RESOLVE FACILITIES

# User Manual

Complete guide to the multi-tenant request and operations management platform — every feature, screen and setting.


VERSION

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# Contents

CHAPTER 1

# About ReSOLVE Facilities

ReSOLVE Facilities is a multi-tenant platform for managing service requests, technical teams and maintenance operations. Built for condominiums, hotels, hospitals, schools, data centers and any organization with units, sectors and field teams.

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## What the platform does

Each ReSOLVE customer — called a **tenant** — has its own isolated workspace: users, service categories, organizational units (sectors), infrastructure (properties / floors / rooms), assignment rules and request data. No tenant ever sees another tenant's data.

Within each tenant, users create **requests** (service orders): a water leak in a room, a broken piece of equipment, a transport to schedule, an event to prepare. Each request follows a lifecycle — *Open → In progress → Resolved* — with priority, resolution deadline (SLA), assignment to a unit and a responsible technician.

## Who it is built for

- **Managers and administrators** — configure the structure (units, categories, rules), manage the team and monitor operational performance on the Dashboard.
- **Supervisors** — distribute work, monitor SLAs and validate resolutions.
- **Technicians** — receive assigned requests, log progress, attach photos, communicate.
- **Users and residents** — open requests from the phone or portal, follow status, receive notifications.

## Essential concepts

### Tenant (organization)

The customer that subscribes to the platform. Each tenant has its own users, configuration and data.

### Unit (sector)

Organizational sub-division inside a tenant — e.g. "Maintenance", "Cleaning", "Reception". Every request is assigned to a unit.

### Infrastructure

The physical hierarchy where requests happen: *property → floor → room*. Lets you pinpoint where the issue is.

### Category and subcategory

Request type (Cleaning, Electrical, Transport, Event...). Configurable per tenant. Can include extra dynamic fields (dates, headcount, etc.).

### Request (service request)

The core unit of work. Has title, description, category, location, priority, SLA deadline, responsible technician, history, attachments and an associated message thread.

### SLA

"Service Level Agreement" — maximum resolution time by category and priority. Available on Growth and higher plans.

### Plan

Free, Starter, Growth, Enterprise or Custom. Defines limits (users, units, requests) and features (AI, SLAs, white-label).

> **BEST PRACTICE**
>
> Before inviting the team, spend 15 minutes setting up **units**, **infrastructure** and **categories**. A well-configured tenant from day one cuts assignment errors and speeds up daily work.

CHAPTER 2

# Creating an account

Sign-up is self-service at `app.resolve-facilities.com/signup`. Every choice you make in this flow defines how your tenant is provisioned — from plan limits to the default category catalog.

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## Before you start

You need:

- A valid email address (will be the login of the first administrator).
- The legal or commercial name of the organization — used in emails, invoices and as the default logo placeholder.
- To know the **organization type** (condominium, hotel, hospital, school, data center, residential, business, other). This determines the initial category catalog.
- If you are paying now, a card (billing is in EUR, processed by Stripe).

## Sign-up walk-through

1. **Organization type** — pick from the dropdown (condominium, hotel, hospital, etc.). The list is automatically translated to the interface language.
2. **Plan** — click the card of the plan you want. *Free* and *14-day Trial* don't require a card; *Starter*, *Growth*, *Enterprise* and *Custom* open Stripe Checkout after the next step.
3. **Organization details** — fill in:
   - Company name
   - Administrator name (will be the first user)
   - Email (will be the login)
   - Password (8+ characters recommended)
   - System language (PT / EN / FR / ES)
4. **Consent** — accept the Terms and Privacy Policy (linked at `resolve-facilities.com/termos.html` and `/privacidade.html`).
5. **Submit** — the system creates the authentication account, provisions the tenant and loads the appropriate category catalog. If the plan is paid, you are redirected to Stripe Checkout; if it is Free or Trial, you go straight to the Dashboard.

**6** **Email confirmation** — you will receive a welcome email from `no-reply@resolve-facilities.com` with next steps.

## What each choice loads

Creating the account runs an atomic server transaction that creates several data rows at once. The table below summarises what is loaded based on your choices:

| CHOICE | WHAT IS CREATED / LOADED |
|---|---|
| **Organization type** | Initial category and subcategory catalog tailored to the sector. For example, a *hotel* gets categories like "Rooms / Cleaning" and "Events"; a *hospital* gets "Biomedical maintenance" and "Clinical hygiene". |
| **System language** | The category catalog above is loaded in the chosen language. Transactional emails (welcome, invitations, dunning) are also sent in this language. |
| **Plan** | Tenant limits: max users, max units, max requests per month. Features enabled: AI, SLAs, white-label, integrations (see chapter 19). |
| **14-day Trial** | Creates the account with Starter limits (5 users, 1 unit, 1000 requests) for 14 days. On day 15, if no paid plan has been activated, the account is **suspended** (it does not auto-downgrade to Free — moving to Free is an explicit choice). |
| **Organization name** | Appears in invoices, emails, and on the Dashboard until you upload your own logo (white-label, Enterprise+). |
| **Administrator name + email** | The first user is created with role `SYSTEM_ADMIN`. You can invite more users later. |
| **Default unit** | A "General" unit is automatically created (rename it later) to receive requests until you configure specific sectors. |

> **HEADS-UP — TRIAL**
>
> At the end of the 14-day trial, the account is **suspended** and users lose access until they subscribe to a plan. Data is preserved but work stops. We recommend setting an alarm for day 12 and deciding in time.

## Custom plan

The **Custom** plan is for organizations that don't fit the fixed tiers. When you pick Custom during sign-up, you go to a calculator where you specify:

- **Number of users** — between 25 and 1000 (above this, contact sales).
- **Number of units (sectors)** — minimum 3, always lower than the number of users.

The price is calculated in real time based on marginal per-user tiers (€4 for the first 199 users, €3.75 between 200 and 499, €3.50 above 500) multiplied by an organizational complexity factor (more units per user = more operational isolation = more support overhead). Includes AI, SLAs, white-label, email support and assisted onboarding.

