FlowStack

USER GUIDE

Run your whole business from one app

Valet, guest requests, reviews, approvals and the back office: set up and run every module, step by step

Valet · Quick review · HR & Leave · Payroll · Procurement · Documents · Forms & approvals · Guest requests

Edition 3 · 2026

flowstackcloud.com

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WELCOME

One app for the whole business

FlowStack brings the daily work of your organization into one place: your people and their leave, payroll, buying and stock, paperwork, approvals and guest requests. Each part is a module. Your organization has the modules you chose, and each person sees only what their role allows.

Valet
Digital tickets, photos, keys and WhatsApp for guests

Quick review
One scan from the lobby to your Google and TripAdvisor page

HR & Leave
People records, leave, shifts and attendance

Payroll
Monthly pay, WPS bank files and payslips

Procurement
Order, receive, stock, invoices and contracts

Documents
Licences and contracts with expiry alerts

Forms & approvals
Requests and contracts that route themselves to approvers

Guest requests
A live service desk for guests, visitors and colleagues

New here?
Start with chapter 1, then ask your administrator to follow chapter 2.

Looking for a task?
Use the contents page. Every section starts with what it is for, then shows the screen.

Reading the screens
Numbered markers on a screenshot match the numbered list under it.

The screens in this guide show a sample organization, Demo Resort & Spa, with sample data. Your own screens will show your data. Menus and buttons depend on your role.

CHAPTER 1

Getting started

1

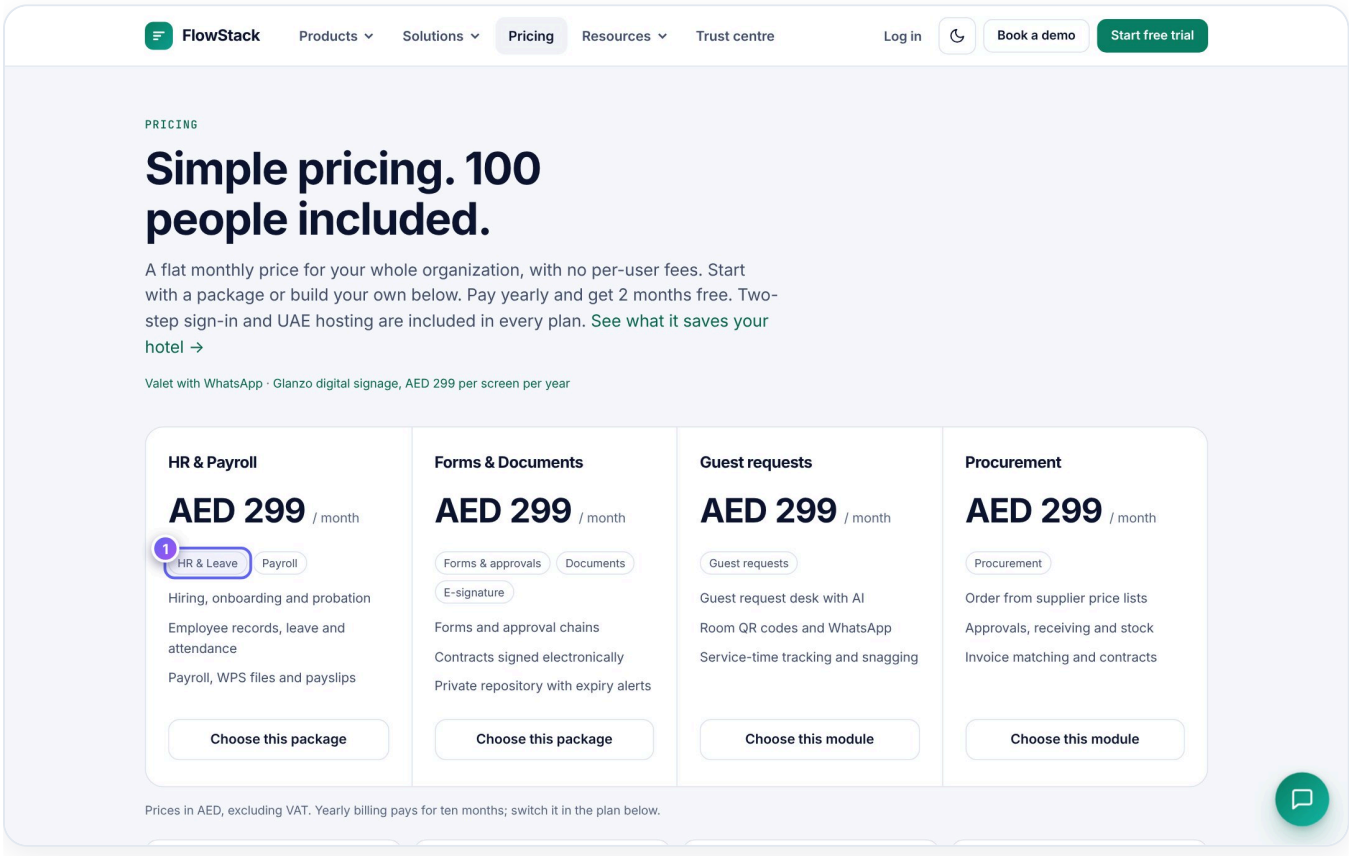
From signing up to your first day in FlowStack: choosing modules, setting a password, signing in and finding your way around.

Start a free trial | Set your password and sign in | Read your dashboard | Use FlowStack on your phone

1.1 Choose your modules and start a free trial

FlowStack is sold by module, so you only pay for what you use. On the Pricing page of the FlowStack website, tick the modules you want. The price on the right changes as you choose. Choosing more modules earns a discount, and yearly billing gives you two months free.

Every organization starts with a free 14-day trial. No card is needed. During the trial you can add up to five people who can sign in, and everything you create is kept when you subscribe.



1 Tick the modules you need: the price follows your choice

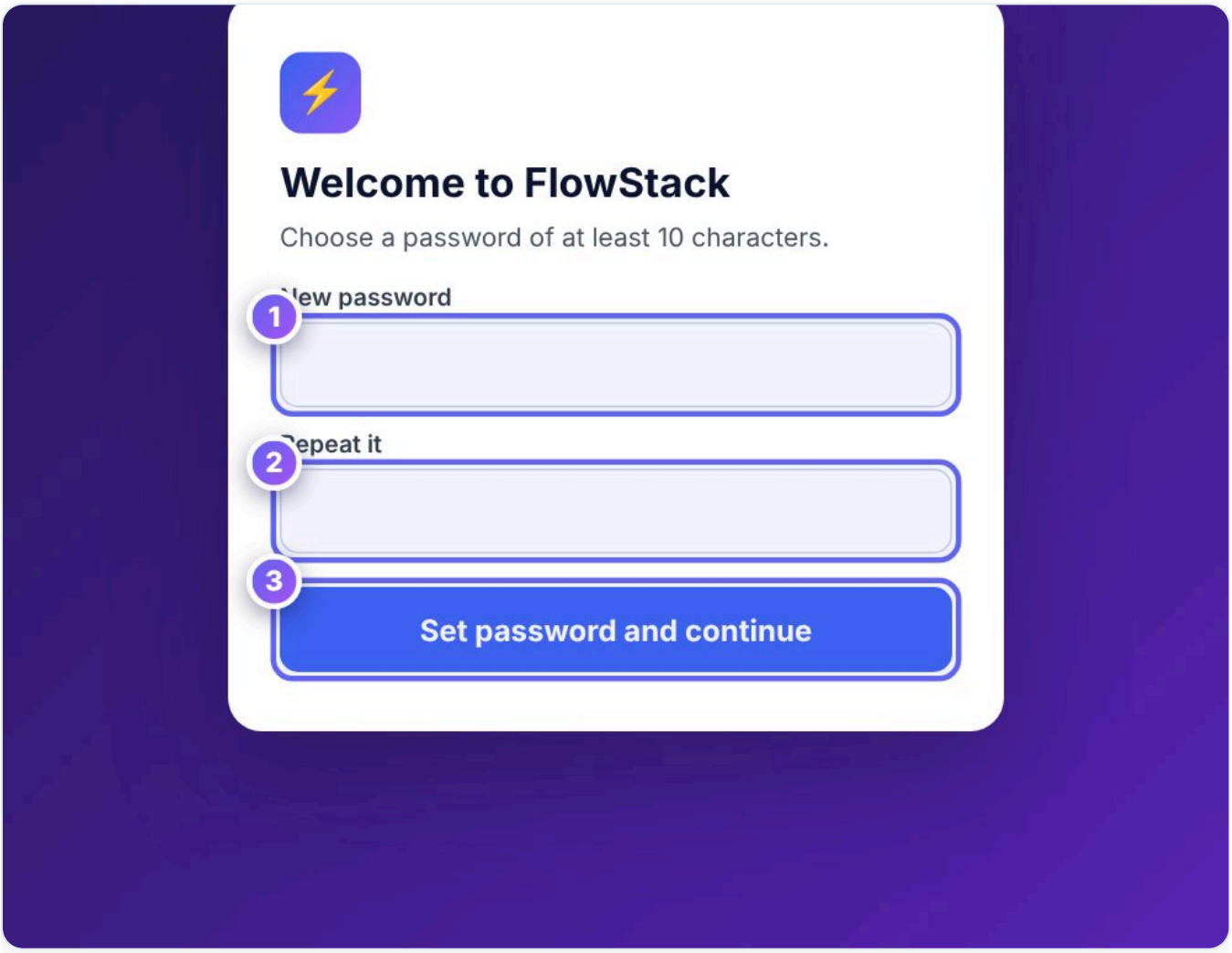
HOW TO

1. Tick the modules you need.
2. Enter your company name, your name and your work email. The person who signs up becomes the administrator.
3. Tick the box to accept the terms, then press Start 14-day free trial.
4. Open the welcome email we send you. It holds your organization code and a link to choose your password.

> **Tip.** The modules and prices on the website always match the product, so a new module appears there by itself.

1.2 Choose your password

The link in your welcome email opens this page. It works once and stays valid for seven days. If it has expired, use Forgot your password? on the sign-in page and we will send a new one.



1. Choose a password of at least ten characters
2. Type it again to be sure
3. Save it and continue

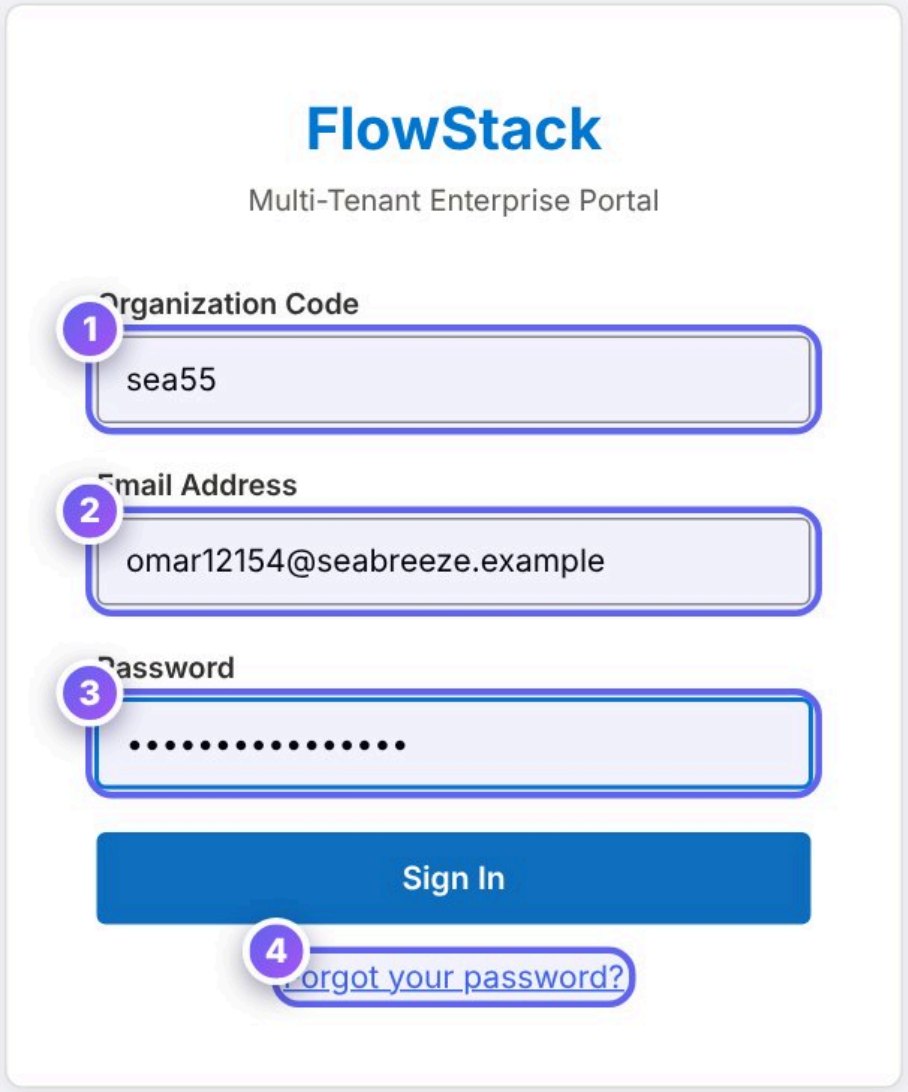
HOW TO

1. Type a password of at least ten characters.
2. Type it again.
3. Press Set password and continue.

> **Tip.** A long phrase is stronger than a short, complicated one. For example: three random words and a number.

1.3 Sign in

Signing in takes three things: the organization code from your welcome email, your work email and your password. The organization code tells FlowStack which organization you belong to, so people at different organizations can even share an email address.



