home.

TERMS AND CONDITIONS

Payments

For regular clients, EFT payments for services rendered during the current month must be made on or before the 7th day of the following month, unless otherwise agreed. Cash payments must be placed in a sealed envelope, clearly marked with the client's surname.

Status: Signed

Print / save PDF

Example Client Service Agreement — second part

What happens next. Generated cleans appear on the **Weekly Schedule** as job cards, each carrying the plan's shift time, shift count, required HCPs and price. The plan is listed with **Starts** (effective date), **Shifts**, **Next clean** and how far it has been generated.

Rules & warnings.

- Cleans are generated **on or after the effective date**, on the chosen weekday(s) only, **Monday to Friday**.
- Changing the frequency or day mid-plan changes future cleans from the effective date forward — it does not rewrite history.
- Care plans are listed **oldest effective date first**.
- The **price per clean** on the plan is what gets invoiced. Correct it here, not on the invoice.
- Changing the **type of clean** in **Edit care plan** also changes the name that invoices and job cards show for that plan.

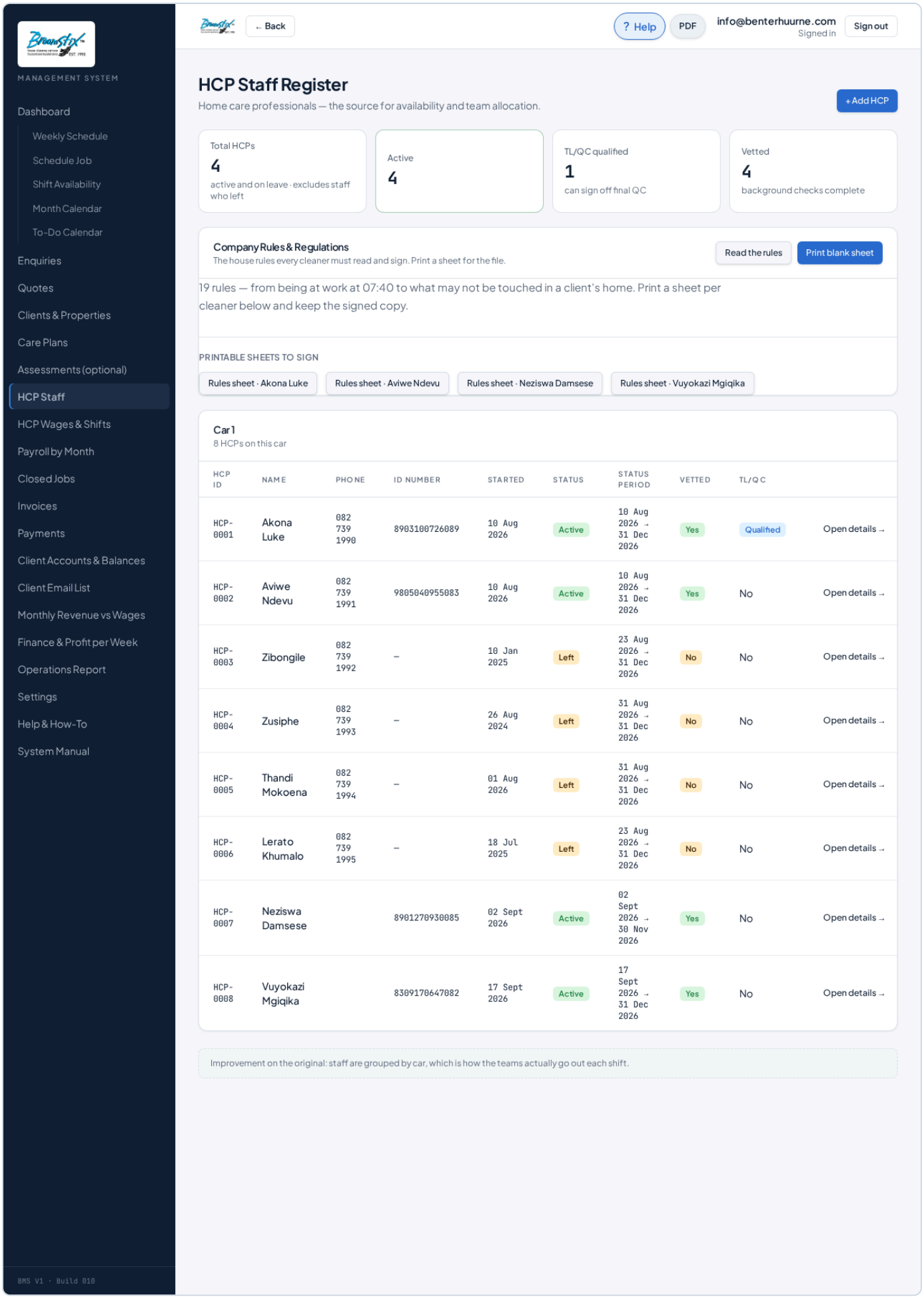
9. HCP Staff management

Purpose. The staff register — the source for availability, team allocation and wages.

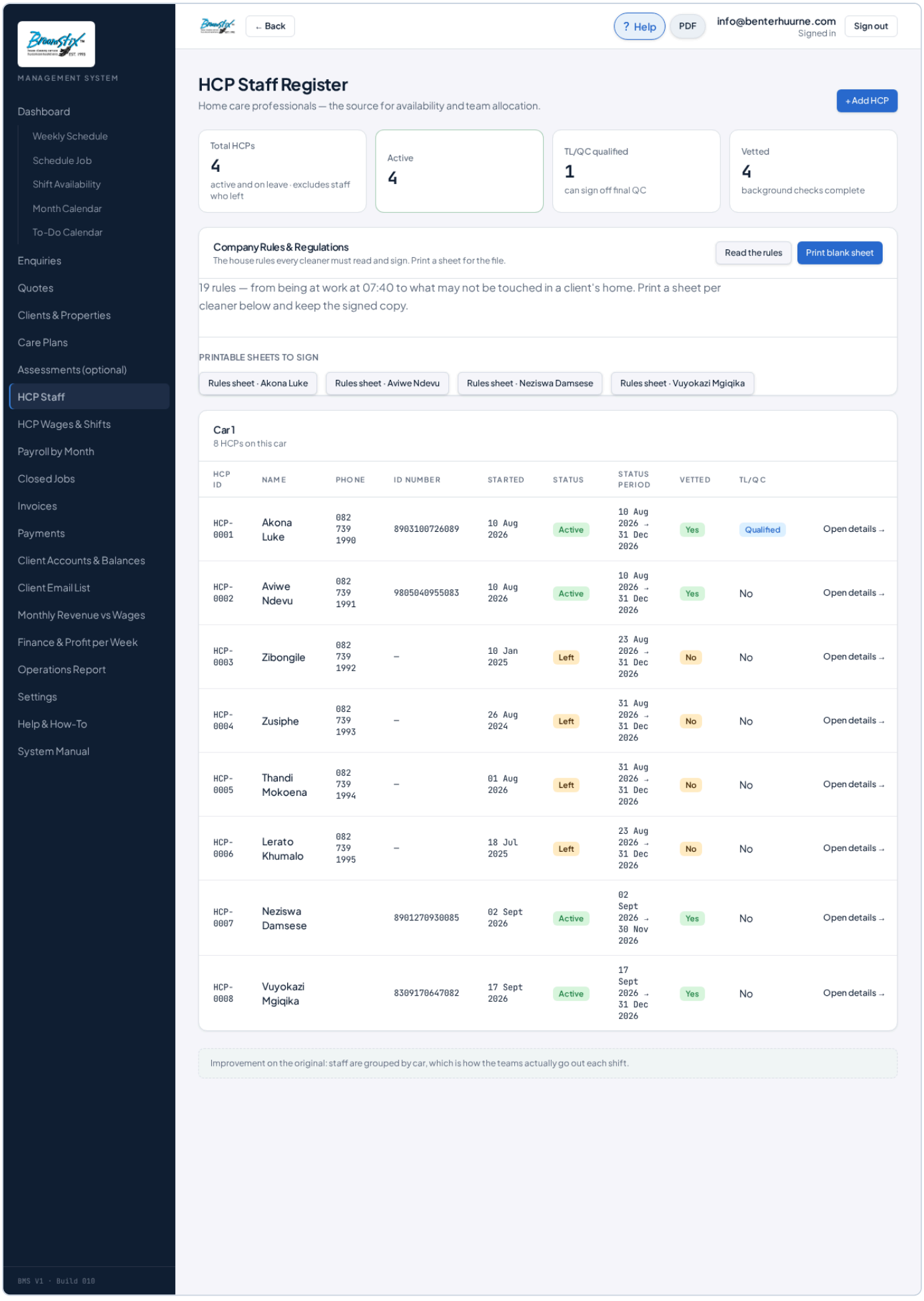
When to use it. When a cleaner joins, changes status, is vetted, qualifies as TL/QC, or gives you banking details.

Step-by-step.

1. Open **HCP Staff** (*HCP Staff Register*).
2. Add a cleaner: code, name, phone, **email**, ID number, address, prior experience, start date, **car**, status and status dates.
3. Tick **TLQC** if they are qualified to sign jobs off, and **Vetted** once vetting is complete.
4. Capture **bank name, account number and branch code**, and an individual **shift rate** if theirs differs from the standard rate.
5. Save.


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HCP Wages & Shifts
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Help & How-To
System Manual
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? Help
PDF
info@benterhuurne.com
Signed in
Sign out
HCP Staff Register
Home care professionals — the source for availability and team allocation.
+ Add HCP
Total HCPs
4
active and on leave · excludes staff who left
Active
4
TL/QC qualified
1
can sign off final QC
Vetted
4
background checks complete
Company Rules & Regulations
The house rules every cleaner must read and sign. Print a sheet for the file.
Read the rules
Print blank sheet
19 rules — from being at work at 07:40 to what may not be touched in a client's home. Print a sheet per cleaner below and keep the signed copy.
PRINTABLE SHEETS TO SIGN
Rules sheet · Akona Luke
Rules sheet · Aviwe Ndevu
Rules sheet · Neziswa Damsese
Rules sheet · Vuyokazi Mgiqika
Car 1
8 HCPs on this car
HCP ID
NAME
PHONE
ID NUMBER
STARTED
STATUS
STATUS PERIOD
VETTED
TL/QC
HCP-0001
Akona Luke
082 739 1990
8903100726089
10 Aug 2026
Active
10 Aug 2026 → 31 Dec 2026
Yes
Qualified
Open details →
HCP-0002
Aviwe Ndevu
082 739 1991
9805040955083
10 Aug 2026
Active
10 Aug 2026 → 31 Dec 2026
Yes
No
Open details →
HCP-0003
Zibongile
082 739 1992
–
10 Jan 2025
Left
23 Aug 2026 → 31 Dec 2026
No
No
Open details →
HCP-0004
Zusiphe
082 739 1993
–
26 Aug 2024
Left
31 Aug 2026 → 31 Dec 2026
No
No
Open details →
HCP-0005
Thandi Mokoena
082 739 1994
–
01 Aug 2026
Left
31 Aug 2026 → 31 Dec 2026
No
No
Open details →
HCP-0006
Lerato Khumalo
082 739 1995
–
18 Jul 2025
Left
23 Aug 2026 → 31 Dec 2026
No
No
Open details →
HCP-0007
Neziswa Damsese
8901270930085
02 Sept 2026
Active
02 Sept 2026 → 30 Nov 2026
Yes
No
Open details →
HCP-0008
Vuyokazi Mgiqika
8309170647082
17 Sept 2026
Active
17 Sept 2026 → 31 Dec 2026
Yes
No
Open details →
Improvement on the original: staff are grouped by car, which is how the teams actually go out each shift.

HCP Staff Register with counters


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PDF
info@benterhuurne.com
Signed in
Sign out
HCP Staff Register
Home care professionals — the source for availability and team allocation.
+ Add HCP
Total HCPs
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active and on leave · excludes staff who left
Active
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TL/QC qualified
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can sign off final QC
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Car 1
8 HCPs on this car
HCP ID
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PHONE
ID NUMBER
STARTED
STATUS
STATUS PERIOD
VETTED
TL/QC
HCP-0001
Akona Luke
082 739 1990
8903100726089
10 Aug 2026
Active
10 Aug 2026 → 31 Dec 2026
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Qualified
Open details →
HCP-0002
Aviwe Ndevu
082 739 1991
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10 Aug 2026
Active
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No
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No
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HCP-0008
Vuyokazi Mgiqika
8309170647082
17 Sept 2026
Active
17 Sept 2026 → 31 Dec 2026
Yes
No
Open details →
Improvement on the original: staff are grouped by car, which is how the teams actually go out each shift.

HCP detail — bank and rate fields

What happens next. Active cleaners become available for **Shift Availability** and **team allocation**; their shifts flow into **HCP Wages & Shifts** and paid totals appear in **Payroll by Month**; their bank details print on the wage slip.

Rules & warnings.

- Only **TL/QC** cleaners may sign a job off. Every working team needs one.
- Without an **email address** you cannot email that cleaner a wage statement — BMS will tell you to add one under HCP Staff → Edit details.
- Without **bank details** the wage slip has nowhere to pay.
- Counters show **Total HCPs**, **Active**, **TL/QC qualified** and **Vetted**.

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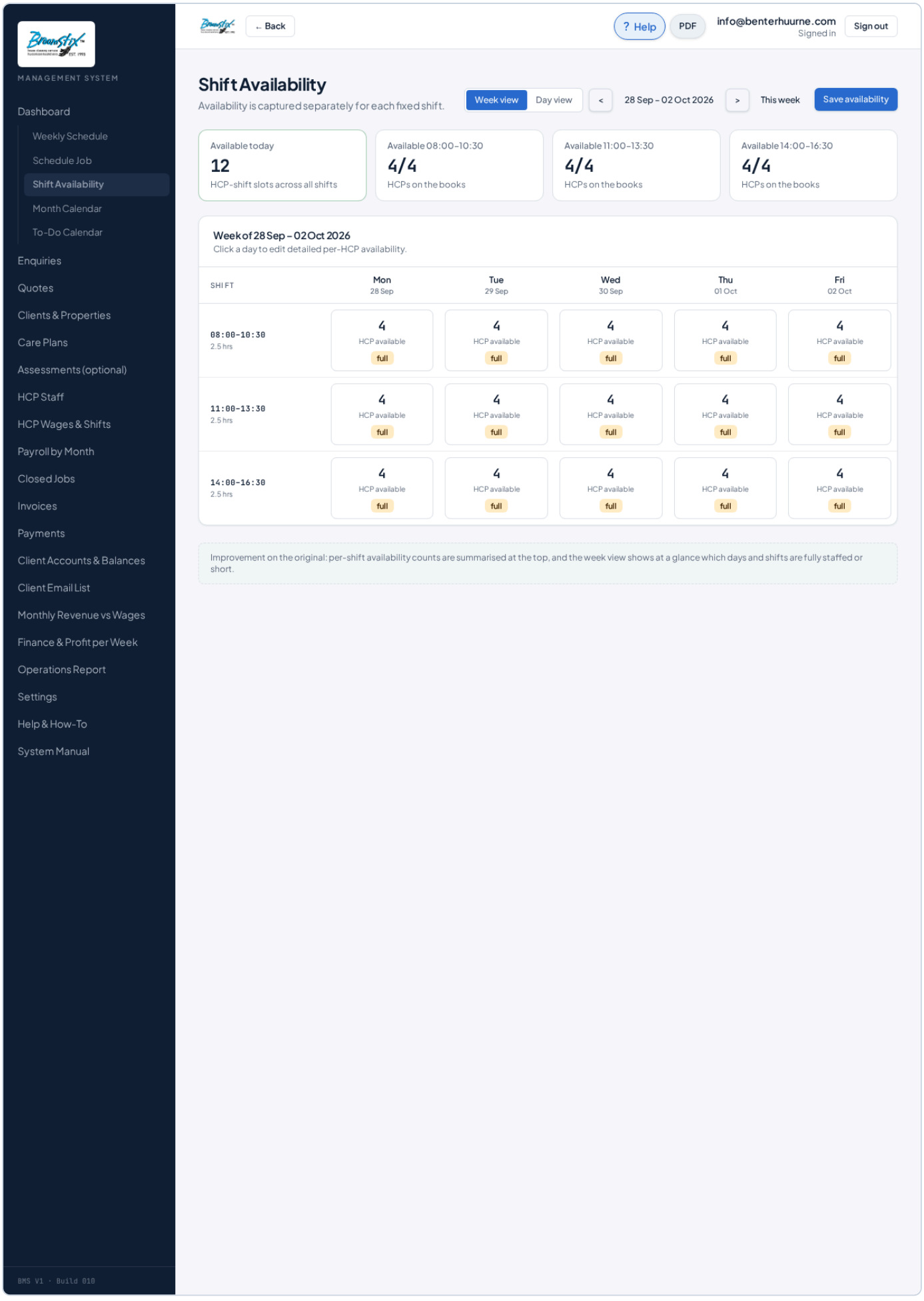
10. HCP availability (Shift Availability)

Purpose. To know who can work which fixed shift, before you allocate teams.

When to use it. Weekly, before you confirm the coming week’s teams — and again whenever someone reports leave or illness.

Step-by-step.

1. Open **Shift Availability**.
2. Step through the weeks with the arrows, or the days with the day arrows.
3. Capture availability **for each fixed shift separately** — availability is not “all day”.
4. Read **Available today** to see your working strength.


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Signed in
Sign out
Shift Availability
Availability is captured separately for each fixed shift.
Week view
Day view
<
28 Sep – 02 Oct 2026
>
This week
Save availability
Available today
12
HCP-shift slots across all shifts
Available 08:00–10:30
4/4
HCPs on the books
Available 11:00–13:30
4/4
HCPs on the books
Available 14:00–16:30
4/4
HCPs on the books
Week of 28 Sep – 02 Oct 2026
Click a day to edit detailed per-HCP availability.
SHIFT
Mon
28 Sep
Tue
29 Sep
Wed
30 Sep
Thu
01 Oct
Fri
02 Oct
08:00–10:30
2.5 hrs
11:00–13:30
2.5 hrs
14:00–16:30
2.5 hrs
4
HCP available
full
Improvement on the original: per-shift availability counts are summarised at the top, and the week view shows at a glance which days and shifts are fully staffed or short.

Shift Availability — week view

What happens next. The Weekly Schedule and Schedule Job use this when offering cleaners, so you do not book someone who is unavailable.

Rules & warnings. Availability is per shift, not per day. Somebody unavailable for the shift, on leave, or already working another property in that same shift **cannot be double-booked**.

---

11. Scheduling jobs — putting a client on the calendar

There are **three** ways a client gets onto the calendar. Use the first that fits the situation.

11.1 By accepting a quote — the normal way for a new client

This is the easiest route, because the day and shift are agreed **before** the work is booked.

1. Every clean on the quote already carries its offered **day and shift** (chosen on the quote, where the free/busy calendar shows what fits).
2. When the client accepts, open the quote and press **Client accepted**. BMS asks you to confirm a day and shift for **each clean** on the quote — Clean 1, Clean 2, and so on.
3. BMS then creates a **care plan per clean** and generates the cleans forward into the diary automatically. Nothing further to book.

The team, price, shifts and notes from the quote travel with the work — you never retype them.

11.2 By hand, with Care Plans → New care plan (repeating work without a quote)

Purpose. To start a repeating clean directly — for example a referral client who agreed everything over the phone.

Step-by-step. Open **Care Plans → + New care plan**, capture the client and property, choose the frequency, weekday(s) and shift, the team size, shift count, price and effective date, then save. BMS generates the cleans into the diary from the effective date — see section 8 for the full detail.

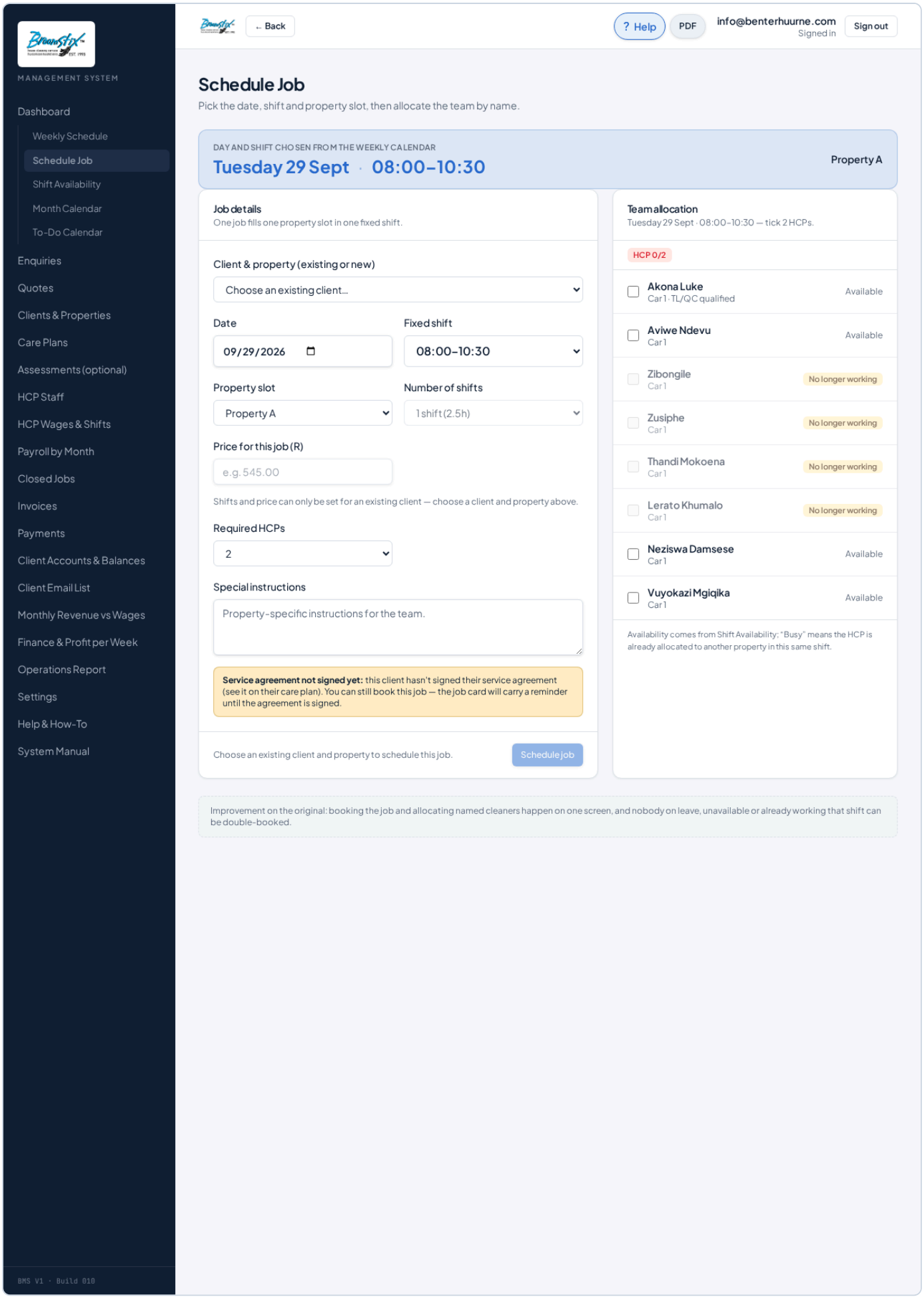
11.3 By hand, with Schedule Job (a single clean)

Purpose. To book one clean on one day — a spring clean, a deep clean, a favour, a move-out clean.

When to use it. Whenever the work does not repeat and therefore needs no care plan.

Step-by-step.

1. Open the **Weekly Schedule** and click a cell marked **AVAILABLE** — the date, shift and property slot (A or B) are filled in for you. (You can also open **Dashboard → Schedule Job** and choose them yourself.)
2. **Job details** — choose the client. For an existing client, BMS asks **“Which clean?”** and lists their cleans as *Clean 1, Clean 2, …*. Pick one and the **price, shift count and number of cleaners fill in automatically** from that clean. For a brand new client, capture the details and set these yourself.
3. Under **Team allocation**, allocate the cleaners by name and choose the **team leader**.
4. Save. One job card is created immediately.