Above 1000 users, self-service sign-up is not available — email support@resolve-facilities.com and we will prepare a tailored quote.

## Accepting an invitation

If you were invited to an existing organization, you receive an email from `no-reply@resolve-facilities.com` with the subject "You have been added to [Organization] on Resolve Facilities" and a "Sign in now" button. Clicking that button:

1. Opens the login screen in the email's language.
2. You sign in with your usual email (or the account is created if this is your first tenant).
3. If you already belong to other organizations, the organization picker (chapter 3.3) appears with the new entry available.

Your administrator sets the role (admin, supervisor, technician, user, resident) — you can request a role change directly from whoever invited you.

CHAPTER 3

# Signing in and recovering your password

Access to the platform is at `app.resolve-facilities.com`. The flow has two steps (email first, password second) and supports multiple organizations per user.

## Sign in

1. Go to app.resolve-facilities.com.
2. Enter the email and click *Continue*.
3. Enter the password. You can tick "Keep me signed in" to avoid repeating the login on every visit.
4. After authentication, you are taken to the Dashboard. If you belong to several organizations, the organization picker is shown first.

## Recover password

If you forgot your password:

1. On the login screen, click *Forgot password?*.
2. Enter the email tied to the account and submit.
3. You will receive an email with a recovery link. **The link is time-limited and can be used only once.**
4. Click the link. You are taken to a recovery page that automatically sets the language you requested the reset in and forwards you to the new-password screen.
5. Set the new password (8+ characters recommended), confirm and submit. You are sent back to the login automatically.

> **EXPIRED LINK**
>
> If the recovery link has expired or has already been used, you'll see a clear message — just repeat the request from "Forgot password?".

## Multiple organizations

The same email can belong to several organizations (for example, a technician servicing two condominiums). In that case, after login the **Organization picker** appears:

- Lists the organizations you belong to, with the plan and the number of users.
- Click the card of the organization you want — you go to that organization's Dashboard.
- You can switch organization later from *Settings* → *Select organization*.

> **DID YOU KNOW…**
>
> The password is unique per user (not per organization). If you change the password, it remains valid for every organization you belong to.

CHAPTER 4

# Installing on mobile

ReSOLVE Facilities is a **Progressive Web App (PWA)**. It is not in the Apple or Google stores — install it directly from the browser in a few seconds. Works like a native app: icon on the home screen, full-screen with no URL bar, push notifications.

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## iOS (Safari)

**IPHONE AND IPAD**

1. Open **Safari** (mandatory — does not work on Chrome or Firefox on iOS).
2. Navigate to `app.resolve-facilities.com`.
3. Sign in (recommended, to make sure the icon is tied to your account).
4. Tap the **Share** button in the bottom bar (square with an up arrow).
5. Scroll down and pick **Add to Home Screen**.
6. Confirm the name ("ReSOLVE") and tap **Add**.
7. The icon appears on the home screen — open it like any other app.

**ANDROID**

1. Open **Chrome**.
2. Navigate to `app.resolve-facilities.com`.
3. Sign in.
4. An "*Install app*" prompt appears automatically — tap to accept.
5. Alternatively: Chrome menu (three dots) → **Install app**.
6. Confirm — the icon is added to the app drawer and to the home screen.

## Android (Chrome)

Android is the most direct path: Chrome automatically detects that the app is installable and shows a prompt. If the prompt disappears or never showed up:

1. Tap the three dots in the top-right of Chrome.
2. Pick **Install app** (or *Add to Home Screen*, depending on the version).
3. Confirm.

**TIP FOR TABLETS**

On iPads and Android tablets, the procedure is identical. On iPad, the Share bar is in the top-right of Safari, not in the bottom bar.

## Allow notifications

After installing and signing in for the first time, the browser asks if you want to allow notifications. **Accept** — notifications are key to receiving alerts about new requests, assignments and real-time messages.

> **IMPORTANT FOR IOS**
>
> On iPhone, push notifications only work if the app was **installed on the home screen** (steps above). On Safari opened as a web page, iOS does not allow push. If you don't receive notifications on iPhone, make sure you are opening the app from the home-screen icon and not from Safari.

To manage notifications after accepting, go to *Settings* → *Notifications* inside the app (chapter 10.3) or to the operating system settings (iPhone Settings / Android → Notifications → ReSOLVE).

CHAPTER 5

# Dashboard

The Dashboard is the home page after sign-in. It shows the day's operational health at a glance: active requests, critical ones, overdue ones, distribution by category and team workload.

## Greeting and logo

At the top a greeting adapts to the time of day (*Good morning / Good afternoon / Good evening*) followed by the organization's logo. If you have an Enterprise+ plan and configured white-label (chapter 18), your own logo appears.

## Key indicators (KPIs)

### Active

Sum of requests in state *Open*, *In progress* and *Delayed*. The best instantaneous read of "open work".

### Critical

Subset of active requests with **CRITICAL** priority. Must be handled immediately.

### Delayed

Requests whose SLA countdown is past its deadline (chapter 17). Only shown if SLAs are configured (Growth+).

### Resolved this month

Count of requests resolved in the current month — a productivity metric.

### Assigned to me

Visible to technicians and supervisors: requests where you are the assigned responsible and are still active.

## Distribution chart

Shows the composition of active requests in a doughnut-style chart, with a dropdown to choose the grouping criterion:

- **Category** — Cleaning, Maintenance, IT, etc.
- **Location** — properties / buildings.
- **Priority** — Critical, High, Normal, Low.
- **Status** — Open, In progress, Delayed.
- **Unit** — responsible sectors. Includes an "Awaiting assignment" segment for requests not yet distributed.

## Team workload

Visible only to users with role `ADMIN`, `SYSTEM_ADMIN` or `SUPERVISOR`. A horizontal bar chart with the number of active requests per technician — useful to spot overload or imbalanced distribution.