1. Your organization code, shown in your welcome email
2. Your work email
3. Your password
4. Forgot it? Get a new link by email

HOW TO

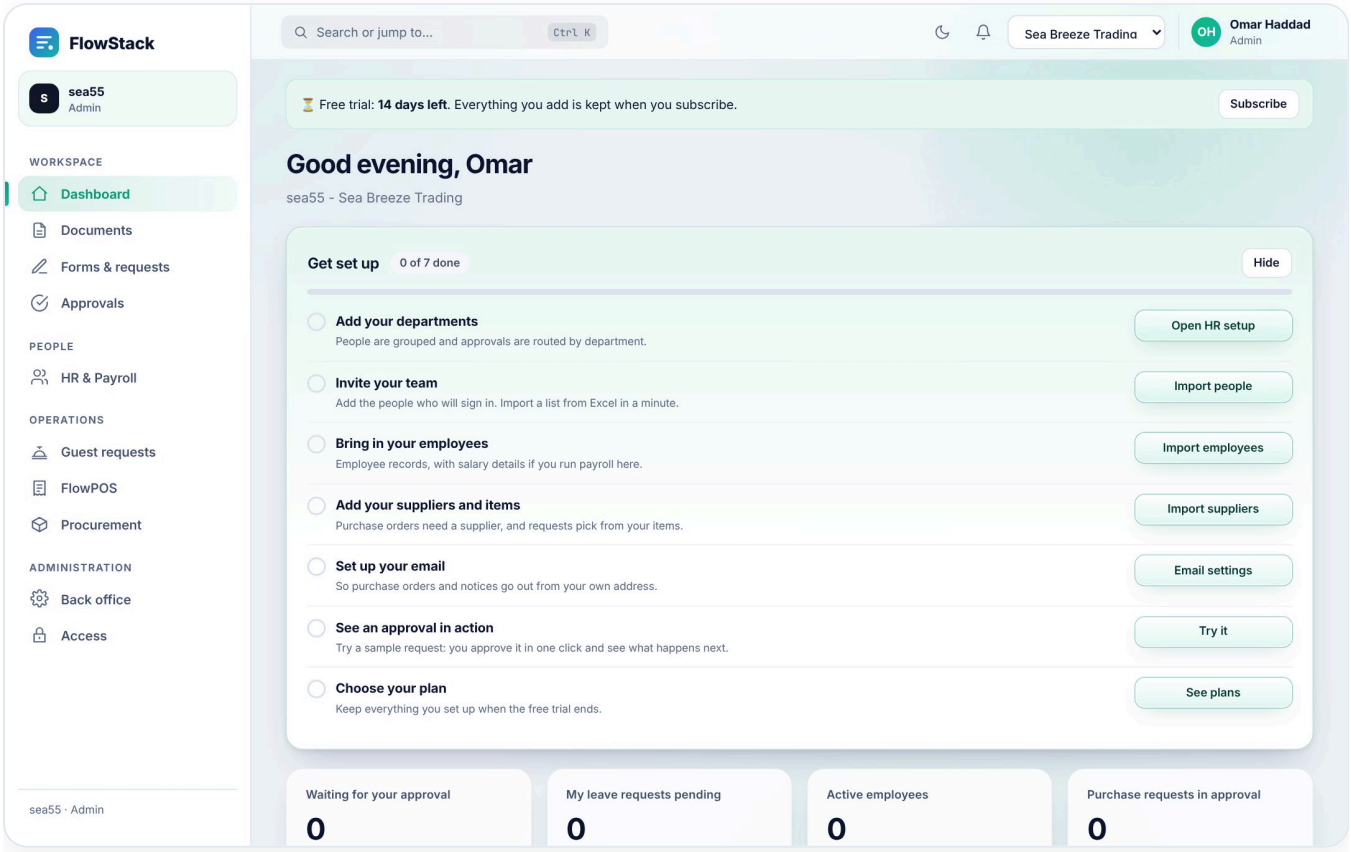
1. Go to the FlowStack sign-in page.
2. Enter your organization code, email and password.
3. Press Sign In.

Tip. On a phone you stay signed in for weeks, so you only do this once. On a shared computer, always choose Log out from your account menu.

1.4 Your welcome screen

The first time an administrator signs in, FlowStack shows a short welcome with the three things most worth doing first. You will only see it once.

The quickest way to understand FlowStack is the first choice: See an approval in action. It creates a sample request from a made-up colleague and takes you to your approvals, where you approve it in one click. It takes about a minute.



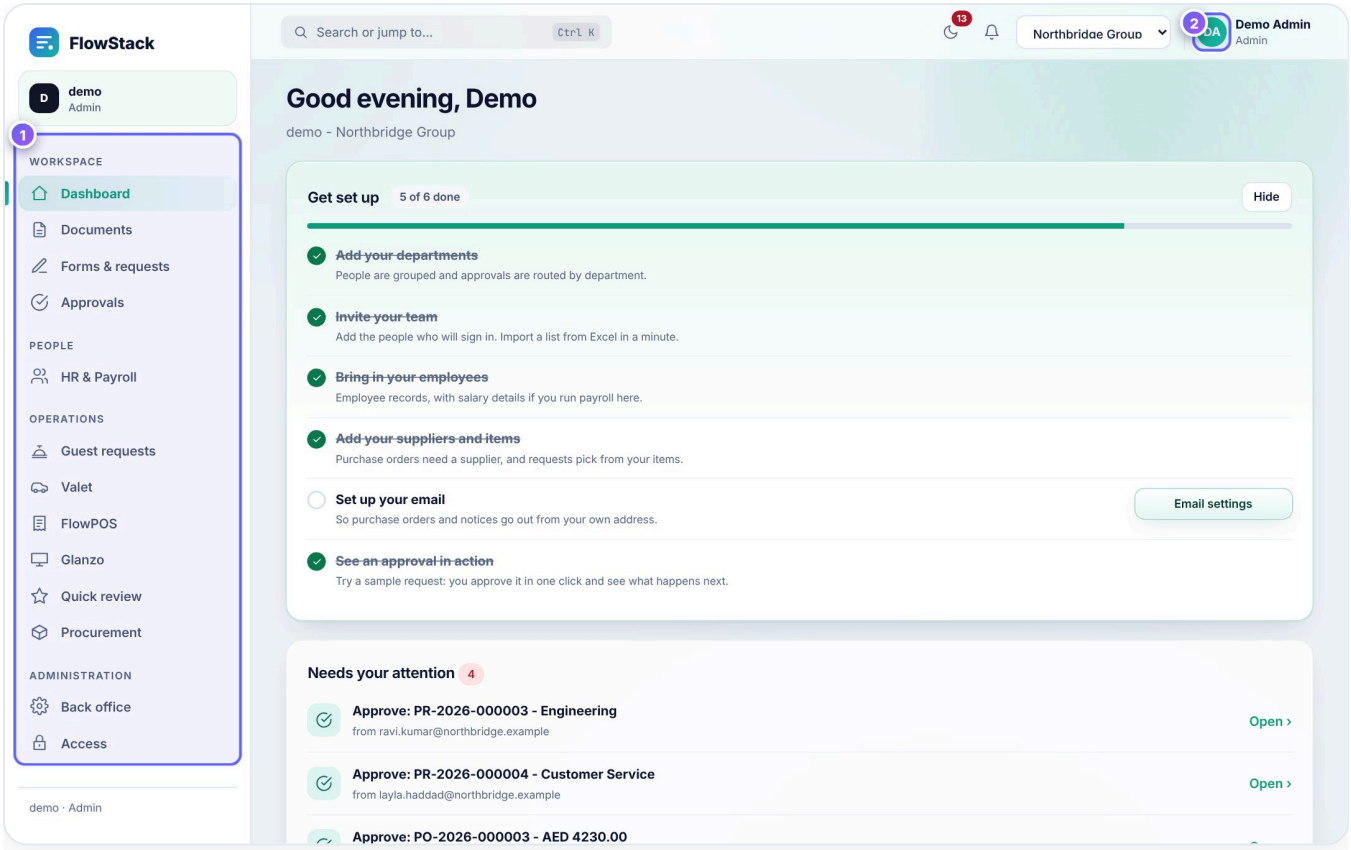
HOW TO

1. Press See an approval in action to try the sample (recommended).
2. Or press Add your team to import your people from Excel.
3. Or press Look around first. Your next steps stay on the dashboard.

1.5 Your dashboard

The dashboard is the first thing you see. It shows only what matters to you today: approvals waiting for your decision, leave requests, documents about to expire and open service requests. Press any card to jump to the details.

The menu on the left lists the modules you can open. It depends on your role and on the modules your organization has, so two people can see different menus.



1 The menu: only the modules you can open

2 Your account: change your password or log out

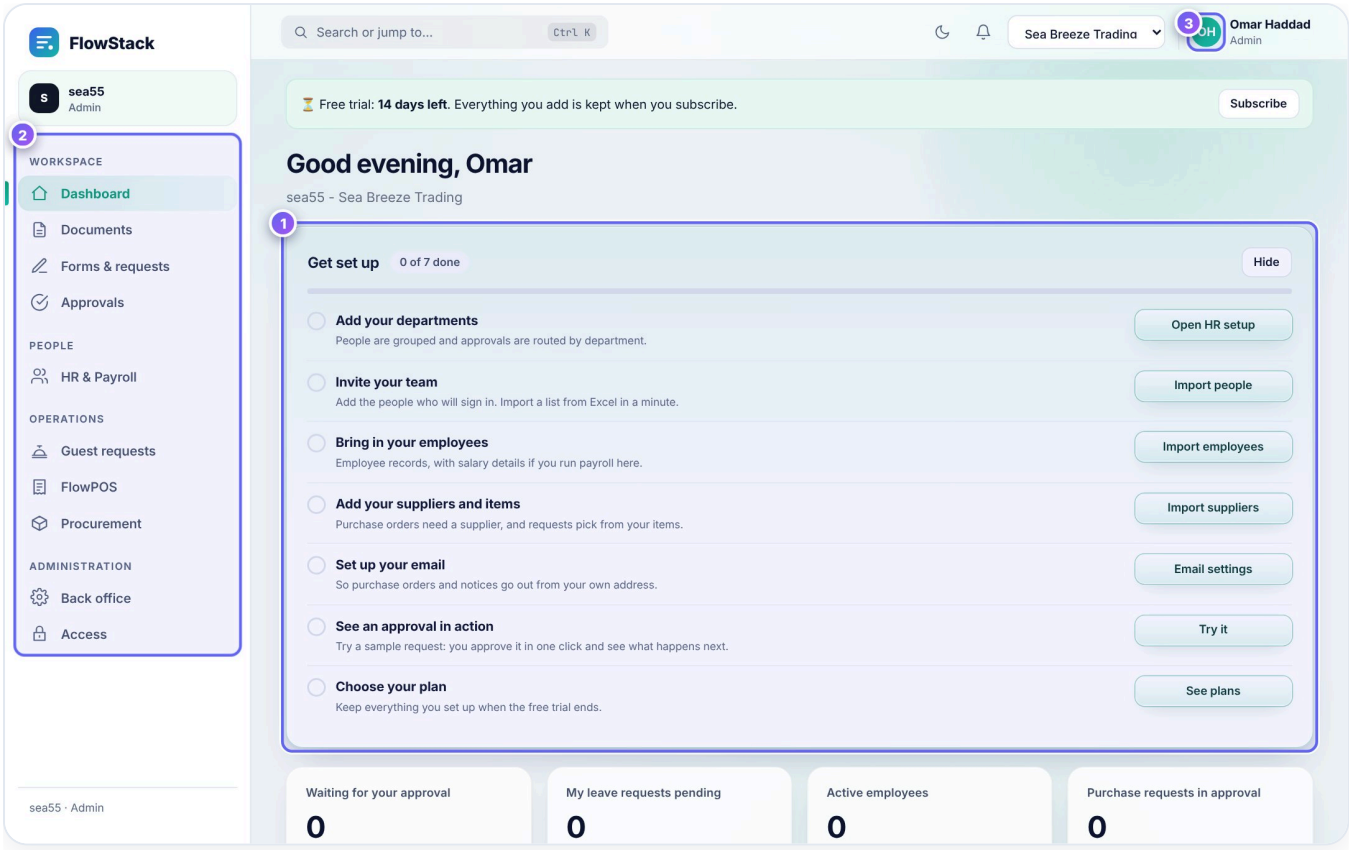
HOW TO

1. Use the menu on the left to move between modules.
2. Press Review next to an item in Needs your approval to decide it straight away.
3. Use the account menu at the top right to change your password or log out. If you work at more than one site, the selector next to it switches between properties.

1.6 Your set-up checklist and free trial

Administrators see a Get set up card on the dashboard. It lists the first steps (add your departments, invite your team, bring in your employees, add suppliers, set up email, try an approval and choose your plan). Each step ticks itself as soon as the work is done, however you did it, and the card goes away when everything is finished. Press Hide to put it away sooner.

While you are on a trial, the number of days left is shown on the dashboard and under Subscription in the Back office. When a trial ends, people can only open the subscription page and log out. Your data is kept for 60 days. We email your administrator about a week before it would be deleted, and subscribing at any time brings everything back as you left it.



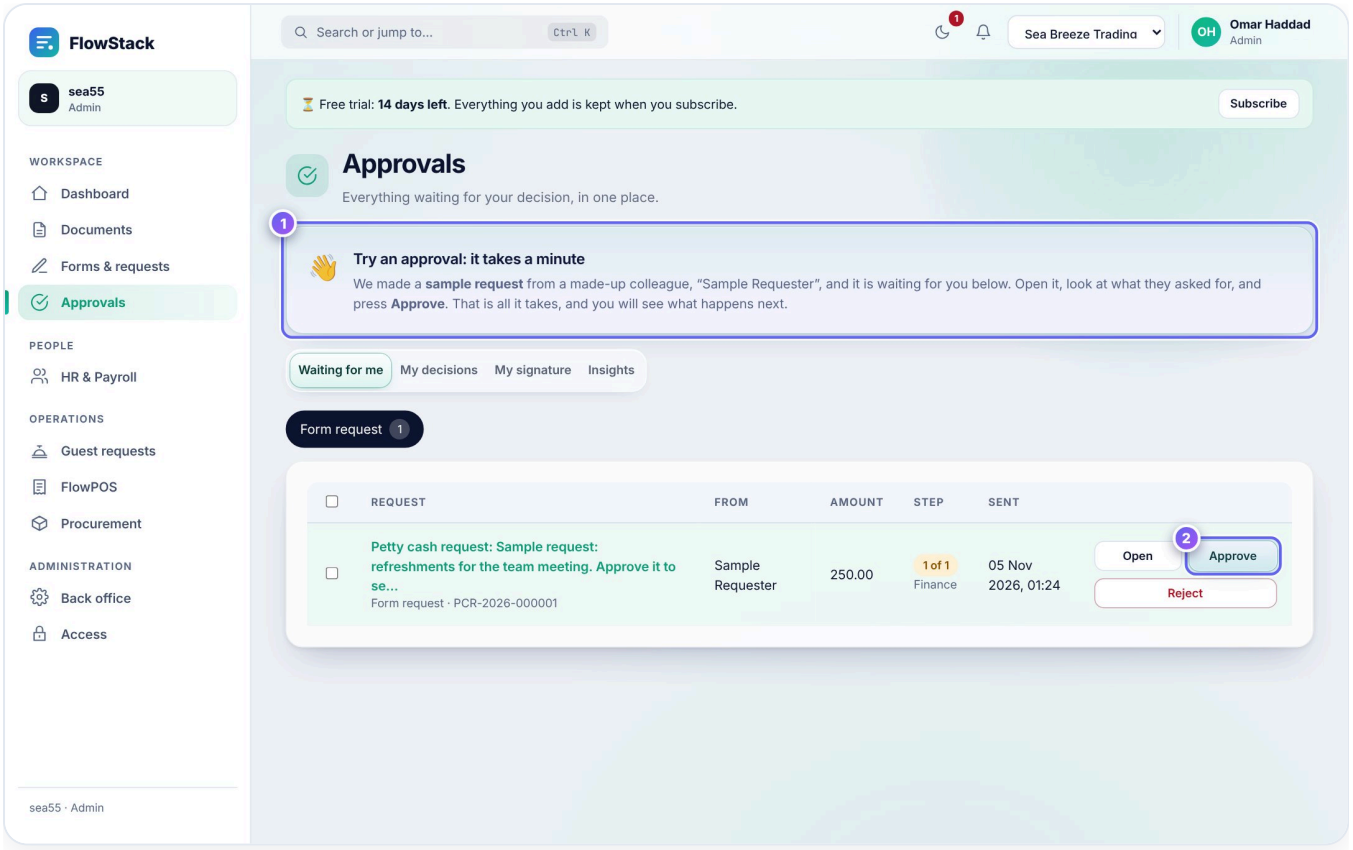
1. Your set-up checklist: each step ticks itself when it is done
2. The menu shows only the modules your organization has
3. Your account menu

> **Tip.** You can subscribe at any moment during the trial, and everything you have added stays exactly as it is.

