

THE RESTAURANT SERVICES APP

APP USER GUIDE

The exclusive Restaurant Services app is your all-in-one hub for managing restaurant service with North Bay & East Restaurant Services. Instead of relying on emails, paper records, or phone calls for every update, the app gives you one place to view service information, approve work, access reports, manage invoices, and stay connected with our team.

You can use the app on mobile or through the desktop web portal, giving you easy access whether you're in the office or on the go.



ACCESS ON THE WEB OR DOWNLOAD THE MOBILE APP



**VISIT
HTTPS**



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OVERVIEW

What the App Is

The Restaurant Services app is the client's main hub for service information, communication, and account visibility. Clients use it to view schedules, reports, quotes, invoices, service requests, and account updates in one place.

Why we built it

- Gives clients one place to manage service-related information
- Improves visibility into schedules, reports, and billing
- Reduces back-and-forth emails, phone calls and document requests
- Makes it easier for clients to approve work, pay invoices, and request service

Mobile & Desktop Access

Clients can access the NBRs app on mobile (apple or google) or through the desktop web portal.

Important App Use Policy

The NBRs Restaurant Services App is the primary client communication and service management platform for North Bay & East Bay Restaurant Services.

Clients are expected to use the app to access schedules, reports, quotes, invoices, service requests, and account updates.

The app serves as the primary source for service information whenever possible; the goal is to reduce manual back-and-forth by directing clients to the app for account visibility, service documentation, approvals, and communication.

Key Client Features

Clients can use the app to:

- Sign Service Agreement
- View upcoming and completed services
- Review and approve quotes
- View invoices and make payments
- Access service reports and photos
- Download/share reports and records
- Submit service requests
- Receive notifications and updates
- Manage multiple locations
- Manage team contacts and account access
- Use live chat for support
- Switch between English and Spanish

LOGIN & ACCOUNT ACCESS

The App uses phone-number or email verification to securely connect you to your company's account. To log in, you'll need to use your mobile phone number or email that is associated with your account.

Individual User Access

Each person from your organization who is listed as a contact on your NBRS account can log in to the app using their own phone number.

Important: There is not one shared "master login" for the client account. App access is tied to individual contacts on the account.

What this means:

- Each user logs in with their own phone number
- That phone number must be tied to a contact on the account
- Multiple people from the same company can have access
- Access is managed at the contact level, not through one shared company login

Good to know:

If someone from your team cannot log in, they may need to be added as a contact on the account or have their phone number updated.

How to Log In

Step 1: Open the NBRS App

Open the NBRS App on your mobile device or access the desktop web portal if provided by your company.

Step 2: Enter Your Mobile Phone Number or Email Address

Tap Continue

Good to know: Your phone number/email must match one of the contacts on your company's account in order to access the app.

Step 3: Enter the Verification Code

After you tap Continue, the app will send a 6-digit verification code to your phone.

On the Confirm phone number screen:

- Enter the 6-digit code you received by text message
- Tap Confirm to continue

Didn't Receive a Code?

If you don't receive your verification code:

- Wait a moment and try again
- Tap Resend code if that option becomes available
- If you still don't receive a code, contact our office at 707-824-9737 to verify your contact information

First-Time Login

If you are the first person from your company to log into the app, you may be prompted to review and sign your company's General Service Agreement before continuing into the app, regardless if a current service agreement is on file.

Troubleshooting Login Issues

Contact NBRS if:

- you do not receive the access code
- your phone number has changed
- you believe you should have access but cannot log in
- you are unsure who on your team is listed as the app contact

USING THE HOME SCREEN

The Home screen is the main starting point of the App. It helps you navigate your account, switch between service locations, and quickly access the services and records tied to your account.

The Home screen works a little differently depending on whether you're using the mobile app or the desktop web portal.

Mobile App Home Screen

On the mobile app, the Home screen acts primarily as a service directory and quick navigation hub.

What you can do from the mobile Home screen:

- View the currently selected property / service location
- Switch between properties if your account has access to multiple locations
- Tap into service categories and service-related areas of the app
- Navigate to key sections using the bottom menu, including:
 - Home
 - Quotes
 - Visits
 - Reports
 - Invoices
 - Profile

How to switch properties on mobile:

If your account includes more than one location:

1. Open the Home screen
2. Tap the property selector near the top of the screen
3. Choose the location you want to view
4. The app will update to show the services and records tied to that property

Good to know:

Switching properties helps you view the correct visits, reports, quotes, and invoices for each location.

Desktop Web Portal Home Screen

On the desktop web portal, the Home screen acts as both a service directory and a dashboard.

What you can do from the desktop Home screen:

- View the selected property / service location
- Switch between locations if your account manages multiple properties
- Access service categories and service pages
- View dashboard-style account information, including quick visibility into items such as:
 - upcoming visits
 - pending quotes
 - service records or account activity, depending on your account setup

Good to know:

The desktop Home screen gives you a broader account overview, while the mobile Home screen is designed more for quick navigation and service access on the go.

Using the Property Toggle

If your company has multiple locations, the property toggle lets you move between them without logging into a separate account.