## Onboarding checklist

For new organizations, a checklist of six steps appears to accelerate initial configuration:

1. Invite first user
2. Create first unit (sector)
3. Review categories
4. Create first request
5. Assign a technician
6. Explore the Dashboard

You can *Dismiss* the checklist at any time — it does not block any feature. It reappears if manually restored.

CHAPTER 6

# Requests

The *Requests* screen is the operational hub: it lists every request you can see, filtered in eight tabs. Visibility depends on your role and the scope defined in Permissions (chapter 16).

## The eight tabs

| TAB | SHOWS |
|---|---|
| **All** | Every request visible to your user. |
| **Assigned to me** | Active requests where you are the assigned technician. |
| **Open** | Status *Open* and *Delayed*. |
| **In progress** | Status *In progress* (technician has started work). |
| **Critical** | Priority *CRITICAL* and still active. |
| **Delayed** | Past the SLA deadline (Growth+). |
| **Resolved** | Successfully closed. |
| **Cancelled** | Cancelled or rejected. |

## Request card

Each request appears as a card with:

- Category icon + name.
- Title (clickable — opens the detail).
- Priority badge (red = critical, amber = high, etc.).
- Current status.
- Location (property / floor / room).
- Responsible unit (or "Awaiting assignment").
- Time since creation (relative format: "2h ago").
- Avatar and name of the assigned technician.
- SLA badge with countdown (if applicable).

Two extras: orders generated by maintenance plans carry the **Preventive** badge (violet — chapter 22), and in the header you can switch between the **card view** and the **condensed view** (one line per request, 2-3× more items per screen). The choice is remembered per device and also exists on the Assets, Plans and Conversations lists.

## CSV export

The *Export CSV* button downloads all requests visible in the current tab in CSV format. Useful for external analysis (Excel, BI, accounting). Columns included:

- ID, Category, Subcategory, Title, Description
- Priority, Status
- Location (property / floor / room)
- Responsible unit, Assigned technician
- Created at, Resolved at
- **Resolution time (hours)** — effective duration between open and resolved
- **SLA defined (hours)** — maximum deadline configured for the category + priority
- **SLA met** — Yes / No

> **PERFORMANCE ANALYSIS**
>
> Combining "Resolution time" and "SLA defined" in Excel or BI makes it easy to spot categories or units consistently missing deadlines — the basis for continuous-improvement conversations.

CHAPTER 7

# Creating a request

The *New Request* screen gathers everything needed to open a service order. The form has five expandable sections — you can fill them in any order.

## Photo and AI analysis

This is the first section of the form. You can attach a photo through:

- **Camera** — take an instant photo (mobile).
- **Gallery / file** — pick an existing image.

### AI analysis STARTER+

After attaching a photo, the *AI analysis* button appears. When clicked:

1. The image is sent to the AI service (Google Gemini).
2. The AI suggests the **category**, **subcategory** and a recommended **description**.
3. You can accept (fills the fields), edit or ignore.

> **FEATURE BY PLAN**
>
> AI analysis is available on the **Starter**, **Growth**, **Enterprise** and **Custom** plans. It is not included in Free.

## Main information

**Category *(required)***

Pick from the catalog configured by your organization (see chapter 12).

**Subcategory**

List filtered by the picked category. Can be empty if the category has no subcategories.

**Title *(required)***

A short, descriptive sentence. Appears on the cards in the list.

**Description *(required)***

Free detail. Include anything the technician needs to know: symptoms, perceived urgency, context, contacts.

## Location

Three hierarchical levels:

1. **Property** — building or general location.
2. **Floor** — floor within the property (if the property has floors).
3. **Room** — specific space within the floor (if the floor has rooms).

The location structure is defined in *Admin → Infrastructure* (chapter 13). If your organization did not configure floors or rooms, those levels show as "N/A".

## Priority

- **LOW** — no urgency, no SLA applied.
- **NORMAL** — regular flow, subject to the category's "normal" SLA.
- **HIGH** — quick attention, subject to the category's "high" SLA.
- **CRITICAL** — emergency. Same SLA as high, but with visual emphasis (red) and visibility in the "Critical" tab.

## Dynamic fields

Some categories carry extra fields adapted to the request type. They appear automatically when you pick the matching category:

**Transport**
Departure date and time, return date and time, destination, passenger count, flight notes (if applicable).

**Event**
Event date, headcount, setup requirements.

**Technical (with severity)**
Equipment identification, technical severity selector (NORMAL / HIGH).

The configuration of these fields is done per category in *Admin → Categories* (chapter 12).

> **AUTOMATIC ASSIGNMENT**
>
> If your organization configured **assignment rules** (chapter 15), the request can be automatically assigned to a unit on submission — for example, all "Electrical" requests go to the "Maintenance" unit. If there is no rule, the request goes into "Awaiting assignment".

CHAPTER 8

# Request detail

Clicking a request card in the list opens the detail screen. This is where practically all the work happens: comments, attachments, status changes, reassignments, history.

## Screen anatomy

| SECTION | CONTENT |
|---|---|
| **Header** | Title, priority badge, status, SLA countdown (if applicable). |
| **Information** | Category, subcategory, description, attached photo, dynamic fields (transport, event, etc.). |
| **Location** | Property / floor / room. |
| **Responsible unit** | Assigned sector. "Transfer" button to reassign. |
| **Technician** | Avatar + technician name. Dropdown to reassign. |
| **History** | Chronological timeline: creation, status changes, reassignments, notes. Each entry shows who did what and when. |
| **Notes and attachments** | Field to add a note or attachment. Notes are visible to every authorized user. |
| **Action buttons** | Vary by role and current state (see below). |

## Actions by role

Available actions depend on your role and the request's state. Summary:

| ACTION | WHO CAN | WHEN |
| --- | --- | --- |
| **Start** | Assigned technician, Admin | Status = Open |
| **Resolve** | Assigned technician, Admin | Status = In progress |
| **Reassign unit** | Admin, Supervisor | Any active state |
| **Reassign technician** | Admin, Supervisor | Any active state |
| **Cancel** | Admin, request author | Active state |
| **Delete** | SYSTEM_ADMIN | Any state |

## History and notes

The history is immutable — every status change, reassignment or note addition is logged with a timestamp and author. Useful for:

- Audit — knowing exactly who did what and when.
- Timing analysis — diagnosing where time was lost on a request.
- Shift continuity — a technician coming in the next morning sees everything that happened overnight.