1.7 Try an approval in one minute

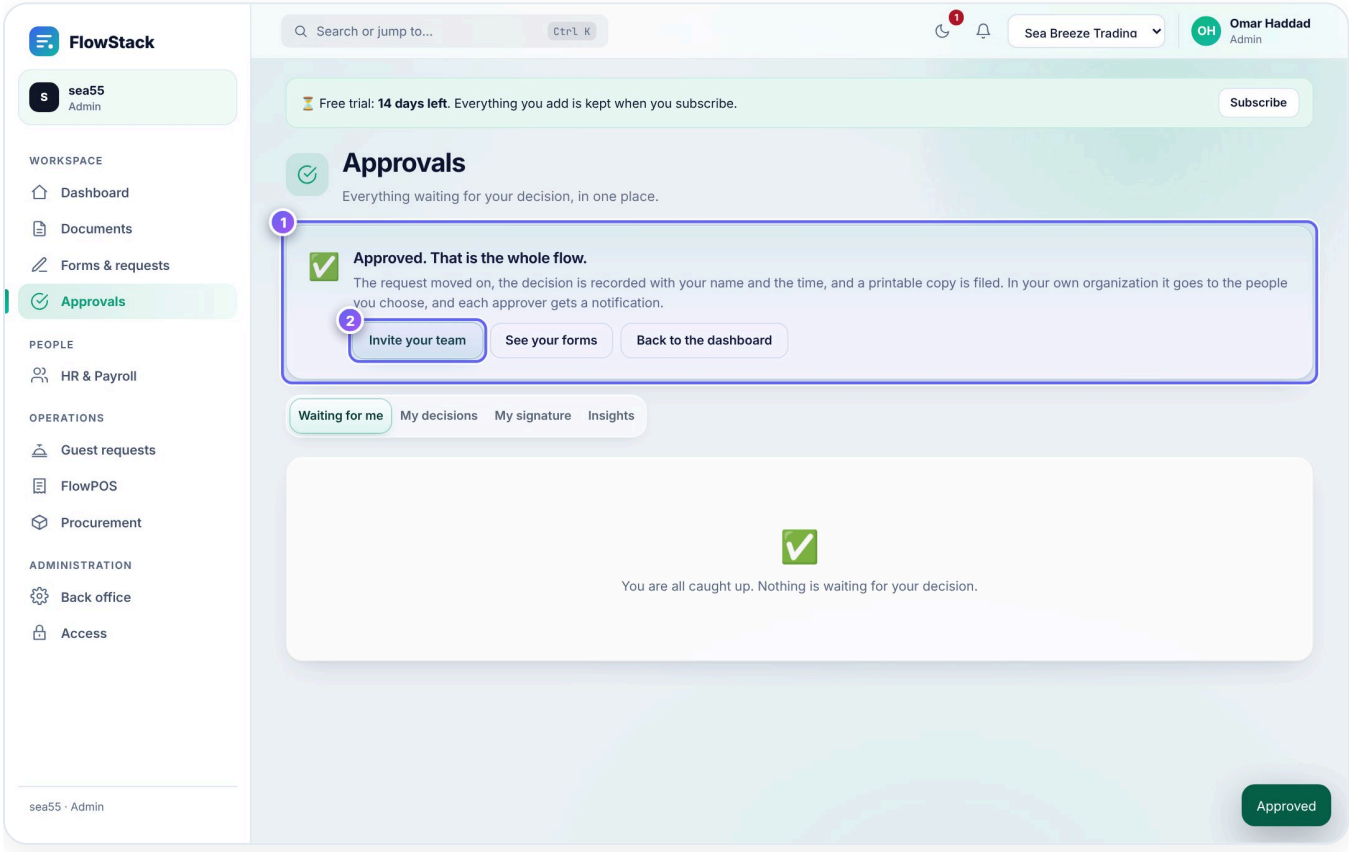
The sample request is a normal request, from a made-up colleague called Sample Requester. It waits in your approvals exactly as a real one would. Open it, read what was asked for, and press Approve. FlowStack records your name, the time and any comment you add, moves the request on and files a printable copy.

In your own organization the request goes to the people you choose, and each approver is told. You can try the sample up to three times; after that, start a real request under Forms and requests.



1 A sample request from a made-up colleague is waiting for you

2 Approve it: your name, the time and any comment are recorded



1 The approval is done: it moved on and is recorded

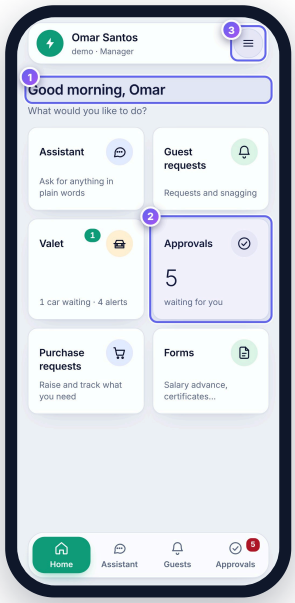
2 Next: add your people

HOW TO

1. Press Approve next to the sample request.
2. Add a comment if you wish, then press Approve.
3. Read the panel that explains what happened, and press Invite your team to go on.

1.8 FlowStack on your phone

FlowStack works like an app on any phone, with nothing to download. It shows only the modules your organization uses and only what you are allowed to do.



HOW TO

1. Open the FlowStack sign-in page in Safari (iPhone) or Chrome (Android) and sign in.
2. iPhone: press Share, then Add to Home Screen. Android: press the menu, then Install app or Add to Home screen.
3. Open FlowStack from your home screen. You stay signed in.
4. Open Menu, then Turn on notifications, and allow them. You will be alerted when something needs you.

> **Tip.** On iPhone, notifications work once FlowStack has been added to the Home Screen and opened from there (iOS 16.4 or later).

CHAPTER 2

Setting up your organization

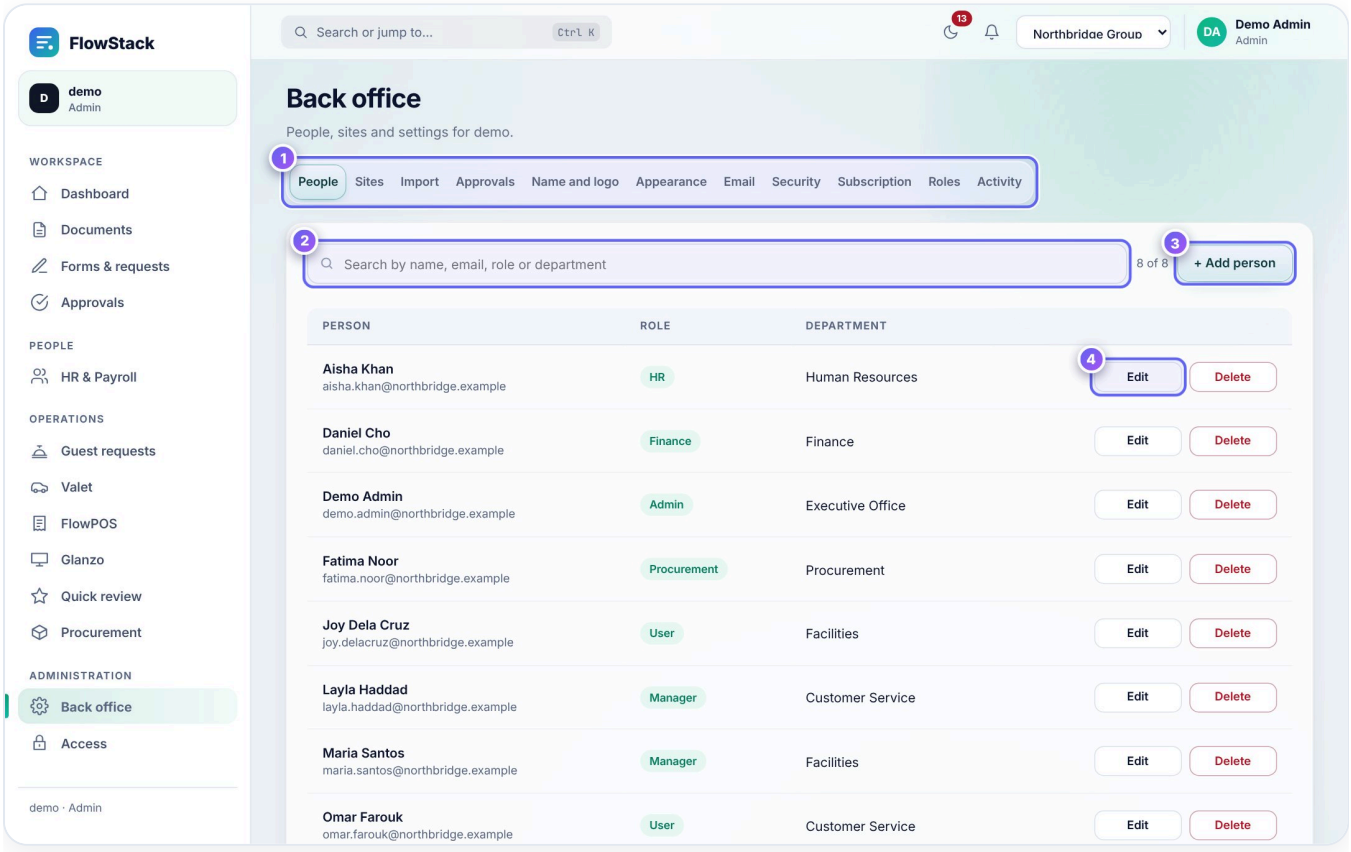
2

For administrators. Add your team, your properties, departments, leave types and approval rules, and set up email and your plan. Plan about an hour.

- Add people and choose what they can open
- Add properties and departments
- Decide who approves what
- Send email from your own address

2.1 Add your team

Open Back office from the menu. It has one tab for each task: People, Sites, Import, Email, Subscription, Roles and Activity. The People tab lists everyone who can sign in. You, the administrator, are already there. Use the search box to find someone quickly.



1. The Back office has one tab for each task
2. Search your people
3. Add a person
4. Change a person's role, department or modules

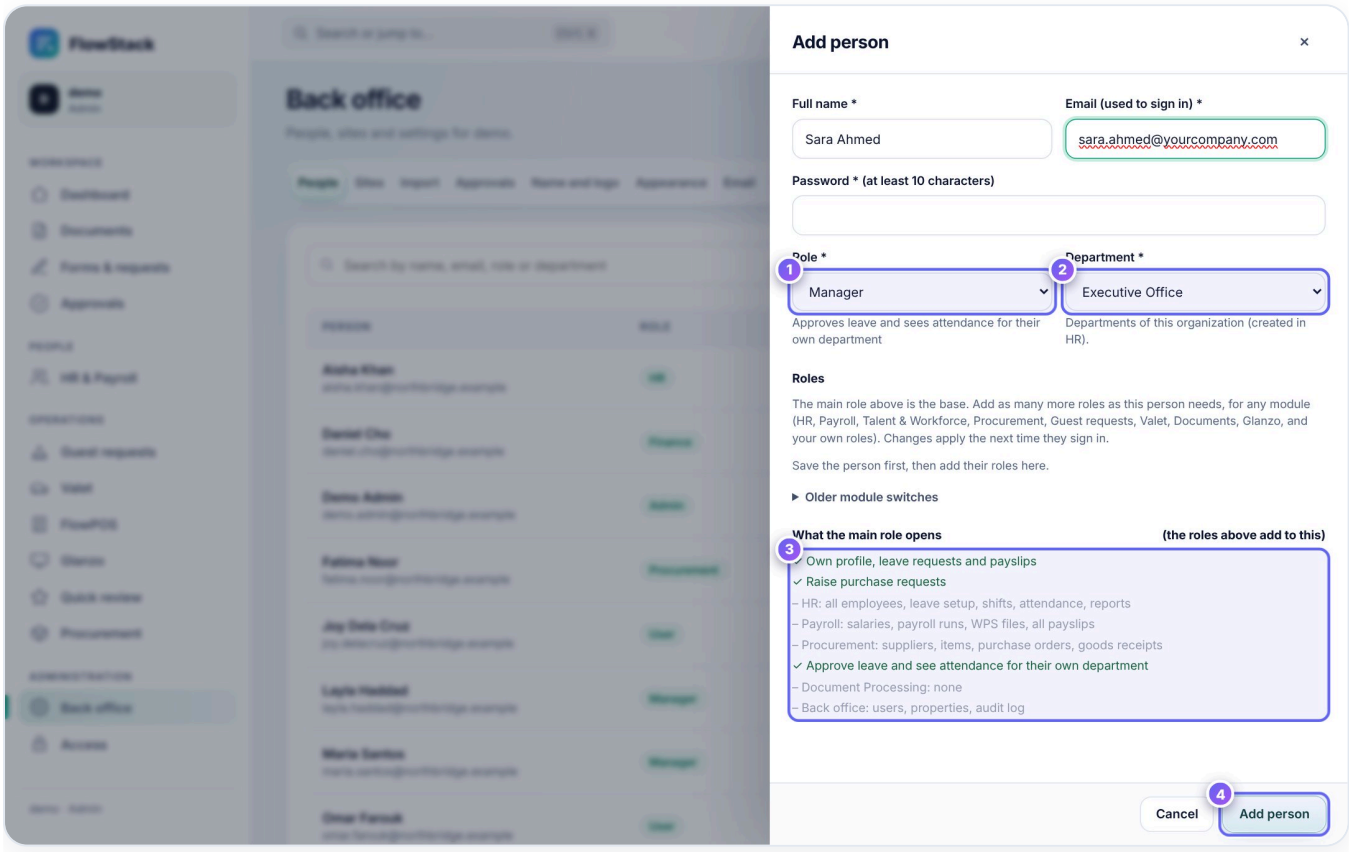
HOW TO

1. Press Add person to add someone new.
2. Press Edit next to a person to change their role, department or modules.
3. Use Delete to remove someone who has left.