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? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Schedule Job
Pick the date, shift and property slot, then allocate the team by name.
DAY AND SHIFT CHOSEN FROM THE WEEKLY CALENDAR
Tuesday 29 Sept · 08:00–10:30
Property A
Job details
One job fills one property slot in one fixed shift.
Client & property (existing or new)
Choose an existing client…
Date
09/29/2026
Fixed shift
08:00–10:30
Property slot
Property A
Number of shifts
1 shift (2.5h)
Price for this job (R)
e.g. 545.00
Shifts and price can only be set for an existing client — choose a client and property above.
Required HCPs
2
Special instructions
Property-specific instructions for the team.
Service agreement not signed yet: this client hasn't signed their service agreement (see it on their care plan). You can still book this job — the job card will carry a reminder until the agreement is signed.
Choose an existing client and property to schedule this job.
Schedule job
Team allocation
Tuesday 29 Sept · 08:00–10:30 — tick 2 HCPs.
HCP 0/2
Akona Luke
Car 1 · TL/QC qualified
Available
Aviwe Ndevu
Car 1
Available
Zibongile
Car 1
No longer working
Zusiphe
Car 1
No longer working
Thandi Mokoena
Car 1
No longer working
Lerato Khumalo
Car 1
No longer working
Neziswa Damsese
Car 1
Available
Vuyokazi Mgiqika
Car 1
Available
Availability comes from Shift Availability; "Busy" means the HCP is already allocated to another property in this same shift.
Improvement on the original: booking the job and allocating named cleaners happen on one screen, and nobody on leave, unavailable or already working that shift can be double-booked.

Schedule Job — job details and team allocation

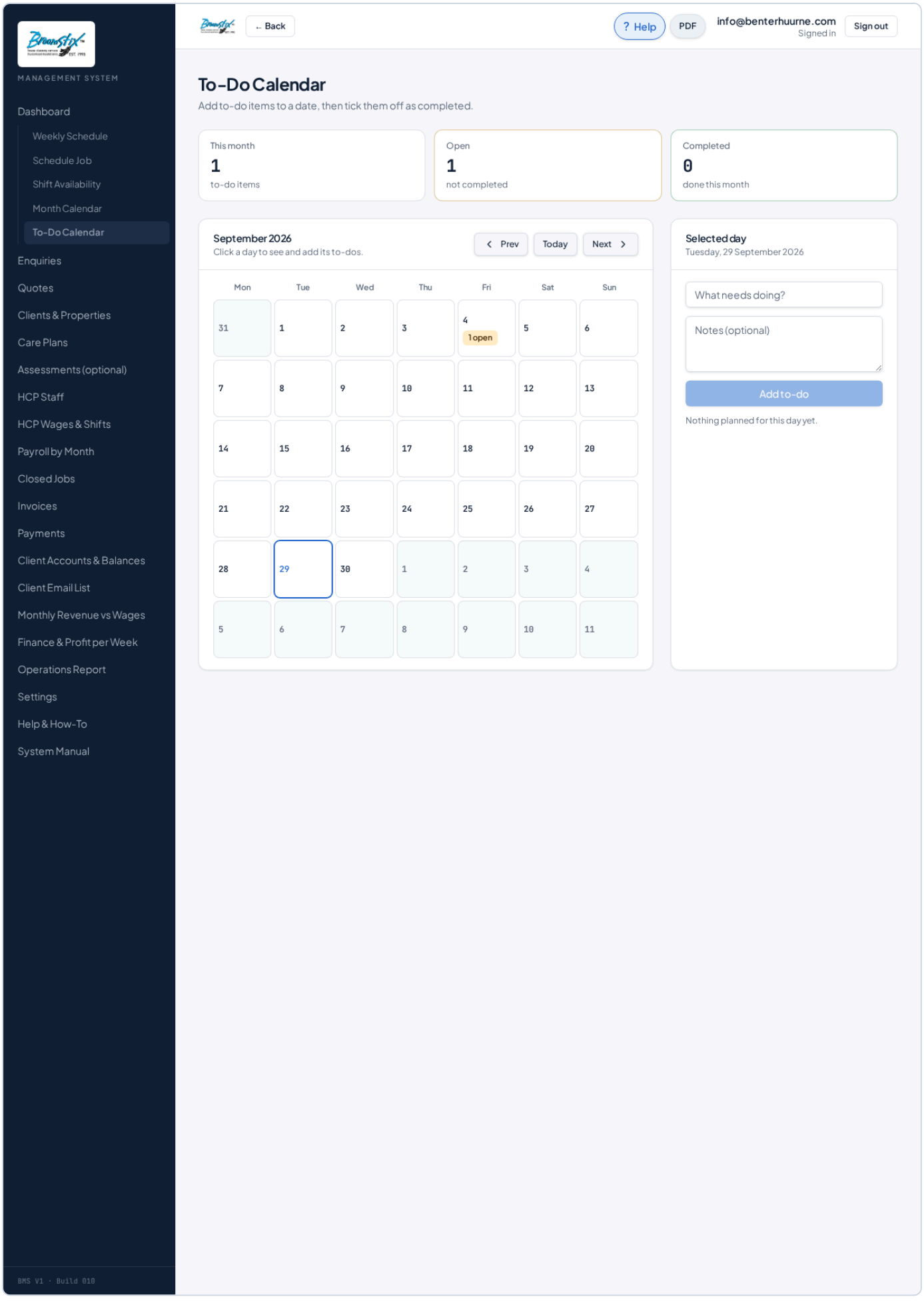
What happens next. The clean appears on the Weekly Schedule exactly like a care-plan clean, and follows the same road: complete → sign off → revenue → invoice.

Rules & warnings. One job fills **one property slot in one fixed shift**. If both slots are taken in that shift, choose another shift or another day. Schedule Job creates **one** clean — it never repeats. For repeating work, use 11.1 or 11.2 instead.

11.4 To-Do Calendar

Purpose. Your own reminders (call a client, order products, chase a signature) alongside the operational diary.

Step-by-step. Open **Dashboard → To-Do Calendar**, add the item with its due date and notes, and tick it complete when done.


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
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? Help
PDF
info@benterhuurne.com
Signed in
Sign out
To-Do Calendar
Add to-do items to a date, then tick them off as completed.
This month
1
to-do items
Open
1
not completed
Completed
0
done this month
September 2026
Click a day to see and add its to-dos.
Prev
Today
Next
Mon
Tue
Wed
Thu
Fri
Sat
Sun
31
1
2
3
4
1 open
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19
20
21
22
23
24
25
26
27
28
29
30
1
2
3
4
5
6
7
8
9
10
11
Selected day
Tuesday, 29 September 2026
What needs doing?
Notes (optional)
Add to-do
Nothing planned for this day yet.

12. Weekly Schedule

Purpose. The operational heart of BMS: the whole week, shift by shift, with both property slots and the team on each job.

When to use it. Every day, and thoroughly once a week when you confirm teams for the week ahead.

Step-by-step.

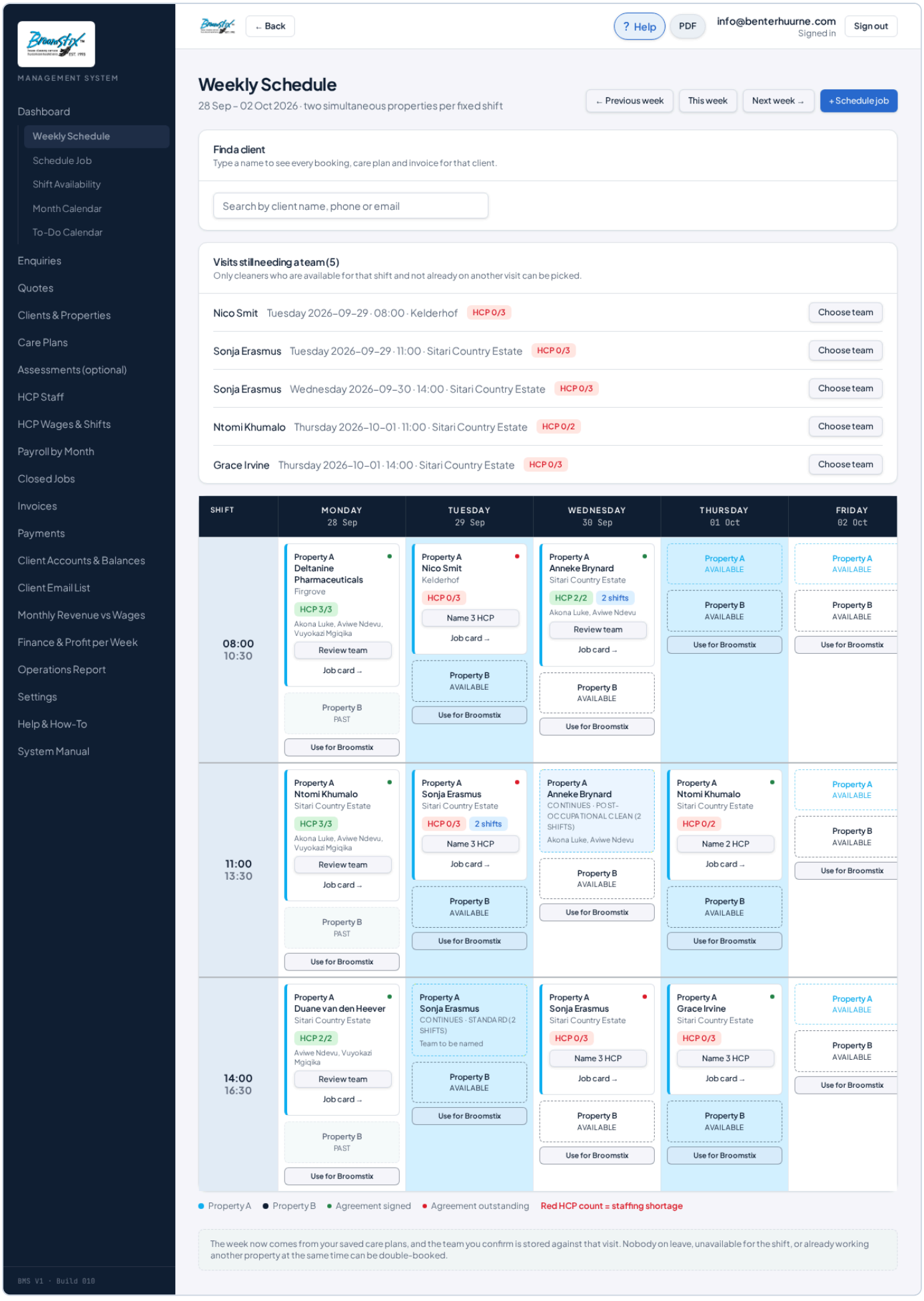
1. Open **Dashboard → Weekly Schedule**. Monday to Friday runs across the top; the three fixed shifts run down the side.
2. Each cell shows **Property A** and **Property B**. A booked slot shows the client, the estate, the HCP count (for example **HCP 3/3**), the shift count, the allocated names and the agreement marker.
3. Use **Review team / Team picker** to tick the cleaners for that clean and set the team leader, then save the team.
4. Open **Job card →** to work on the clean itself.
5. Use the **client lookup panel** above the schedule to search a client by name, phone or email and see all their bookings, plans, invoices and balance at a glance.
6. Public holidays are badged on the day.

12.1 Using Property B for Broomstix days (vetting, training, in-house work)

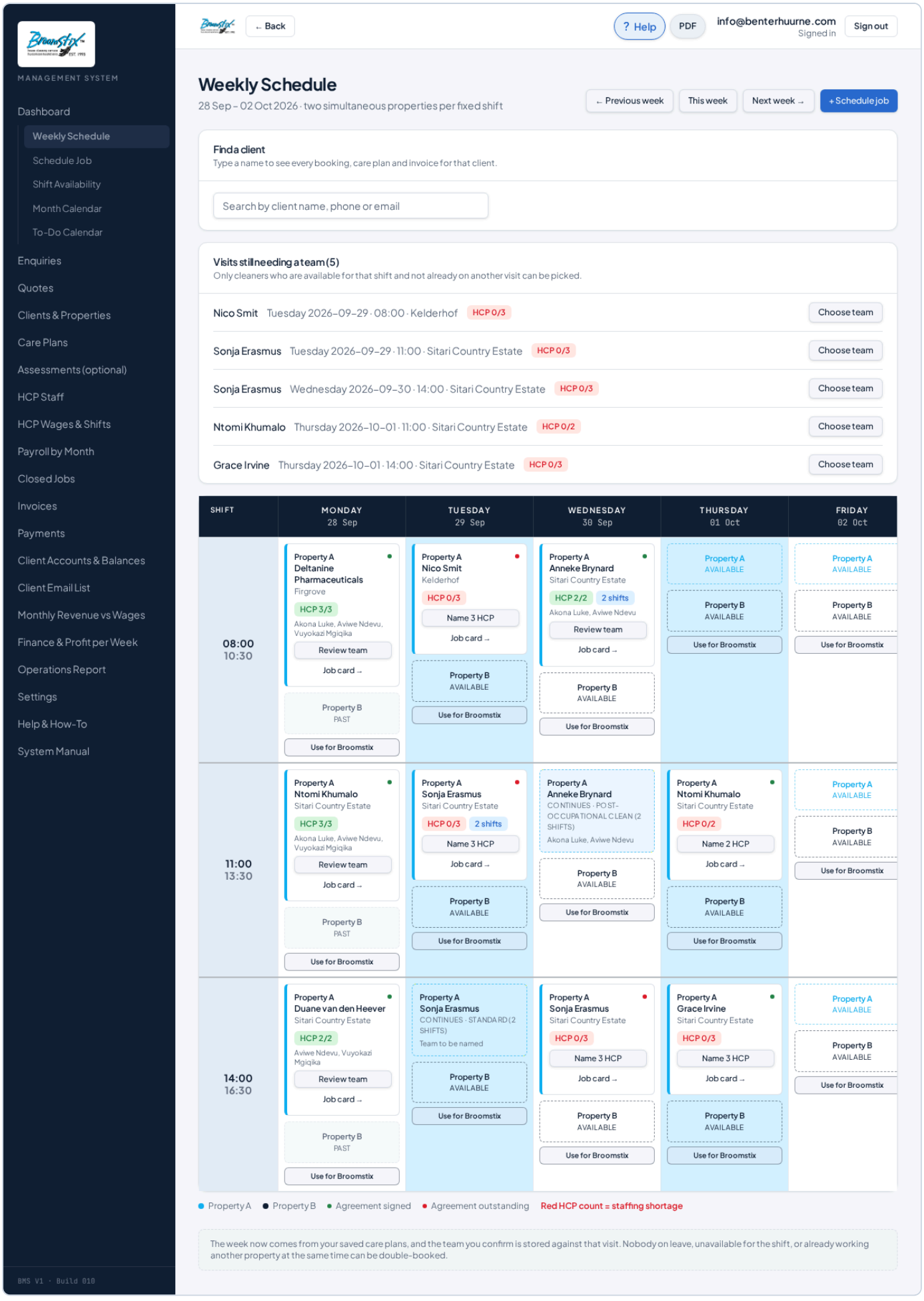
A free **Property B** slot can be used for your own people — vetting, training or a working day at Broomstix (29 Hildebrand Road, Sitari Country Estate, Macassar) — but only when you choose to, one shift at a time. In a normal week Property B simply stays empty.

1. On the **Weekly Schedule**, click the free **Property B** slot for the day and shift you want.
2. Press **Use for Broomstix**, choose the reason (**Vetting**, **Training** or **Working at Broomstix**) and how many people are going.
3. Press **Keep this slot**, then tick the names of the cleaners who were there, exactly like booking a client clean.
4. The booked slot shows on the planner as **Broomstix (in-house)**, and those shifts appear under **HCP Wages & Shifts** so the cleaners are paid for the shift.

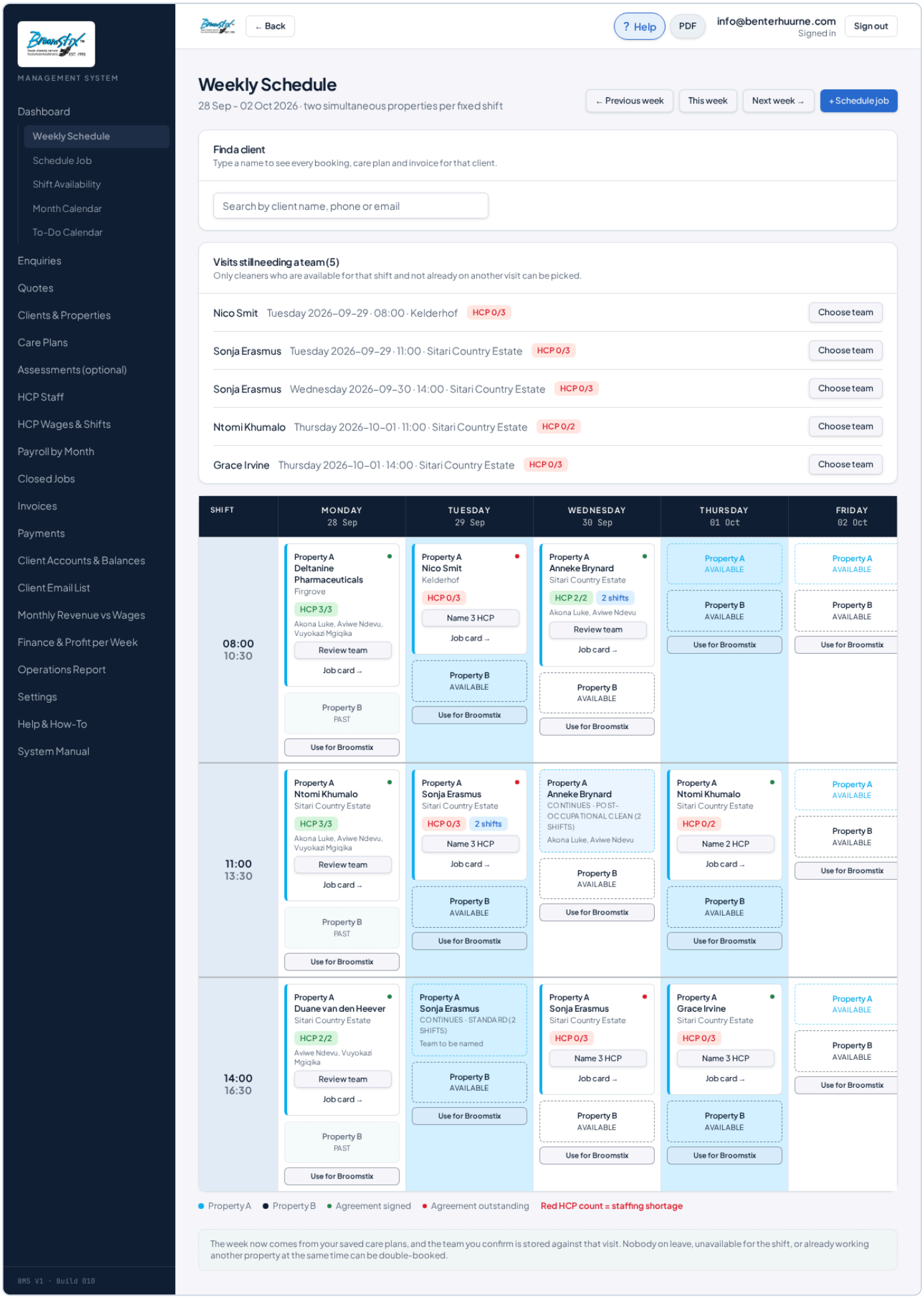
Rules & warnings. A Broomstix day is **never priced and never invoiced** — no client is ever charged for it. Past shifts still show the **Use for Broomstix** button, so you can log the day afterwards.


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Dashboard
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Schedule Job
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Care Plans
Assessments (optional)
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HCP Wages & Shifts
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info@benterhuurne.com
Signed in
Sign out
Weekly Schedule
28 Sep – 02 Oct 2026 · two simultaneous properties per fixed shift
← Previous week
This week
Next week →
+ Schedule job
Find a client
Type a name to see every booking, care plan and invoice for that client.
Search by client name, phone or email
Visits still needing a team (5)
Only cleaners who are available for that shift and not already on another visit can be picked.
Nico Smit Tuesday 2026-09-29 · 08:00 · Kelderhof HCP 0/3 Choose team
Sonja Erasmus Tuesday 2026-09-29 · 11:00 · Sitari Country Estate HCP 0/3 Choose team
Sonja Erasmus Wednesday 2026-09-30 · 14:00 · Sitari Country Estate HCP 0/3 Choose team
Ntomi Khumalo Thursday 2026-10-01 · 11:00 · Sitari Country Estate HCP 0/2 Choose team
Grace Irvine Thursday 2026-10-01 · 14:00 · Sitari Country Estate HCP 0/3 Choose team
SHIFT
MONDAY 28 Sep
TUESDAY 29 Sep
WEDNESDAY 30 Sep
THURSDAY 01 Oct
FRIDAY 02 Oct
08:00 10:30
Property A Deltanine Pharmaceuticals Firgrove HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST Use for Broomstix
Property A Nico Smit Kelderhof HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A Anneke Brynard Sitari Country Estate HCP 2/2 2 shifts Akona Luke, Aviwe Ndevu Review team Job card →
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
11:00 13:30
Property A Ntomi Khumalo Sitari Country Estate HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST Use for Broomstix
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 2 shifts Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A Anneke Brynard CONTINUES · POST-OCCUPATIONAL CLEAN (2 SHIFTS) Akona Luke, Aviwe Ndevu
Property B AVAILABLE Use for Broomstix
Property A Ntomi Khumalo Sitari Country Estate HCP 0/2 Name 2 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
14:00 16:30
Property A Duane van den Heever Sitari Country Estate HCP 2/2 Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST Use for Broomstix
Property A Sonja Erasmus CONTINUES · STANDARD (2 SHIFTS) Team to be named
Property B AVAILABLE Use for Broomstix
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A Grace Irvine Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
Property A Property B Agreement signed Agreement outstanding Red HCP count = staffing shortage
The week now comes from your saved care plans, and the team you confirm is stored against that visit. Nobody on leave, unavailable for the shift, or already working another property at the same time can be double-booked.

Weekly Schedule — full week grid


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Next week →
+ Schedule job
Find a client
Type a name to see every booking, care plan and invoice for that client.
Search by client name, phone or email
Visits still needing a team (5)
Only cleaners who are available for that shift and not already on another visit can be picked.
Nico Smit Tuesday 2026-09-29 · 08:00 · Kelderhof HCP 0/3 Choose team
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Grace Irvine Thursday 2026-10-01 · 14:00 · Sitari Country Estate HCP 0/3 Choose team
SHIFT
MONDAY 28 Sep
TUESDAY 29 Sep
WEDNESDAY 30 Sep
THURSDAY 01 Oct
FRIDAY 02 Oct
08:00 10:30
Property A Deltanine Pharmaceuticals Firgrove HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST
Use for Broomstix
Property A Nico Smit Kelderhof HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE
Use for Broomstix
Property A Anneke Brynard Sitari Country Estate HCP 2/2 2 shifts Akona Luke, Aviwe Ndevu Review team Job card →
Property B AVAILABLE
Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE
Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE
Use for Broomstix
11:00 13:30
Property A Ntomi Khumalo Sitari Country Estate HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST
Use for Broomstix
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 2 shifts Name 3 HCP Job card →
Property B AVAILABLE
Use for Broomstix
Property A Anneke Brynard CONTINUES · POST-OCCUPATIONAL CLEAN (2 SHIFTS) Akona Luke, Aviwe Ndevu
Property B AVAILABLE
Use for Broomstix
Property A Ntomi Khumalo Sitari Country Estate HCP 0/2 Name 2 HCP Job card →
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Use for Broomstix
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Property A Duane van den Heever Sitari Country Estate HCP 2/2 Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property B PAST
Use for Broomstix
Property A Sonja Erasmus CONTINUES · STANDARD (2 SHIFTS) Team to be named
Property B AVAILABLE
Use for Broomstix
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE
Use for Broomstix
Property A Grace Irvine Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property B AVAILABLE
Use for Broomstix
Property A AVAILABLE
Property B AVAILABLE
Use for Broomstix
Property A · Property B · Agreement signed · Agreement outstanding · Red HCP count = staffing shortage
The week now comes from your saved care plans, and the team you confirm is stored against that visit. Nobody on leave, unavailable for the shift, or already working another property at the same time can be double-booked.