## SLA countdown

If the category has an SLA configured (Growth+ plans, see chapter 17), the header shows a badge with:

- **Time remaining** — in hours / minutes until the deadline.
- **Color** — green up to ⅔ of the deadline, yellow between ⅔ and the deadline, red after overdue.

Requests that miss the deadline move to *Delayed* (visible in the "Delayed" tab) and count towards the Dashboard's "Delayed" KPI.

CHAPTER 9

# Communication

The *Communication* screen is the organization's operational chat — real-time conversations between technicians, supervisors, teams and residents. Replaces WhatsApp and email for internal coordination.

## Conversation types

- **Direct** — 1:1 between two users.
- **Technical area** — every member of an area (e.g. all electricians).
- **Location** — every user tied to a property/floor.
- **Request** — conversation linked to a specific request; appears on the request detail.

## Messages and attachments

You can send:

- Plain text (with emoji and basic formatting).
- Images (from phone or file).
- PDFs (manuals, specifications).

Messages arrive in real time (push notification, if authorized). Each conversation shows how many unread messages it has.

## Creating a group

To create a new conversation:

1. Click the *+ Create group* button at the top of the conversation list.
2. Pick the type (direct, area, location, request).
3. Select members (autocomplete over the user list).
4. Give it a name (except for direct conversations, which use the other user's name).
5. Submit — the group appears immediately for every member.

CHAPTER 10

# Personal settings

The *Settings* screen bundles everything tied to the individual account: avatar, name, language, theme, notifications, privacy and sign-out. For users with administrative roles, it is also the entry point to the organization's configuration menus.

## Profile and status

### Avatar

User photo (JPEG, PNG, WebP or GIF; 2 MB max). Appears in messages, request cards and team lists.

### Name

Display name. Editable at any time.

### Email

Read-only — the email is the account's unique identifier. To change it, contact your administrator.

### Status

**Online** — available to be assigned.
**Busy** — requires a reason (in a meeting, out of office, etc.).
**Offline** — unavailable; the system avoids automatic assignments.

## Language and theme

### Interface language

Portuguese, English, French or Spanish. The change is instant — no need to sign out. The language is also used for external links (privacy policy) and transactional emails.

### Theme

Light or dark. Stored on the device (not synced across devices).

## Notifications

Shows the current notification permission state:

- **Granted** — you are receiving push notifications.
- **Default** — you haven't decided yet; you can accept via the button.
- **Blocked** — you refused earlier; go to the browser / OS settings to re-enable.

The *Test subscription* button confirms that your device is properly registered. It shows the tail of the subscription endpoint.

**IOS**

On iPhone, push notifications only work if you installed the app on the home screen (see chapter 4). The Settings screen shows a specific warning if it detects you are using the app in Safari without having installed it.

## Privacy

Clicking *Privacy policy* opens the up-to-date document at `resolve-facilities.com/privacidade.html` in the chosen language. For GDPR requests (data access, export, deletion), email support@resolve-facilities.com.

## Sign out

The *Sign out* button at the bottom of the screen ends the current session. If "Keep me signed in" was ticked, it is cleared on this device as well.

CHAPTER 11

# Team — users, job functions, technical areas

The *Team* menu bundles all people management: invite users, assign roles and technical areas, manage multi-tenant membership. Accessible only to users with an administrative role.

## Inviting users

1. Click the *Invite user* button.
2. Fill in the invitee's email.
3. Pick the initial role (Admin, Supervisor, Technician, Auxiliary, User, Resident).
4. Submit — the system automatically sends an email with the acceptance link.

If the email already belongs to a platform user (in other organizations), they get a "You have been added to [Organization]" email letting them know a new organization is available in the picker. If this is their first tenant, a new account is created and they get a welcome email.

## Job functions

Distinct from system roles (Admin/Supervisor/etc.), **job functions** describe the professional role: Electrician, Carpenter, Receptionist, Manager, etc. They help filter the team list and assign requests with more clarity.

To manage: *Team* → *Job functions*. Add, edit or remove entries at any time.

## Technical areas

**Technical areas** are operational domains — Cleaning, Maintenance, IT, Security, etc. A user can belong to one or more areas. They enable:

- Automatic communication groups per area.
- Filtering of the team list.
- Automatic assignment rules (chapter 15) — e.g. IT requests go to users in the IT area.

Each area can have its own icon (picked from a Material Symbols library).

## Multiple organizations

A user can belong to multiple organizations. In the team list, multi-tenant users are flagged with a badge. Each organization sees only this user's role *within* the organization itself — roles and data are not shared across tenants.

## External customer (Customer Portal)

The **CUSTOMER** role (CLIENTE) is for people *outside* your internal team who need to interact with the platform — typically an end customer, a resident in a third-party-managed condominium, or an external partner. It's the gateway to the **Customer Portal**: a deliberately narrowed view of the app that keeps the customer focused on their own requests without exposing the organisation's internal structure.

### What the Customer can do

- Create requests (category, description, priority, photo, location)
- See **their own** requests (created by them) and any request where they are the assigned responsible
- Start and resolve assigned requests
- Cancel their own requests
- Exchange messages in the chat groups of the requests they are part of
- Direct conversation with the organisation's **SYSTEM_ADMIN** (auto-created — see below)

### What the Customer cannot see

- Requests from other units or other customers
- The team list (technicians, supervisors, other customers)
- Chat groups by *technical area* or *location*
- Admin menus (Categories, Infrastructure, Units, Rules, Permissions, SLAs, Billing, White-label)
- The "Create group" button on the Communication screen

### How to invite a customer

1. In *Team → Invite user*, enter the customer's email.
2. In the role dropdown, pick **CLIENTE** (Customer).
3. (Optional) Tie them to a unit — useful if you want their requests to follow that unit's automatic routing rule.
4. Submit. The system sends the invite by email; once accepted, the customer creates an account (if new) or gains access to this organisation (if they already had one elsewhere).