How to use the property toggle:

1. Open the Home screen
2. Locate the current property / location shown near the top of the screen
3. Tap or click the property name
4. Select the location you want to view
5. The app will refresh to show the records and services for that property

HOW TO VIEW VISITS

The Visits section shows your upcoming and completed service visits in one place. You can use it to track scheduled work, review past visits, switch between list and calendar views, and filter visits by service type.

What You Can Do in Visits

In the Visits section, you can:

- View upcoming visits
- Review past visits
- Switch between list view and calendar view
- Filter visits by service type
- Search for visits
- Open a visit to review its details

How to Open Visits

On mobile:

1. Open the NBRS App
2. Tap Visits from the bottom navigation bar

On desktop:

1. Log into the NBRS web portal
2. Click Visits from the top navigation menu

Viewing Visits in List View

The List View displays visits in a scrollable list so you can quickly see what's coming up and what has already been completed.

On mobile, the list may be organized into sections such as:

- Upcoming
- Past

On desktop, the list may be grouped into:

- Today Visits
- Upcoming Visits
- Past Visits

Each visit entry may show:

- Service type
- Date
- Time
- Location / property name
- Service image or icon

How to use List View

1. Open Visits
2. Stay in List View if you want to scroll through visits in order
3. Tap or click a visit to open the visit details page

List View is helpful when you want to:

- quickly check your next scheduled service
- review past completed visits
- scan multiple visits at once

Viewing Visits in Calendar View

The Calendar View helps you see visits by date so you can plan around upcoming service appointments more easily.

How to switch to Calendar View

1. Open Visits
2. Tap or click the calendar view icon
3. Use the calendar to navigate by month and date
4. Select a date to see visits scheduled for that day

Calendar View is helpful when you want to:

- see when service is scheduled during the month
- check whether multiple visits fall on the same date
- plan around upcoming service appointments

HOW TO VIEW VISITS

Filtering Visits by Service Type

If your account has multiple service types, you can filter the Visits page to show only the services you want to review.

How to filter visits

1. Open Visits
2. Tap or click Filters
3. Select one or more service types
4. Tap Apply

Example service filters may include:

- Hood Cleaning
- Hood Repairs
- Interceptor Pumping
- Grease Trap Pumping
- Hydro Jetting
- Oil Recycling
- Steam Cleaning
- Pressure Washing
- Deep Cleaning

Filtering is helpful when you want to:

- review only one type of service
- find a specific past visit more quickly
- separate recurring service categories by location

Searching for a Visit

If available, use the search bar at the top of the Visits page to look up visits by service type or related visit information.

How to search:

1. Open Visits
2. Tap or click the search field
3. Enter the service name or related keyword
4. Select the visit you want to review

Pro Tip

If you manage multiple service types or multiple locations, using Calendar View + Filters together is one of the easiest ways to quickly find the visit you're looking for.

HOW TO VIEW VISITS

Opening a Visit

To view more details about a specific service visit:

1. Open Visits
2. Locate the visit in List View or Calendar View
3. Tap or click the visit entry to open the visit details page

What You Can Find in Visit Details

Each visit includes important service information to help you prepare for your appointment and understand what was scheduled.

Depending on the service, visit details may include:

- Service name
- Scheduled date and time
- Property / location
- Technician information
- Services included in the visit
- Before Your Visit instructions
- After Service reminders or recommendations
- Calendar add option
- Link to the related service page, when available

Before & After Visit Information

Some visit detail pages include helpful instructions for before and after the service visit.

Before Your Visit information may include:

- how to prepare the service area before our team arrives
- access instructions or reminders
- service-specific preparation notes

After Service information may include:

- reminders for what to do after service is completed
- service-specific follow-up guidance
- recommendations related to the serviced equipment or area

Why this matters:

These visit instructions are there to help you get the most out of your service visit, avoid delays, and make sure your team knows what to expect before and after service.

Good to Know

Visit details are designed to give you more than just the appointment time — they also provide service-specific instructions, preparation reminders, and helpful information tied to that visit.

HOW TO REQUEST SERVICE

Service requests are located within each individual service page.

On mobile:

1. Open the Home screen
2. Tap the service icon for the service you need
3. Open that service's page

On desktop:

1. Open the NBRS web portal
2. Navigate to the service you want to view
3. Open the service page for that service

From the service page, you can view service information and choose the action you need.

What You Can Do from a Service Page

Depending on the service, the service page may allow you to:

- Request a quote for a new service you do not currently receive
- Request emergency service
- Open a chat with the department team for that service
- Review information about the service before submitting a request

Requesting a Quote for a New Service

If your location needs a service you do not currently receive from NBRS, you can request a quote directly from that service's page.

How to request a new service quote:

1. Open the service page for the service you want
2. Tap or click Add This Service and complete the required information
3. Submit your request for review by the NBRS team who will return a quote for the service

Examples of when to use this:

- You want to add a new recurring service to your account
- You want pricing for a service your location does not currently receive
- You want more information about expanding service at a specific property

Requesting Emergency Service

If you need urgent help related to a specific service, you can request emergency service from that service's page.