Weekly Schedule — Team picker


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
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Sign out
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28 Sep – 02 Oct 2026 · two simultaneous properties per fixed shift
← Previous week
This week
Next week →
+ Schedule job
Find a client
Type a name to see every booking, care plan and invoice for that client.
Search by client name, phone or email
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Only cleaners who are available for that shift and not already on another visit can be picked.
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Grace Irvine Thursday 2026-10-01 · 14:00 · Sitari Country Estate HCP 0/3 Choose team
SHIFT
MONDAY 28 Sep
TUESDAY 29 Sep
WEDNESDAY 30 Sep
THURSDAY 01 Oct
FRIDAY 02 Oct
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14:00 16:30
Property A Deltanine Pharmaceuticals Firgrove HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property A Nico Smit Kelderhof HCP 0/3 Name 3 HCP Job card →
Property A Anneke Brynard Sitari Country Estate HCP 2/2 2 shifts Akona Luke, Aviwe Ndevu Review team Job card →
Property A AVAILABLE
Property B AVAILABLE Use for Broomstix
Property B PAST Use for Broomstix
Property A Ntomi Khumalo Sitari Country Estate HCP 3/3 Akona Luke, Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 2 shifts Name 3 HCP Job card →
Property A Anneke Brynard CONTINUES · POST-OCCUPATIONAL CLEAN (2 SHIFTS) Akona Luke, Aviwe Ndevu
Property A Ntomi Khumalo Sitari Country Estate HCP 0/2 Name 2 HCP Job card →
Property A Duane van den Heever Sitari Country Estate HCP 2/2 Aviwe Ndevu, Vuyokazi Mgiqika Review team Job card →
Property A Sonja Erasmus CONTINUES · STANDARD (2 SHIFTS) Team to be named
Property A Sonja Erasmus Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property A Grace Irvine Sitari Country Estate HCP 0/3 Name 3 HCP Job card →
Property A AVAILABLE
Property B AVAILABLE
Use for Broomstix
Property A Property B Agreement signed Agreement outstanding Red HCP count = staffing shortage
The week now comes from your saved care plans, and the team you confirm is stored against that visit. Nobody on leave, unavailable for the shift, or already working another property at the same time can be double-booked.

Client lookup panel

What happens next. The team you confirm is stored against that visit and becomes the basis of shifts, wages and the payroll feed.

Rules & warnings.

- **A red HCP count means a staffing shortage** — the clean is short of cleaners. Fix it before the day.
- The colour markers distinguish **Property A** and **Property B**, and **Agreement signed** from **Agreement outstanding**.
- Nobody on leave, unavailable for the shift, or already working another property in the same shift can be double-booked.
- **AVAILABLE** in a cell means that property slot is free for new work.

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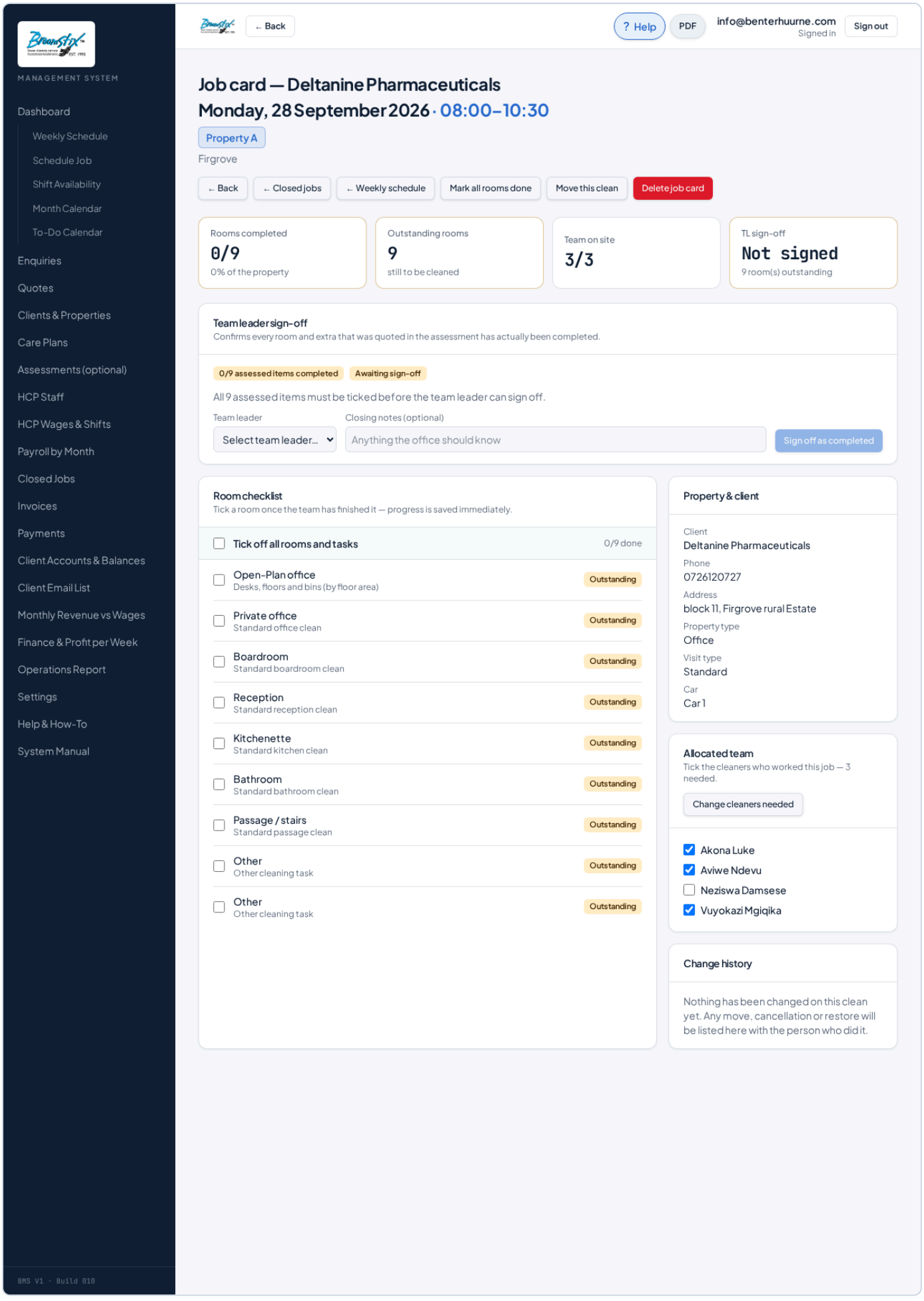
13. Managing and completing jobs (the Job card)

Purpose. The job card is the operational record of one clean: what was cleaned, by whom, and who signed it off.

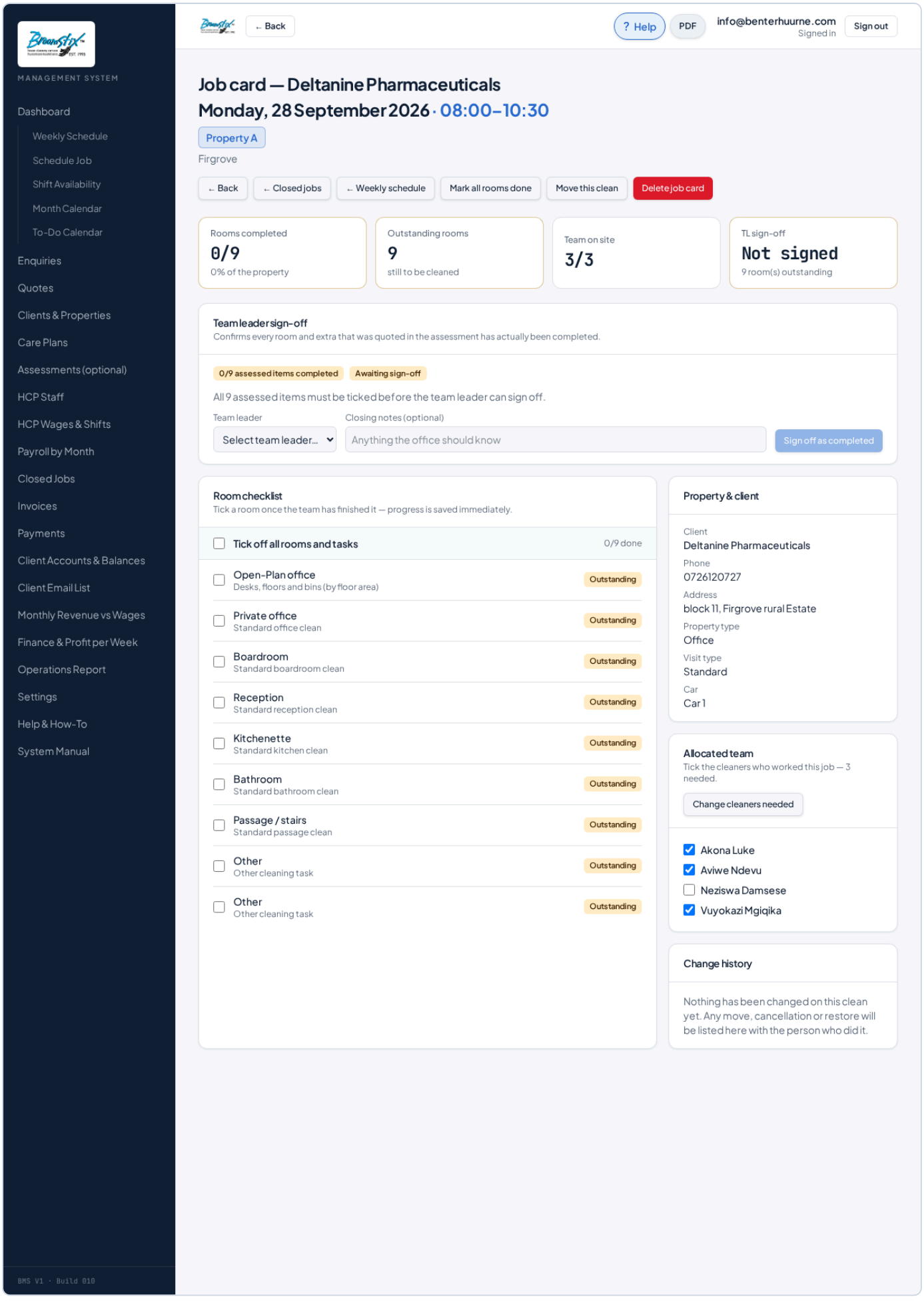
When to use it. On the day of the clean, and immediately afterwards to close it.

Step-by-step.

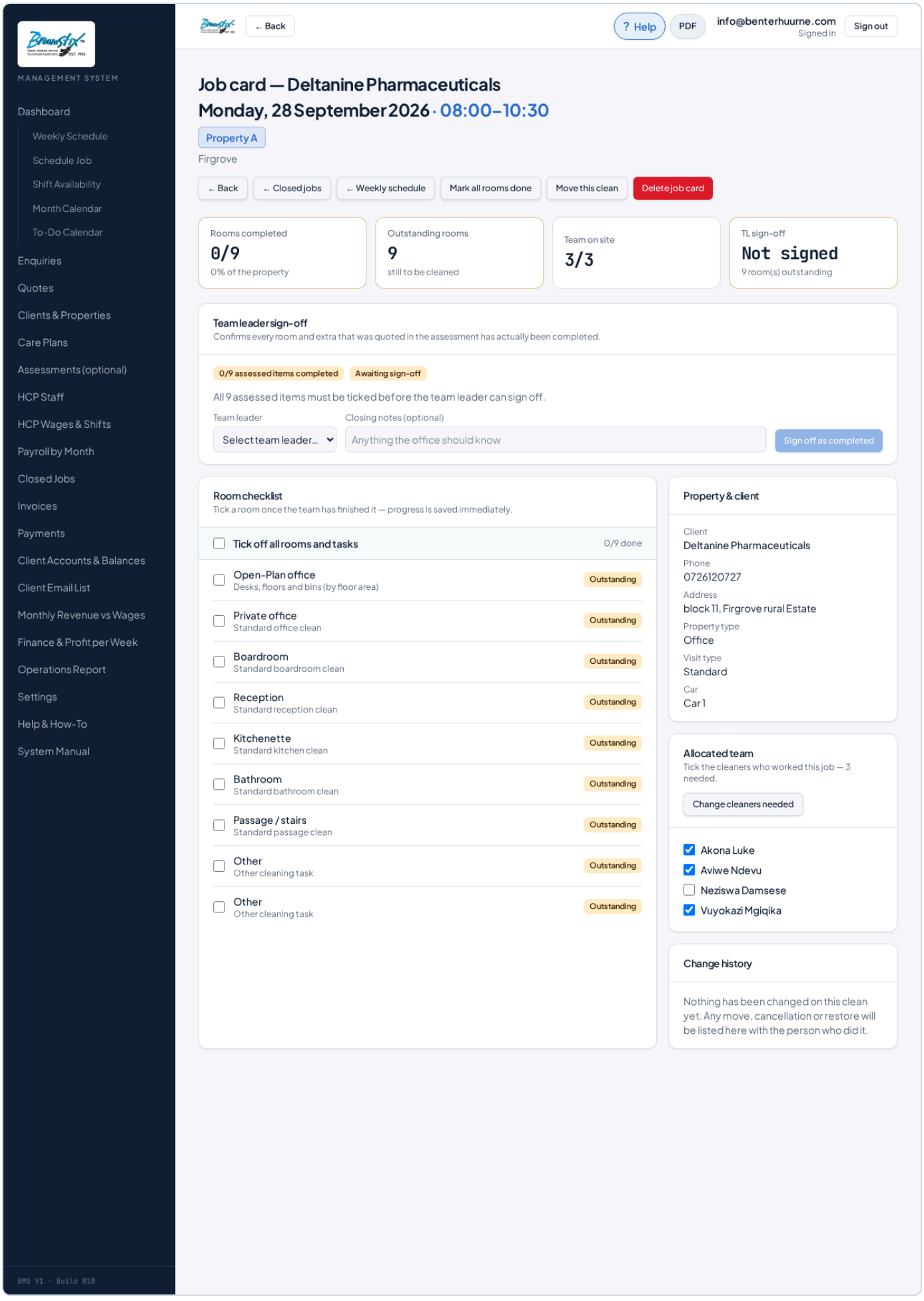
1. Open the clean from the Weekly Schedule, the Dashboard, the client's account, HCP Wages or Closed Jobs.
2. The header shows the **weekday, full date and shift time** prominently, and the **Property A / Property B** badge.
3. Check **Property & client** and **Scope notes** before the team starts.
4. Confirm the **Allocated team** and the team leader.
5. If this particular job needs a different team size, an Owner or Manager presses **Change cleaners needed**, enters the new number and confirms with their own password.
6. Work through the **Room checklist**, ticking rooms as they are completed. The counters show **Rooms completed**, **Outstanding rooms** and **Team on site** (for example 3/3).
7. When the work is done, the team leader completes **Team leader sign-off**, adding **sign-off notes** where anything must be recorded.
8. If the clean must move, use **Move this clean** and pick the new date; you may also **keep**, **cancel** or **restore** a clean.
9. **Change history** at the foot of the card shows every team-size change, move, cancellation, restore, keep and deletion — with the action, who did it and the exact date and time.
10. **Delete job card** removes the clean entirely and requires an Owner or Manager password.


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Schedule Job
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Enquiries
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Assessments (optional)
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HCP Wages & Shifts
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Operations Report
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Help & How-To
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BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Job card — Deltanine Pharmaceuticals
Monday, 28 September 2026 · 08:00–10:30
Property A
Firgrove
← Back
← Closed jobs
← Weekly schedule
Mark all rooms done
Move this clean
Delete job card
Rooms completed
0/9
0% of the property
Outstanding rooms
9
still to be cleaned
Team on site
3/3
TL sign-off
Not signed
9 room(s) outstanding
Team leader sign-off
Confirms every room and extra that was quoted in the assessment has actually been completed.
0/9 assessed items completed
Awaiting sign-off
All 9 assessed items must be ticked before the team leader can sign off.
Team leader
Select team leader...
Closing notes (optional)
Anything the office should know
Sign off as completed
Room checklist
Tick a room once the team has finished it — progress is saved immediately.
Tick off all rooms and tasks
0/9 done
Open-Plan office
Desks, floors and bins (by floor area)
Outstanding
Private office
Standard office clean
Outstanding
Boardroom
Standard boardroom clean
Outstanding
Reception
Standard reception clean
Outstanding
Kitchenette
Standard kitchen clean
Outstanding
Bathroom
Standard bathroom clean
Outstanding
Passage / stairs
Standard passage clean
Outstanding
Other
Other cleaning task
Outstanding
Other
Other cleaning task
Outstanding
Property & client
Client
Deltanine Pharmaceuticals
Phone
0726120727
Address
block 11, Firgrove rural Estate
Property type
Office
Visit type
Standard
Car
Car 1
Allocated team
Tick the cleaners who worked this job — 3 needed.
Change cleaners needed
Akona Luke
Aviwe Ndevu
Neziswa Damsese
Vuyokazi Mgiqika
Change history
Nothing has been changed on this clean yet. Any move, cancellation or restore will be listed here with the person who did it.

Job card — header, counters and sign-off


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
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Clients & Properties
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HCP Wages & Shifts
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Property A
Firgrove
← Back
← Closed jobs
← Weekly schedule
Mark all rooms done
Move this clean
Delete job card
Rooms completed
0/9
0% of the property
Outstanding rooms
9
still to be cleaned
Team on site
3/3
TL sign-off
Not signed
9 room(s) outstanding
Team leader sign-off
Confirms every room and extra that was quoted in the assessment has actually been completed.
0/9 assessed items completed
Awaiting sign-off
All 9 assessed items must be ticked before the team leader can sign off.
Team leader
Select team leader...
Closing notes (optional)
Anything the office should know
Sign off as completed
Room checklist
Tick a room once the team has finished it — progress is saved immediately.
Tick off all rooms and tasks
0/9 done
Open-Plan office
Desks, floors and bins (by floor area)
Outstanding
Private office
Standard office clean
Outstanding
Boardroom
Standard boardroom clean
Outstanding
Reception
Standard reception clean
Outstanding
Kitchenette
Standard kitchen clean
Outstanding
Bathroom
Standard bathroom clean
Outstanding
Passage / stairs
Standard passage clean
Outstanding
Other
Other cleaning task
Outstanding
Other
Other cleaning task
Outstanding
Property & client
Client
Deltanine Pharmaceuticals
Phone
0726120727
Address
block 11, Firgrove rural Estate
Property type
Office
Visit type
Standard
Car
Car 1
Allocated team
Tick the cleaners who worked this job — 3 needed.
Change cleaners needed
Akona Luke
Aviwe Ndevu
Neziswa Damsese
Vuyokazi Mgiqika
Change history
Nothing has been changed on this clean yet. Any move, cancellation or restore will be listed here with the person who did it.

Job card — Room checklist


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info@benterhuurne.com
Signed in
Sign out
Job card — Deltanine Pharmaceuticals
Monday, 28 September 2026 · 08:00–10:30
Property A
Firgrove
← Back
← Closed jobs
← Weekly schedule
Mark all rooms done
Move this clean
Delete job card
Rooms completed
0/9
0% of the property
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still to be cleaned
Team on site
3/3
TL sign-off
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9 room(s) outstanding
Team leader sign-off
Confirms every room and extra that was quoted in the assessment has actually been completed.
0/9 assessed items completed
Awaiting sign-off
All 9 assessed items must be ticked before the team leader can sign off.
Team leader
Select team leader...
Closing notes (optional)
Anything the office should know
Sign off as completed
Room checklist
Tick a room once the team has finished it — progress is saved immediately.
Tick off all rooms and tasks
0/9 done
Open-Plan office
Desks, floors and bins (by floor area)
Outstanding
Private office
Standard office clean
Outstanding
Boardroom
Standard boardroom clean
Outstanding
Reception
Standard reception clean
Outstanding
Kitchenette
Standard kitchen clean
Outstanding
Bathroom
Standard bathroom clean
Outstanding
Passage / stairs
Standard passage clean
Outstanding
Other
Other cleaning task
Outstanding
Other
Other cleaning task
Outstanding
Property & client
Client
Deltanine Pharmaceuticals
Phone
0726120727
Address
block 11, Firgrove rural Estate
Property type
Office
Visit type
Standard
Car
Car 1
Allocated team
Tick the cleaners who worked this job — 3 needed.
Change cleaners needed
Akona Luke
Aviwe Ndevu
Neziswa Damsese
Vuyokazi Mgiqika
Change history
Nothing has been changed on this clean yet. Any move, cancellation or restore will be listed here with the person who did it.

Job card — Change history

What happens next. Sign-off is the switch that turns work into money. The moment the job card is closed:

- the clean counts as **revenue earned** under Closed Jobs;
- it becomes available to invoice under **Invoices → Every finished clean, per client**;
- its shifts count towards the cleaners' **wages**.

Rules & warnings.

- Only a **TL/QC** cleaner may sign off. Where a clean has no room list, it counts as complete so sign-off is still possible.
- A clean that is **not signed off earns nothing and can never be invoiced**. This is the single most common cause of "missing" revenue.
- A job card that has already been **invoiced cannot be deleted**.
- Never delete a clean to correct it — **move** it. Deleting loses the record; moving keeps the audit trail.

Job statuses on the job card

Status	Meaning
Scheduled	Booked in the diary, not started.
In progress	Work under way; some rooms ticked.
Waiting final QC	Rooms done, team leader has not signed off yet.
Completed	Signed off. Revenue earned; ready to bill.
Cancelled	Called off; no revenue, no wages from it.

An **exception** (something the client should know, damage, access refused, a room skipped) is captured as **sign-off notes** on a **Completed** job card — this is BMS V1's "completed with exception".