2.2 Add a person

Each person has a work email, a role and a department. The role decides what they can open. The department matters for approvals: the head of a department approves leave and requests for their own people. The form opens in a panel on the right, so you never lose your place in the list.

Give each person a starting password of at least ten characters and tell them to change it after they sign in (account menu, Change password). To avoid choosing passwords at all, use the Excel import below: each person then gets an email to choose their own.



1. The role decides what the person can open
2. Their department (used for approvals)
3. Exactly what this person will be able to do
4. Save: they get an email to choose a password

HOW TO

1. Type the full name and work email.
2. Choose the role (see Appendix A for what each role can do).
3. Choose the department.
4. The role already opens some modules. Tick more modules to give extra access, for example Procurement for a manager. The list at the bottom shows exactly what the person will be able to do.
5. Press Add person.

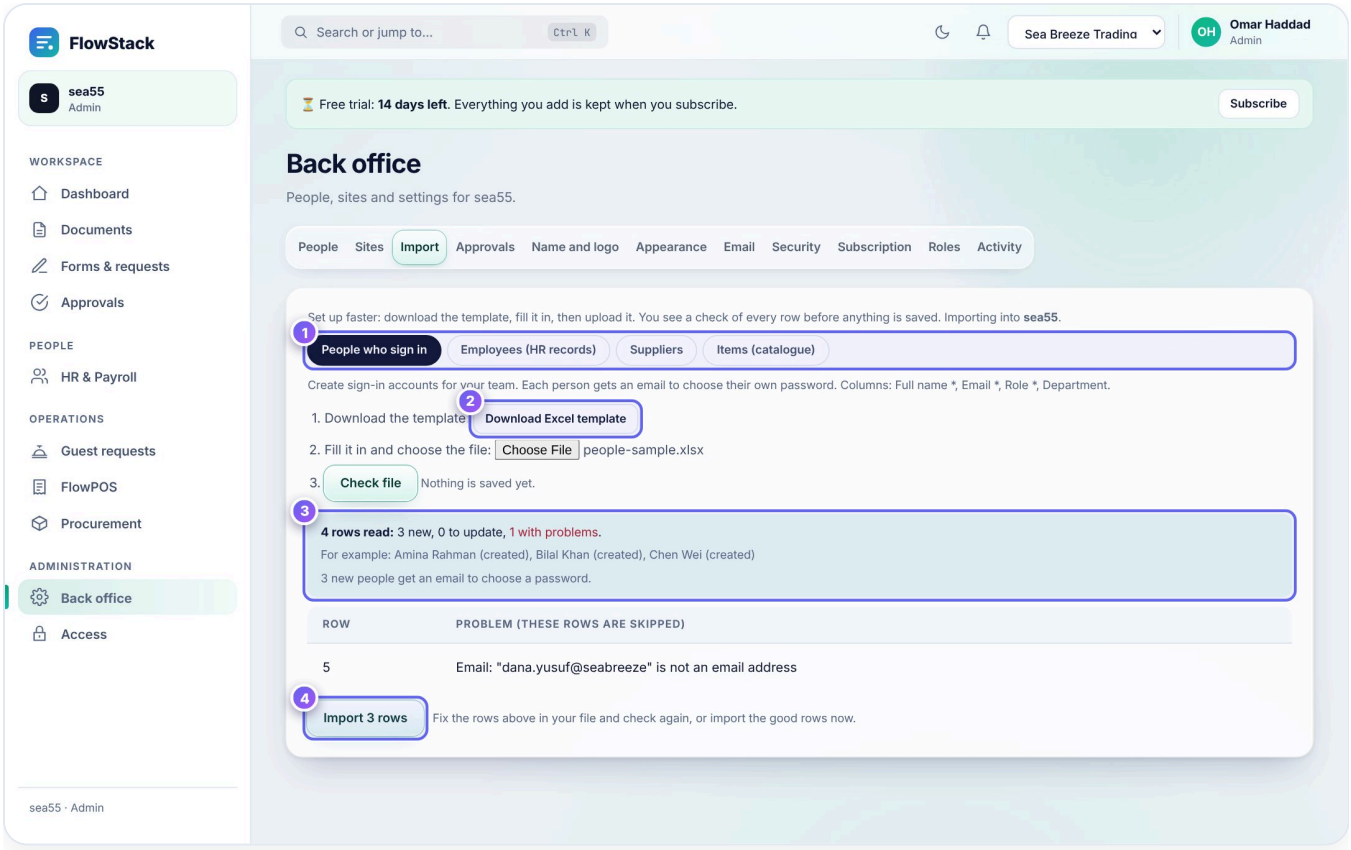
> **Tip.** Give people the smallest role that lets them do their job. Administrators can approve any step and open everything.

2.3 Import people, employees, suppliers and items from Excel

The Import tab brings in a whole list at once. Choose what to import: People who sign in, Employees (HR records, with salary details if you run payroll), Suppliers or Items. Download the Excel template, fill in one row for each record and upload it. The template has drop-down lists for choices and a How to fill in sheet.

FlowStack checks every row first and tells you how many are new, how many will update an existing record, and which have problems, with the reason. Nothing is saved until you press Import. Good rows are saved and bad rows are skipped, so you can fix them in your file and upload it again. Importing again updates records instead of duplicating them: people are matched by email, employees by number or email, suppliers and items by code.

Missing departments are created from the sheet. Each new person gets an email with a link to choose their own password, so nobody has to share a password.



1. Choose what to import: people, employees, suppliers or items
2. Download the Excel template and fill it in
3. A check of every row before anything is saved
4. Import the good rows

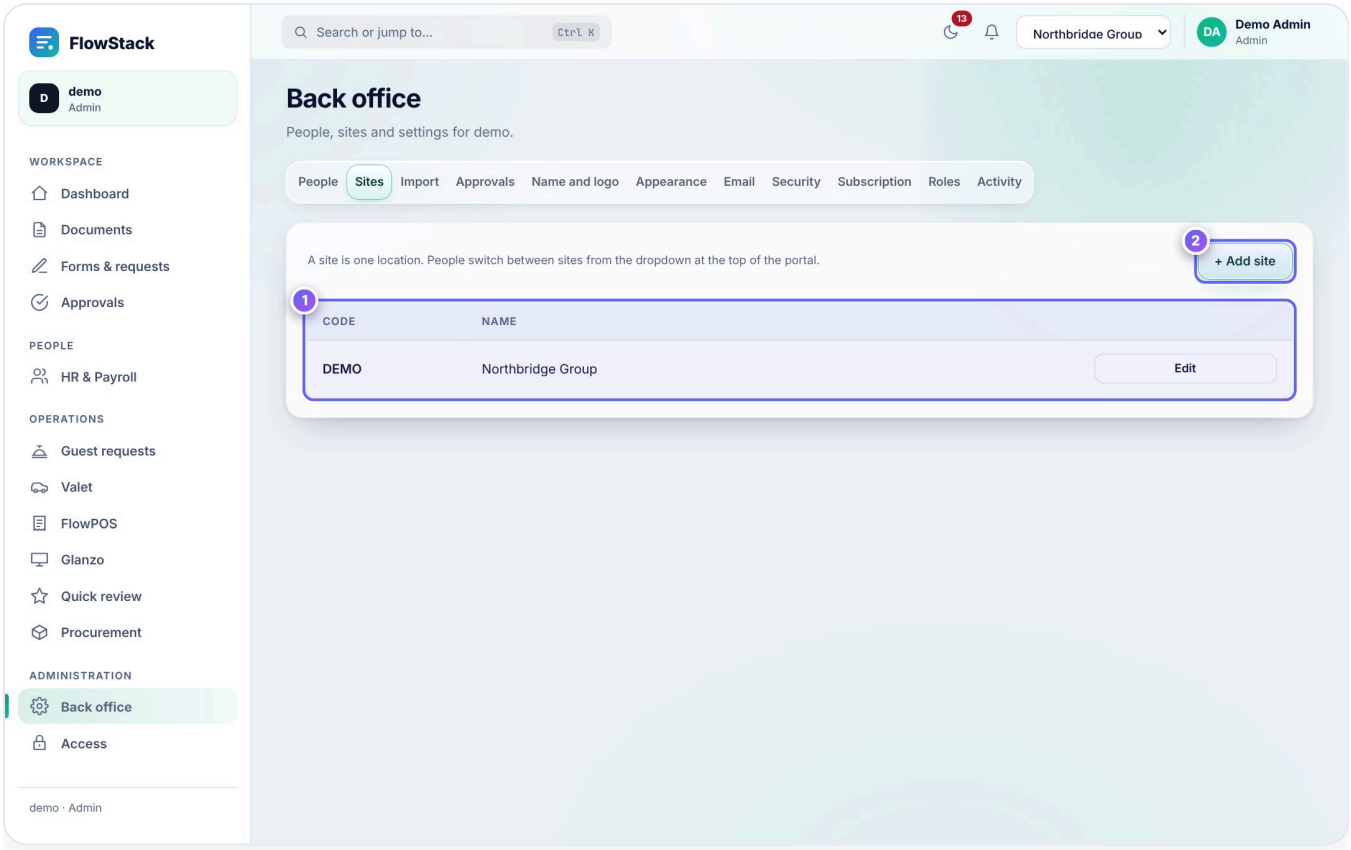
HOW TO

1. Open Back office, then Import, and choose what to import.
2. Press Download Excel template and fill it in.
3. Choose the file and press Check file.
4. Read the check. Fix any rows with problems, or press Import to save the good rows.

> **Tip.** Start with people and departments, then employees, then suppliers and items.

2.4 Add your sites

A site (called a property in some screens) is one branch, office or location. Most organizations have one. If you run several, add each one in the Sites tab. People then switch between the sites they work in with the selector at the top of every page, and stock, orders, invoices and reports follow the site you choose.



1 Your sites or branches

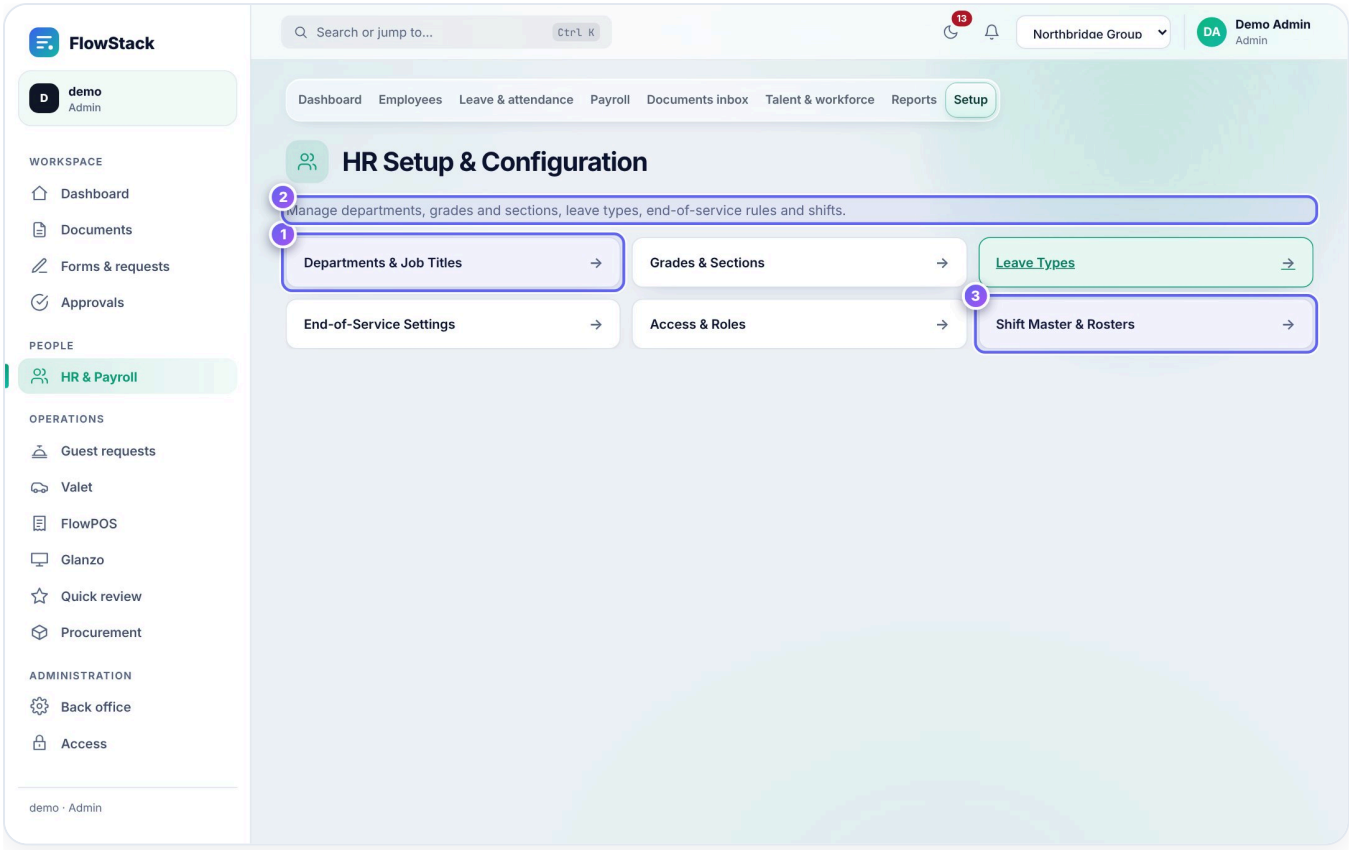
2 Add another site: a short code and a name

HOW TO

1. Open the Sites tab and press Add site.
2. Enter a short code (for example MAIN) and a name.
3. Press Add site.

2.5 HR setup

HR setup holds the lists that the rest of FlowStack relies on: departments, leave types and shifts. Set them up once, before you add employees.



