

# BizApp360 Complete User Guide

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This guide explains how owners, staff, field teams and BizApp360 internal admins should use BizApp360 during the controlled pilot and launch-readiness period.

## 1. What BizApp360 Is

BizApp360 is a South African-first business operating system for contractors, service teams, SMEs, facilities teams and field workers. It brings customers, sites, quotes, invoices, jobs, job cards, staff, departments, documents, support, add-ons, accounting, mobile field work and integrations into one controlled workspace.

## 2. Who It Is For

BizApp360 is for company owners, managers, field technicians, sales representatives, project managers, HSE officers, finance staff, HR staff, stock/stores users, facilities teams, approved contractors and future white-label clients.

## 3. Start A 15-Day Trial

1. Open <https://www.bizapp360.com>.
2. Click **\*\*Start Trial\*\***.
3. Enter your basic account and company details.
4. Accept the terms, privacy, POPIA and trial terms.
5. Submit signup.

[Screenshot needed: Start Trial page]

## 4. Confirm Email

1. Open the confirmation email.
2. Click the BizApp360 confirmation button.
3. Return to BizApp360.
4. Log in if requested.

[Screenshot needed: Email confirmation]

## 5. Choose Package

Choose the package that matches your business size and workflow:

- Starter Control: small teams starting with customers, quotes, invoices and basic jobs.
- Operations Pro: field teams needing scheduling, job cards, mobile proof and stock used on jobs.
- Business360: growing teams needing departments, HR self-service, approvals and management reporting.
- Scale Enterprise: branch/multi-site operations, advanced permissions and white-label readiness.
- Facilities Core / Pro / Enterprise FM: facilities, property, tenant and contractor workflows.

All prices are excluding VAT.

## 6. Request Add-ons

Add-ons can be selected during trial setup or later under **\*\*Add-ons\*\***.

Add-on statuses:

- Available: visible but not active.
- Requested: you asked BizApp360 to review it.
- Pending setup: BizApp360 must configure or approve it.
- Active: available to use.
- Suspended: temporarily disabled.
- Cancelled: no longer available.

Paid features should not unlock until the add-on is active.

## 7. Complete Business Setup

Open **\*\*Business Setup\*\*** or **\*\*Universal Setup\*\***.

1. Confirm your company profile.
2. Add industry details.
3. Choose whether you sell services, products or both.
4. Add accounting and payroll preferences.
5. Choose departments and staff setup needs.
6. Save and continue.

[Screenshot needed: Business Setup page]

## 8. Add Company Details

Add:

- Registered/trading name
- Registration number
- VAT number and VAT status
- Phone and email
- Address
- Logo
- Website
- Billing contact

#### 9. Add First Customer

1. Open **Customers**.
2. Click add customer.
3. Add customer name, contact person, phone and email.
4. Add notes if needed.
5. Save.

[Screenshot needed: Add Customer page]

#### 10. Add Sites And Branches

Use **Sites** or **Branches** to add physical places where work happens. Link sites to customers where possible.

#### 11. Create A Quote

1. Open **Quotes**.
2. Choose customer/site.
3. Add products or services.
4. Check VAT/ex VAT wording.
5. Save or send.

#### 12. Create An Invoice

1. Open **Invoices**.
2. Choose customer or job.
3. Add billable items.
4. Check payment terms.
5. Save invoice.

### 13. Create A Job

1. Open **\*\*Jobs\*\***.
2. Choose customer and site.
3. Add job scope.
4. Assign staff if needed.
5. Save job.

### 14. Create A Job Card

1. Open **\*\*Job Cards\*\***.
2. Choose job/customer/site.
3. Add checklist, notes and assigned technician.
4. Field staff can add photos, parts used, time and signature.

### 15. Add Staff

Open **\*\*Team & Access Control\*\***.

1. Add staff name, email and phone.
2. Choose department.
3. Choose role template.
4. Choose dashboard template.
5. Decide whether to send a login invite.

No staff password is shown or stored by BizApp360 screens.

### 16. Create Departments

Departments help group people, dashboards, documents and approvals. Common departments include Admin, Finance, Sales, Operations, Field Team, HR, Stock, Fleet, Projects, Compliance and Support.