---

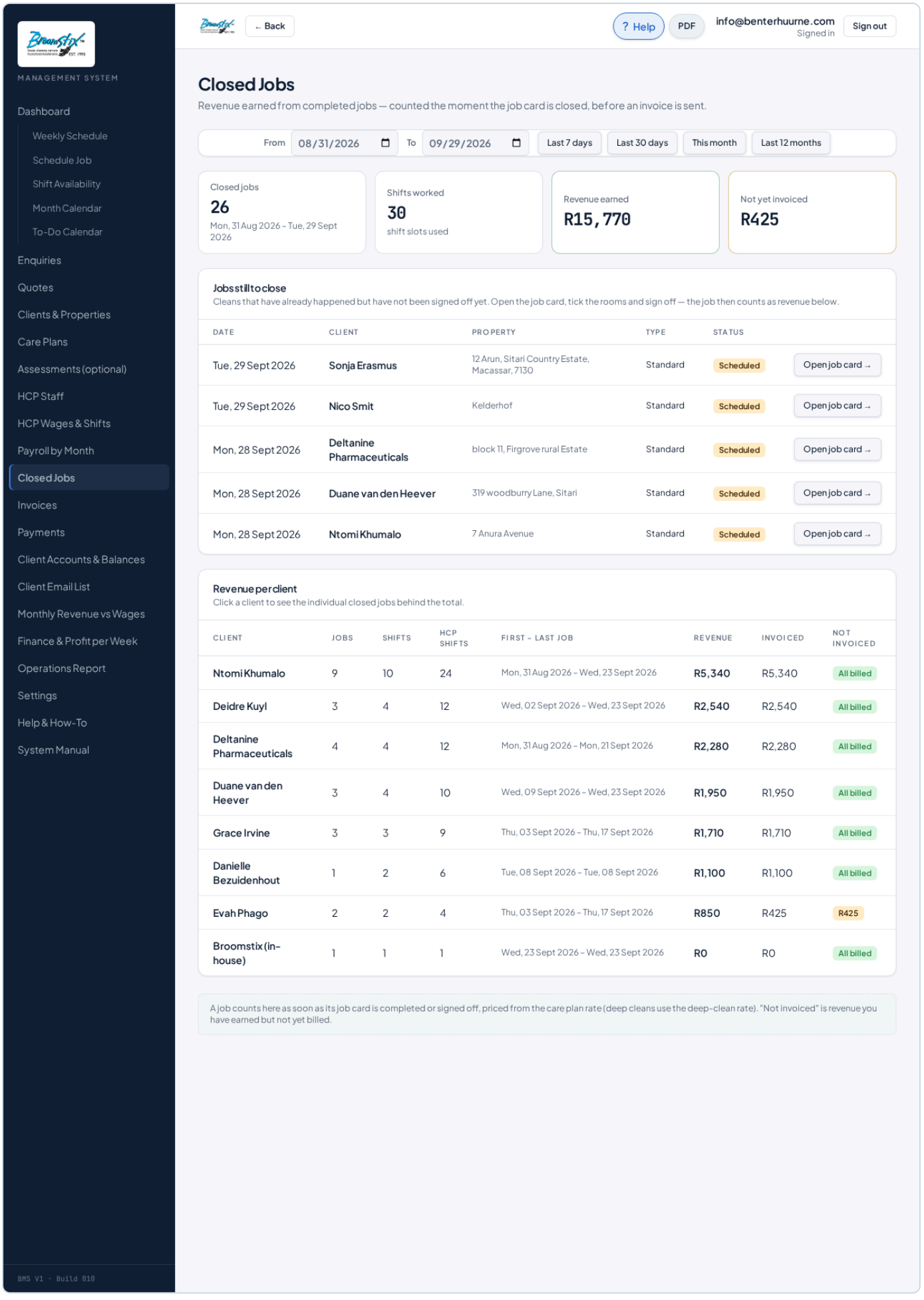
14. Closed Jobs

Purpose. To show revenue earned from completed jobs — counted the moment the job card is closed, **before** an invoice is sent.

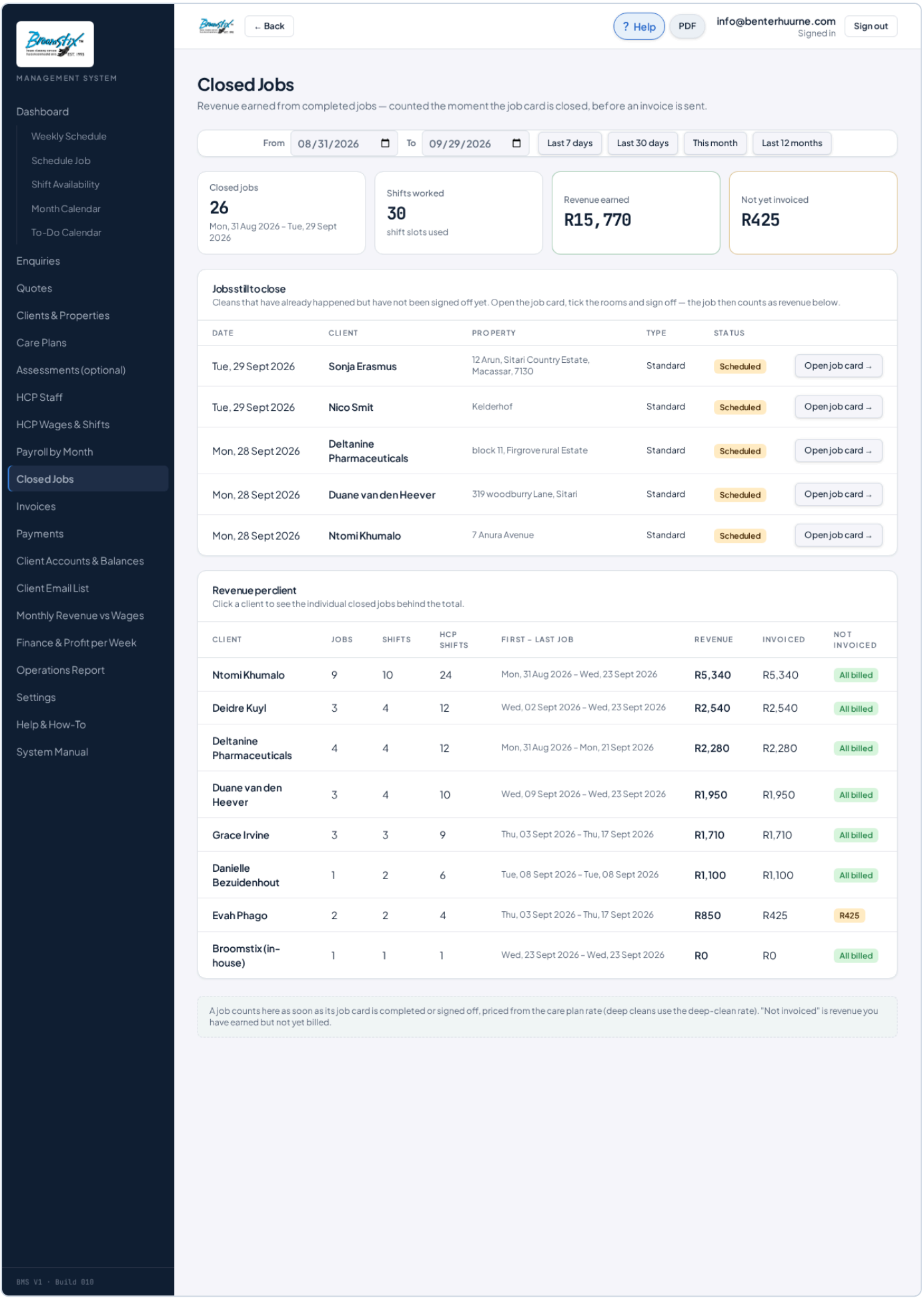
When to use it. Weekly, to reconcile "work done" against "work billed".

Step-by-step.

1. Open **Closed Jobs**.
2. Set the date range.
3. Click the counters to drill in: **Closed jobs**, **Shifts worked**, **Revenue earned**, **Not yet invoiced**.
4. Work the **Jobs still to close** list — every past or today's clean that has not been completed or signed off. Use **Open job card** and close it properly.
5. Read **Revenue per client** to see who your earnings come from.


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Closed Jobs
Revenue earned from completed jobs — counted the moment the job card is closed, before an invoice is sent.
From 08/31/2026
To 09/29/2026
Last 7 days
Last 30 days
This month
Last 12 months
Closed jobs
26
Mon, 31 Aug 2026 – Tue, 29 Sept 2026
Shifts worked
30
shift slots used
Revenue earned
R15,770
Not yet invoiced
R425
Jobs still to close
Cleans that have already happened but have not been signed off yet. Open the job card, tick the rooms and sign off — the job then counts as revenue below.
DATE
CLIENT
PROPERTY
TYPE
STATUS
Tue, 29 Sept 2026
Sonja Erasmus
12 Arun, Sitari Country Estate, Macassar, 7130
Standard
Scheduled
Open job card →
Tue, 29 Sept 2026
Nico Smit
Kelderhof
Standard
Scheduled
Open job card →
Mon, 28 Sept 2026
Deltanine Pharmaceuticals
block 11, Firgrove rural Estate
Standard
Scheduled
Open job card →
Mon, 28 Sept 2026
Duane van den Heever
319 woodburry Lane, Sitari
Standard
Scheduled
Open job card →
Mon, 28 Sept 2026
Ntomi Khumalo
7 Anura Avenue
Standard
Scheduled
Open job card →
Revenue per client
Click a client to see the individual closed jobs behind the total.
CLIENT
JOBS
SHIFTS
HCP SHIFTS
FIRST – LAST JOB
REVENUE
INVOICED
NOT INVOICED
Ntomi Khumalo
9
10
24
Mon, 31 Aug 2026 – Wed, 23 Sept 2026
R5,340
R5,340
All billed
Deidre Kuyl
3
4
12
Wed, 02 Sept 2026 – Wed, 23 Sept 2026
R2,540
R2,540
All billed
Deltanine Pharmaceuticals
4
4
12
Mon, 31 Aug 2026 – Mon, 21 Sept 2026
R2,280
R2,280
All billed
Duane van den Heever
3
4
10
Wed, 09 Sept 2026 – Wed, 23 Sept 2026
R1,950
R1,950
All billed
Grace Irvine
3
3
9
Thu, 03 Sept 2026 – Thu, 17 Sept 2026
R1,710
R1,710
All billed
Danielle Bezuidenhout
1
2
6
Tue, 08 Sept 2026 – Tue, 08 Sept 2026
R1,100
R1,100
All billed
Evah Phago
2
2
4
Thu, 03 Sept 2026 – Thu, 17 Sept 2026
R850
R425
R425
Broomstix (in-house)
1
1
1
Wed, 23 Sept 2026 – Wed, 23 Sept 2026
R0
R0
All billed
A job counts here as soon as its job card is completed or signed off, priced from the care plan rate (deep cleans use the deep-clean rate). "Not invoiced" is revenue you have earned but not yet billed.

Closed Jobs — counters


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
BMS V1 · Build 010
← Back
? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Closed Jobs
Revenue earned from completed jobs — counted the moment the job card is closed, before an invoice is sent.
From 08/31/2026
To 09/29/2026
Last 7 days
Last 30 days
This month
Last 12 months
Closed jobs
26
Mon, 31 Aug 2026 – Tue, 29 Sept 2026
Shifts worked
30
shift slots used
Revenue earned
R15,770
Not yet invoiced
R425
Jobs still to close
Cleans that have already happened but have not been signed off yet. Open the job card, tick the rooms and sign off — the job then counts as revenue below.
DATE
CLIENT
PROPERTY
TYPE
STATUS
Tue, 29 Sept 2026
Sonja Erasmus
12 Arun, Sitari Country Estate, Macassar, 7130
Standard
Scheduled
Open job card →
Tue, 29 Sept 2026
Nico Smit
Kelderhof
Standard
Scheduled
Open job card →
Mon, 28 Sept 2026
Deltanine Pharmaceuticals
block 11, Firgrove rural Estate
Standard
Scheduled
Open job card →
Mon, 28 Sept 2026
Duane van den Heever
319 woodburry Lane, Sitari
Standard
Scheduled
Open job card →
Mon, 28 Sept 2026
Ntomi Khumalo
7 Anura Avenue
Standard
Scheduled
Open job card →
Revenue per client
Click a client to see the individual closed jobs behind the total.
CLIENT
JOBS
SHIFTS
HCP SHIFTS
FIRST – LAST JOB
REVENUE
INVOICED
NOT INVOICED
Ntomi Khumalo 9 10 24 Mon, 31 Aug 2026 – Wed, 23 Sept 2026 R5,340 R5,340 All billed
Deidre Kuyl 3 4 12 Wed, 02 Sept 2026 – Wed, 23 Sept 2026 R2,540 R2,540 All billed
Deltanine Pharmaceuticals 4 4 12 Mon, 31 Aug 2026 – Mon, 21 Sept 2026 R2,280 R2,280 All billed
Duane van den Heever 3 4 10 Wed, 09 Sept 2026 – Wed, 23 Sept 2026 R1,950 R1,950 All billed
Grace Irvine 3 3 9 Thu, 03 Sept 2026 – Thu, 17 Sept 2026 R1,710 R1,710 All billed
Danielle Bezuidenhout 1 2 6 Tue, 08 Sept 2026 – Tue, 08 Sept 2026 R1,100 R1,100 All billed
Evah Phago 2 2 4 Thu, 03 Sept 2026 – Thu, 17 Sept 2026 R850 R425 R425
Broomstix (in-house) 1 1 1 Wed, 23 Sept 2026 – Wed, 23 Sept 2026 R0 R0 All billed
A job counts here as soon as its job card is completed or signed off, priced from the care plan rate (deep cleans use the deep-clean rate). "Not invoiced" is revenue you have earned but not yet billed.

Jobs still to close

What happens next. Everything in **Not yet invoiced** is waiting for you on the Invoices screen.

Rules & warnings. *Jobs still to close* should be empty at the end of every week. Anything left there is unpaid, unbilled work.

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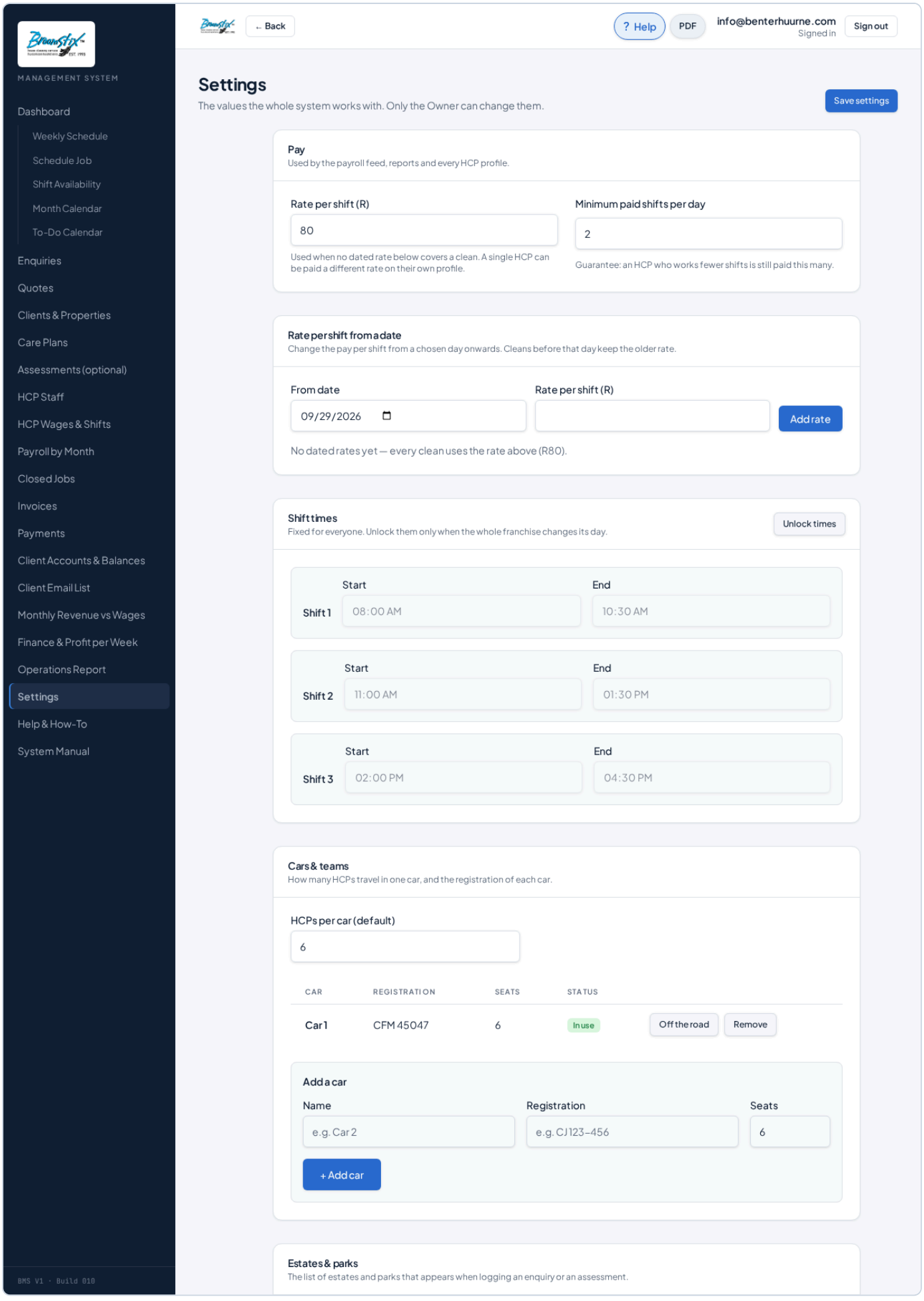
15. Quality control and exceptions

Purpose. To keep service quality visible and traceable.

When to use it. After every clean, and weekly when you review the week.

Step-by-step.

1. **Dashboard → Waiting final QC** shows cleans finished but not yet signed off. Clear this daily.
2. On each job card, confirm the **room checklist** is fully ticked and the **team leader sign-off** is complete.
3. Record anything unusual in the **sign-off notes** — this is the permanent exception record.
4. Use **Change history** on the job card, and **Settings → Clean change history**, to trace who moved, cancelled or deleted any clean and when.
5. **Operations Report → Quality exceptions** and **Action list** give you the weekly view.


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Care Plans
Assessments (optional)
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HCP Wages & Shifts
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Finance & Profit per Week
Operations Report
Settings
Help & How-To
System Manual
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? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Settings
The values the whole system works with. Only the Owner can change them.
Save settings
Pay
Used by the payroll feed, reports and every HCP profile.
Rate per shift (R)
80
Used when no dated rate below covers a clean. A single HCP can be paid a different rate on their own profile.
Minimum paid shifts per day
2
Guarantee: an HCP who works fewer shifts is still paid this many.
Rate per shift from a date
Change the pay per shift from a chosen day onwards. Cleans before that day keep the older rate.
From date
09/29/2026
Rate per shift (R)
Add rate
No dated rates yet — every clean uses the rate above (R80).
Shift times
Fixed for everyone. Unlock them only when the whole franchise changes its day.
Unlock times
Start
End
Shift 1
08:00 AM
10:30 AM
Start
End
Shift 2
11:00 AM
01:30 PM
Start
End
Shift 3
02:00 PM
04:30 PM
Cars & teams
How many HCPs travel in one car, and the registration of each car.
HCPs per car (default)
6
CAR
REGISTRATION
SEATS
STATUS
Car 1
CFM 45047
6
In use
Off the road
Remove
Add a car
Name
e.g. Car 2
Registration
e.g. CJ 123-456
Seats
6
+ Add car
Estates & parks
The list of estates and parks that appears when logging an enquiry or an assessment.

Settings — Clean change history

Rules & warnings. A clean sitting in **Waiting final QC** is invisible to revenue and to wages. Sign-off notes are the only place an exception is recorded — write them at the time, not from memory.

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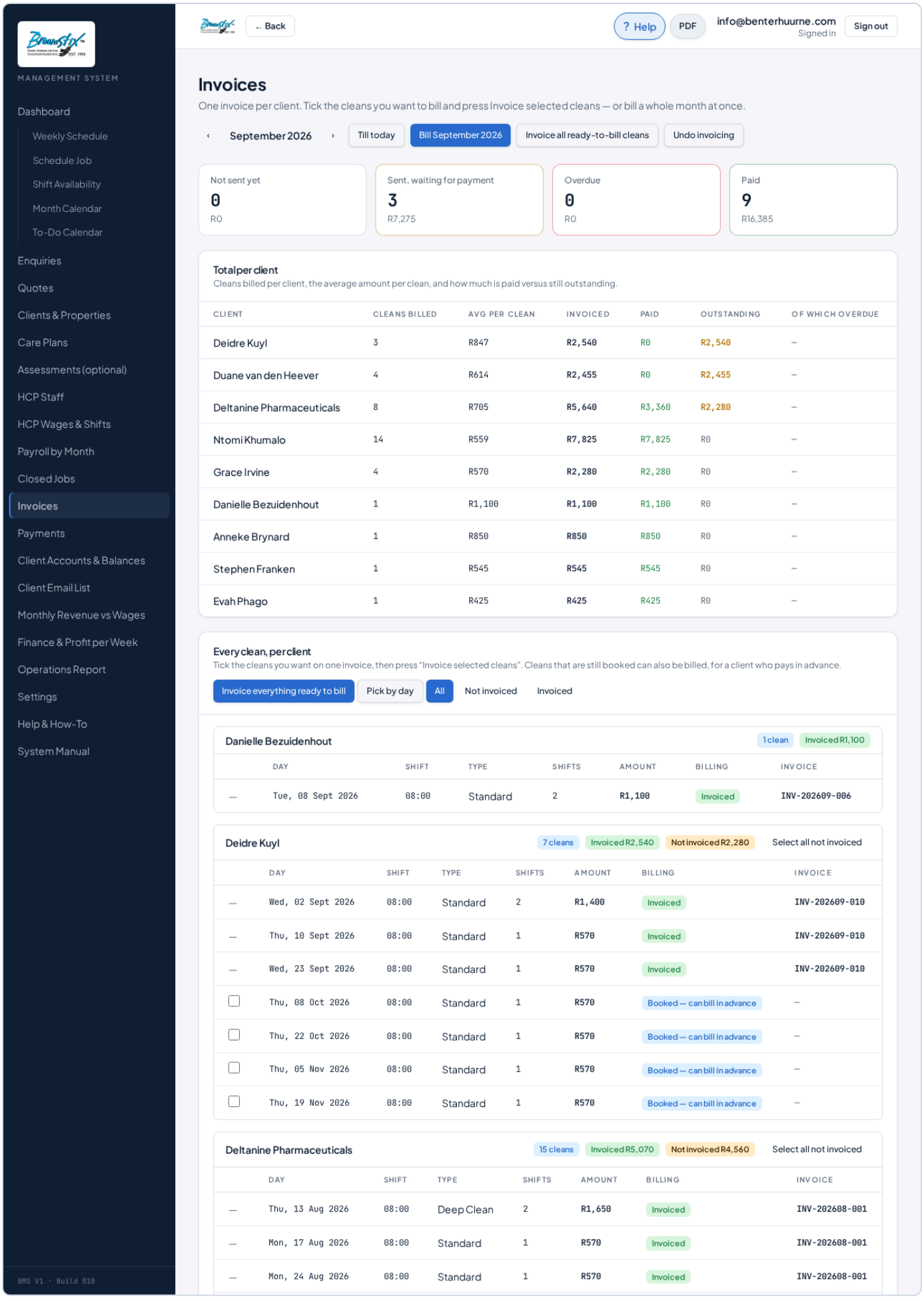
16. Invoices

Purpose. To turn completed cleans into invoices: normally **one invoice per client per month**, built from that month's visits.