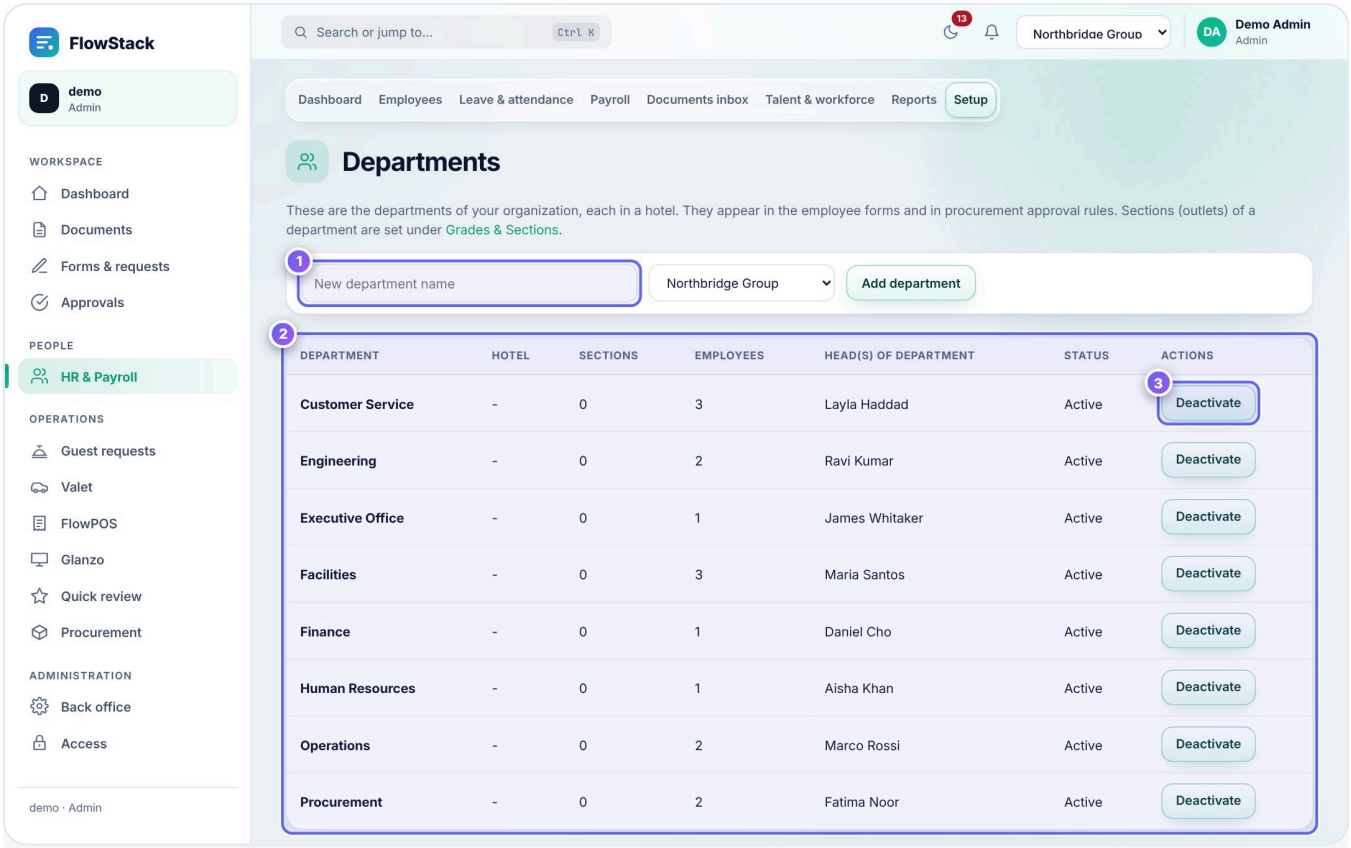
1 Departments and job titles

2 Leave types and yearly entitlements

3 Working shifts and rosters

2.6 Departments

Departments appear on employee records, on forms and in approval rules. The head of each department is the person flagged as Head of department on their HR profile.



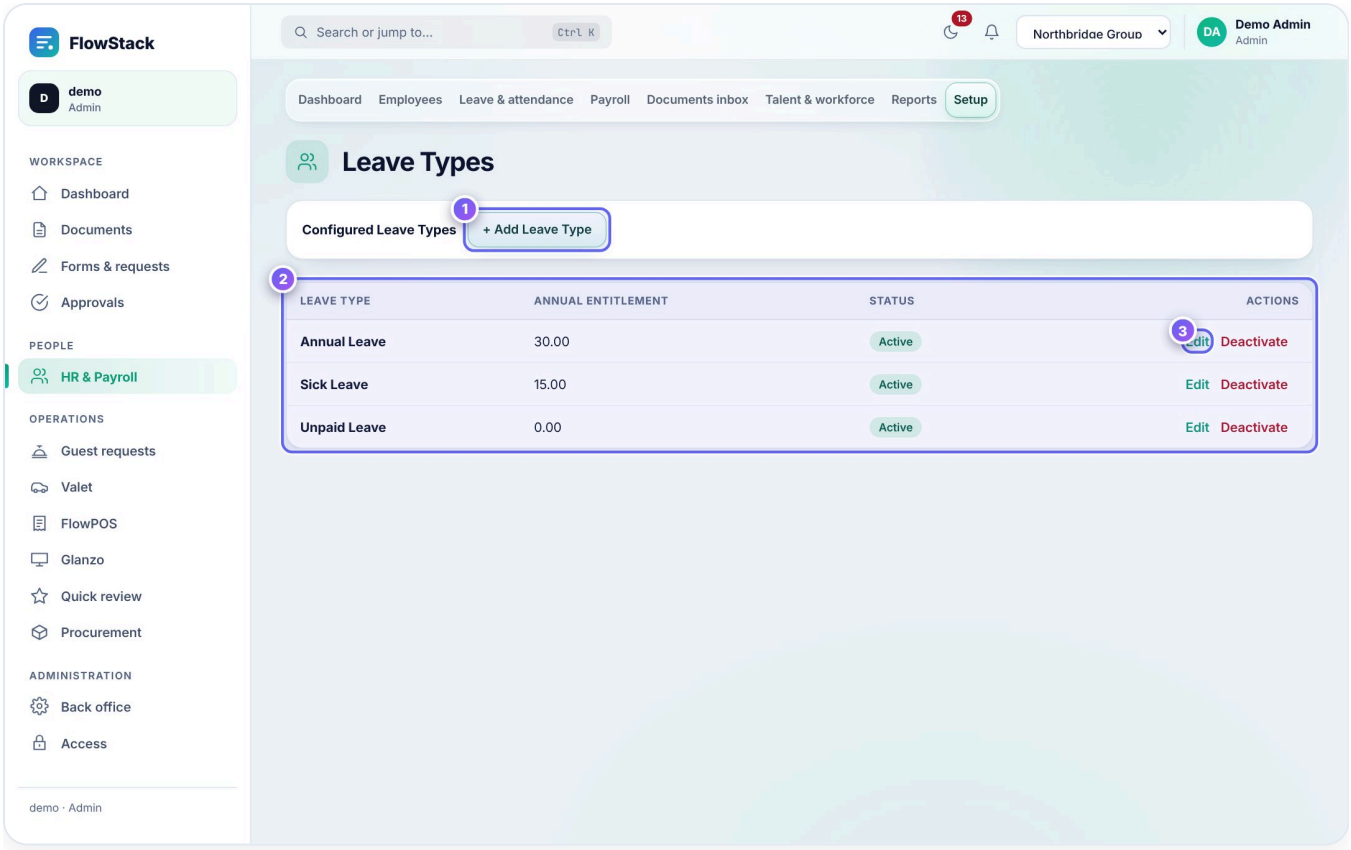
1. Add a department by name
2. Each department, its head and its people
3. Retire a department that is no longer used

HOW TO

1. Type a department name and press Add department.
2. Deactivate a department you no longer use. Its people stay on record.

2.7 Leave types

Define each type of leave and how many days a person gets each year. When you add a new type or a new joiner, press Generate Missing Balances under Leave Balances to give everyone their days.



1. Add a type of leave
2. Entitlement in days per year
3. Change an entitlement

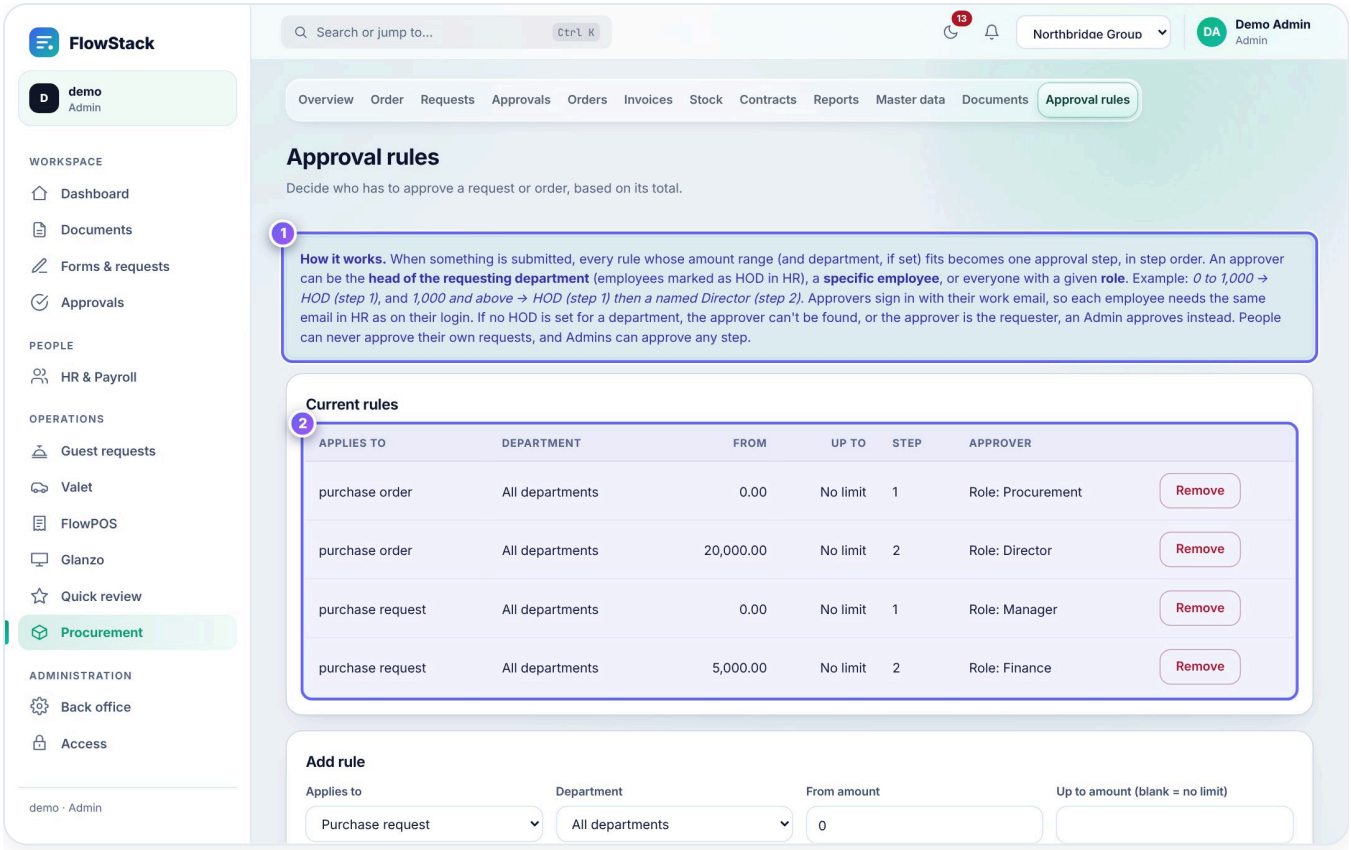
HOW TO

1. Press Add Leave Type, give it a name and the yearly entitlement.
2. Press Edit to change an entitlement, or Deactivate to stop using a type.

2.8 Approval rules: who signs

Approval rules decide who has to approve a purchase request, a purchase order or a supplier invoice. Each rule covers an amount range and, if you wish, one department. Every matching rule becomes one approval step, in step order.

People can never approve their own requests. If no rule matches, or the approver cannot be found, an administrator approves instead, so nothing is ever stuck.

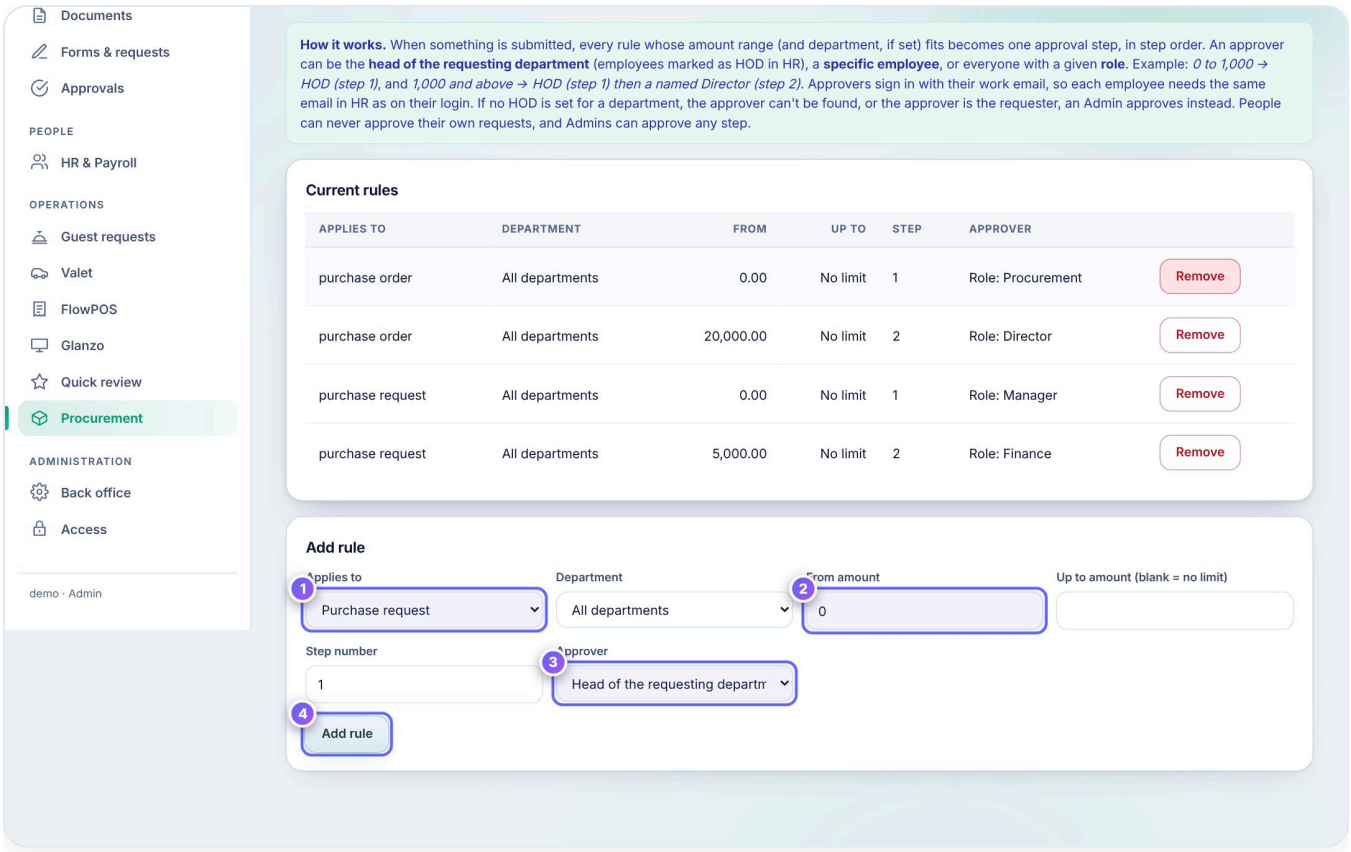


1 How rules turn into approval steps

2 The rules you have today

2.9 Add an approval rule

An approver can be the head of the requesting department, a named person, or everyone who has a role. For example: up to 1,000, the head of the department approves. Above 1,000, the head approves first and a director approves second.