How to request emergency service:

1. Open the service page for the service related to your issue
2. Tap or click Emergency Service
3. Select the call button to speak with a member of the NBRS team

Use Emergency Service when:

- you have an urgent service issue that needs immediate attention
- the problem cannot wait until your next scheduled visit
- you need to notify NBRS quickly through the app

HOW TO USE CHAT

The Chat feature lets you communicate directly with Team North Bay inside the app. Chats can be created by service type, which helps route your message to the correct department faster.

You can use Chat to ask service-related questions, request help, follow up on an issue, or contact the team responsible for a specific service.

What You Can Use Chat For

You can use Chat to:

- Ask questions about a specific service
- Contact the department responsible for that service
- Follow up on a report, service issue, or recommendation
- Ask for help before requesting a quote or service
- Communicate with Team North Bay without calling or emailing

How Chats Are Organized

Chats can be created by service, which helps your message reach the right department or team. For example, you may start a chat related to:

- Hood Cleaning
- Grease Trap Pumping
- Interceptor Pumping
- Hydro Jetting
- Oil Recycling
- Hood Repairs
- Steam Cleaning
- other service categories available to your account

When you start a chat from a service-related page, the conversation is tied to that service so it can be routed appropriately.

Where You Can Start a Chat

You may be able to start a chat from multiple places in the app, including:

- the Home screen
- a service page
- a Follow-Up Report
- other service-related pages where a department contact or Contact Us option is shown

Starting a Chat from a Service Page

If you have a question about a specific service, the easiest option is to start the chat from that service's page.

How to start a chat from a service page:

1. Open the Home screen or navigate to the service you need
2. Tap or click the service to open its service page
3. Select Contact Us or the chat option shown on that page
4. Enter your message and send it

Starting a chat from the service page helps make sure your message is tied to the correct service department.

HOW TO USE CHAT

Starting a Chat from a Follow-Up Report

If you have a question about something found during service, you may be able to start a chat directly from the Follow-Up Report.

Use this when you want to:

- ask about a deficiency or issue listed in the report
- get more information about a recommended service
- follow up on a repair or corrective-work recommendation
- ask what a note or finding means

Accessing Your Existing Chats

Once a chat has been created, you can return to it anytime in the app to review messages and continue the conversation.

You can access existing chats from:

- the Home screen
- the main Chat area, if shown in your app view
- service-related pages or report areas where that conversation is linked

How to Use Chat Effectively

For the fastest help, try to start your chat from the page most closely related to your question.

For example:

- Start from the service page if your question is about a specific service
- Start from the Follow-Up Report if your question is about something found during a completed visit
- Start from the Home screen if you need general help and aren't sure where to begin

This helps your message get routed to the right team more quickly.

Good to Know

- Chats are intended to help connect you with the right NBRS department directly inside the app
- Starting a chat from a service-related page helps tie your question to the right service category
- If you manage multiple locations, make sure you are viewing the correct property before starting a chat about a location-specific issue

Pro Tip

If your question is about a specific service, report, or recommendation, starting the chat from that page gives the NBRS team more context and can help speed up the response.

Starting a Chat with the Service Department

Each service page can also connect you directly with the department or service team related to that service.

HOW TO USE FOLLOW-UP REPORTS

The Follow-Up Reports section gives you access to detailed service reports after completed visits. These reports are designed to show what was serviced, what was found, and whether any issues or recommendations were identified during the visit. Please allow up to 48 hours after service completion for reports to be published.

You can use Follow-Up Reports to review service findings, view before-and-after photos, contact your service advisor, pay open invoices tied to the visit, and download or share report records.

What You Can Do in Follow-Up Reports

From the Reports section, you can:

- View your most recent reports
- Open older completed reports
- Filter reports by service type or date
- Review report findings, service conditions, and technician notes
- View before-and-after photos when included
- Contact your service advisor from the report
- Pay an open invoice from the report, when available
- Download the report as a PDF
- Send or share the report
- Share the report using a QR code - great tool for instant sharing with inspectors

How to Open Follow-Up Reports

On mobile:

1. Open the NBRS App
2. Tap Reports from the bottom navigation bar

On desktop:

1. Log into the NBRS web portal
2. Click Reports from the top navigation menu

Viewing the Reports List

The main Reports page shows your available follow-up reports in a list format.

Reports may be organized by sections such as:

- Most Recent
- All Reports

Each report entry may show:

- service type
- property / location
- report date
- technician or service team reference
- quick status indicators such as:
 - number of items checked
 - “good” conditions
 - issues found

HOW TO USE FOLLOW-UP REPORTS

Filtering Reports

If you want to narrow down your report list, you can filter reports by date and service type.

How to filter reports:

1. Open Reports
2. Tap or click Filters
3. Choose the date range you want to view
4. Select the service type, if needed
5. Save or apply the filter

Filtering is helpful when you want to:

- find reports for a specific service
- review reports from a certain date range
- narrow down reports for one property or service category

Opening a Follow-Up Report

To view a completed report:

1. Open Reports
2. Select the report you want to review
3. Scroll through the report to view the service summary, findings, photos, and other visit details

What You'll Find Inside a Follow-Up Report

Each report is designed to give you a detailed view of the completed service visit.