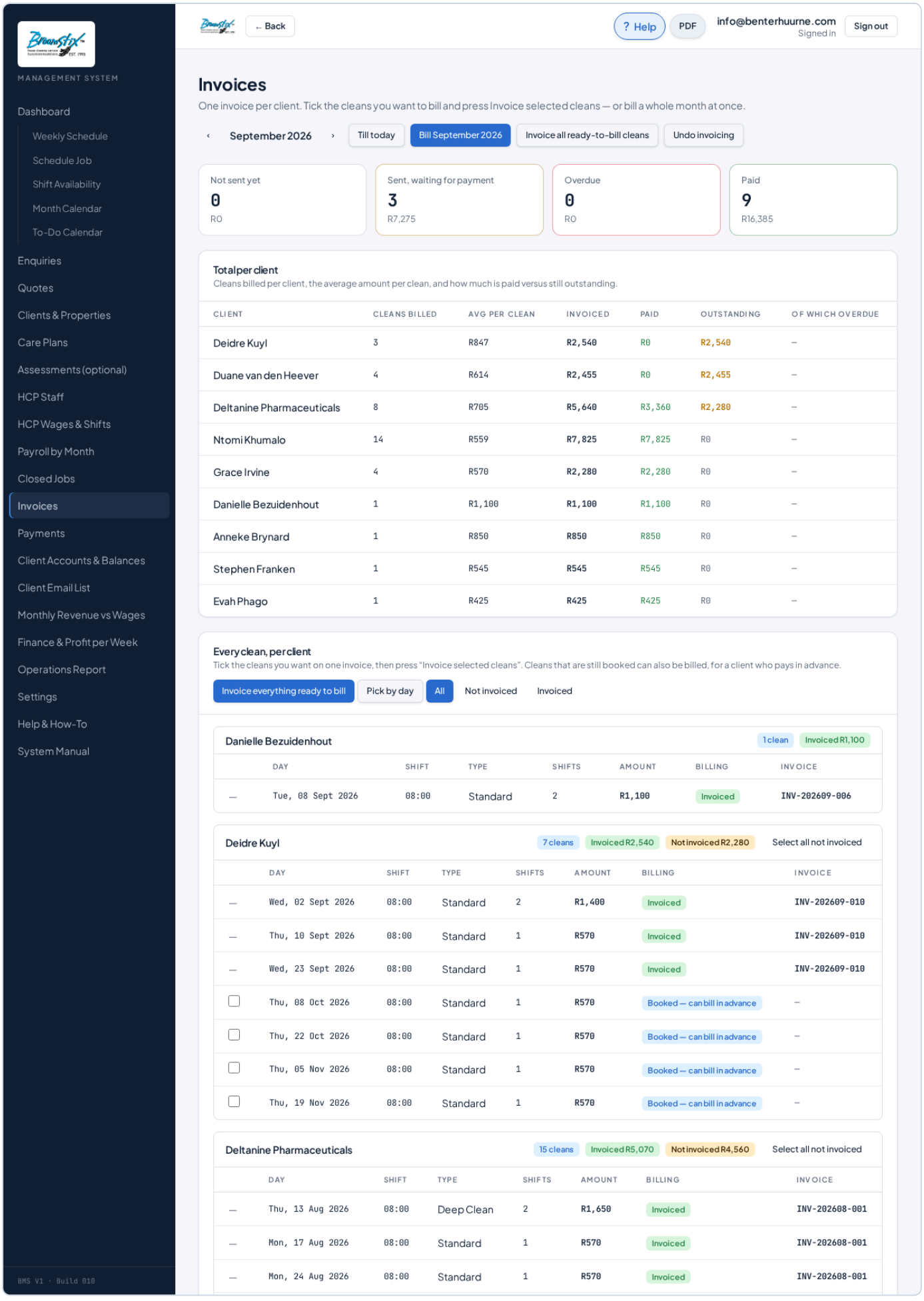
When to use it. At month end, or at any point using **Till today**.

Step-by-step.

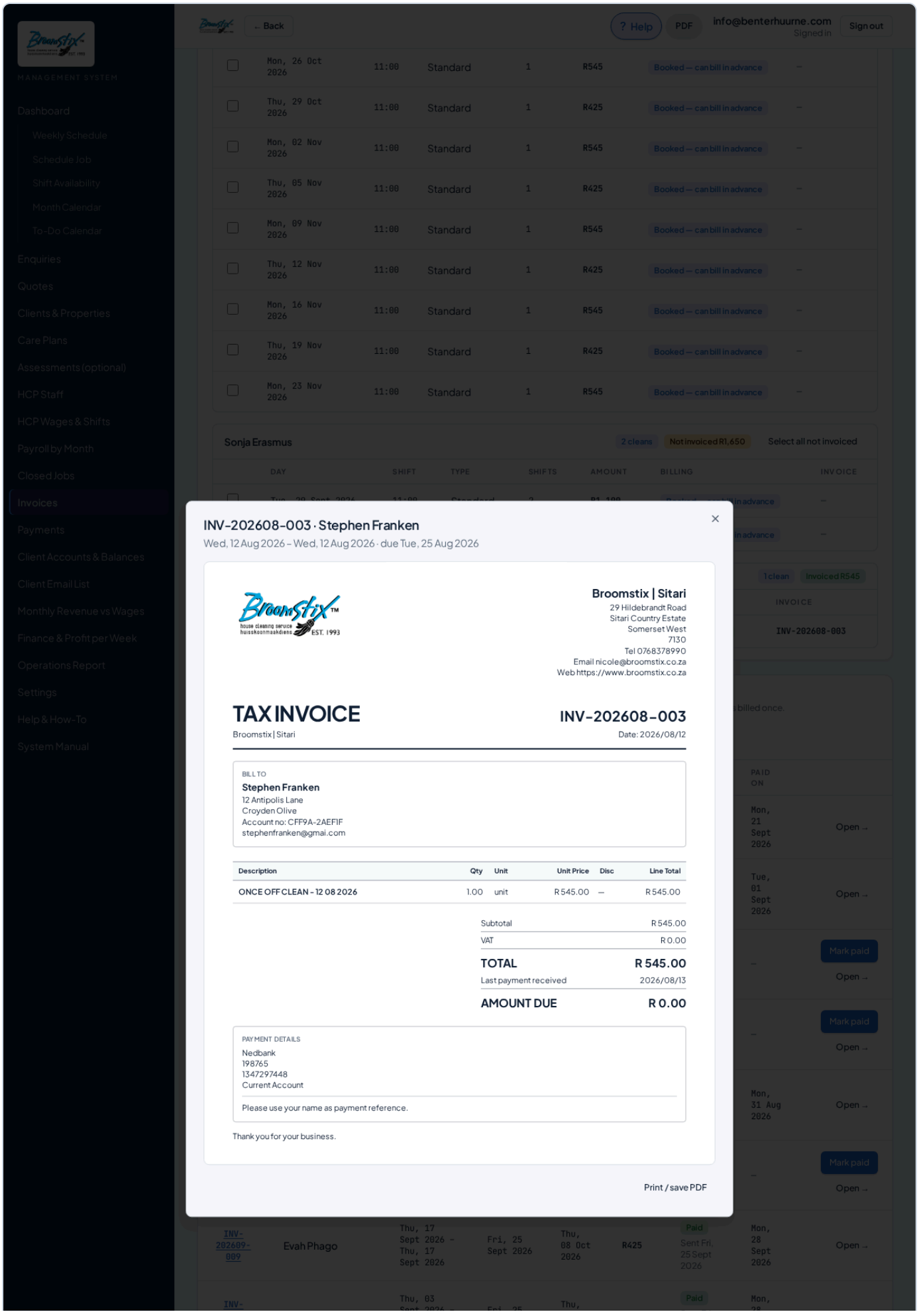
1. Open **Invoices**.
2. In **Every finished clean, per client**, each clean shows its date, shift, amount, whether it is invoiced, and the **invoice reference** where it is. The filters on top show **All**, **Not invoiced** or **Invoiced** cleans. Client totals carry summary pills for the number of cleans, **Invoiced**, **Not invoiced** and any overdue amount, and cleans booked for clients who pay in advance carry a **Booked — can bill in advance** pill.
3. To bill selected cleans: tick them for one or several clients. **Select all not invoiced** ticks a client's cleans in one go, and **Pick by day** opens a small month calendar where one click ticks every unbilled clean on that day — including "can bill in advance" cleans; click the day again to untick it. The bar at the bottom shows your running total. Press **Invoice selected cleans**: BMS makes **one Draft invoice per client, dated the day you make it**. Cleans you did not tick stay ready for later.
4. To bill everything ready in one go: press **Invoice everything ready to bill** above the list — it invoices every unbilled finished clean, one invoice per client, including booked cleans for clients who pay in advance.
5. Use **Undo invoicing** to remove Draft invoices that have no payments yet and return those cleans to ready to bill.
6. Scroll down to the **Invoice register** — every invoice sits there, drafts sorted to the top. Click the reference to open the printable **TAX INVOICE** document: logo, franchise details, reference, date, bill-to details, dated clean lines, subtotal, VAT, total, Nedbank payment details. Check it, add extras such as a **cleaning material fee** with **Add a charge**, then press **Preview & send** to email it, or **Mark as sent** once you have sent it yourself. You can also print it or save it as a PDF.

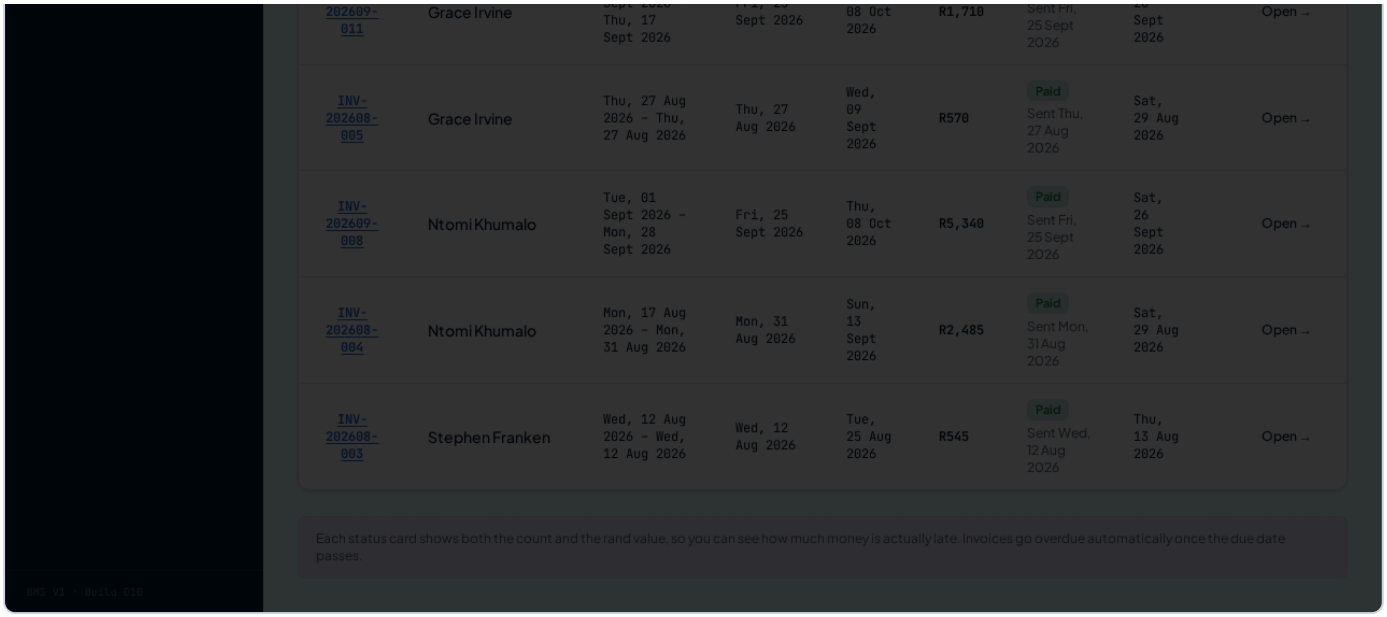

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Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
Finance & Profit per Week
Operations Report
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Help & How-To
System Manual
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? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Invoices
One invoice per client. Tick the cleans you want to bill and press Invoice selected cleans — or bill a whole month at once.
‹ September 2026 ›
Till today
Bill September 2026
Invoice all ready-to-bill cleans
Undo invoicing
Not sent yet
0
R0
Sent, waiting for payment
3
R7,275
Overdue
0
R0
Paid
9
R16,385
Total per client
Cleans billed per client, the average amount per clean, and how much is paid versus still outstanding.
CLIENT
CLEANS BILLED
AVG PER CLEAN
INVOICED
PAID
OUTSTANDING
OF WHICH OVERDUE
Deidre Kuyl 3 R847 R2,540 R0 R2,540 –
Duane van den Heever 4 R614 R2,455 R0 R2,455 –
Deltanine Pharmaceuticals 8 R705 R5,640 R3,360 R2,280 –
Ntomi Khumalo 14 R559 R7,825 R7,825 R0 –
Grace Irvine 4 R570 R2,280 R2,280 R0 –
Danielle Bezuidenhout 1 R1,100 R1,100 R1,100 R0 –
Anneke Brynard 1 R850 R850 R850 R0 –
Stephen Franken 1 R545 R545 R545 R0 –
Evah Phago 1 R425 R425 R425 R0 –
Every clean, per client
Tick the cleans you want on one invoice, then press "Invoice selected cleans". Cleans that are still booked can also be billed, for a client who pays in advance.
Invoice everything ready to bill
Pick by day
All
Not invoiced
Invoiced
Danielle Bezuidenhout
1 clean
Invoiced R1,100
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Tue, 08 Sept 2026 08:00 Standard 2 R1,100 Invoiced INV-202609-006
Deidre Kuyl
7 cleans
Invoiced R2,540
Not invoiced R2,280
Select all not invoiced
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Wed, 02 Sept 2026 08:00 Standard 2 R1,400 Invoiced INV-202609-010
– Thu, 10 Sept 2026 08:00 Standard 1 R570 Invoiced INV-202609-010
– Wed, 23 Sept 2026 08:00 Standard 1 R570 Invoiced INV-202609-010
Thu, 08 Oct 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 22 Oct 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 05 Nov 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 19 Nov 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Deltanine Pharmaceuticals
15 cleans
Invoiced R5,070
Not invoiced R4,560
Select all not invoiced
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Thu, 13 Aug 2026 08:00 Deep Clean 2 R1,650 Invoiced INV-202608-001
– Mon, 17 Aug 2026 08:00 Standard 1 R570 Invoiced INV-202608-001
– Mon, 24 Aug 2026 08:00 Standard 1 R570 Invoiced INV-202608-001

Invoices — counters and Total per client


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
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? Help
PDF
info@benterhuurne.com
Signed in
Sign out
Invoices
One invoice per client. Tick the cleans you want to bill and press Invoice selected cleans — or bill a whole month at once.
‹ September 2026 ›
Till today
Bill September 2026
Invoice all ready-to-bill cleans
Undo invoicing
Not sent yet
0
R0
Sent, waiting for payment
3
R7,275
Overdue
0
R0
Paid
9
R16,385
Total per client
Cleans billed per client, the average amount per clean, and how much is paid versus still outstanding.
CLIENT
CLEANS BILLED
AVG PER CLEAN
INVOICED
PAID
OUTSTANDING
OF WHICH OVERDUE
Deidre Kuyl 3 R847 R2,540 R0 R2,540 –
Duane van den Heever 4 R614 R2,455 R0 R2,455 –
Deltanine Pharmaceuticals 8 R705 R5,640 R3,360 R2,280 –
Ntomi Khumalo 14 R559 R7,825 R7,825 R0 –
Grace Irvine 4 R570 R2,280 R2,280 R0 –
Danielle Bezuidenhout 1 R1,100 R1,100 R1,100 R0 –
Anneke Brynard 1 R850 R850 R850 R0 –
Stephen Franken 1 R545 R545 R545 R0 –
Evah Phago 1 R425 R425 R425 R0 –
Every clean, per client
Tick the cleans you want on one invoice, then press "Invoice selected cleans". Cleans that are still booked can also be billed, for a client who pays in advance.
Invoice everything ready to bill
Pick by day
All
Not invoiced
Invoiced
Danielle Bezuidenhout
1 clean
Invoiced R1,100
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Tue, 08 Sept 2026 08:00 Standard 2 R1,100 Invoiced INV-202609-006
Deidre Kuyl
7 cleans
Invoiced R2,540
Not invoiced R2,280
Select all not invoiced
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Wed, 02 Sept 2026 08:00 Standard 2 R1,400 Invoiced INV-202609-010
– Thu, 10 Sept 2026 08:00 Standard 1 R570 Invoiced INV-202609-010
– Wed, 23 Sept 2026 08:00 Standard 1 R570 Invoiced INV-202609-010
Thu, 08 Oct 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 22 Oct 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 05 Nov 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 19 Nov 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Deltanine Pharmaceuticals
15 cleans
Invoiced R5,070
Not invoiced R4,560
Select all not invoiced
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Thu, 13 Aug 2026 08:00 Deep Clean 2 R1,650 Invoiced INV-202608-001
– Mon, 17 Aug 2026 08:00 Standard 1 R570 Invoiced INV-202608-001
– Mon, 24 Aug 2026 08:00 Standard 1 R570 Invoiced INV-202608-001

Every finished clean, per client — selection **Example — TAX INVOICE.**


INV-202608-003 · Stephen Franken
Wed, 12 Aug 2026 – Wed, 12 Aug 2026 · due Tue, 25 Aug 2026
Broomstix | Sitari
29 Hildebrandt Road
Sitari Country Estate
Somerset West
7130
Tel 0768378990
Email nicole@broomstix.co.za
Web https://www.broomstix.co.za
TAX INVOICE
Broomstix | Sitari
INV-202608-003
Date: 2026/08/12
BILL TO
Stephen Franken
12 Antipolis Lane
Croyden Olive
Account no: CFF9A-2AEF1F
stephenfranken@gmai.com
Description
Qty
Unit
Unit Price
Disc
Line Total
ONCE OFF CLEAN - 12 08 2026
1.00
unit
R 545.00
–
R 545.00
Subtotal
R 545.00
VAT
R 0.00
TOTAL
R 545.00
Last payment received
2026/08/13
AMOUNT DUE
R 0.00
PAYMENT DETAILS
Nedbank
198765
1347297448
Current Account
Please use your name as payment reference.
Thank you for your business.
Print / save PDF



Example printable TAX INVOICE, exactly as the client receives it

What happens next. The invoice appears in the **Invoice register**, on the client's account and statement, in the client portal, and in **Payments** waiting for money.

Rules & warnings.

- **Nothing bills itself.** An invoice exists only because you ticked cleans and pressed the button.
- **Only finished (signed-off) cleans can be invoiced.** Open jobs are skipped.
- An invoice can be undone only while it is still a **Draft with no payments** — once it has been sent, or a payment is recorded on it, it stays.
- The amount comes from the **care plan's price per clean** (or deep clean price). Fix pricing on the plan.
- Extra charges, such as a cleaning material fee, are added to the individual invoice with **Add a charge** — they are never automatic.

Invoice statuses

Status	Meaning
Draft	Created in BMS, not yet sent to the client. Can still be undone.
Sent ("Issued")	Sent to the client; the money is now expected.
Outstanding	Any amount still owing on a Sent invoice — including part-paid invoices.
Overdue	Outstanding past its due date. Chase it.
Paid	Payments received equal the invoice total. Nothing left owing.

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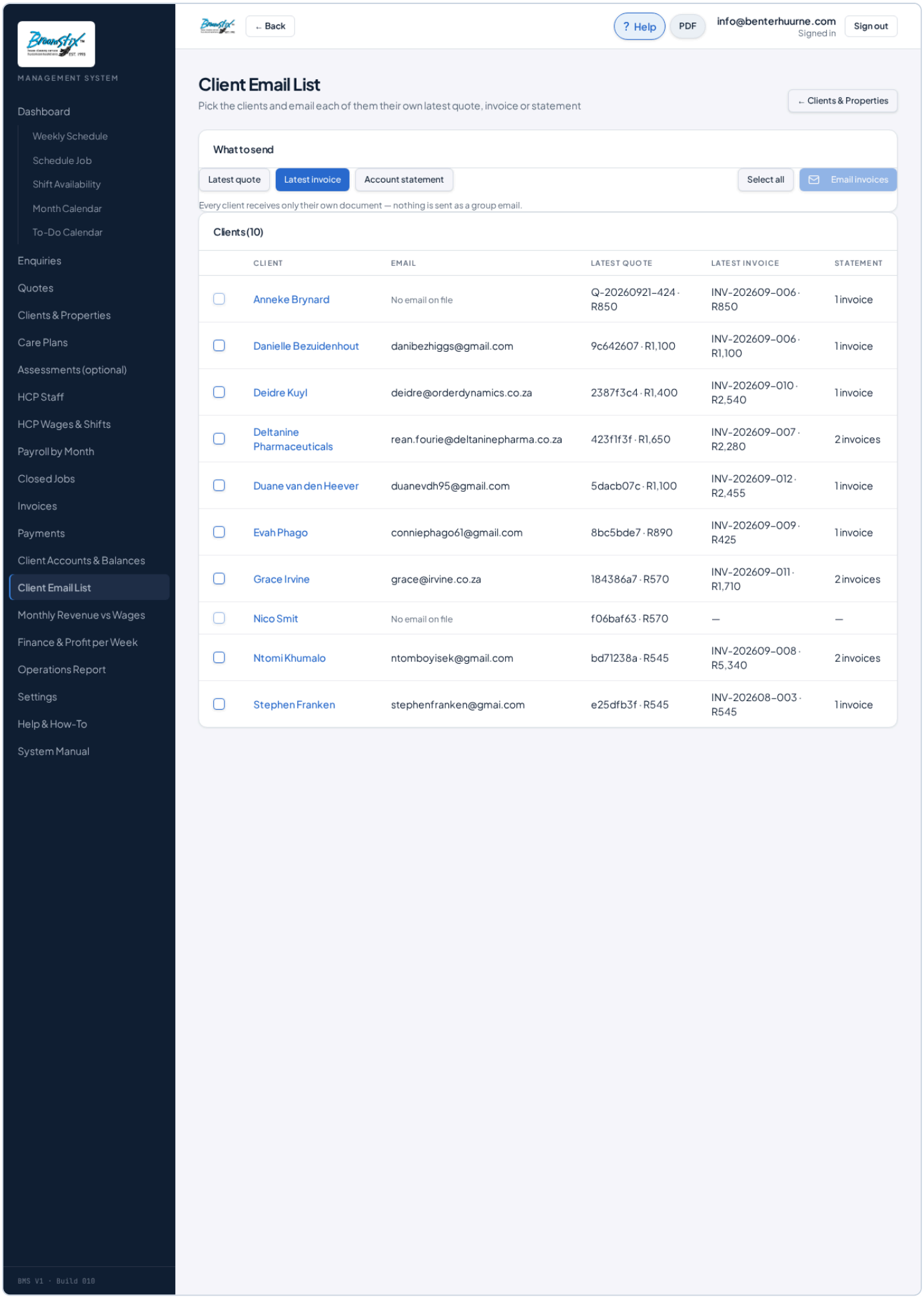
17. Issuing invoices and recording payments

Purpose. To get the invoice to the client and to record the money coming back.

When to use it. Immediately after generating invoices, and every time a payment lands in the bank.

Step-by-step — issuing.

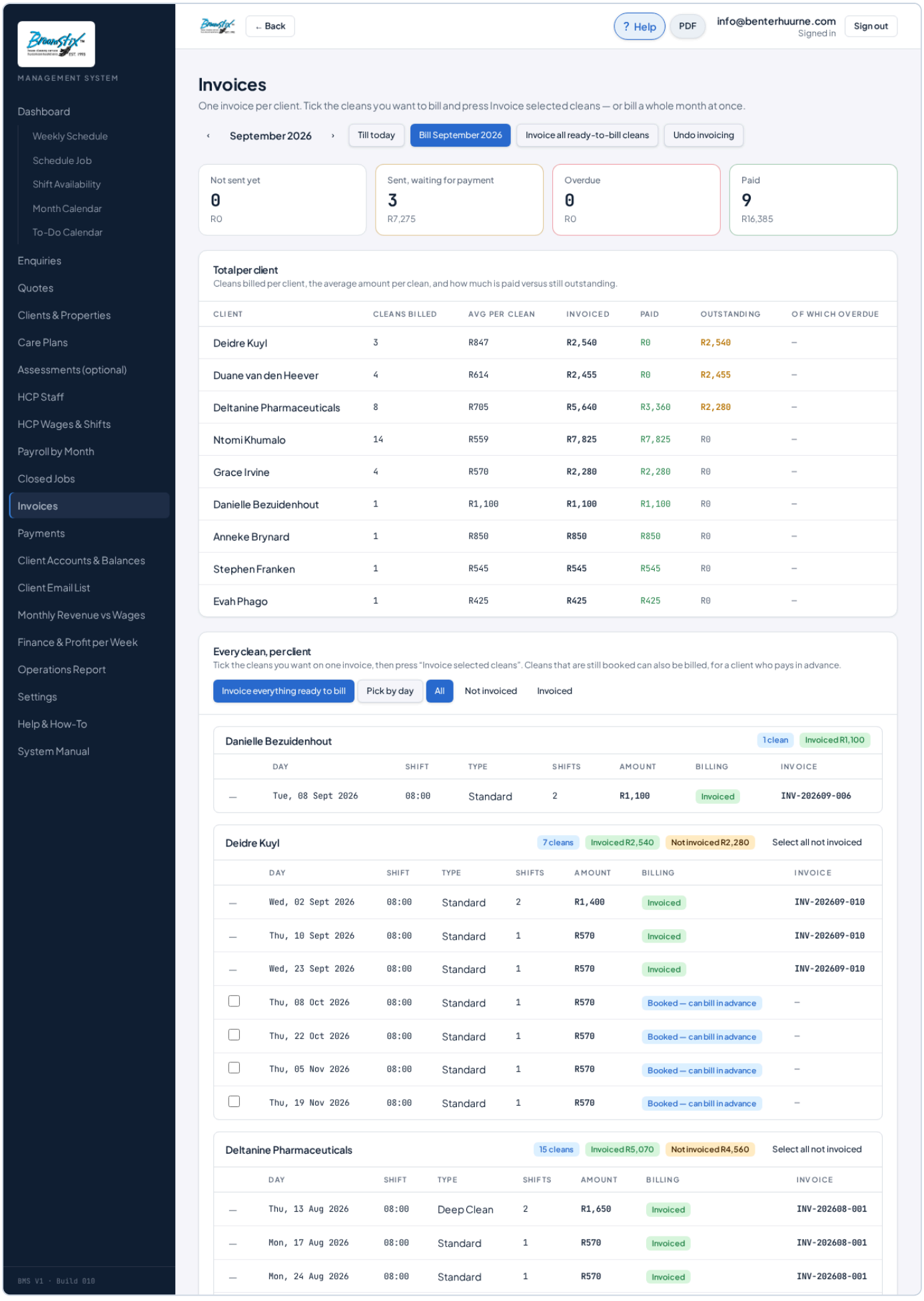
1. From the **Invoice register** on the Invoices page, open the invoice and press **Preview & send** to email it to the client — or print / save it as a PDF and send it yourself, then press **Mark as sent**.
2. To send to many clients at once, open **Client Email List**, choose **what to send** (latest quote, invoice or statement), tick the clients, send, and read the **Send results**.