1. What the rule applies to: requests, orders or invoices
2. The amount range it covers
3. Who approves: the department head, a person, or a role
4. Add the rule

HOW TO

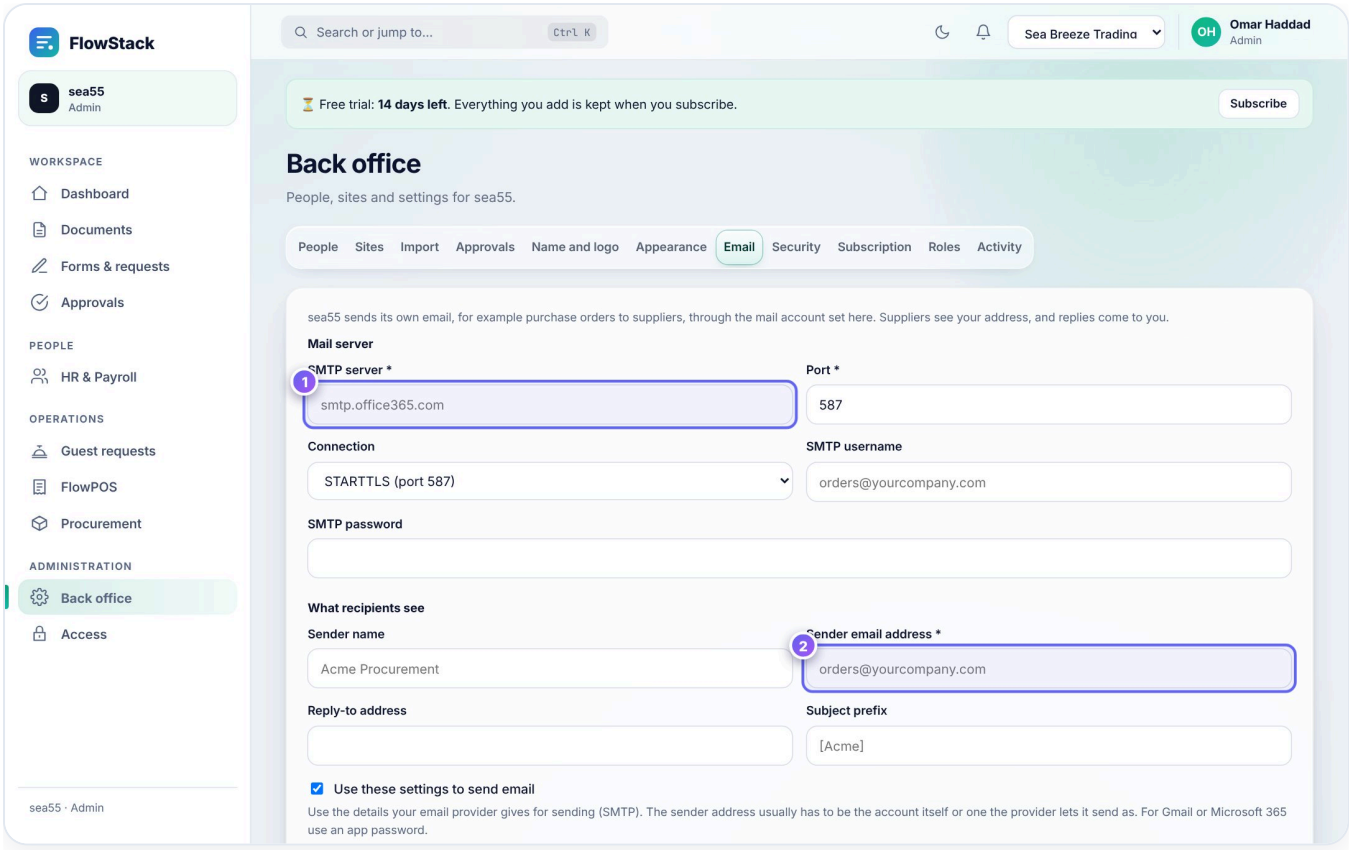
1. Choose what the rule applies to.
2. Set the amount range and, if needed, the department.
3. Set the step number: step 1 approves first.
4. Choose the approver and press Add rule.

> **Tip.** Approvers sign in with their work email, so the email on their HR record must match the email on their login.

2.10 Send email from your own address

Each organization sends its own email, for example purchase orders to suppliers, using its own mail account. Suppliers see your organization as the sender and their replies reach you, not us.

Open the Email tab and fill in your mail server details (your IT provider or email service gives you these), press Save email settings, then send a test email to yourself with the test button.



1 Your mail server

2 The address recipients see

HOW TO

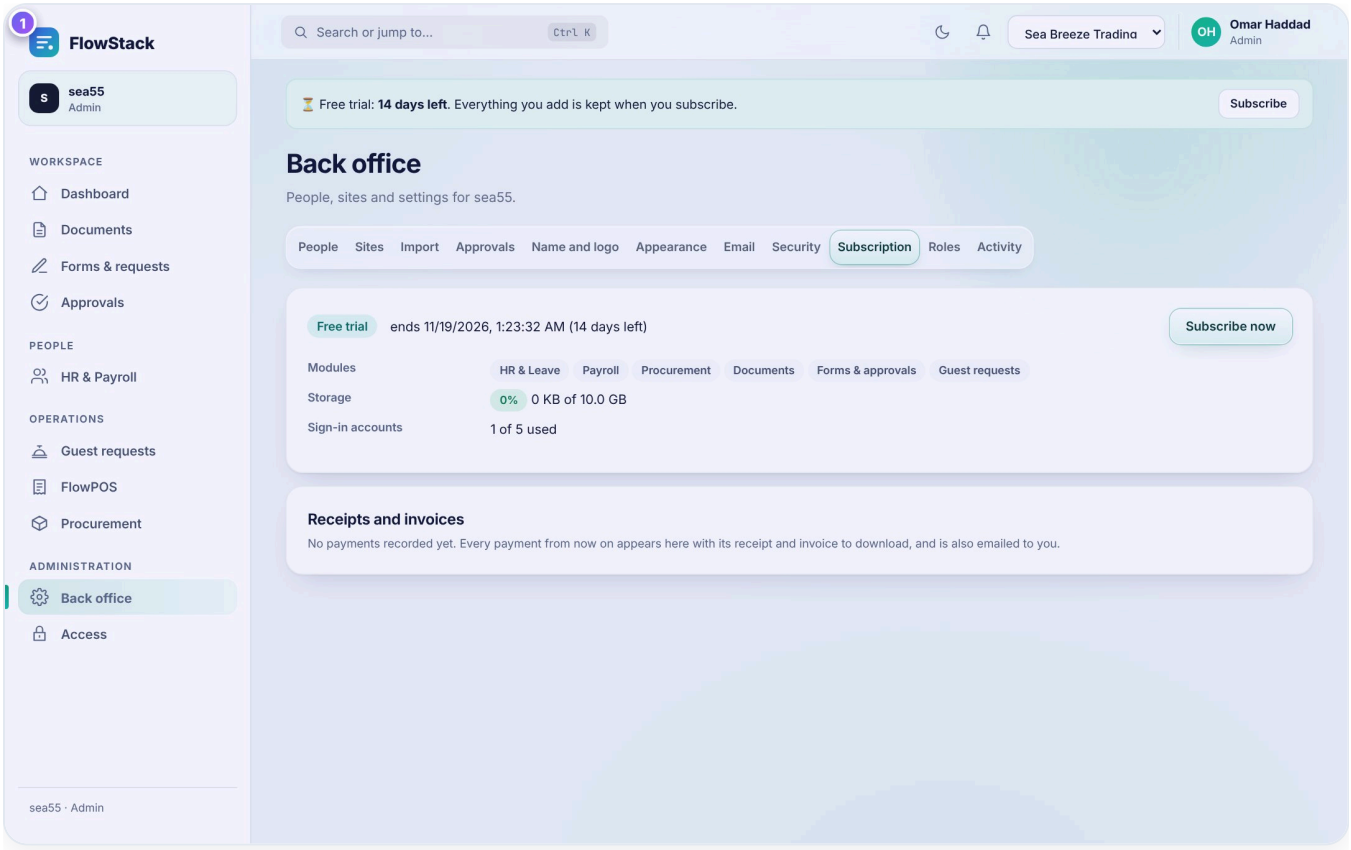
1. Enter the SMTP server, port and connection type.
2. Enter the username and password of the mailbox.
3. Enter the sender name and address, and an optional reply-to address and subject prefix.
4. Save, then send a test email to yourself.

> **Tip.** Do this before you send your first purchase order, so approved orders go out automatically.

2.11 Your subscription

The Subscription tab shows your plan, when your trial ends, how many sign-in accounts you have used and which modules you have. Press Subscribe now to move to a paid plan.

If a payment fails, access continues for seven days so you can fix it. If you cancel, you keep access until the end of the period you have paid for. If a subscription ends and is not renewed, your data is kept for 60 days and then deleted permanently. We email your administrator about a week before, and subscribing at any time restores access.



1 Your plan: trial end date, accounts used, and how to subscribe

2.12 Your first-week checklist

- [ ] Try the sample approval from the welcome screen, to see the whole flow.
- [ ] Import your people from Excel (Back office, Import), with the right role and department.
- [ ] Add your sites if you have more than one (Back office, Sites).
- [ ] Set up departments, leave types and shifts under HR setup.
- [ ] Import your employees (Back office, Import, Employees).
- [ ] Set up email, so orders and notices come from your organization.
- [ ] Add approval rules for purchases and invoices.
- [ ] Procurement: import your suppliers and items from Excel, and add prices.
- [ ] Forms: add the starter forms you need (Forms, Manage forms, Add starter forms).
- [ ] Documents: upload your licences and certificates, with expiry dates.
- [ ] Guest requests: add the starter catalog, teams and your locations.

- [ ] Ask everyone to add FlowStack to their phone and turn on notifications.

2.13 A set-up checklist for a hotel

Work through the list in order and tick each one off. Every step can be changed later, so start with sensible defaults and refine them as you learn how your team works. The Get set up card on the administrator's dashboard ticks the first steps by itself.

STEP	WHERE	ABOUT
Add your team and their roles	Back office, People (or Import)	15 minutes
Add your sites	Back office, Sites	5 minutes
Set your approval rules	Procurement, Approval rules	10 minutes
Add stands, team and photo rules for Valet	Valet, Setup	15 minutes
Add departments and request types for guest requests	Guest requests, Setup	15 minutes
Add outlets and review links, then print the QR codes	Quick review	15 minutes
Add departments, leave types and shifts for HR	HR & Payroll, Setup	20 minutes
Set your email address and your plan	Back office, Email and Subscription	10 minutes
Install FlowStack on your team's phones	FlowStack sign-in page, Add to Home Screen	5 minutes each

CHAPTER 3

Valet

3

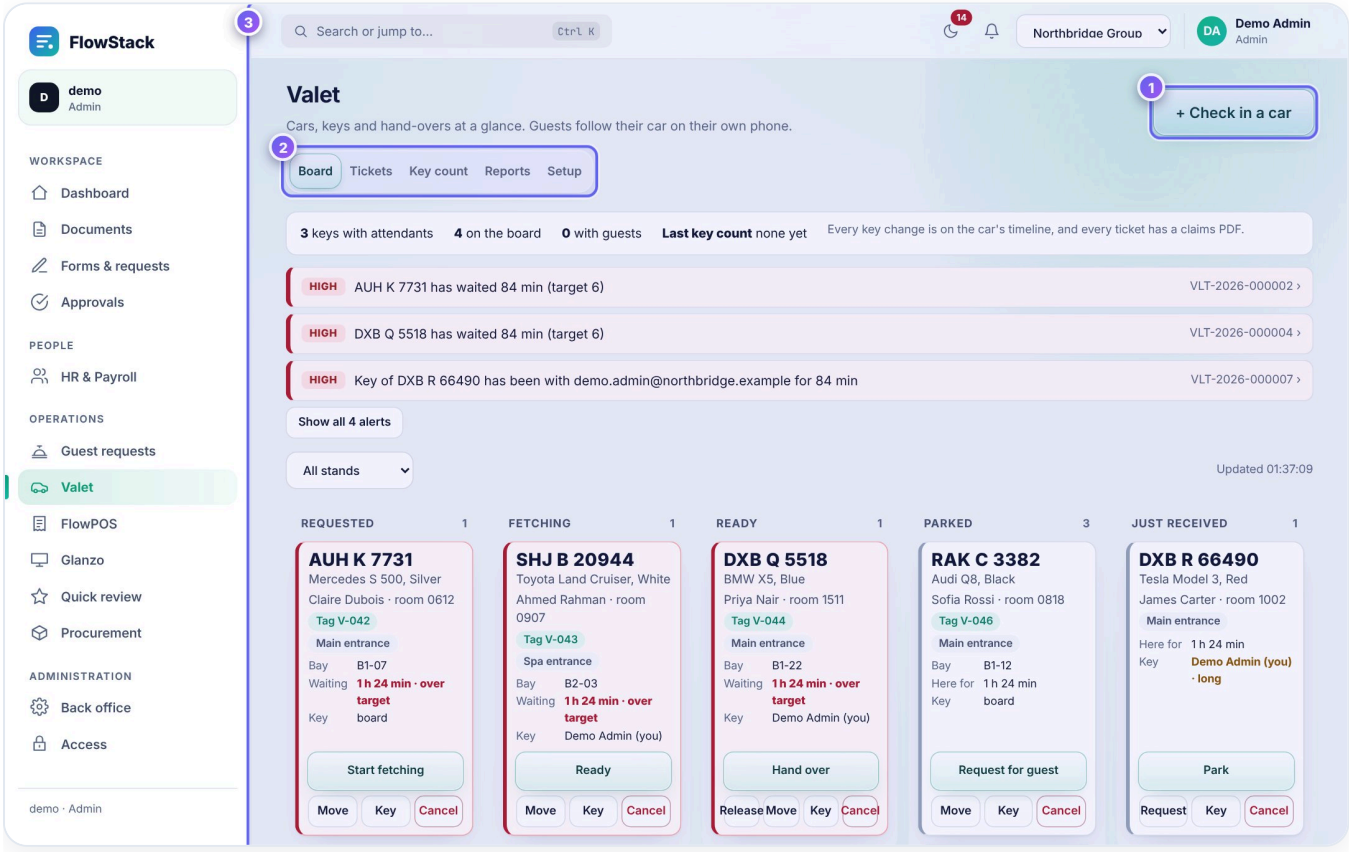
Replace paper tags with a digital ticket. Check cars in with photos, keep every key accounted for, let guests ask for their car on WhatsApp, and hand over with a private release code.