### 17. Assign Permissions

Use role templates first. Keep access simple:

- Owners see the full company workspace.
- Managers see team and department work.
- Field technicians see assigned jobs/job cards.
- Finance sees invoices, payments and reports.

- Sales sees leads, customers and quotes.

## 18. Invite Staff

1. Add staff record.
2. Choose login access.
3. Send invite link when ready.
4. Staff create their own password securely.

## 19. Staff Login

Staff go to <https://www.bizapp360.com/login>, sign in, and see the dashboard allowed for their role.

## 20. Field Portal

Field staff use **Field Portal** to see assigned work, site address, job scope, checklist, photos, parts used, notes, signature and completion status.

## 21. Install BizApp360 On Mobile

1. Open <https://www.bizapp360.com/mobile-app>.
2. Scan the QR code or open BizApp360 on the phone.
3. Log in.
4. Add to Home Screen / Install App.
5. Open BizApp360 from the home screen.

[Screenshot needed: Mobile App QR page]

## 22. Scan QR Code

Use the phone camera to scan the QR code on the Mobile App page. The code opens the BizApp360 install or login page.

## 23. WhatsApp Setup

Manual capture and click-to-chat can be used first. Official WhatsApp Business API requires Meta/provider setup, phone number ID, business account ID, access token and webhook verification. Tokens must be stored in Vercel server environment variables, not in browser forms.

## 24. Email Setup

BizApp360 system email uses branded provider setup. Internal mailboxes are managed in the Super Admin Mail Centre. Client mailboxes remain company-scoped and must not show BizApp360 internal mailboxes.

## 25. Support Tickets

Open **Support**, choose category and priority, explain the issue and submit. Support tickets can be open, closed, reopened or archived.

## 26. Billing And Subscription

Billing shows package, trial status, add-ons and payment readiness. PayFast live activation must only happen after merchant approval, sandbox tests, webhook validation and billing checks pass.

## 27. Add-ons

Open **Add-ons** to request extra services such as marketplace discovery, white-label, custom domain, data migration, WhatsApp/SMS, AI, accounting import, training or dedicated onboarding.

## 28. Accounting

Open **BizApp360 Accounting**. Start with:

- Money In
- Money Out
- Invoices
- Expenses
- VAT
- Bank Import
- Reports
- Accountant Export

Advanced bookkeeper/SARS workflow tools are available further down the same workspace.

## 29. Import From Accounting Software

Use **Import & Accounting Setup** or **Integrations** for Sage, QuickBooks, Xero, Zoho Books or CSV import/export. API integrations require provider credentials and testing.

### 30. Stock, Suppliers, Fleet, Assets And Documents

Use the matching workspace pages to capture business records. Archive/restore should be used instead of hard delete for important operational data.

### 31. Compliance, Permits, HSE And Quality

Use Compliance, Permits, Incidents, Inspections and Quality pages to track safety files, corrective actions, audits and document readiness.

### 32. Get Support

Use **Support**, **Show Me How**, or contact BizApp360 Support through the public support page.

### 33. First 15 Minutes

During the first 15 minutes:

1. Confirm company profile.
2. Choose package.
3. Skip or request add-ons.
4. Add first customer.
5. Add first staff member.
6. Open the dashboard.

### 34. Before Trial Ends

Before the trial ends:

1. Complete setup.
2. Add real customers and jobs.
3. Invite staff.
4. Test quotes/invoices/job cards.
5. Review billing/add-ons.
6. Contact BizApp360 if you need migration or training.

### 35. FAQ

**Do I need coding?** No.

**Can I use BizApp360 on a phone?** Yes, use the installable web app.

**\*\*Are add-ons active immediately?\*** No, requested add-ons stay pending until approved/setup.

**\*\*Can I delete test accounts?\*** Platform admins can mark test/demo, archive, restore or soft-delete test records safely.

**\*\*Does BizApp360 store card details?\*** No raw card details should be stored.

### 36. Troubleshooting

- If login fails, use Forgot Password.
- If an area is being prepared, contact BizApp360 Support.
- If an email does not arrive, check spam and ask support to verify delivery logs.
- If WhatsApp is not connected, use manual capture while Meta/provider setup is completed.
- If PayFast is not active, keep billing in trial/manual readiness mode.