### AUTOMATIC SUPPORT CONVERSATION

When the invite is processed, the platform automatically creates a **direct conversation** between the customer and the organisation's SYSTEM_ADMIN. It appears immediately in *Communication* with the administrator's name, giving the customer a guaranteed support channel without having to search for one.

### DIFFERENCES VS. THE USER ROLE

Operational permissions (create, start, resolve own and assigned requests) are identical. What sets the Customer apart is the **communication filter** — they don't see the team or collective groups, only their requests and the direct channel with the admin. Use USER (UTILIZADOR) for internal non-technical staff; use CLIENTE for third parties.

CHAPTER 12

# Categories and subcategories

Categories define the types of request your organization processes. They are initially loaded based on the organization type picked at sign-up, but you can edit, add or remove them freely.

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## Structure

- **Category** — main grouping (Cleaning, Maintenance, Electrical, Transport, Event...).
- **Subcategory** — sub-type within the category (Leaks, Breakdowns, Painting — inside Maintenance).
- **Icon** — picked from a Material Symbols library.

## Dynamic fields

Each category can enable extra fields in the request form (see chapter 7.5):

### Requires transport data

Enables: departure date, return date, destination, passenger count.

### Requires event data

Enables: event date, headcount, requirements.

### Is technical

Enables: equipment identification, severity selector.

## Automatic assignment

You can tie a category to a **default unit**. When a user creates a request in that category, it is automatically assigned to the unit. See chapter 15 for finer multi-condition rules.

> **DELETING A CATEGORY**
>
> Deleting a category that has linked requests is blocked — you must reclassify those requests first. Categories with no requests can be deleted without restriction.

CHAPTER 13

# Infrastructure — properties, floors and rooms

Infrastructure defines the physical hierarchy where requests happen. The more detailed it is, the more precise the records and the more useful the location-based analyses.

## Hierarchy

1. **Property** — building, complex, facility (name + optional address).
2. **Floor** — floor within the property. Can be left blank if the structure is single-level.
3. **Room** — specific space within the floor (apartment 3F, server room, suite 204...).

## Best practices

- **Consistent naming** — set a pattern from the start (e.g. "Block A / Floor 2 / Room 204") and follow it everywhere.
- **Don't overdo it** — if you'll never need to locate down to the room, don't create rooms. Floors may be enough.
- **N/A rooms** — for shared zones (hallway, stairs), use the name "Common" or "N/A".

CHAPTER 14

# Units (sectors)

Units are the teams / sectors that receive requests. Every request is assigned to a unit. The number of units is capped by the plan (1 on Free and Starter, 3 on Growth, 10 on Enterprise, configurable on Custom).

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## Create and manage

In *Admin → Units*:

- **Name** — Maintenance, Cleaning, Reception, IT…
- **Linked technical area** — optional; ties the unit to an area (chapter 11.3) for automatic rules and communication.

## Delete

Deleting a unit that has assigned requests requires confirmation — the requests move back to "Awaiting assignment" and you must reassign them manually.

> **LIMITS PER PLAN**
>
> Free: 1 unit · Starter: 1 unit · Growth: 3 units · Enterprise: 10 units · Custom: tailored (minimum 3, always less than the number of users).

CHAPTER 15

# Automatic assignment rules

Rules automate the routing of requests to units, removing the manual step and cutting the time to the technician's first touch.

## How it works

Each rule defines: "**When** a request has [condition], **assign** to unit [X]". Supported conditions:

- Category equals...
- Subcategory equals...
- Property equals...
- Priority equals...

Rules are evaluated in order (top-down). The first match wins; the rest are ignored for that request. You can drag to reorder.

> **FALLBACK RULE**
>
> Put a "Generic → General unit" rule at the bottom of the list to make sure no request ends up orphaned. The earlier rules catch the specific cases; the fallback catches the rest.

CHAPTER 16

# Permissions and roles

The permissions matrix defines what each role can do: create, view, edit, change state, delete, transfer, assign and manage configuration.

## Available roles

| ROLE | WHO THEY TYPICALLY ARE |
|---|---|
| SYSTEM_ADMIN | Primary administrator of the organization. Full control over the tenant. |
| ADMIN | Delegated administrator. Operational configuration. |
| SUPERVISOR | Team manager. Distributes requests, monitors SLAs. |
| TECNICO | Executes assigned requests. |
| AUXILIAR | Technical support, without responsibility for assigned requests. |
| UTILIZADOR | Creates requests, sees their own. |
| MORADOR | Creates requests in a condominium context. |
| CLIENTE | External customer. Same operational permissions as UTILIZADOR but communication limited to the SYSTEM_ADMIN — see chapter 11.5. |

## Scope

Each permission has a *scope*:

- **Same unit** — only sees requests in their own unit.
- **Other units** — sees requests from other units.
- **Own created** — only what they created.
- **Own assigned** — only what is assigned to them.

## Where to see the matrix

The *Admin → Permissions* screen shows the full matrix read-only. Changes are centrally managed by the ReSOLVE team — to request adjustments to your organization's permission profile, contact support@resolve-facilities.com.

CHAPTER 17

# Custom SLAs GROWTH+

SLAs (*Service Level Agreements*) define the maximum resolution time by category and priority. They let you measure operational performance, flag delayed requests and give customers visibility on the expected response time.

## How it works

For each category you set two values:

- **High + Critical priority** — maximum number of hours to resolve.
- **Normal priority** — maximum number of hours to resolve.
- **Low priority** — no SLA (product decision — to avoid saturating the team with low-value requests).