- Check a car in with photos
- Follow a car from received to handed over
- Let guests ask on WhatsApp
- Track every key
- Set up stands, the team and the photo rules

3.1 The valet board

The board shows every car in your care in one column for each stage: just received, parked, requested, fetching and ready. Each card shows the plate, the car, the guest and room, the stand, how long the car or guest has been waiting, and who holds the key. Cars that wait longer than your target turn red.

Every card has a button for the next step, so an attendant moves a car along with one tap. Supervisors also see alerts above the board: slow requests, keys held for too long, mileage over the limit and cars released without the code.



1. Check in a car
2. Board, tickets, key count, reports and setup
3. One column for each stage, from just received to ready

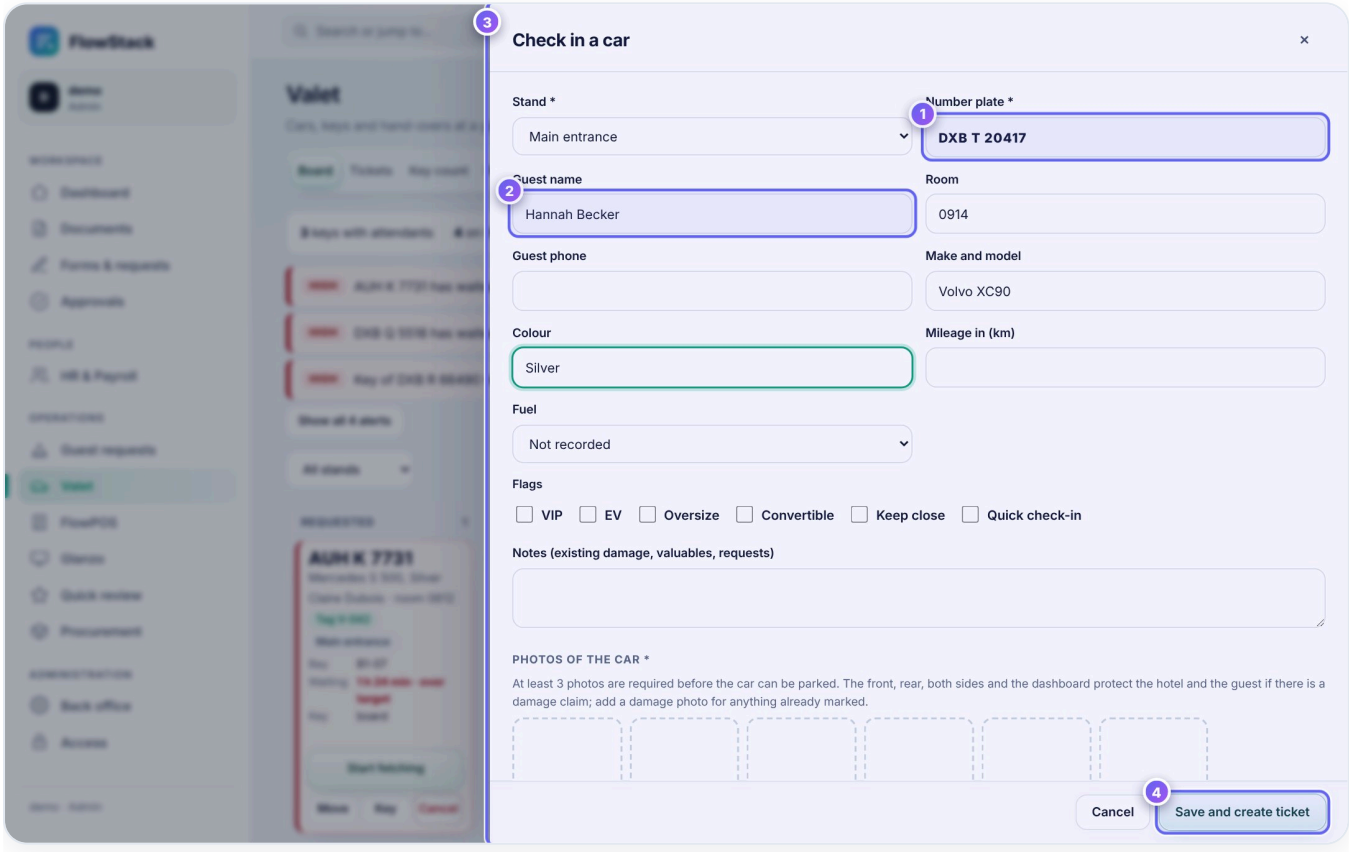
HOW TO

1. Press All stands to see one stand only.
2. Press a card to open the full ticket.
3. Press the blue button on a card to take the next step.

3.2 Check a car in

Press Check in a car. Enter the number plate, choose the stand where the car was received, and add the guest, room, make, colour, mileage and fuel. Tick any flags (VIP, EV) and write down anything already marked on the car under Notes. The guest can sign on the screen if you want a signature at check-in.

When you press Save and create ticket, the ticket gets a number and two QR codes: one opens the guest's page, the other opens a WhatsApp chat (see Guests and WhatsApp below). The slip prints with both.



1. The number plate
2. The guest and the room: the guest is linked to the ticket
3. Photos of the car: your setup decides how many are required
4. Save: the ticket and its QR codes are created

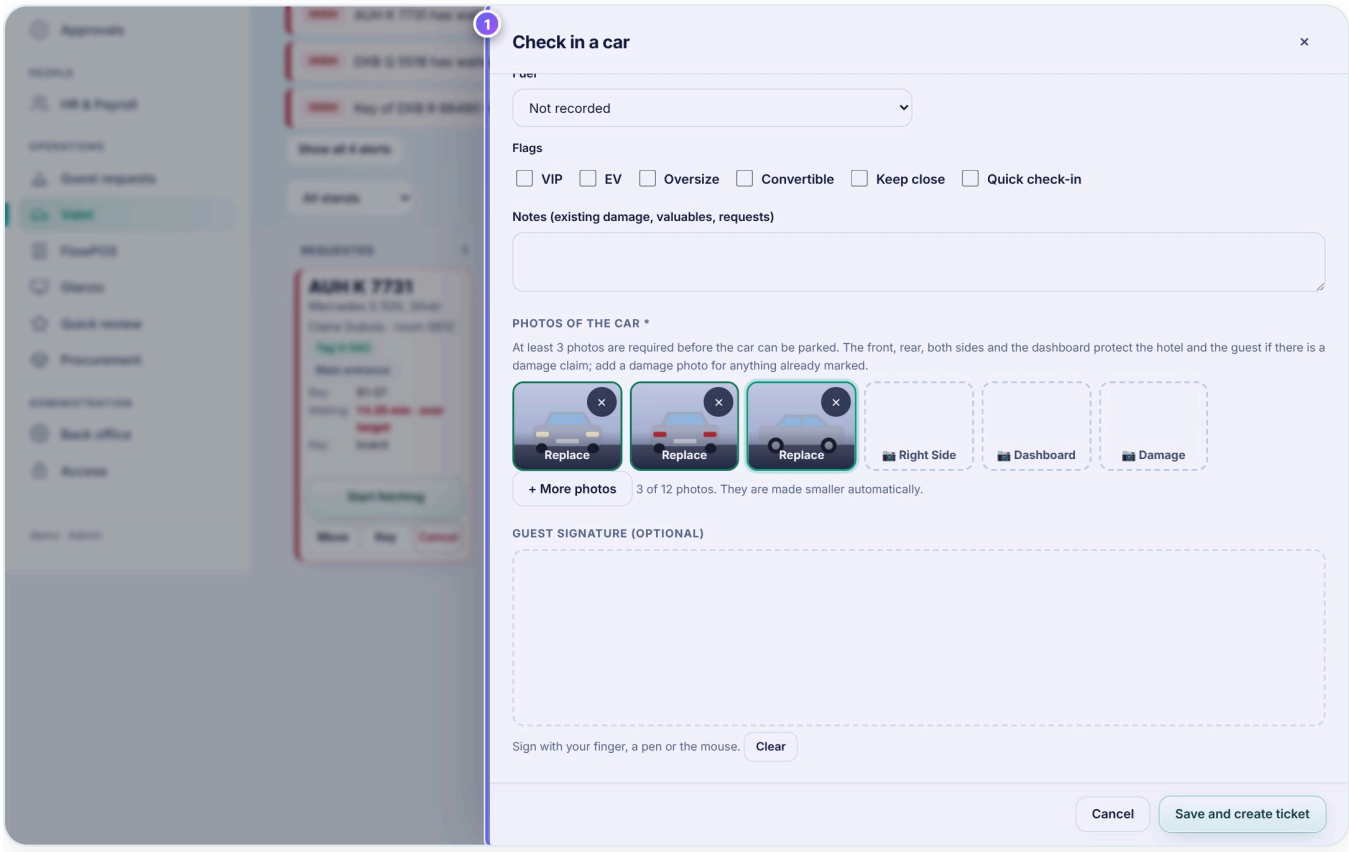
HOW TO

1. Press Check in a car.
2. Type the plate and the guest's room.
3. Add the photos your setup asks for.
4. Press Save and create ticket, then print or show the slip.

3.3 Photos at check-in and at return

Photos protect the hotel and the guest if there is a damage claim: the ticket keeps the photos from check-in and from return side by side. Take the front, rear, both sides and the dashboard, and add a damage photo for anything already marked. Each photo is shrunk on the device first, so it uploads quickly even on a weak signal.

You decide how many photos are required. Under Setup, set Photos required at check-in and Photos required when the car goes back, each from none up to six. A car cannot be parked until the check-in requirement is met, and cannot be handed over until the return requirement is met. Set a number to None if you do not want to require any.

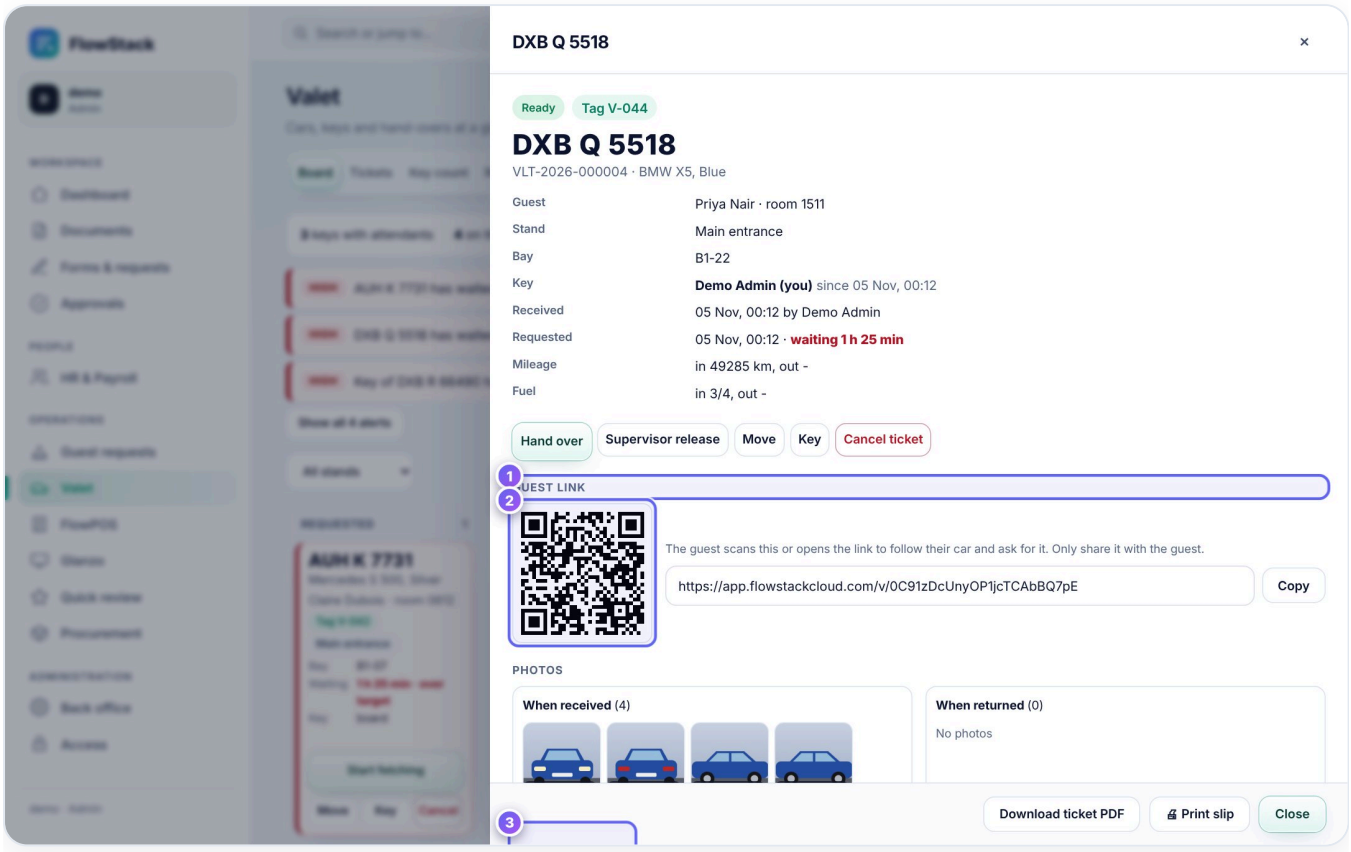


1. Each photo is shrunk on the device first, so it uploads fast

> **Tip.** On the phone the check-in photos are taken in the order front, rear, left, right, dashboard. If you require three, the first three are required and the others can be skipped.

