

Welcome — New Team Member Guide

Welcome to Flags Unlimited! Follow the steps below to log in and save the Ops App to your phone's home screen — one tap, just like any other app. Page two walks through the everyday workflows so you know where things live before your first real job.

Your login Web address: ops.flags-unlimited.com · Email: your @flags-unlimited.com address · Password: from your manager

iPhone / iPad

Use Safari — this won't work in Chrome on iOS.

- 1 Open Safari and go to ops.flags-unlimited.com, then log in
- 2 Tap the Share icon (square with an arrow up)
- 3 Tap "Add to Home Screen", then tap "Add"
- 4 Tap the new icon on your home screen any time to open the app

Android

Use Chrome for the smoothest setup.

- 1 Open Chrome and go to ops.flags-unlimited.com, then log in
- 2 Tap the three-dot menu (top-right)
- 3 Tap "Add to Home screen" or "Install app", then confirm
- 4 Tap the new icon on your home screen any time to open the app

GOOD TO KNOW

- App icon looks outdated after an update? Delete it and repeat the steps above to get the latest version.
- New to the app? Check out the Onboarding module for hands-on practice before using real data — Sandbox Mode lets you click through everything without touching live customer records.
- Every screen has a small "?" help icon, and a feedback button to send us a quick note anytime.
- Turn on notifications when your phone asks. That's how you get storm alerts, @mentions and reply notices.

YOUR FIRST WEEK

Where the everyday work happens.

- **Find your workspace** — The bar at the top switches between Home, Ops, Sales and Management. The app remembers where you were, so a refresh or a fresh login drops you back on the same page.
- **Start with Needs Attention** — Every board has a Needs Attention tile showing what's waiting on you and how long it's been sitting. On the Sales & Marketing board it now sits in the main tile grid with the rest of your shortcuts.
- **Techs: your day runs through Jobs** — Open the job, follow the route order, use the site map and Street View to find the pole, then finish with a Closeout — photos, supplies used, 1–10 condition scores, NFC tag and the customer's signature. Anything you skip needs a short note saying why.
- **Log your miles as you go** — Mileage records the real road distance between your job start and end points and links the trip to the job automatically. Manual overrides are allowed but must be explained — it's an IRS-grade record.
- **Office: intake and follow-ups** — Service Calls capture incoming requests and convert into scheduled jobs. Follow-ups due on the Sales board is your daily call list.

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NEWEST WORKFLOWS — WHAT CHANGED RECENTLY

- **Create Quote is the first tile on the Sales board** — Tap it to build a PDF quote for a prospective customer: capture their details, pick products and quantities from the Shopify catalog, set a discount and installation estimate, and preview the PDF before it goes out.
- **Every quote creates a Shopify draft order first** — The draft order is created before the PDF is generated, so pricing, the customer record and the quote always match. The finished PDF carries a checkout link and QR code the customer can pay from on their phone.
- **Compare poles side by side** — The comparison table pins the spec column while you scroll, has a "differences only" toggle, and filters by wind rating, material and price. Edit quantities right in the table and the quote total updates with you. Your selections save as a draft so you can pick the quote back up later.
- **Quotes list and quote detail** — /sales/quotes lists every quote with customer, date, reference number, total and status. Search, filter and sort it, open any quote for its full line items and send/download history, email it in one tap, or select several and download them as PDFs or a single ZIP. CSV export is there too.
- **Quotes from an RFQ** — Generating a quote from an RFQ prefills the customer and site details and files the quote back into that RFQ's history, moving it to "quoted" automatically. If a prefilled product, quantity or install preset no longer matches the live catalog, you'll see a warning before you send.
- **Marketing ideas have discussions and history** — Comment on an idea to ask for changes before it moves to Approved or In Progress, and open the history to see every status change — who, when, and old to new — with a revert option when you're allowed to use it.
- **Marketing events sync panel** — See the last successful push to the Master Schedule, anything that failed, and re-push everything with one tap if a sync went sideways.
- **Customer questions come back to you** — When the office replies to a customer question in the portal, the thread shows an unread badge and a timestamped history grouped by day, so nothing gets lost mid-conversation.

TROUBLESHOOTING

The problems that come up most, and what to do next.

Issue	What you'll see	Next step
Can't log in	<i>Password won't work?</i>	Use "Forgot password" on the login screen and check your @flags-unlimited.com inbox (including spam). If the reset email never arrives, your account may not be created yet — message your manager.
Login loops back	<i>You sign in and land on the login screen again.</i>	You're likely on an old saved copy of the app. Delete the home-screen icon, reopen ops.flags-unlimited.com in the browser, log in, then re-add it to your home screen.
"You don't have access"	<i>A page, board or button is hidden or greyed out.</i>	Access follows your role (Tech, Office, Super Admin) and your assigned branch. Confirm you're on the right branch with the switcher at the top; if the work really is yours, ask an admin to update your role or branch — techs can't grant it themselves.
Data looks wrong or empty	<i>Records you expect are missing.</i>	Check whether Sandbox Mode is on — sandbox hides live records, and live hides sandbox. Also clear any saved filter view still applied from a previous session.
Quote won't generate	<i>The PDF button spins or errors out.</i>	A quote creates its Shopify draft order first, so it needs a customer, at least one product with a quantity, and a working connection. Fix any field flagged in red, then tap Generate again — your draft is autosaved, so nothing is lost.

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Products missing from a quote	<i>A pole or flag isn't in the picker.</i>	The catalog syncs from Shopify. Search by SKU as well as name; if it's genuinely absent the product is likely unpublished or out of the synced collection — send a note through the feedback button and the office can publish it.
Quote PDF didn't reach the customer	<i>Sent, but nothing received.</i>	Open the quote's detail page and read the send history. If the email shows as failed, re-send or download the PDF and attach it manually — the draft order and checkout link stay valid either way.

WHEN YOU GET STUCK

Not sure about something? Use the "?" icon on the screen you're stuck on, or the feedback button to send a note straight to the team. There's no wrong question in your first month — asking early keeps bad data out of the system.

Welcome to the team — glad to have you on board!

Full feature detail lives in the App Overview & Capabilities Guide, linked in the footer of every page in the app.