## Application

Once configured:

- Every new request inherits the SLA of its category + priority.
- The request detail shows a countdown.
- Requests that miss the deadline move to *Delayed*.
- The CSV export (chapter 6.3) includes "SLA defined" and "SLA met" columns.

> **AVAILABILITY**
>
> Custom SLAs are included on the **Growth**, **Enterprise** and **Custom** plans. On Free and Starter, requests have no SLA and the "Delayed" tab is hidden.

CHAPTER 18

# White-label ENTERPRISE+

White-label lets you customize the platform's look with your organization's logo and primary color — useful for premium condominiums, hotels, hospitals and any customer that wants to project their brand to end users.

## What to customize

### Logo

Replaces the ReSOLVE logo on the Dashboard, on the login screen (if accessed directly to the organization) and in transactional emails. PNG, SVG or JPEG format, 2 MB max.

### Primary color

Defines the color of buttons, links and highlights. Applies across the app. Can be entered as a hex value or picked from the color picker.

## Application

White-label changes apply **immediately** to every user in the organization — no need to sign out / in. The *Reset* button restores the default ReSOLVE logo and color.

> **AVAILABILITY**
>
> White-label is included on the **Enterprise** and **Custom** plans. On Free, Starter and Growth, this menu shows only an upgrade prompt.

CHAPTER 19

# Billing and plans

All the organization's financial management is concentrated in *Settings → Billing*: current plan, plan changes, payment method, invoice history and refunds.

## Plan comparison

| | FREE | STARTER | GROWTH | ENTERPRISE | CUSTOM |
|---|---|---|---|---|---|
| **Monthly price (EUR)** | €0 | €19 | €109 | €439 | variable |
| **Annual price (EUR)** | €0 | €190 | €1090 | €4390 | variable |
| **Max users** | 3 | 5 | 25 | 100 | tailored |
| **Max units** | 1 | 1 | 3 | 10 | tailored |
| **Requests / month** | 20 | 1000 | unlimited | unlimited | unlimited |
| **AI suggestions (Gemini)** | — | ✓ | ✓ | ✓ | ✓ |
| **Push notifications** | ✓ | ✓ | ✓ | ✓ | ✓ |
| **Custom SLAs** | — | — | ✓ | ✓ | ✓ |
| **White-label** | — | — | — | ✓ | ✓ |
| **Assisted onboarding** | — | — | — | ✓ | ✓ |
| **Assets and Preventive module (add-on)** | — | — | + €250/month | + €850/month | +€9/user |
| **Support** | Community | Email | Email | Email | Email |

**ANNUAL VS MONTHLY**

Annual billing gives you roughly 2 months free compared to monthly (€190 vs €228 annual on Starter, for instance). The cycle is chosen at subscription time and can be changed later (chapter 19.2).

## Changing plan

In *Settings → Billing*, click *Change plan*. The plan table appears with clickable cards.

- **Upgrade** (Starter → Growth, Growth → Enterprise...) — immediate change. The difference is charged proportionally on the next cycle (automatic Stripe proration).
- **Cycle switch** (monthly ↔ annual on the same plan) — allowed. Proration applies.
- **Downgrade** (Growth → Starter, Enterprise → Growth...) — **not allowed in self-service.** To downgrade, cancel the current subscription (stays active until the end of the paid cycle) and subscribe to the lower plan afterwards. For special cases, contact support@resolve-facilities.com.

## Stripe billing portal

The *Manage billing* button opens Stripe's secure portal — outside our platform — where you can:

- Update the payment method (card).
- Update the billing address.
- Update the VAT ID.
- Download invoice PDFs.
- Cancel the subscription (cancellation applies at the end of the current paid cycle).

## Invoices and refunds

The "Invoice history" table shows the last 12 charges, with:

- Creation date
- Plan (Starter, Growth, etc.)
- Cycle (monthly / annual)
- EUR amount
- Status: **Paid**, **Failed** or **Refunded**
- Link to download the PDF

Refunded invoices (total or partial) appear with a clear badge, avoiding confusion with paid invoices.

## 14-day trial

The trial is an explicit choice at sign-up: it grants 14 days with Starter limits (5 users, 1 unit, 1000 requests, AI on). On day 15:

- If you subscribed to a paid plan — you move to that plan automatically.
- If you didn't subscribe — the account is **suspended**. Data is preserved but access is blocked until you subscribe.

**IMPORTANT**

The trial does not auto-migrate to Free at the end. Free is an explicit choice made at sign-up — those who want Free pick Free from the start. Those who picked Trial made a commitment to evaluate the paid product.

## Add-ons — additional modules

On top of the base plan, the organization can activate additional modules on the same subscription. The first one available is **Asset Management and Preventive Maintenance** (chapter 22):

- **Growth:** +€250/month (or +€2500/year).
- **Enterprise:** +€850/month (or +€8500/year).
- **Custom:** +€9/user/month (+€90/user/year), for the contracted users.
- **Free, Trial and Starter:** not available — upgrade to Growth or higher.

To activate: *Settings* → *Billing* → *Add-ons* → *Activate module* (requires an active subscription). The module switches on in seconds; the prorated amount for the current period lands on the next invoice (Stripe proration — no immediate charge). To remove it, use *Remove module* on the same card: access switches off immediately and the prorated credit lands on the next invoice. **Data is never deleted** — when you reactivate, everything comes back as it was.

**MANUAL OFFER**

Organizations with special terms can have the module activated directly by the ReSOLVE team — in that case the card shows the *Offer* badge, with no charge and no removal button.

CHAPTER 20

# Supported languages

The platform is translated into four languages: Portuguese, English, French and Spanish. The change is instant and propagates across the whole app.

## Available languages

- **Português (PT)** — European Portuguese, primary language.
- **English (EN)**
- **Français (FR)**
- **Español (ES)**

## Where to switch

There are three places where the language selector appears:

1. **Login screen** — top-right. Useful before signing in.
2. **Settings → Language** — after sign-in.
3. **Sign-up** — chosen when the organization is created (also sets the language of the initial catalog and emails).