Depending on the service, a report may include:

- service name
- property / location
- service date
- technician or service advisor information
- report findings
- condition summaries
- compliance-related observations
- before-and-after photos
- service-specific measurements or inspection details
- issues or deficiencies identified during service
- contact option for your service advisor
- payment button for an open invoice tied to the visit
- export and sharing options

Understanding Report Findings

The main body of the Follow-Up Report is where you'll see the results of the service visit.

This may include:

- condition summaries for the serviced unit or area
- items marked as good
- items that need attention
- issues or deficiencies found during service
- service-specific measurements, percentages, or readings
- notes related to compliance, maintenance, or system condition

Why this matters:

The Follow-Up Report is intended to help you understand not only what work was completed, but also the current condition of the serviced system and whether any next steps may be recommended.

HOW TO USE FOLLOW-UP REPORTS

Before-and-After Photos

Some reports include before-and-after photos to help show the condition of the serviced area before work began and after the service was completed.

These photos may help you:

- visually confirm the work performed
- understand service results more clearly
- review problem areas identified during the visit

Contacting Your Service Advisor from the Report

If you have questions about the report, you may be able to contact your service advisor directly from the report page.

Use this if you want to:

- ask about a finding or issue listed in the report
- get more information about a recommendation
- follow up on something identified during the visit
- request clarification on service results

Paying an Invoice from the Report

If there is an open invoice tied to the service visit, the report may include a Pay Invoice option.

How to pay from the report:

1. Open the report
2. Tap or click Pay Invoice if the option is shown
3. Follow the payment steps provided in the app

Good to know

Not every report will include a payment option. This depends on whether an open invoice is connected to that visit.

Exporting and Sharing a Report

Each Follow-Up Report can also act as a shareable service record.

From the Export & Share section, you may be able to:

- Download the report as a PDF
- Send the report - requires permission and access to phone apps
- Share the report using a QR code

Downloading a Report as a PDF

Use this option when you want a saved copy of the report for your own records or for sharing outside the app.

To download a report:

1. Open the report
2. Tap or click the Export & Share section
3. Select Download report as PDF

Sending a Report

The Send Report option allows you to share the report using the sharing options available on your device.

This may be helpful if you want to:

- send the report to another team member
- share service documentation internally
- forward a report to someone who needs to review the completed work

HOW TO USE FOLLOW-UP PLAN

When deficiencies are identified during service, your Follow-Up Report may include a Follow-Up Plan with recommended next steps.

A Follow-Up Plan is designed to help you quickly review service-related issues, corrective work, repairs, and optional add-on services that may be recommended after a visit. From the Follow-Up Plan, you can choose how you want to move forward with each item.

What You Can Do in a Follow-Up Plan

From the Follow-Up Plan, you may be able to:

- Review deficiencies identified during service
- View recommended corrective work, repairs, or optional add-on services
- See pricing for follow-up items when available
- Choose how you want to handle each item, depending on the service and recommendation
- Approve eligible items directly through the app

Where Follow-Up Plans Appear

Follow-Up Plans are tied to the Follow-Up Report for a completed visit.

If a Follow-Up Plan is included, you can access it from the related service report after the visit has been completed.

What You'll See in a Follow-Up Plan

Each Follow-Up Plan item is designed to clearly show:

- the problem or deficiency identified during service
- the recommended solution
- the available next-step option(s) for that item
- pricing, when applicable

Items may be grouped into sections such as:

- Items Needing Attention
- Custom Quoted Services
- other follow-up or recommended service categories tied to the visit

Understanding Your Options

Depending on the item, you may see one or more ways to move forward.

1. Add to Next Service

Some items can be added to your next scheduled service visit.

Use this option if:

- the issue does not need immediate attention
- you want the work handled during your next regular visit
- you want to bundle the work with already scheduled service

2. Fix Immediately

Some items may be eligible for an off-route visit or more immediate scheduling.

Use this option if:

- the issue needs to be handled sooner
- you do not want to wait until the next scheduled visit
- the recommendation is time-sensitive or operationally important

Good to know:

Items scheduled outside your regular service route may be priced differently than work added to a future scheduled visit.

HOW TO USE FOLLOW-UP PLAN

3. Request a Quote

Some recommendations require additional review, scoping, or custom pricing before they can be approved.

Use this option if:

- the work is more complex
- the service requires a custom scope
- pricing or service details need to be reviewed before moving forward

When you request a quote, the NBRs team will review the request and follow up with the next steps.

How to Review and Approve Follow-Up Items

1. Open the Follow-Up Report for the completed visit
2. Locate the Follow-Up Plan section
3. Review each item listed under the plan
4. Read the problem, solution, and available options for that item
5. Select how you would like to move forward:
 - Add to next service
 - Fix immediately
 - Request a quote
6. Review the total shown at the bottom of the plan, if applicable
7. Tap or click Approve to continue

Reviewing Pricing

When pricing is available, it will appear next to the follow-up item option shown in the plan. Pricing may vary depending on:

- the type of service being recommended
- whether the work is added to a future visit or scheduled separately
- whether the item requires custom quoting or review

Approving a Follow-Up Plan

Once you've selected the items you want to move forward with, you can approve the Follow-Up Plan directly in the app.