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Signed in
Sign out
Client Email List
Pick the clients and email each of them their own latest quote, invoice or statement
← Clients & Properties
What to send
Latest quote
Latest invoice
Account statement
Select all
Email invoices
Every client receives only their own document — nothing is sent as a group email.
Clients (10)
CLIENT
EMAIL
LATEST QUOTE
LATEST INVOICE
STATEMENT
Anneke Brynard
No email on file
Q-20260921-424 · R850
INV-202609-006 · R850
1 invoice
Danielle Bezuidenhout
danibezhiggs@gmail.com
9c642607 · R1,100
INV-202609-006 · R1,100
1 invoice
Deidre Kuyl
deidre@orderdynamics.co.za
2387f3c4 · R1,400
INV-202609-010 · R2,540
1 invoice
Deltanine Pharmaceuticals
rean.fourie@deltaninepharma.co.za
423f1f3f · R1,650
INV-202609-007 · R2,280
2 invoices
Duane van den Heever
duanevdh95@gmail.com
5dacb07c · R1,100
INV-202609-012 · R2,455
1 invoice
Evah Phago
conniephago61@gmail.com
8bc5bde7 · R890
INV-202609-009 · R425
1 invoice
Grace Irvine
grace@irvine.co.za
184386a7 · R570
INV-202609-011 · R1,710
2 invoices
Nico Smit
No email on file
f06baf63 · R570
—
—
Ntomi Khumalo
ntomboyisek@gmail.com
bd71238a · R545
INV-202609-008 · R5,340
2 invoices
Stephen Franken
stephenfranken@gmai.com
e25dfb3f · R545
INV-202608-003 · R545
1 invoice

Client Email List — what to send and client selection

Step-by-step — recording a payment.

1. Open **Payments**. A reminder at the top counts the invoices that are **overdue**.
2. Find the client’s invoice under **Client invoices** and **click the invoice reference** — the payment box opens with the client’s name in bold.
3. Enter the **payment date**, the **amount** (the outstanding balance is offered by default), the **method**, a **reference** and any notes.
4. Save. **Part payments are fully supported** — record exactly what came in, as many times as it takes, until the total is reached. Closing the box without saving records nothing.


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Signed in
Sign out
Invoices
One invoice per client. Tick the cleans you want to bill and press Invoice selected cleans — or bill a whole month at once.
‹ September 2026 ›
Till today
Bill September 2026
Invoice all ready-to-bill cleans
Undo invoicing
Not sent yet
0
R0
Sent, waiting for payment
3
R7,275
Overdue
0
R0
Paid
9
R16,385
Total per client
Cleans billed per client, the average amount per clean, and how much is paid versus still outstanding.
CLIENT
CLEANS BILLED
AVG PER CLEAN
INVOICED
PAID
OUTSTANDING
OF WHICH OVERDUE
Deidre Kuyl 3 R847 R2,540 R0 R2,540 –
Duane van den Heever 4 R614 R2,455 R0 R2,455 –
Deltanine Pharmaceuticals 8 R705 R5,640 R3,360 R2,280 –
Ntomi Khumalo 14 R559 R7,825 R7,825 R0 –
Grace Irvine 4 R570 R2,280 R2,280 R0 –
Danielle Bezuidenhout 1 R1,100 R1,100 R1,100 R0 –
Anneke Brynard 1 R850 R850 R850 R0 –
Stephen Franken 1 R545 R545 R545 R0 –
Evah Phago 1 R425 R425 R425 R0 –
Every clean, per client
Tick the cleans you want on one invoice, then press "Invoice selected cleans". Cleans that are still booked can also be billed, for a client who pays in advance.
Invoice everything ready to bill
Pick by day
All
Not invoiced
Invoiced
Danielle Bezuidenhout
1 clean
Invoiced R1,100
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Tue, 08 Sept 2026 08:00 Standard 2 R1,100 Invoiced INV-202609-006
Deidre Kuyl
7 cleans
Invoiced R2,540
Not invoiced R2,280
Select all not invoiced
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Wed, 02 Sept 2026 08:00 Standard 2 R1,400 Invoiced INV-202609-010
– Thu, 10 Sept 2026 08:00 Standard 1 R570 Invoiced INV-202609-010
– Wed, 23 Sept 2026 08:00 Standard 1 R570 Invoiced INV-202609-010
Thu, 08 Oct 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 22 Oct 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 05 Nov 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Thu, 19 Nov 2026 08:00 Standard 1 R570 Booked — can bill in advance –
Deltanine Pharmaceuticals
15 cleans
Invoiced R5,070
Not invoiced R4,560
Select all not invoiced
DAY
SHIFT
TYPE
SHIFTS
AMOUNT
BILLING
INVOICE
– Thu, 13 Aug 2026 08:00 Deep Clean 2 R1,650 Invoiced INV-202608-001
– Mon, 17 Aug 2026 08:00 Standard 1 R570 Invoiced INV-202608-001
– Mon, 24 Aug 2026 08:00 Standard 1 R570 Invoiced INV-202608-001

Payments — client invoices and payment capture

What happens next. Balances, invoice status, the client statement, the client portal, **Monthly Revenue vs Wages** and **Finance & Profit per Week** all update automatically. Counters show **Received**, **Outstanding**, **Fully paid invoices** and **Part paid**.

Rules & warnings.

- Never adjust an invoice total to match a short payment — record the part payment and leave the balance **Outstanding**.
- Anyone in your business can record a payment on any invoice — payments are not tied to whoever created the invoice.
- Client statements net off every recorded payment, so a part payment shows correctly on the statement.
- If email sending is unavailable (the sending domain must be verified before BMS can email on your behalf), print or save documents as PDFs and send them from your own mailbox.

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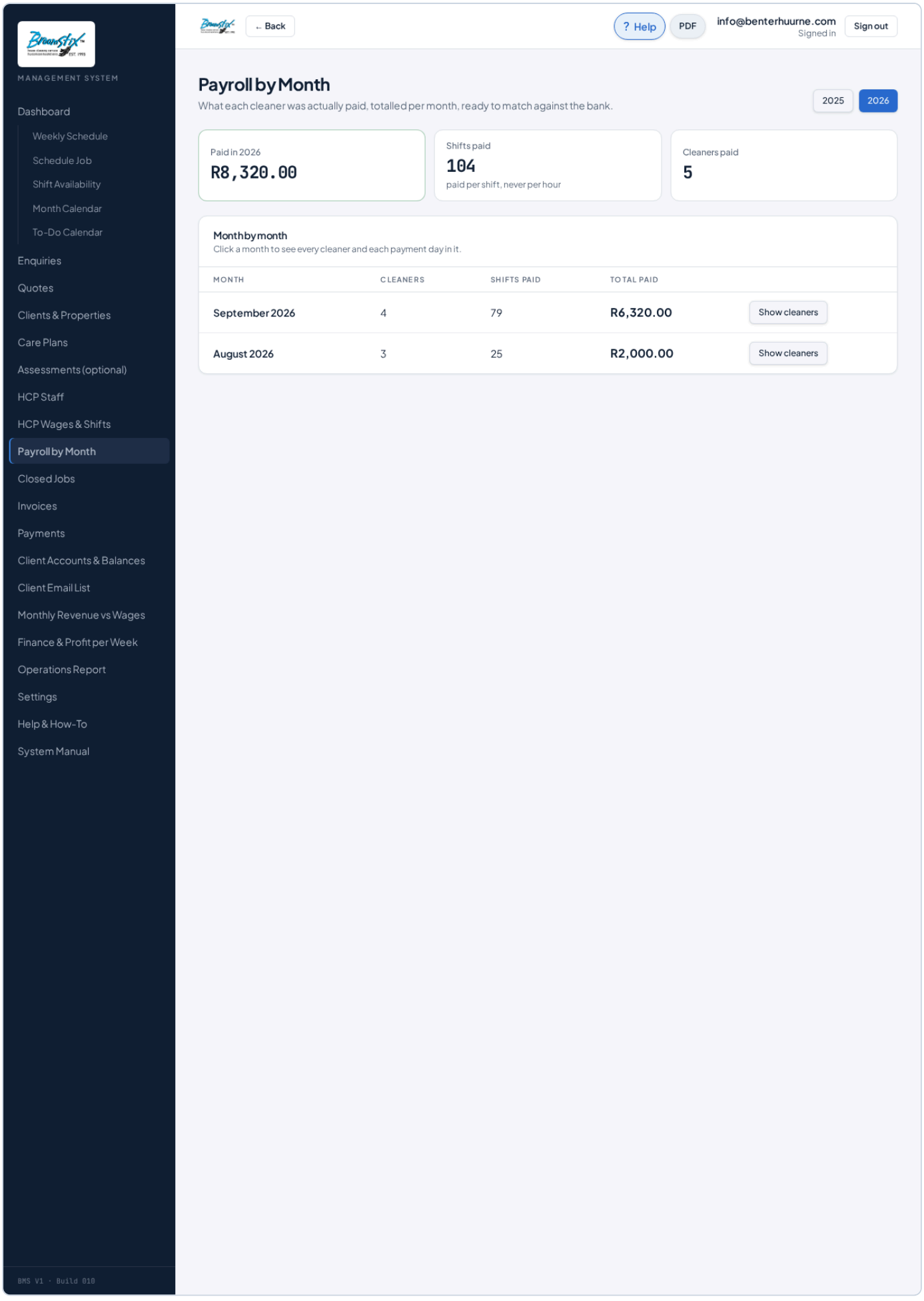
18. Payroll by Month

Purpose. To total what each cleaner was actually paid in every month and match it against the bank account.

When to use it. During month-end bank reconciliation, after staff payments have been recorded.

Step-by-step.

1. Open **Payroll by Month** and choose this year or last year.
2. Read **Paid in the year**, **Shifts paid** and **Cleaners paid**.
3. Under **Month by month**, open a month to see each cleaner’s shift total, amount paid and number of payment days.
4. Open a cleaner inside the month to see the client work included on each payment day.


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Sign out
Payroll by Month
What each cleaner was actually paid, totalled per month, ready to match against the bank.
2025
2026
Paid in 2026
R8,320.00
Shifts paid
104
paid per shift, never per hour
Cleaners paid
5
Month by month
Click a month to see every cleaner and each payment day in it.
MONTH
CLEANERS
SHIFTS PAID
TOTAL PAID
September 2026
4
79
R6,320.00
Show cleaners
August 2026
3
25
R2,000.00
Show cleaners

Payroll by Month — monthly totals and payment days

What happens next. This page is a reconciliation view. Record and correct the actual staff payments under **HCP Wages & Shifts**.

Rules & warnings.

- Wages are **per shift**, never per hour.
- A December shift paid in January appears in January, because this page groups by the payment date.
- Use this page to match monthly totals against the bank; use **HCP Wages & Shifts** to make or correct payments.

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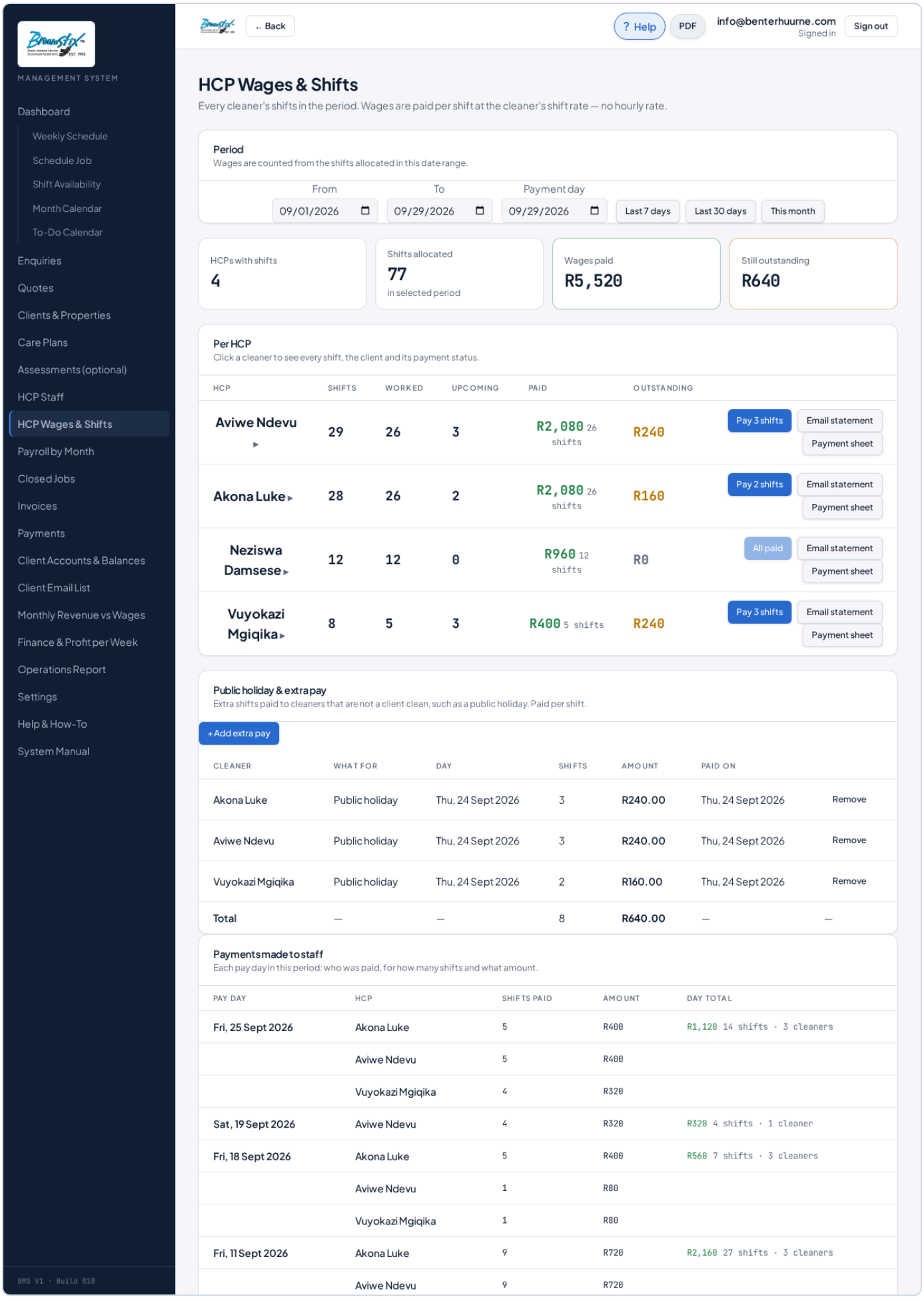
19. HCP Wages & Shifts (paying the cleaners)

Purpose. To see every cleaner’s shifts for a period and record what you paid them.

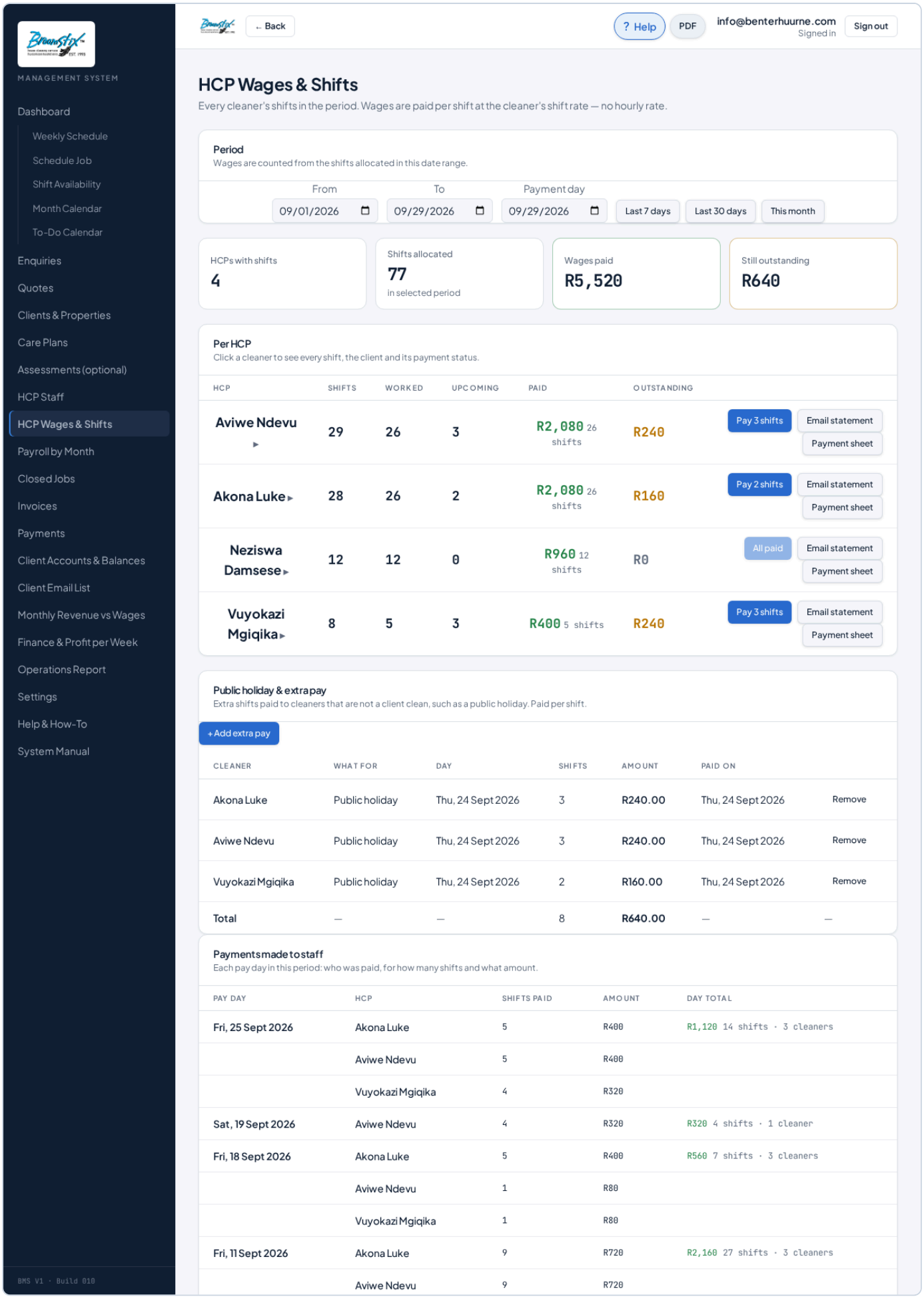
When to use it. Weekly, when you pay staff.

Step-by-step.

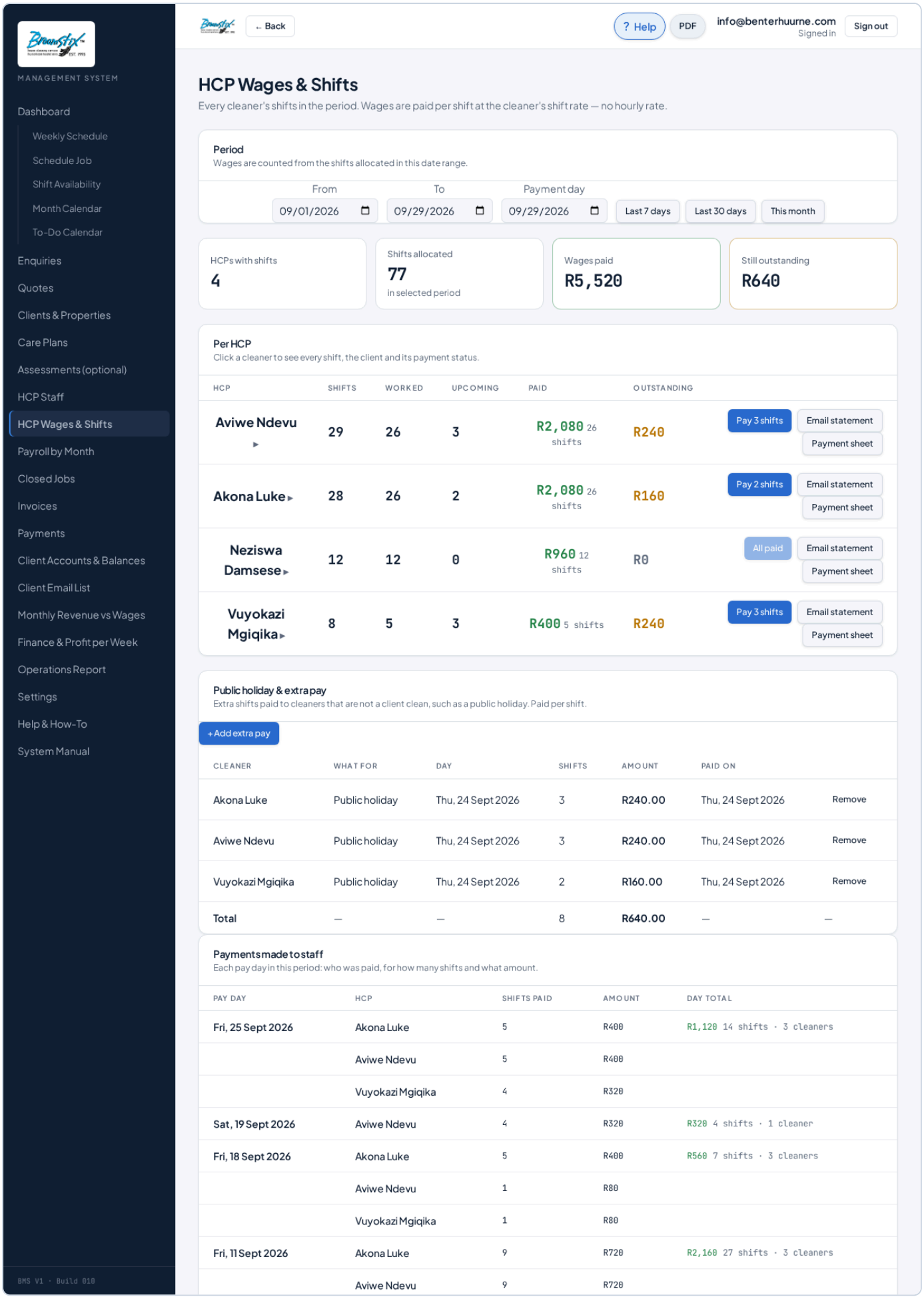
1. Open **HCP Wages & Shifts** and set the **Period**.
2. Read the counters: **HCPs with shifts**, **Shifts allocated**, **Wages paid**, **Still outstanding**.
3. Expand a cleaner under **Per HCP**. The row summary shows Shifts, Worked and Upcoming prominently, with their bank name, account number, branch code and email.
4. Each clean is listed with its **weekday and date** and client, and is **clickable** — it opens that job card.
5. Set the **Payment day**, then use **Pay X shifts** for the whole cleaner, or **Mark paid** per line.
6. Open the printable **wage slip** — cleaner, period, each shift, client, status, paid date, amount, paid and outstanding totals and bank details — to print or save as a PDF.
7. Email the cleaner their paid and outstanding shifts where an email address is on file.
8. **Payments made to staff** shows what was paid, to whom, on which day, for how many shifts.