## What changes

- The entire app interface.
- Transactional emails (welcome, invitations, password recovery, dunning).
- The privacy policy and terms when opened from the app.

## What does not change

- Content entered by users (titles, descriptions, messages) — stays in the language it was written in.
- The initial category catalog — was loaded in the language chosen at sign-up. To change it, edit the categories manually.

> **AUTOMATIC DETECTION**
>
> When a user accesses the site for the first time (with no stored preference), the platform tries to detect the browser language. If it is one of the four supported, it is used; otherwise it falls back to English.

CHAPTER 21

# Push notifications

Push notifications alert you to important events even when the app is closed — assigned requests, new messages, critical status changes.

## How they work

1. When you sign in, the browser asks for notification permission. Accept it.
2. The device registers itself on the server (push subscription).
3. When there is an event that concerns you, the server sends the notification to the device (even with the app closed).
4. Tapping the notification opens the app on the relevant screen (e.g. the request in question).

## Events that trigger notifications

- A new request has been assigned to you.
- You received a new message in a conversation you are part of.
- The state of one of your requests changed (resolved, cancelled).
- A request you are involved in is approaching its SLA deadline.

## Manage permissions

To change the permission after accepting/rejecting:

**Browser (desktop)**

Padlock next to the URL → Permissions → Notifications.

**iOS**

iPhone Settings → Notifications → ReSOLVE → enable / disable.

**Android**

Settings → Apps → ReSOLVE → Notifications.

> **IOS — NO INSTALL, NO PUSH**
>
> Repeating the warning from chapter 4: on iPhone, without "Add to Home Screen" in Safari, **there are no push notifications**. It is an iOS restriction, not ours. Install the app on the home screen before accepting notifications.

CHAPTER 22

# Asset Management and Preventive Maintenance ADD-ON · GROWTH+

Add-on module that brings equipment registration with QR labels and planned preventive maintenance to the platform: plans automatically generate work orders, with a step-by-step procedure and non-conformity detection. Managed in *Settings → Asset Management*.

## Activation and pricing

The module is a paid add-on on top of the base plan (chapter 19.6): **Growth +€250/month**, **Enterprise +€850/month**, **Custom +€9/user/month** (annual billing with ~2 months free). Activate it in *Settings → Billing → Add-ons*; it requires an active subscription on a Growth or higher plan. When you remove it, the data is kept — reading stays available, creating and editing are blocked — and reactivating brings everything back as it was.

## Types and families

Before registering assets, define the catalog in *Asset Management → Types and Families* — for example, the *HVAC* type with the *Chillers*, *AHUs* and *Splits* families. Types feed the filters, the groupings and the scope of preventive plans. A type with linked assets or plans cannot be deleted (update them first).

## Asset registration

Each asset has: name, type and family, location (property / floor / room), responsible sector, manufacturer, model, serial number, purchase and warranty dates, criticality (low / medium / high), notes and a photo (stored privately — only members of the organization can see it). The **state** follows the lifecycle:

- **Active** — in normal operation.
- **Inactive** — temporarily stopped.
- **Under maintenance** — being worked on.
- **Decommissioned** — end of life; stops receiving preventive orders.

The list has search, filters (state, criticality, property), cascading groupings (type → family, location → floor, state) and a condensed view. An asset with linked requests cannot be deleted — set its state to *Decommissioned*, which preserves the history. Deleting an asset also deletes that asset's specific preventive plans.

## QR labels and scanning

Generate sticker labels as a PDF (one per asset, with QR code and identification) and apply them to the equipment. Any team member points the phone camera at the QR — it opens the asset sheet directly, with the intervention history and the plans. From the sheet, the *Create request* button opens a corrective request already linked to the asset and with the location pre-filled.

## Bulk import

In *Asset Management → Assets → Import*, download the CSV template (it includes a guidance row per column), fill it in and import hundreds of assets at once. Validation is row by row — a row with an error does not block the rest, and a second click on Import only retries the rows that failed. An equivalent importer exists for maintenance plans.

## Preventive maintenance plans

A plan defines *what*, *where*, *when* and *how*:

- **Scope** — a specific asset; every asset of a type; of a family; or of a location (with optional floor and room). On broad scopes, each run generates one order per covered asset.
- **Frequency** — every X days, weeks or months, starting from the defined next date.
- **Responsibility** — assigned sector, priority and category (the order inherits the category's SLA).
- **Procedure** — a list of structured tasks: check (✓), condition inspection (Operational / Degraded / Failure), Yes / No / N.A. question, meter reading (e.g. pressure, running hours) and free text.

Plan cards show the next date and the number of tasks; clicking opens read-only, the pencil edits. Editing the procedure does not change orders already generated — each order keeps its own copy.

## Generated preventive orders

Every day (05:00 UTC) the platform generates the due orders as regular requests with the **Preventive** badge — they enter the usual flow (assignment, SLA, chat, reports). The responsible sector receives a push notification and the people in charge an aggregated email ("N orders generated"). On the request detail, the technician runs the procedure task by task; answers can be saved at any time, without changing the request's status.

> **NON-CONFORMITIES**
>
> If an inspection records *Degraded / Failure*, or a question is answered *No*, the platform offers to immediately create a **corrective request** linked to the same asset — the automatic bridge between preventive and corrective work.

A stopped plan (module deactivated, plan inactive) does not pile up overdue orders: when it resumes, it generates **one** catch-up order and skips to the next future date.

## Printouts (PDF)

- **Preventive schedule** — weekly, monthly or annual map of the plans and the covered assets, with scope filters (PDF button on the plans screen).
- **Asset sheet** — document with identification, QR code, technical data and linked plans (on the asset sheet).
- **QR labels** — sticker sheet (section 22.4).

CHAPTER 23

# Condominium Portal

The official channel between management and residents: notices, meetings with automatic reminders, minutes and documents — on each resident's phone, without informal messaging groups.