Approving a Follow-Up Plan allows NBRs to move forward with the selected follow-up work based on the options you chose. This acts as a service quote approval or authorization of work.

Good to Know

- Not every report will include a Follow-Up Plan
- Follow-Up Plans only appear when there are recommended next steps, deficiencies, repairs, or add-on opportunities related to the completed visit
- Some items may be ready for direct approval, while others may require a quote request first
- If you're unsure which option to choose, you can contact Team North Bay for help before approving the item

Pro Tip

If you're managing multiple locations, review the property name, service type, and recommended item details before approving a Follow-Up Plan so you know the work is tied to the correct visit and location.

HOW TO USE QUOTES

The Quotes section allows you to review, approve, and manage service quotes directly in the NBRS App. Quotes may be used for one-time work, recurring services, recommended follow-up work, or new services being added to your account.

Quotes in the app are designed to make approvals easier by giving you one place to review service details, pricing, and required terms before signing approval.

What You Can Do in Quotes

From the Quotes section, you can:

- View pending, approved, and archived quotes
- Review pricing and service details for one-time or recurring work
- Open an individual quote to review the scope of service
- Approve and sign quotes directly in the app
- Review and accept required Terms & Conditions during the approval process
- Request changes if you are not ready to approve the quote as written
- Contact the NBRS team if you have questions about the quote

What Types of Quotes You May See

Quotes in the app may include:

- One-time services
- Recurring services
- Add-on services
- Corrective work or repairs
- Services recommended after a report or Follow-Up Plan
- New service requests submitted through the app

Examples:

- adding a new recurring grease trap pumping service
- approving a one-time hood cleaning
- approving steam cleaning, pressure washing, or repairs
- reviewing a quote generated from a Follow-Up Plan or service recommendation

How to Open Quotes

On mobile:

1. Open the NBRS App
2. Tap Quotes from the bottom navigation bar

On desktop:

1. Log into the NBRS web portal
2. Click Quotes from the top navigation menu

Viewing the Quotes List

The main Quotes page shows your available quotes and may organize them into sections such as:

- Awaiting
- Approved
- Archived

Each quote entry may show:

- quote number
- service name or quote title
- quote amount
- quote status
- date information tied to the quote

HOW TO USE QUOTES

Opening an Individual Quote

To review a quote in detail:

1. Open Quotes
2. Select the quote you want to review
3. Scroll through the quote to review the service details, pricing, terms, and approval options

What You'll See Inside a Quote

Depending on the quote, the quote page may include:

- quote status
- issue date
- expiration date
- service name(s)
- pricing
- quantity or frequency
- service descriptions
- service images or visual references
- service-specific notes
- approval options
- request changes option
- contact option for questions

Quotes may contain one service or multiple services bundled together in a single approval.

Reviewing Terms & Conditions

When you approve a quote in the app, you will be prompted to review and accept the Terms & Conditions for each service type included in the quote. This happens as part of the quote approval process.

What this means:

If a quote includes multiple service types, you may need to review and accept terms for each service type before the quote can be approved.

Example:

If a quote includes Hood Cleaning, Steam Cleaning, Grease Trap Pumping you may be required to review and accept the terms for each of those services during approval.

Approving a Quote

If you're ready to move forward, you can approve the quote directly in the app.

How to approve a quote:

1. Open the quote
2. Review the service details, pricing, and quote contents
3. Tap or click Approve
4. Review and accept the Terms & Conditions for each service type included in the quote
5. Complete the required signature when prompted
6. Submit the approval

Good to know:

You must accept the required service terms and complete the signature step in order to finalize quote approval in the app.

Requesting Changes to a Quote

If you are not ready to approve the quote as written, you can request changes.

Use Request Changes if:

- you want the quote revised before approval
- you have questions about the scope or pricing
- you want to remove, change, or clarify part of the proposed work
- you need to discuss timing, frequency, or service details with the NBRS team

HOW TO USE INVOICES & PAYMENTS

The Invoices section allows you to view open and past invoices, review invoice details, download invoice PDFs, and make payments directly in the Restaurant Services App.

Depending on your account setup, the app may also require you to add a credit card on file before certain approved quotes can be scheduled or before card payments can be made through the app.

What You Can Do in Invoices

From the Invoices section, you can:

- View open and paid invoices
- Review individual invoice details
- Download invoice PDFs
- Pay invoices directly through the app
- Add a credit card in the app when required
- Review invoice history by payment status

Important Payment Information

A credit card on file is required in the app for all customers who do not have approved credit terms with NBRBS.

If we currently have a credit card on file for your company, we cannot transfer that payment information into the new app. Existing payment information is securely encrypted and cannot be accessed or migrated by our team. As a result, you may need to enter your card information again within the app.

This does not change your existing payment arrangement with North Bay Restaurant Services. If your account is currently set up to have a card charged on the same day services are performed, that arrangement will continue following the transition. If you have established credit terms with North Bay Restaurant Services, those terms will also continue to apply.

If you want to make a credit card payment through the app, you will need to enter and save your card directly in the app.

Credit cards saved in the app do not transfer back to Jobber

Payment methods entered in the app are stored for use within the app experience and do not sync back to your main client profile in the NBRBS CRM.