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info@benterhuurne.com
Signed in
Sign out
HCP Wages & Shifts
Every cleaner's shifts in the period. Wages are paid per shift at the cleaner's shift rate — no hourly rate.
Period
Wages are counted from the shifts allocated in this date range.
From
09/01/2026
To
09/29/2026
Payment day
09/29/2026
Last 7 days
Last 30 days
This month
HCPs with shifts
4
Shifts allocated
77
in selected period
Wages paid
R5,520
Still outstanding
R640
Per HCP
Click a cleaner to see every shift, the client and its payment status.
HCP
SHIFTS
WORKED
UPCOMING
PAID
OUTSTANDING
Aviwe Ndevu ▸
29
26
3
R2,080 26 shifts
R240
Pay 3 shifts
Email statement
Payment sheet
Akona Luke ▸
28
26
2
R2,080 26 shifts
R160
Pay 2 shifts
Email statement
Payment sheet
Neziswa Damsese ▸
12
12
0
R960 12 shifts
R0
All paid
Email statement
Payment sheet
Vuyokazi Mgiqika ▸
8
5
3
R400 5 shifts
R240
Pay 3 shifts
Email statement
Payment sheet
Public holiday & extra pay
Extra shifts paid to cleaners that are not a client clean, such as a public holiday. Paid per shift.
+ Add extra pay
CLEANER
WHAT FOR
DAY
SHIFTS
AMOUNT
PAID ON
Akona Luke
Public holiday
Thu, 24 Sept 2026
3
R240.00
Thu, 24 Sept 2026
Remove
Aviwe Ndevu
Public holiday
Thu, 24 Sept 2026
3
R240.00
Thu, 24 Sept 2026
Remove
Vuyokazi Mgiqika
Public holiday
Thu, 24 Sept 2026
2
R160.00
Thu, 24 Sept 2026
Remove
Total
—
—
8
R640.00
—
—
Payments made to staff
Each pay day in this period: who was paid, for how many shifts and what amount.
PAY DAY
HCP
SHIFTS PAID
AMOUNT
DAY TOTAL
Fri, 25 Sept 2026
Akona Luke
5
R400
R1,120 14 shifts · 3 cleaners
Aviwe Ndevu
5
R400
Vuyokazi Mgiqika
4
R320
Sat, 19 Sept 2026
Aviwe Ndevu
4
R320
R320 4 shifts · 1 cleaner
Fri, 18 Sept 2026
Akona Luke
5
R400
R560 7 shifts · 3 cleaners
Aviwe Ndevu
1
R80
Vuyokazi Mgiqika
1
R80
Fri, 11 Sept 2026
Akona Luke
9
R720
R2,160 27 shifts · 3 cleaners
Aviwe Ndevu
9
R720

HCP Wages & Shifts — Per HCP expanded


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Signed in
Sign out
HCP Wages & Shifts
Every cleaner's shifts in the period. Wages are paid per shift at the cleaner's shift rate — no hourly rate.
Period
Wages are counted from the shifts allocated in this date range.
From
09/01/2026
To
09/29/2026
Payment day
09/29/2026
Last 7 days
Last 30 days
This month
HCPs with shifts
4
Shifts allocated
77
in selected period
Wages paid
R5,520
Still outstanding
R640
Per HCP
Click a cleaner to see every shift, the client and its payment status.
HCP
SHIFTS
WORKED
UPCOMING
PAID
OUTSTANDING
Aviwe Ndevu ▸
29
26
3
R2,080 26 shifts
R240
Pay 3 shifts
Email statement
Payment sheet
Akona Luke ▸
28
26
2
R2,080 26 shifts
R160
Pay 2 shifts
Email statement
Payment sheet
Neziswa Damsese ▸
12
12
0
R960 12 shifts
R0
All paid
Email statement
Payment sheet
Vuyokazi Mgiqika ▸
8
5
3
R400 5 shifts
R240
Pay 3 shifts
Email statement
Payment sheet
Public holiday & extra pay
Extra shifts paid to cleaners that are not a client clean, such as a public holiday. Paid per shift.
+ Add extra pay
CLEANER
WHAT FOR
DAY
SHIFTS
AMOUNT
PAID ON
Akona Luke
Public holiday
Thu, 24 Sept 2026
3
R240.00
Thu, 24 Sept 2026
Remove
Aviwe Ndevu
Public holiday
Thu, 24 Sept 2026
3
R240.00
Thu, 24 Sept 2026
Remove
Vuyokazi Mgiqika
Public holiday
Thu, 24 Sept 2026
2
R160.00
Thu, 24 Sept 2026
Remove
Total
—
—
8
R640.00
—
—
Payments made to staff
Each pay day in this period: who was paid, for how many shifts and what amount.
PAY DAY
HCP
SHIFTS PAID
AMOUNT
DAY TOTAL
Fri, 25 Sept 2026
Akona Luke
5
R400
R1,120 14 shifts · 3 cleaners
Aviwe Ndevu
5
R400
Vuyokazi Mgiqika
4
R320
Sat, 19 Sept 2026
Aviwe Ndevu
4
R320
R320 4 shifts · 1 cleaner
Fri, 18 Sept 2026
Akona Luke
5
R400
R560 7 shifts · 3 cleaners
Aviwe Ndevu
1
R80
Vuyokazi Mgiqika
1
R80
Fri, 11 Sept 2026
Akona Luke
9
R720
R2,160 27 shifts · 3 cleaners
Aviwe Ndevu
9
R720

Wage slip document


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Sign out
HCP Wages & Shifts
Every cleaner's shifts in the period. Wages are paid per shift at the cleaner's shift rate — no hourly rate.
Period
Wages are counted from the shifts allocated in this date range.
From
09/01/2026
To
09/29/2026
Payment day
09/29/2026
Last 7 days
Last 30 days
This month
HCPs with shifts
4
Shifts allocated
77
in selected period
Wages paid
R5,520
Still outstanding
R640
Per HCP
Click a cleaner to see every shift, the client and its payment status.
HCP
SHIFTS
WORKED
UPCOMING
PAID
OUTSTANDING
Aviwe Ndevu ▸
29
26
3
R2,080 26 shifts
R240
Pay 3 shifts
Email statement
Payment sheet
Akona Luke ▸
28
26
2
R2,080 26 shifts
R160
Pay 2 shifts
Email statement
Payment sheet
Neziswa Damsese ▸
12
12
0
R960 12 shifts
R0
All paid
Email statement
Payment sheet
Vuyokazi Mgiqika ▸
8
5
3
R400 5 shifts
R240
Pay 3 shifts
Email statement
Payment sheet
Public holiday & extra pay
Extra shifts paid to cleaners that are not a client clean, such as a public holiday. Paid per shift.
+ Add extra pay
CLEANER
WHAT FOR
DAY
SHIFTS
AMOUNT
PAID ON
Akona Luke
Public holiday
Thu, 24 Sept 2026
3
R240.00
Thu, 24 Sept 2026
Remove
Aviwe Ndevu
Public holiday
Thu, 24 Sept 2026
3
R240.00
Thu, 24 Sept 2026
Remove
Vuyokazi Mgiqika
Public holiday
Thu, 24 Sept 2026
2
R160.00
Thu, 24 Sept 2026
Remove
Total
—
—
8
R640.00
—
—
Payments made to staff
Each pay day in this period: who was paid, for how many shifts and what amount.
PAY DAY
HCP
SHIFTS PAID
AMOUNT
DAY TOTAL
Fri, 25 Sept 2026
Akona Luke
5
R400
R1,120 14 shifts · 3 cleaners
Aviwe Ndevu
5
R400
Vuyokazi Mgiqika
4
R320
Sat, 19 Sept 2026
Aviwe Ndevu
4
R320
R320 4 shifts · 1 cleaner
Fri, 18 Sept 2026
Akona Luke
5
R400
R560 7 shifts · 3 cleaners
Aviwe Ndevu
1
R80
Vuyokazi Mgiqika
1
R80
Fri, 11 Sept 2026
Akona Luke
9
R720
R2,160 27 shifts · 3 cleaners
Aviwe Ndevu
9
R720

Payments made to staff

What happens next. Paid and outstanding wages feed **Monthly Revenue vs Wages**; the cleaner sees the same figures in their portal.

Rules & warnings.

- The wage for a clean uses the **rate that applied on that clean's date** (Settings → *Rate per shift from a date*), with a cleaner's own rate taking precedence.
- Changing today's rate does **not** rewrite past wages — that is deliberate.
- A cleaner with **no email address** cannot be emailed a statement; BMS says so instead of failing.

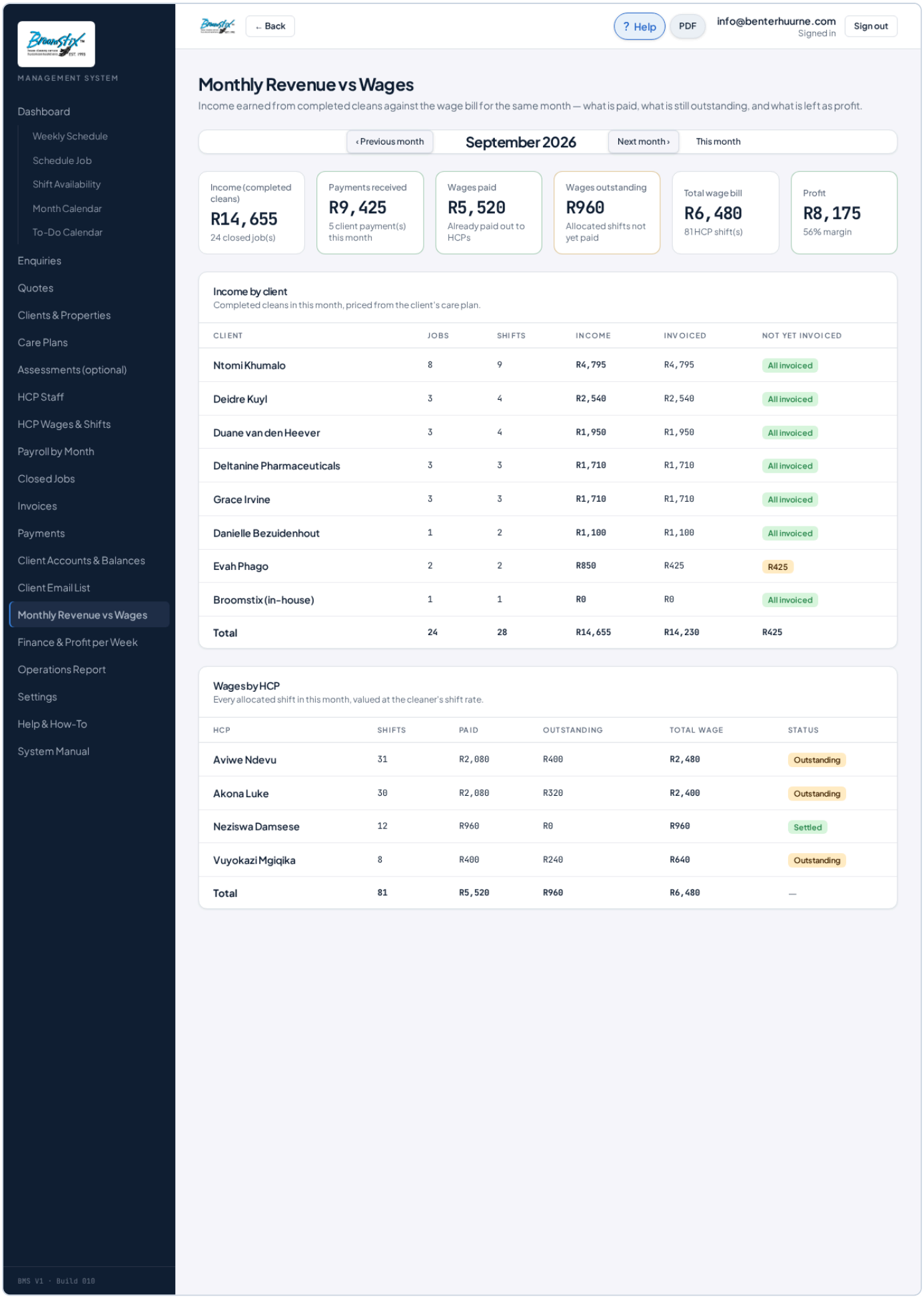
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20. Monthly Revenue vs Wages

Purpose. Income earned from completed cleans against the wage bill for the same month.

When to use it. At month end.

Step-by-step. Open **Monthly Revenue vs Wages** and read **Income (completed cleans)**, **Cash received**, **Wages paid**, **Wages outstanding**, **Total wage bill** and **Profit**, then **Income by client** and **Wages by HCP**.


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Signed in
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Monthly Revenue vs Wages
Income earned from completed cleans against the wage bill for the same month — what is paid, what is still outstanding, and what is left as profit.
‹ Previous month
September 2026
Next month ›
This month
Income (completed cleans)
R14,655
24 closed job(s)
Payments received
R9,425
5 client payment(s) this month
Wages paid
R5,520
Already paid out to HCPs
Wages outstanding
R960
Allocated shifts not yet paid
Total wage bill
R6,480
81 HCP shift(s)
Profit
R8,175
56% margin
Income by client
Completed cleans in this month, priced from the client's care plan.
CLIENT
JOBS
SHIFTS
INCOME
INVOICED
NOT YET INVOICED
Ntomi Khumalo
8
9
R4,795
R4,795
All invoiced
Deidre Kuyl
3
4
R2,540
R2,540
All invoiced
Duane van den Heever
3
4
R1,950
R1,950
All invoiced
Deltanine Pharmaceuticals
3
3
R1,710
R1,710
All invoiced
Grace Irvine
3
3
R1,710
R1,710
All invoiced
Danielle Bezuidenhout
1
2
R1,100
R1,100
All invoiced
Evah Phago
2
2
R850
R425
R425
Broomstix (in-house)
1
1
R0
R0
All invoiced
Total
24
28
R14,655
R14,230
R425
Wages by HCP
Every allocated shift in this month, valued at the cleaner's shift rate.
HCP
SHIFTS
PAID
OUTSTANDING
TOTAL WAGE
STATUS
Aviwe Ndevu
31
R2,080
R400
R2,480
Outstanding
Akona Luke
30
R2,080
R320
R2,400
Outstanding
Neziswa Damsese
12
R960
R0
R960
Settled
Vuyokazi Mgiqika
8
R400
R240
R640
Outstanding
Total
81
R5,520
R960
R6,480
—

Monthly Revenue vs Wages

Rules & warnings. *Income* is what you earned (cleans completed); *Cash received* is what actually arrived. They differ by whatever is still outstanding — that gap is your collections job.

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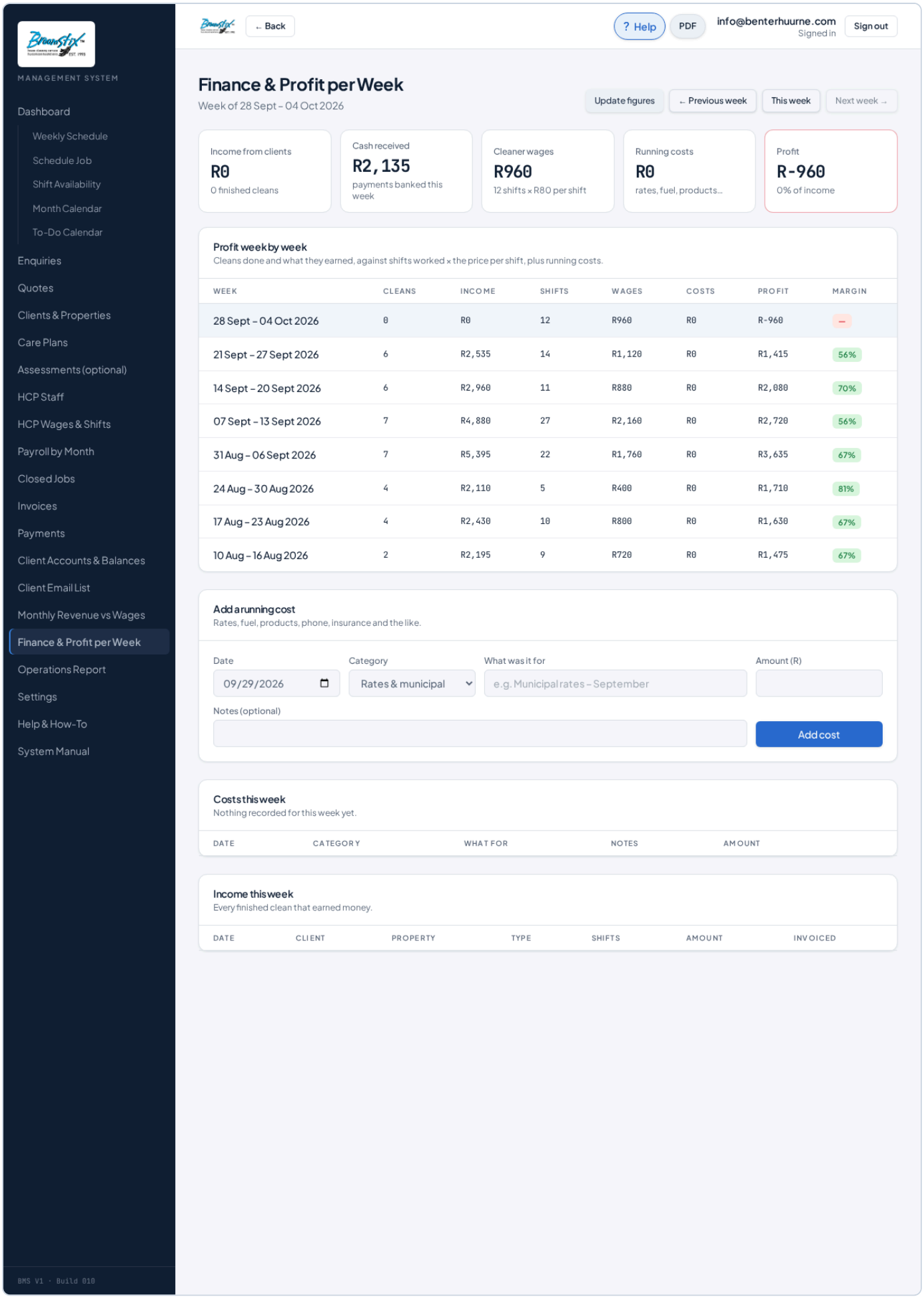
21. Finance & Profit per Week

Purpose. True weekly profit: income from finished jobs, less cleaner wages, less running costs.

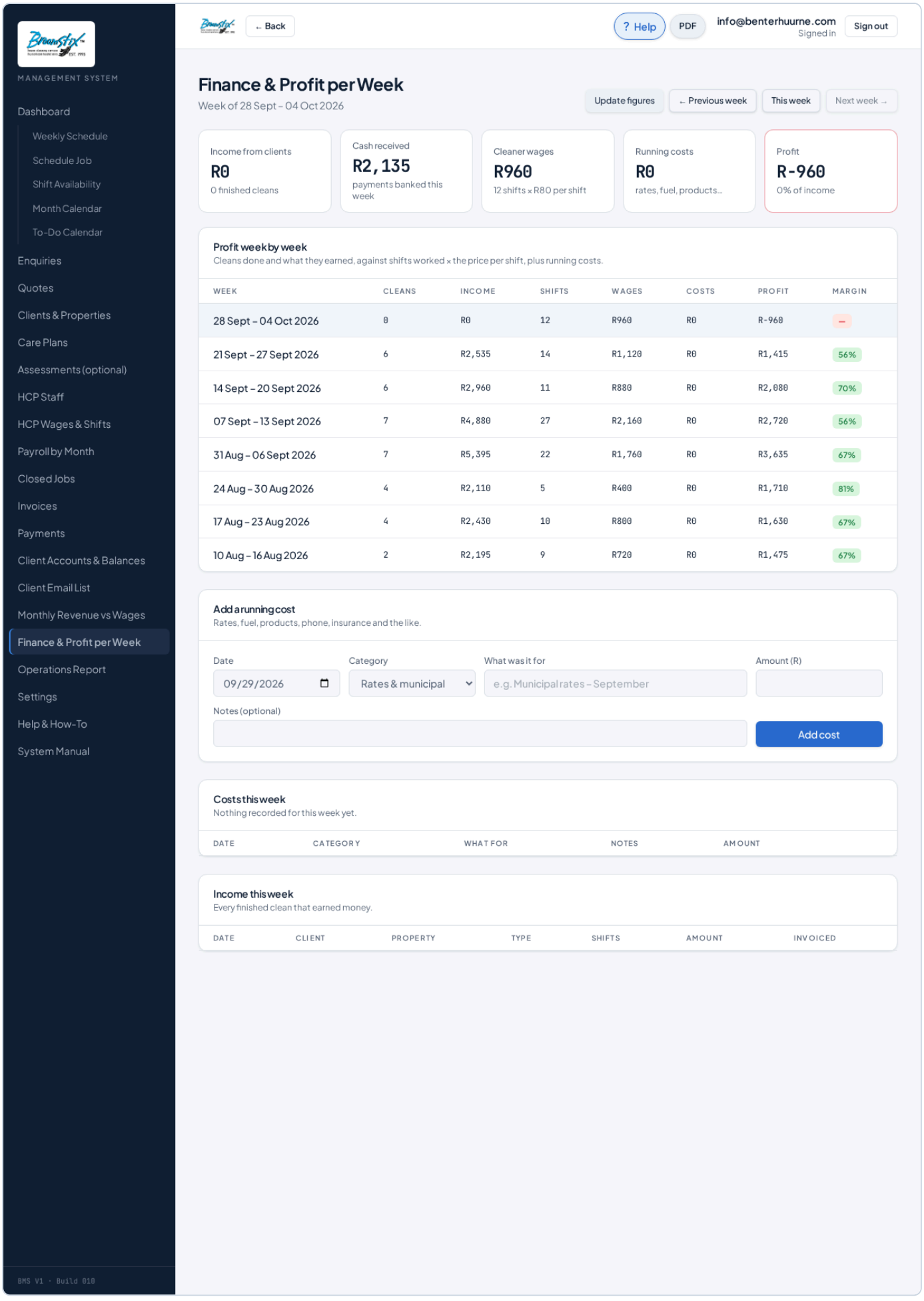
When to use it. Weekly, and whenever you pay a business expense.

Step-by-step.

1. Open **Finance & Profit per Week**.
2. Move between weeks with **← Previous week**, **This week** and **Next week →**.
3. Choose **Update figures** to pull the latest jobs, shifts, payments, costs and shift prices for the week on screen.
4. Read the cards: **Income from clients**, **Cash received**, **Cleaner wages**, **Running costs**, **Profit**.
5. Use **Profit week by week** to compare recent weeks; click a row to jump to that week.
6. Record a cost under **Add a running cost**: date, category, what it was for, amount, notes.
7. Review **Costs this week** (with category totals) and **Income this week** (every finished clean that earned money).