## Activation

The portal switches on automatically for organizations created with the **Condominium** type (chapter 2) — it is included in the plan, at no extra cost. For other organization types, contact support.

## For the manager

In *Settings* → *Condominium*, four tabs:

- **Notices** — communications published to residents (text, with an optional file).
- **Meetings** — meeting notices with date, time and place; automatic reminder the day before.
- **Minutes** — record of the decisions; each set of minutes can be linked to its meeting.
- **Documents** — regulations, budgets and other condominium files.

Each publication has a **scope**: general (the whole condominium) or a specific building — each resident only sees what concerns them. Accepted files: PDF, images, Word (.docx) and Excel (.xlsx), up to 10 MB, stored privately and opened via a temporary secure link.

## For the resident

Residents get a **Condominium** entry in the main navigation, in read-only mode: they browse the notices, meetings, minutes and documents of the general scope and of their building, and download the files securely. (Creating maintenance requests stays in the normal flow — chapter 7.)

## Meeting reminders

The day before each meeting (around 08:00), the covered residents receive a push notification and an email with the title, date, time and place. If the meeting is postponed, the reminder automatically re-arms for the day before the new date.

> **LAST-MINUTE MEETINGS**
>
> Meetings created after the day-before send has already gone out (for example, today for tomorrow morning) may not get an automatic reminder — in that case, publish a notice as well.

CHAPTER 24

# Glossary

Definitions of the main terms used in this platform and in this manual.

---

### Tenant

Platform customer — an organization with its own isolated space of users, configuration and data. Every ReSOLVE customer is a tenant.

### Unit (sector)

Organizational sub-division inside a tenant: Maintenance, Cleaning, Reception, IT. Every request belongs to a unit.

### Asset (equipment)

Equipment or installation registered in the Asset Management module — chiller, elevator, electrical panel... Identified by a QR label and with its own intervention history (chapter 22).

### Preventive maintenance plan

Rule that generates automatic work orders at a defined frequency, for a scope of assets (one asset, a type, a family or a location), with a step-by-step procedure.

### Preventive order

Request generated automatically by a maintenance plan — it carries the "Preventive" badge and the procedure to execute.

### Non-conformity

Negative answer on a procedure task (failure, degraded, "no"). Triggers the proposal of a corrective request linked to the asset.

### Add-on

Paid additional module on top of the base plan — for example, Asset Management and Preventive Maintenance. Activated in Settings → Billing.

### Category

Request type (Cleaning, Electrical, Transport). Configurable by the administrator.

### Subcategory

Sub-type within a category (Breakdowns, Leaks — inside Maintenance).

### SLA

"Service Level Agreement" — maximum resolution time by category and priority. Available from the Growth plan onwards.

### Request (service request)

Service order opened by a user. Lifecycle: Open → In progress → Resolved / Cancelled.

### Technical area

Operational domain a user belongs to (Cleaning, IT, Security...). Enables assignment rules and communication groups.

### Job function

The user's professional role (Electrician, Carpenter, Receptionist). Different from the system role (Admin / Technician / etc.).

### PWA

"Progressive Web App" — an application that installs from the browser and runs like a native app, without going through the App Store or Google Play.

### White-label

Visual customization of the platform (logo + color) with the customer's brand. Available Enterprise+.

### Custom plan

Plan with limits and price tailored to the number of users and units. Available self-service up to 1000 users; above that, via sales contact.

### Proration

Time-proportional calculation. Applies when you upgrade mid-cycle — you only pay the difference for the remaining time.

### Stripe Checkout / Portal

Stripe tools (our payments partner) where the initial subscription is created (Checkout) and managed afterwards (Portal: change card, download invoices).

### Dunning

Sequence of automatic warnings when a payment fails. The platform sends emails before suspending service to give time to fix the problem.

CHAPTER 25

# Frequently asked questions

The most common doubts from new users.

### I don't get notifications on iPhone.

Make sure you opened the app from the home-screen icon, not from Safari. If you haven't installed it yet, go to chapter 4 and follow the "Add to Home Screen" steps. iOS does not allow push notifications without that installation.

### I forgot my password.

On the login screen, click *Forgot password?*, enter your email and follow the link you receive. The link is time-limited — if expired, just repeat the request.

### Can I use the same email across multiple organizations?

Yes. After login, the organization picker is shown (chapter 3.3). The role may be different in each organization (e.g. admin in one, technician in another).

### How do I download invoices?

In *Settings* → *Billing*, in the history table, click the "PDF" link on each invoice. Alternatively, open the Stripe Portal (*Manage billing*) for access to every historical invoice.

### I want to downgrade the plan.

Self-service downgrades are blocked. Cancel the current subscription (stays active until the end of the paid cycle) and subscribe to the lower plan afterwards, or contact support@resolve-facilities.com for support.

### The category catalog is incomplete or doesn't match my business.

The initial catalog was loaded based on the organization type picked at sign-up. You can edit freely: add, rename, delete categories and subcategories in *Admin* → *Categories* (chapter 12).

### How do I delete personal data (GDPR)?

GDPR requests should be submitted in writing to support@resolve-facilities.com. The organization's administrator can delete users in *Team*; for full deletion of the tenant and its data, a formal request is required.

### How much does each plan cost and what is included?

See chapter 19.1 (Plan comparison). Summary: Free €0, Starter €19/mo, Growth €109/mo, Enterprise €439/mo, Custom variable. Billing in EUR, processed by Stripe.

### Can I pay in another currency?

No — we sell exclusively in EUR. Stripe may auto-convert at the customer's card depending on the issuing bank, but invoices are issued in EUR.

# Support and contacts

For any operational doubts, technical issues, suggestions or formal data-protection requests, get in touch. We respond during business hours (Mon–Fri, 9 am–6 pm Lisbon time) and critical requests are prioritised.

**ReSOLVE Facilities**

support@resolve-facilities.com

resolve-facilities.com

app.resolve-facilities.com



This manual describes the current version of the platform. Features and screens may evolve.