A credit card on file may be required for accounts without approved Net Terms

If your account does not have approved Net Terms with NBRBS, the app may require you to add a credit card on file.

This card may be required in order to:

- pay invoices through the app
- complete approval workflows that require a card on file
- allow approved quotes to move forward to scheduling, when applicable

Good to know:

Accounts with approved Net Terms may not be required to keep a credit card on file in the app in the same way as accounts without approved terms.

How to Open Invoices

On mobile:

1. Open the App
2. Tap Invoices from the bottom navigation bar

On desktop:

1. Log into the App web portal
2. Click Invoices from the top navigation menu

HOW TO USE INVOICES & PAYMENTS

Viewing the Invoices List

The main Invoices page shows your invoice history and may organize invoices by status, such as:

- Past Due
- Awaiting
- Paid

Each invoice entry may show:

- invoice number
- service name or invoice description
- invoice amount
- due date
- invoice status

Opening an Individual Invoice

To review an invoice in detail:

1. Open Invoices
2. Select the invoice you want to review
3. Review the invoice details, including the service, invoice amount, issue date, and due date

An invoice may include:

- invoice number
- service description
- invoice date
- due date
- restaurant / property name
- line-item pricing
- total balance due
- payment option
- PDF download option

Downloading an Invoice PDF

If you need a copy of the invoice for your records, you can download the invoice PDF directly from the invoice page.

To download an invoice PDF:

1. Open the invoice
2. Tap or click Download PDF

Paying an Invoice in the App

If payment is available for the invoice, you can pay directly from the invoice page.

How to pay an invoice:

1. Open the invoice you want to pay
2. Tap or click Pay Now
3. If prompted, enter or confirm your payment method
4. Complete the payment steps shown in the app

Adding a Credit Card in the App

If you do not already have a card saved in the app, you may be prompted to add one before you can complete a payment.

How to add a card:

1. Open the invoice or payment screen
2. Tap Add a payment method or continue to the card-entry screen
3. Enter your card information and billing details
4. Save the card and continue with payment

HOW TO USE INVOICES & PAYMENTS

Good to know

Adding a card in the app may also satisfy app requirements for accounts that need a card on file before scheduling approved work.

If You See “Add a Card to Continue”

In some cases, the app may prompt you to add a payment method before an approved quote can move forward.

This typically means:

- your account does not have approved Net Terms on file, and
- a credit card on file is required before the approved work can be scheduled

If this message appears:

1. Tap Add a payment method
2. Enter the card details you want to keep on file in the app
3. Save the payment method to continue

Good to Know

- Credit card processing is handled by Stripe, a secure payment platform; all transactions may be subject to 3rd party transaction fees.
- Credit cards already stored in Jobber do not automatically appear in the app.
- If you want to make credit card payments through the app, you must add the card inside the app
- Cards saved in the app do not sync back to Jobber
- Accounts without approved Net Terms may be required to keep a card on file in the app
- Invoice availability and payment options may vary depending on your account setup and invoice status

Pro Tip

If your company plans to pay by credit card through the app, it's best to add the payment method in the app before you need to approve or pay for something urgently.

HOW TO USE PROFILE

The Profile section is where you manage your account settings, company contacts, properties, notification preferences, payment methods, language settings, documents, and promotional offers.

If your company manages multiple restaurant locations or service properties, the Profile area also helps you switch between locations and keep contact information organized by property.

What You Can Do in Profile

From the Profile section, you can:

- View and manage your company profile
- Switch between multiple properties or locations
- Manage company contacts and assign contacts to specific properties
- View and update payment method information
- Manage notification preferences
- Change the app language between English and Spanish
- View service-related documents and agreements
- Access promotional offers
- Review service agreement status
- Log out of the app

NOTIFICATIONS

The app includes notification settings so you can choose which alerts you want to receive.

Notification categories may include:

- Service UpdatesJob scheduled
- Technician on the way
- Service completed
- Quotes & ApprovalsNew quote available
- Approval reminders
- Invoices & PaymentsNew invoice issued
- Payment confirmation
- Upcoming or overdue invoice reminders
- Credit card expiration or decline alerts
- Chat & CommunicationDirect messages from NBRS
- Other account noticesPromotions, reminders, or account updates

What you can do:

- Review notification history
- Open an individual notification for more detail
- Turn notification categories on or off in preferences

Good to know

Notifications are one of the main ways the app keeps you informed about upcoming service, completed reports, new quotes, and billing activity.

MULTI-PROPERTY MANAGEMENT

If your company has more than one location, the app allows you to manage multiple properties under one account.

What you can do:

- Switch between properties or restaurant locations
- View property-specific services, reports, invoices, and activity
- Add a new property request where applicable
- Confirm you are working under the correct location before reviewing service details, quotes, reports, or invoices

Where to switch properties:

You may be able to switch properties from:

- the Home screen
- the Profile page
- the web dashboard / web portal

Good to know

Many parts of the app are property-specific, so it's important to make sure you are viewing the correct location before taking action.

COMPANY CONTACTS

The Company Contacts section allows you to manage who is associated with your account and what role each person has.