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
Enquiries
Quotes
Clients & Properties
Care Plans
Assessments (optional)
HCP Staff
HCP Wages & Shifts
Payroll by Month
Closed Jobs
Invoices
Payments
Client Accounts & Balances
Client Email List
Monthly Revenue vs Wages
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info@benterhuurne.com
Signed in
Sign out
Finance & Profit per Week
Week of 28 Sept – 04 Oct 2026
Update figures
← Previous week
This week
Next week →
Income from clients
R0
0 finished cleans
Cash received
R2,135
payments banked this week
Cleaner wages
R960
12 shifts × R80 per shift
Running costs
R0
rates, fuel, products…
Profit
R-960
0% of income
Profit week by week
Cleans done and what they earned, against shifts worked × the price per shift, plus running costs.
WEEK
CLEANS
INCOME
SHIFTS
WAGES
COSTS
PROFIT
MARGIN
28 Sept – 04 Oct 2026
0
R0
12
R960
R0
R-960
–
21 Sept – 27 Sept 2026
6
R2,535
14
R1,120
R0
R1,415
56%
14 Sept – 20 Sept 2026
6
R2,960
11
R880
R0
R2,080
70%
07 Sept – 13 Sept 2026
7
R4,880
27
R2,160
R0
R2,720
56%
31 Aug – 06 Sept 2026
7
R5,395
22
R1,760
R0
R3,635
67%
24 Aug – 30 Aug 2026
4
R2,110
5
R400
R0
R1,710
81%
17 Aug – 23 Aug 2026
4
R2,430
10
R800
R0
R1,630
67%
10 Aug – 16 Aug 2026
2
R2,195
9
R720
R0
R1,475
67%
Add a running cost
Rates, fuel, products, phone, insurance and the like.
Date
09/29/2026
Category
Rates & municipal
What was it for
e.g. Municipal rates – September
Amount (R)
Notes (optional)
Add cost
Costs this week
Nothing recorded for this week yet.
DATE
CATEGORY
WHAT FOR
NOTES
AMOUNT
Income this week
Every finished clean that earned money.
DATE
CLIENT
PROPERTY
TYPE
SHIFTS
AMOUNT
INVOICED

Finance & Profit per Week — cards and weekly table


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
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HCP Wages & Shifts
Payroll by Month
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Finance & Profit per Week
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Update figures
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rates, fuel, products…
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0% of income
Profit week by week
Cleans done and what they earned, against shifts worked × the price per shift, plus running costs.
WEEK
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INCOME
SHIFTS
WAGES
COSTS
PROFIT
MARGIN
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R0
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R880
R0
R2,080
70%
07 Sept – 13 Sept 2026
7
R4,880
27
R2,160
R0
R2,720
56%
31 Aug – 06 Sept 2026
7
R5,395
22
R1,760
R0
R3,635
67%
24 Aug – 30 Aug 2026
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10
R800
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R1,630
67%
10 Aug – 16 Aug 2026
2
R2,195
9
R720
R0
R1,475
67%
Add a running cost
Rates, fuel, products, phone, insurance and the like.
Date
09/29/2026
Category
Rates & municipal
What was it for
e.g. Municipal rates – September
Amount (R)
Notes (optional)
Add cost
Costs this week
Nothing recorded for this week yet.
DATE
CATEGORY
WHAT FOR
NOTES
AMOUNT
Income this week
Every finished clean that earned money.
DATE
CLIENT
PROPERTY
TYPE
SHIFTS
AMOUNT
INVOICED

Add a running cost

Rules & warnings.

- **Income** counts finished cleans, not money received.
- **Wages** are shifts worked × the price per shift that applied on that date, whether or not the wages have been paid.
- Capture running costs **as they happen** or your profit will look better than it is.

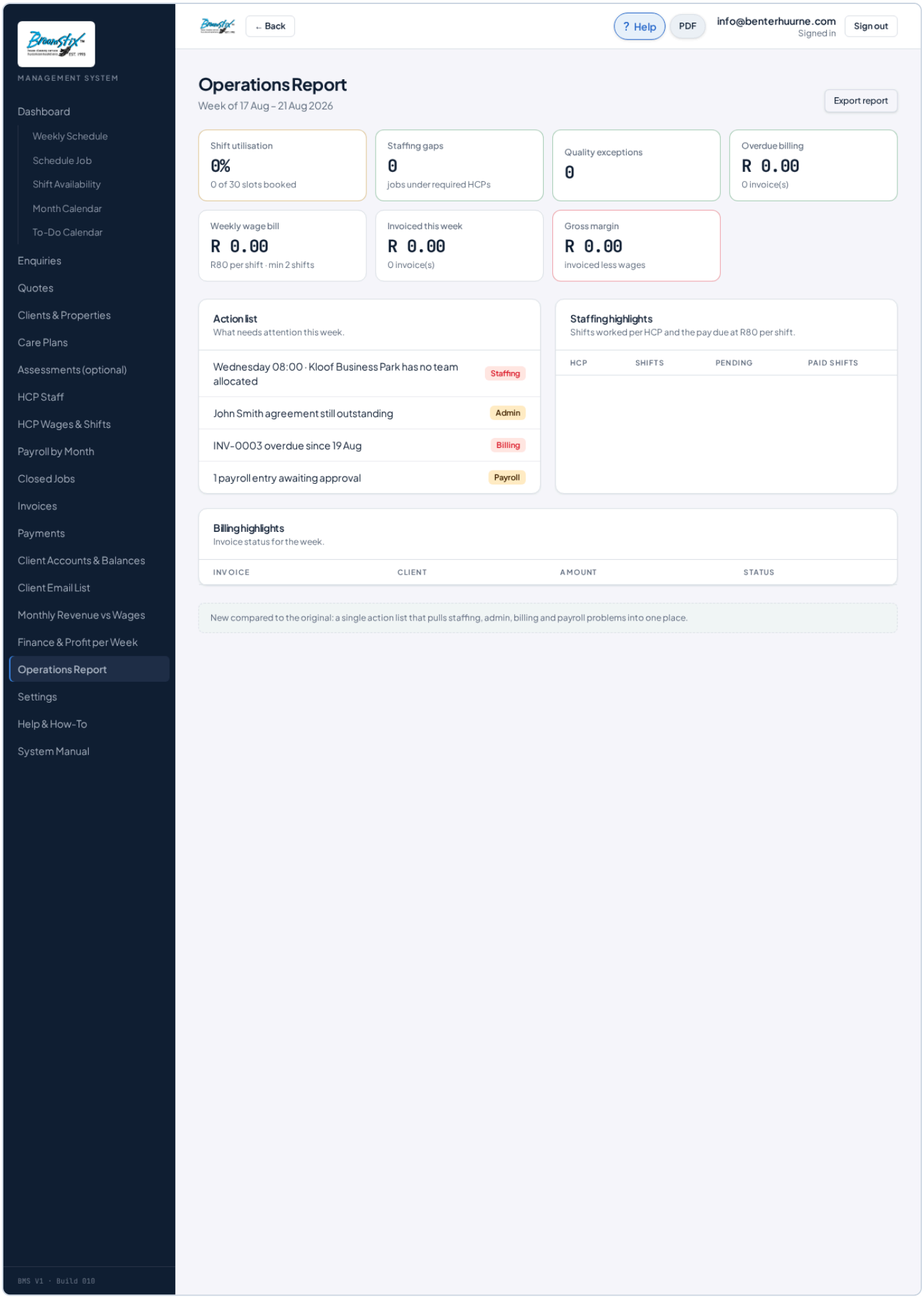
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22. Operations Report

Purpose. The one-page weekly management summary.

When to use it. Once a week, in your review.

Step-by-step. Open **Operations Report** and read **Shift utilisation**, **Staffing gaps**, **Quality exceptions**, **Overdue billing**, **Weekly wage bill**, **Invoiced this week** and **Gross margin**, then work the **Action list**, **Staffing highlights** and **Billing highlights**.


MANAGEMENT SYSTEM
Dashboard
Weekly Schedule
Schedule Job
Shift Availability
Month Calendar
To-Do Calendar
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HCP Staff
HCP Wages & Shifts
Payroll by Month
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Signed in
Sign out
Operations Report
Week of 17 Aug – 21 Aug 2026
Export report
Shift utilisation
0%
0 of 30 slots booked
Staffing gaps
0
jobs under required HCPs
Quality exceptions
0
Overdue billing
R 0.00
0 invoice(s)
Weekly wage bill
R 0.00
R80 per shift · min 2 shifts
Invoiced this week
R 0.00
0 invoice(s)
Gross margin
R 0.00
invoiced less wages
Action list
What needs attention this week.
Wednesday 08:00 · Kloof Business Park has no team allocated
Staffing
John Smith agreement still outstanding
Admin
INV-0003 overdue since 19 Aug
Billing
1 payroll entry awaiting approval
Payroll
Staffing highlights
Shifts worked per HCP and the pay due at R80 per shift.
HCP
SHIFTS
PENDING
PAID SHIFTS
Billing highlights
Invoice status for the week.
INVOICE
CLIENT
AMOUNT
STATUS
New compared to the original: a single action list that pulls staffing, admin, billing and payroll problems into one place.

Operations Report

Rules & warnings. The **Action list** is the point of this screen — clear it every week.

---

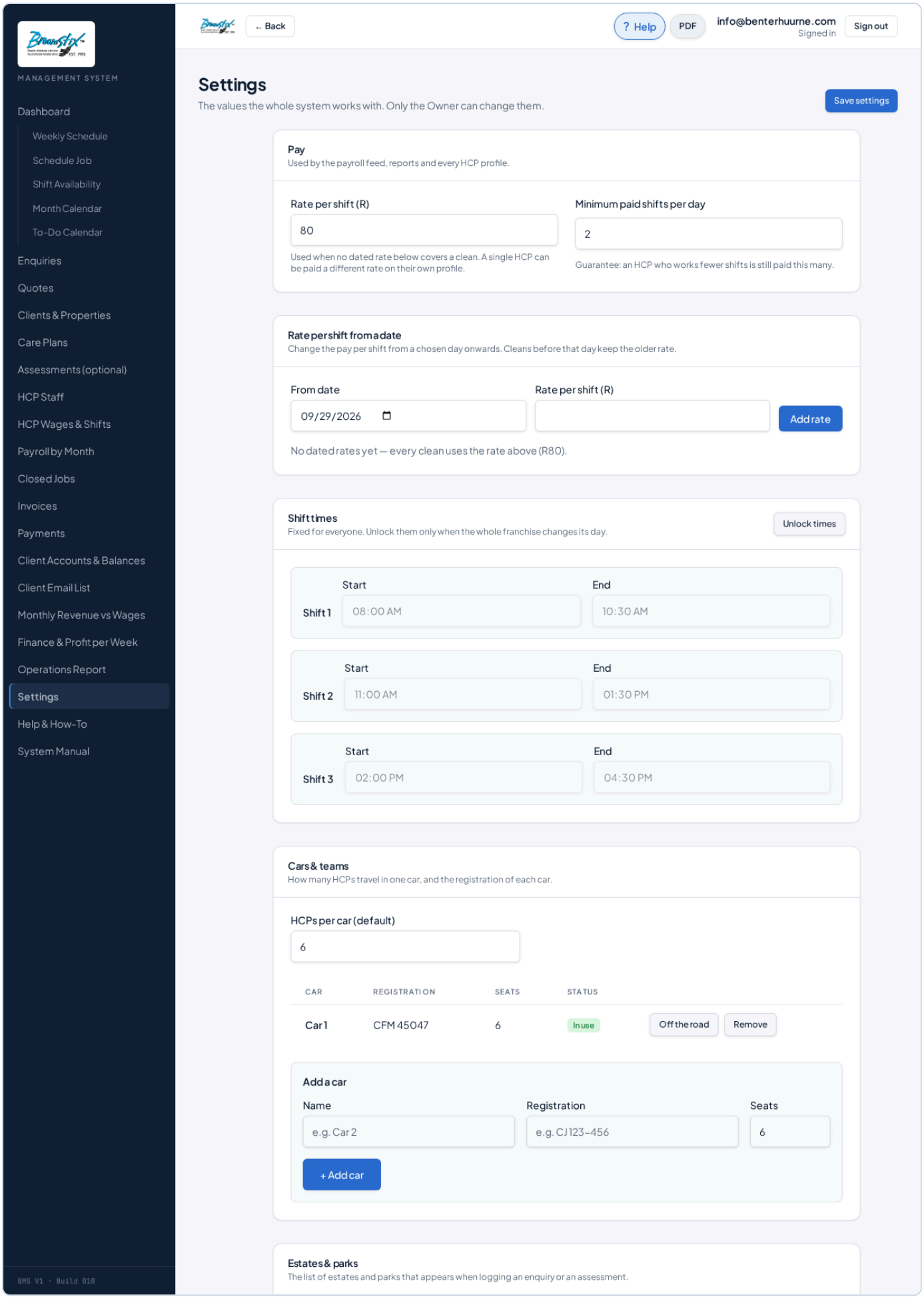
23. Settings

Purpose. The values the whole system works with. **Only the Owner may change them.**

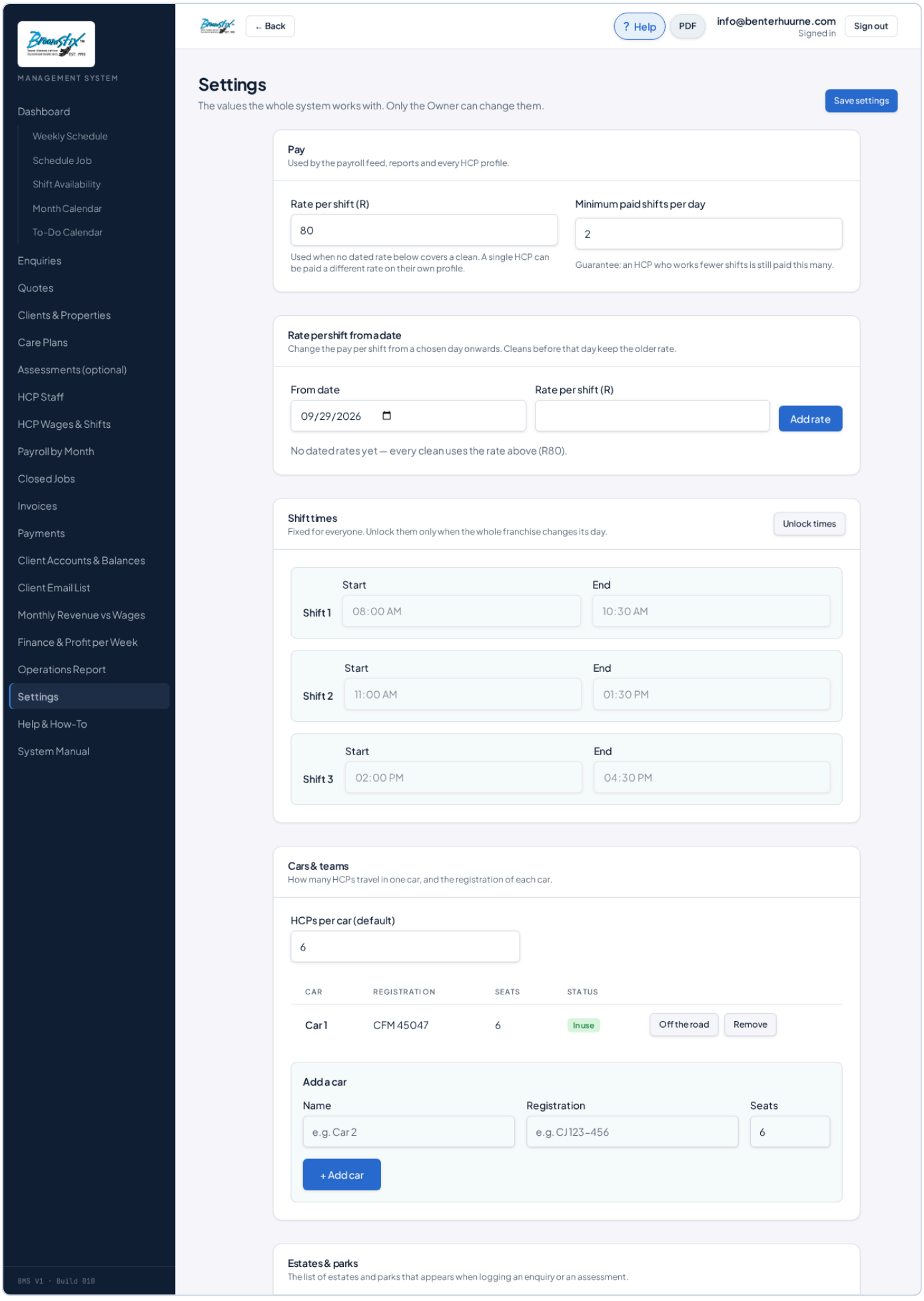
When to use it. At setup, and whenever a rate, shift time, car, estate, frequency, holiday or user access changes.

Step-by-step.

1. **Pay** — the standard rate per shift, the minimum paid shifts and HCPs per car, used by the payroll feed, reports and every HCP profile.
2. **Rate per shift from a date** — add a new rate with the date it takes effect. Wages for each clean use the newest rate on or before that clean's date.
3. **Shift times** — the three fixed shifts.
4. **Cars & teams** — the vehicles and their capacity.
5. **Estates & parks** — the estate list used by the assessment, quote and care-plan dropdowns.
6. **Cleaning frequencies** — weekly, fortnightly, monthly, once-off and their repeat rules.
7. **People & access** and **Who may do what** — user accounts and roles.
8. **Public holidays** — choose the public holidays for this year and next, either manually or from the South African suggestions (including the Monday observed after a Sunday holiday). BMS then lists the **affected cleans**, and for each one you decide manually: **move** it to another date, **keep** it, **cancel** it, or **restore** it.
9. **Clean change history** — the full audit trail of every clean that was moved, cancelled, kept, restored or deleted, with the actor and the time.


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Signed in
Sign out
Settings
The values the whole system works with. Only the Owner can change them.
Save settings
Pay
Used by the payroll feed, reports and every HCP profile.
Rate per shift (R)
80
Used when no dated rate below covers a clean. A single HCP can be paid a different rate on their own profile.
Minimum paid shifts per day
2
Guarantee: an HCP who works fewer shifts is still paid this many.
Rate per shift from a date
Change the pay per shift from a chosen day onwards. Cleans before that day keep the older rate.
From date
09/29/2026
Rate per shift (R)
Add rate
No dated rates yet — every clean uses the rate above (R80).
Shift times
Fixed for everyone. Unlock them only when the whole franchise changes its day.
Unlock times
Start
End
Shift 1
08:00 AM
10:30 AM
Start
End
Shift 2
11:00 AM
01:30 PM
Start
End
Shift 3
02:00 PM
04:30 PM
Cars & teams
How many HCPs travel in one car, and the registration of each car.
HCPs per car (default)
6
CAR
REGISTRATION
SEATS
STATUS
Car 1
CFM 45047
6
In use
Off the road
Remove
Add a car
Name
e.g. Car 2
Registration
e.g. CJ 123-456
Seats
6
+ Add car
Estates & parks
The list of estates and parks that appears when logging an enquiry or an assessment.

Settings — Pay and Rate per shift from a date


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In use
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Name
e.g. Car 2
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e.g. CJ 123-456
Seats
6
+ Add car
Estates & parks
The list of estates and parks that appears when logging an enquiry or an assessment.

Settings — Public holidays and affected cleans

Rules & warnings.

- BMS **never** moves or cancels a clean on a public holiday by itself — you decide, clean by clean.
- Changing a rate from a date affects future cleans only; past wages stay as they were paid.
- Removing an estate or frequency does not change plans already using it.

---

24. How information flows through BMS

24.1 The full life of one clean

1. **Enquiry logged** — a name and a need. No money, no diary entry.
2. **Quote raised** — directly from the enquiry, or after an optional Home Assessment; every quoted clean has its own frequency, HCPs, shifts, price and notes.
3. **Quote accepted** — a day and shift is chosen for every clean on the quote.
4. **Care Plan created** with an effective date, weekday(s), shift time, shift count and price. BMS **generates the cleans** into the diary.
5. **Weekly Schedule** — the clean occupies Property A or B in a fixed shift; you confirm the team and the team leader.
6. **Job card worked** — rooms ticked and the team leader signs the work off.
7. **Team leader signs off** → status **Completed**. This is the switch. At that moment:
    - **Closed Jobs** counts the amount as **revenue earned**;
    - the clean appears in **Invoices → Every finished clean, per client** as ready to bill;
    - its shifts count towards **HCP Wages & Shifts**.
8. **Wages paid** — recorded on HCP Wages with the payment day; the cleaner's wage slip, portal and **Payroll by Month** reflect it.
9. **Invoice generated** — status **Draft**. Still reversible with **Undo invoicing**.
10. **Invoice issued** — status **Sent**. The amount is now **Outstanding**, and **Overdue** if it passes the due date.
11. **Payment recorded** — part payments reduce the balance; when payments equal the total the invoice becomes **Paid**. Statement, portal, Payments, Monthly Revenue vs Wages and Finance all update.
12. **Profit** — Finance & Profit per Week shows income less wages less running costs for that week.

24.2 What each figure really counts

Figure	Counted when	Where to see it
Revenue earned	Job card signed off	Closed Jobs, Monthly Revenue vs Wages, Finance
Invoiced	Invoice created	Invoices, Operations Report
Cash received	Payment recorded	Payments, Monthly Revenue vs Wages, Finance
Wage bill	Shift allocated to a signed-off clean	HCP Wages, Finance
Wages paid	Marked paid with a payment day	HCP Wages, Monthly Revenue vs Wages
Running costs	Cost captured on Finance	Finance & Profit per Week

24.3 Status dictionary

Status	Applies to	Meaning
Draft	Quote, Invoice	Prepared in BMS, not yet sent. Reversible.
Sent (issued)	Quote, Invoice	Sent to the client; a reply or payment is expected.
Outstanding	Invoice	Money still owing, including part-paid invoices.
Overdue	Invoice	Outstanding past the due date.
Paid	Invoice	Payments equal the total; nothing owing.
Completed	Clean / job card	Signed off by the team leader. Revenue earned; billable.
Completed with an exception	Clean / job card	Completed, with the issue written into the team leader's **sign-off notes**. There is no separate status in BMS V1.
Cancelled	Clean / job card	Called off. No revenue, no wages.

---

25. The Broomstix operating rhythm

Every day

1. Dashboard — clear **Waiting final QC** and **Understaffed**.
2. Action new **Enquiries** and portal **quote requests**.
3. Sign off yesterday's job cards.

Every week

1. Capture **Shift Availability** for the coming week.
2. Confirm teams and team leaders on the **Weekly Schedule**.
3. Empty **Jobs still to close**.
4. Pay staff on **HCP Wages**, send wage slips, and use **Payroll by Month** for bank reconciliation.
5. Capture running costs and review **Finance & Profit per Week**.
6. Work the **Operations Report** action list.

Every month

1. Generate invoices, issue them, and send statements from the **Client Email List**.
2. Chase **Overdue** invoices.
3. Review **Monthly Revenue vs Wages**.

Every year

1. Load next year's **public holidays** in Settings and decide on the affected cleans.
2. Review the rate per shift with a new effective date.

---

26. Golden rules

1. Work runs **Monday to Friday**, in three fixed shifts, with at most **two properties at a time**.
2. **No sign-off, no money.** An unsigned clean earns nothing and cannot be invoiced.
3. **Never delete a clean to correct it — move it.** Deleting destroys the record; moving keeps the audit trail.

4. Every team needs a **TL/QC** cleaner.
5. Fix a price on the **care plan**, not on the invoice.
6. Record **part payments** exactly as received; never edit the invoice total.
7. Accept BMS’s **duplicate client** warning — one client, one record.
8. Wages are **per shift**, at the rate effective on the clean’s date, with the weekly minimum applied.
9. Capture **running costs** as they happen.
10. Only the **Owner** changes Settings; changing a job’s required cleaners or deleting its job card needs an Owner or Manager password.
11. A **Broomstix (in-house)** day booked on Property B is paid to the cleaner as a shift, but is **never priced and never invoiced** to any client.

Broomstix Management System (BMS) — User & Operations Manual · Version BMS V1.1 — 29 September 2026