What you can do:

- View your company contact list
- Add a new contact
- Edit an existing contact
- Update phone number, email, and role information
- Assign contact types such as:
 - Billing Contact
 - Scheduling Contact
 - Emergency Contact
- Assign contacts to a specific property when needed

Why this matters:

Keeping contacts up to date helps ensure the right people receive:

- service scheduling updates
- invoice and billing notices
- emergency communications
- account-related messages

LANGUAGE SETTINGS

The app can be used in English or Spanish.

What you can do:

- Switch the app language between English and Spanish
- Use the app in the language most comfortable for your team

Where to change it:

The language toggle is located on the Profile page and is typically shown with a globe icon.

PROMOTIONAL OFFERS

The Promotional Offers section displays special offers, discounted services, or featured service opportunities that may be available for your account.

What you can do:

- View current promotions offered through the app
- Review discounted or featured service opportunities
- Use offers to request service or discuss options with the NBRS team

Examples may include:

- discounted add-on services
- special pricing on related cleaning services
- seasonal or promotional service offers

PAYMENT METHODS

The Payment Methods area is where you manage the payment method used inside the app.

Important:

Credit cards previously provided to NBRS do not transfer into the app, and credit cards saved in the app do not sync back to the NBRS CRM program.

If your account does not have approved Net Terms, the app may require a credit card on file in order to:

- make credit card payments through the app
- complete certain approval workflows
- allow approved work to move forward to scheduling when applicable

DOCUMENTS & AGREEMENTS

The Profile section may also provide access to account documents, service agreements, privacy policy and other account-related records.

This is where clients may be prompted to review or sign required agreements when needed.

SERVICE AGREEMENT & TERMS ACCEPTANCE

The app includes multiple layers of terms and agreement acceptance, and clients may be required to approve different terms at different points in the app. This is an important part of using the platform.

There are three different types of terms / agreements clients may be asked to accept:

1) NBRS General Service Agreement

This is the overall company service agreement that governs the business relationship between the client and NBRS.

It may include items such as:

- general service terms
- payment terms
- service policies
- liability / access / site responsibility language
- scheduling and service expectations

2) App Terms & Conditions

These are the terms related to use of the NBRS App / portal itself.

They may cover:

- use of the platform
- account access
- communication and digital approvals
- app-based workflows and permissions

3) Service-Specific Terms & Conditions

These are the terms tied to a specific service type being approved in a quote or service approval workflow.

When Clients May Need to Accept Terms

During first-time account setup or first login

The first person from a client company who logs into the app may be prompted to review and sign the general NBRS Service Agreement. This replaces the old process of handling the agreement separately outside the app.

During quote approval

When a quote is approved in the app, the client may be required to review and accept the service-specific Terms & Conditions for each service type included in that quote.

If a quote includes multiple service types, the client may need to accept terms for each applicable service.

During app/account use

Clients may also be required to accept the app's own platform / app Terms & Conditions as part of onboarding or account use.

SERVICE AGREEMENT & TERMS ACCEPTANCE

Important: Approving a Quote Is Not Just a Signature

When a quote is approved in the app, the client is not only signing the quote itself. They may also be required to accept:

- the service-specific terms for the services included in that quote
- the NBRS general terms where applicable
- the app / platform terms where applicable

That means quote approval may involve reviewing multiple sets of terms before signing.

What to Keep in Mind as a Client

Before approving work in the app, make sure you understand:

- which property/location you are working under
- which contacts should receive service and billing communications
- whether your payment method is current
- whether there are any agreements or terms still waiting for acceptance
- whether the quote includes one service or multiple service types with separate terms

Profile & Account Management Tips

- Double-check the selected property before reviewing quotes, invoices, visits, or reports
- Keep contacts updated so the right people receive billing, scheduling, and emergency communications
- Review your notification preferences so you don't miss quote approvals, invoices, or service updates
- If your team prefers Spanish, use the language toggle in Profile
- If you're asked to approve a quote, expect that you may also need to review service-specific terms and conditions before signing

FAQ & TROUBLESHOOTING

Category	Issues / Question	What to Check / What to Do
Log In	I'm not receiving my login verification code	Make sure you entered the same mobile phone number or email address that is on file with NBRS and that it belongs to a contact on the account. Double-check for typing errors and try again. If the code still doesn't arrive, contact NBRS to verify or update the phone number on file.
Log In	I can log in, but I don't see the right company or property	Use the property selector on the Home or Profile page to switch locations. Confirm you are on the correct property before reviewing visits, reports, quotes, or invoices.
Log In	Someone on our team needs access to the app	Make sure that person has been added as a company contact with the correct phone number. They may also need to be assigned to the correct property or contact role.
Documents	Why am I being asked to sign a service agreement?	The first person from a client company may be prompted to sign the NBRS General Service Agreement during first-time setup or first login. This is part of the account onboarding process.
Documents	Why do I have to accept terms when approving a quote?	Quote approval may require you to accept service-specific Terms & Conditions for each service type included in the quote. You may also need to accept broader company or app terms where applicable.
Documents	I already signed something before — why am I seeing terms again?	The app may require different agreements at different times, including the general service agreement, app/platform terms, and service-specific terms tied to a quote or service approval.
Properties	Why am I seeing the wrong location's information?	You are likely viewing the wrong property. Use the property toggle on the Home screen or Profile page to switch to the correct location.
Properties	Can I manage multiple properties under one account?	Yes. If your company has multiple service locations, the app can support multi-property management. Use the property selector to move between locations and view property-specific services, reports, quotes, and invoices.
Contacts	How do I update who receives service, billing, or emergency information?	Go to Profile > Company Contacts and update the contact list if your account has permission. If not, contact NBRS and provide the contact's name, phone number, email, and role.
Contacts	I can't find a visit I know was scheduled	Make sure you're on the correct property, then check whether the visit is listed under upcoming, today, or past visits. Try calendar view or filters if available.
Visits	The visit instructions look different than I expected	Visit details may include service-specific before-visit and after-visit instructions that vary by service type. If something looks incorrect or doesn't match your site setup, contact NBRS before the visit.
Reports	When will my follow-up report appear?	Reports are typically available after the service has been completed and the report has been finalized. If the visit was just completed, check back later and confirm you are on the correct property.

FAQ & TROUBLESHOOTING

Category	Issues / Question	What to Check / What to Do
Reports	Why don't I see a report for a completed visit?	The report may still be in process, the visit may have been completed very recently, or you may be viewing the wrong property. If it still doesn't appear, contact NBRS.
Follow-Up Plan	What can I do with a Follow-Up Plan?	Depending on the item, you may be able to add it to your next scheduled service, approve it for an off-route visit, or request a quote for more complex work.
Follow-Up Plan	Why can't I approve every Follow-Up Plan item the same way?	Not all follow-up items work the same way. Some have preset pricing and can be approved immediately, some are only available as add-ons to the next service, and some require admin review and a quote.
Quotes	Why can't I approve a quote yet?	Common reasons include: required terms & conditions have not been accepted, the signature step is incomplete, the quote has expired, or the account needs a credit card on file before the work can move forward.
Quotes	I approved a quote — what happens next?	After approval, the quote moves into NBRS's workflow for scheduling, recurring service setup, or follow-up. Depending on the service, NBRS may schedule the work directly or contact you to confirm next steps.
Quotes	What if I want changes to a quote instead of approving it?	Use Request Changes on the quote if available, or contact NBRS through the app to ask for pricing clarification, scope changes, frequency changes, or service corrections.
Payments	Why do I have to add a card if we already have one on file with NBRS?	Credit cards previously provided to our team do not transfer into the app. If you want to make credit card payments in the app, or if your account requires a card on file, the card must be added directly inside the app.
Payments	If I add a card in the app, will it appear in Jobber?	No. Payment methods saved in the app do not sync back to NBRS's CRM.
Payments	Why is the app asking for a credit card on file?	If your account does not have approved Net Terms, the app may require a credit card on file in order to pay by card, complete certain approval workflows, or allow approved work to move into scheduling.
Payments	Can I still pay another way if I don't want to pay in the app?	That depends on your account setup and payment terms with NBRS. If your company normally pays by ACH, check, or approved terms, contact NBRS if you're unsure whether a card is still required in the app.
Payments	Where is my receipt?	Receipt visibility may vary depending on the payment flow. You can still use Download PDF from the invoice screen for a copy of the invoice. If you need payment confirmation or receipt details not shown in the app, contact NBRS.
Chat	How do I message the right department?	The app allows chats to be started by service / department so your message goes to the correct team. You may be able to start chat from the Home screen, a service page, or a follow-up report.

FAQ & TROUBLESHOOTING

Category	Issues / Question	What to Check / What to Do
Chat	I sent a message but haven't gotten a response yet	Response times may vary depending on department availability and business hours. If the issue is urgent or service-related, contact NBRS directly by phone.
Chat	Why do I see multiple chats?	Chats may be organized by service / department so questions about hood cleaning, grease trap pumping, hydro jetting, repairs, and other services go to the correct team.
Notifications	Why am I not getting notifications?	Make sure notifications are enabled for the app on your device, review your notification preferences in the Profile section, and confirm you're logged into the correct account.
Notifications	Can I turn off some notifications but keep others?	Yes — if enabled for your account, notification preferences can be managed in Profile > Notifications / Preferences.
Quotes	Can I use the app in Spanish?	Yes. The app supports English and Spanish. Use the language toggle in the Profile section to switch languages.
Languages	What if I want changes to a quote instead of approving it?	Use Request Changes on the quote if available, or contact NBRS through the app to ask for pricing clarification, scope changes, frequency changes, or service corrections.
Languages	The app is showing the wrong language	Go to Profile and use the language selector to switch languages. If it doesn't update correctly, contact NBRS.
Promotions	What are Promotional Offers?	Promotional Offers are app-based offers that may highlight discounted services, seasonal offers, related add-on services, or featured recommendations. Availability may vary by account or service type.
Troubleshoot	Who do I contact if something in the app isn't working?	Contact NBRS if you can't receive your login code, can't access the correct property, can't find a report / quote / invoice, have questions about pricing or recommended work, or the app is not behaving as expected.