3.4 The ticket

Open any card to see the ticket: the car and guest, where the key is, the photos, the WhatsApp QR code and a timeline of everything that happened, with who did it. Press Add photos at any time, for example when damage is noticed later. Press Print slip for the paper slip, or Ticket PDF for the full record with the photos from check-in and return side by side. That PDF settles a damage claim.

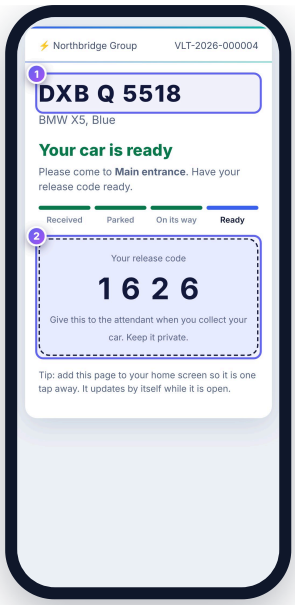


1. The car, the guest and where the key is
2. The guest scans this to follow the car or chat on WhatsApp
3. Add photos at any time

3.5 Guests and WhatsApp

The guest never installs anything. The QR code on the slip opens a private page that shows where the car is, and shows the release code once the car is ready. If your plan includes WhatsApp, a second QR code opens WhatsApp with a message ready to send. The guest sends it, and the chat answers with the hotel and the car and offers two buttons: Request my car and Where is my car? If you have more than one stand the guest chooses where to meet the car.

When the car is ready the guest gets one message with the stand and their release code. The guest always starts the conversation, so the hotel never messages anyone who has not asked. A guest can write STOP at any time to stop messages about the ticket. If more than 24 hours have passed since the guest last wrote, the ready message is sent as an approved WhatsApp template instead.

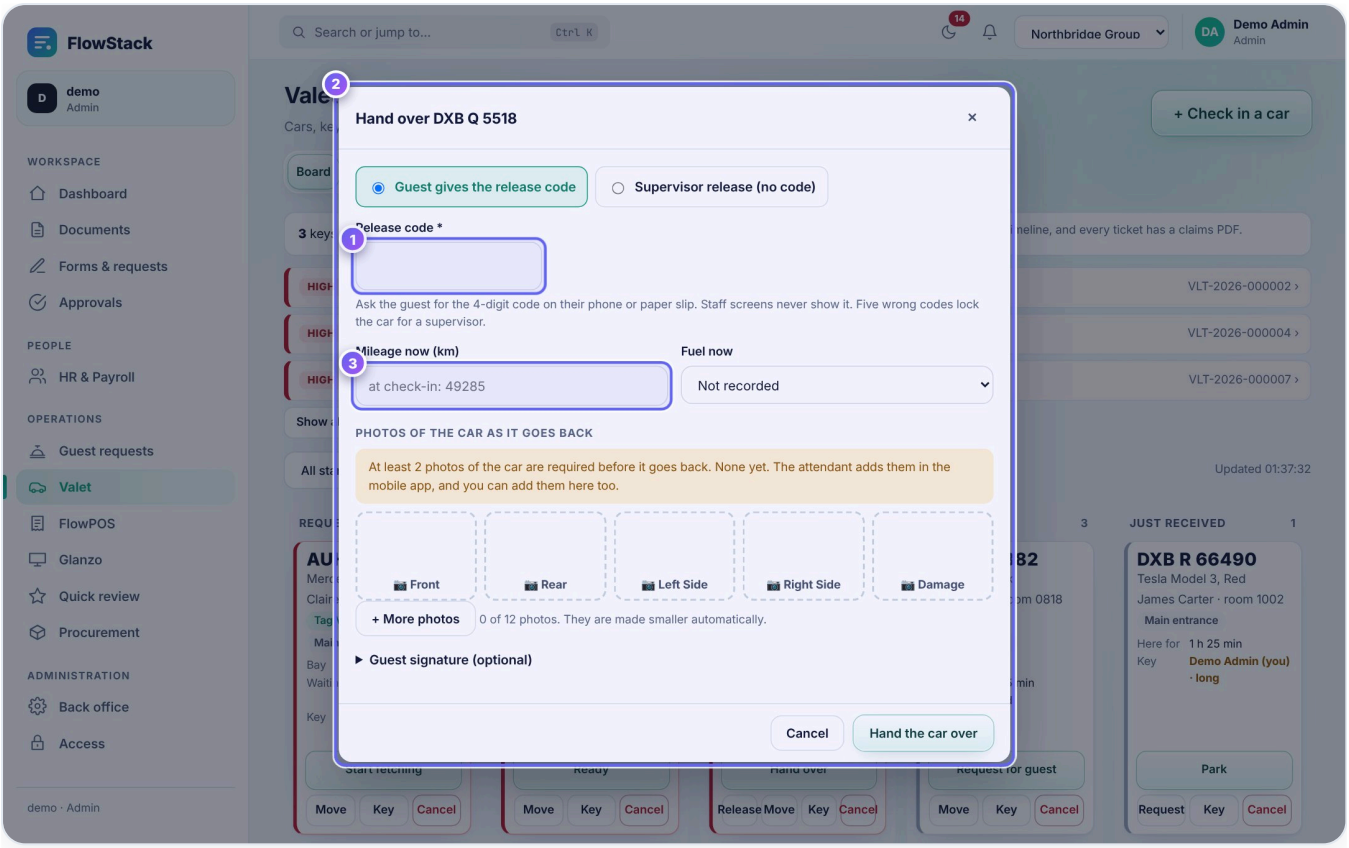


Tip. Valet uses about three WhatsApp messages per car: the welcome, the confirmation of the request, and the ready message. That is deliberate: it keeps WhatsApp costs low.

3.6 Fetch, ready and hand over

When a guest asks for the car, it moves to Requested. The attendant who presses Start fetching becomes the named holder of the key. At the stand the attendant presses Ready, and the guest is told. At hand-over the guest reads out the release code, and the attendant enters it, takes the return photos, notes the mileage and fuel and presses Hand the car over. The ticket closes and the whole timeline is kept.

If a guest has lost the code, only a supervisor can release the car without it, and must write a reason. That reason is recorded with their name and shown as an alert to the other supervisors. Five wrong codes lock the car until a supervisor releases it. If your hotel does not use release codes, switch them off under Setup and hand-over only needs the return photos and mileage.



1. The release code the guest reads out: staff screens never show it
2. Return photos, as many as your setup requires
3. Mileage and fuel now, compared with check-in

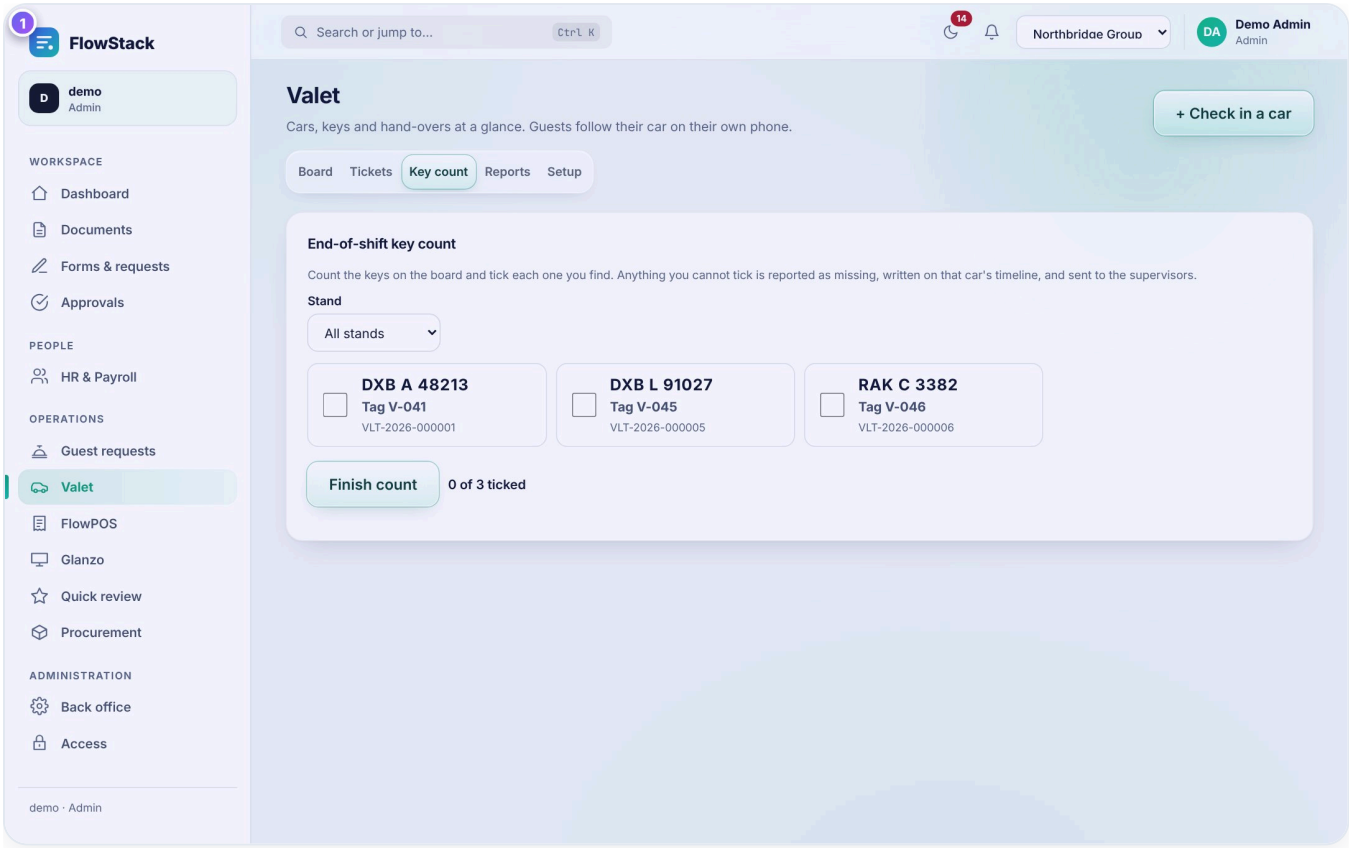
HOW TO

1. Press Start fetching on a requested car.
2. Press Ready when the car is at the stand.
3. Press Hand over, enter the code and take the return photos.
4. Press Hand the car over.

3.7 Every key accounted for

Every key carries a tag and is always held by a named person, the key board or the guest. Each hand-over of a key is on the ticket timeline, so a missing key can be traced to the last person who held it. If you keep a list of key tags under Setup, the attendant must type a tag from the list and it must be free, so one tag is never on two cars. With no list any tag name is accepted.

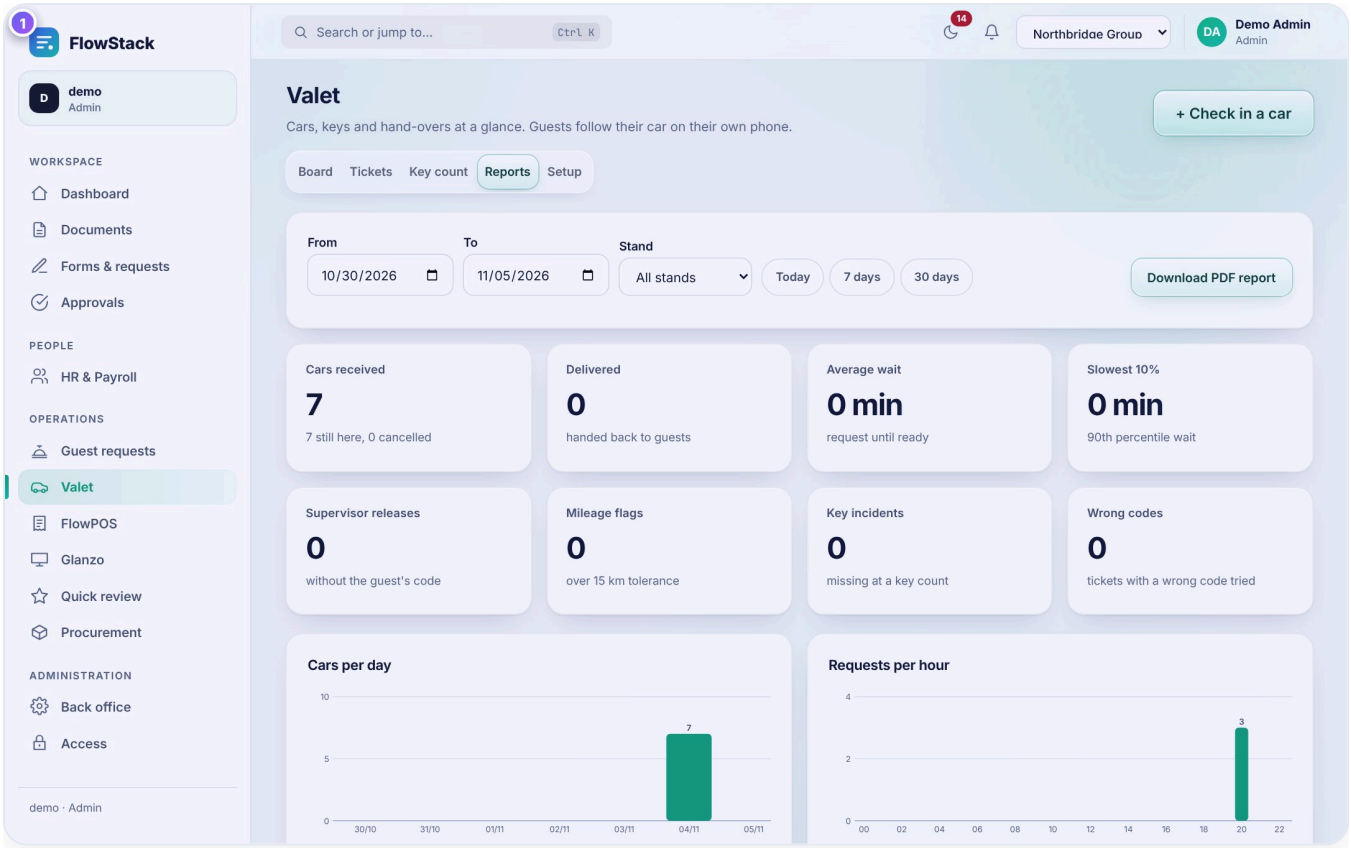
At the end of a shift, open Key count and tick every key you find on the board. Missing keys are recorded and reported.



1 Tick every key you find on the board: anything missing is recorded

3.8 Alerts and reports

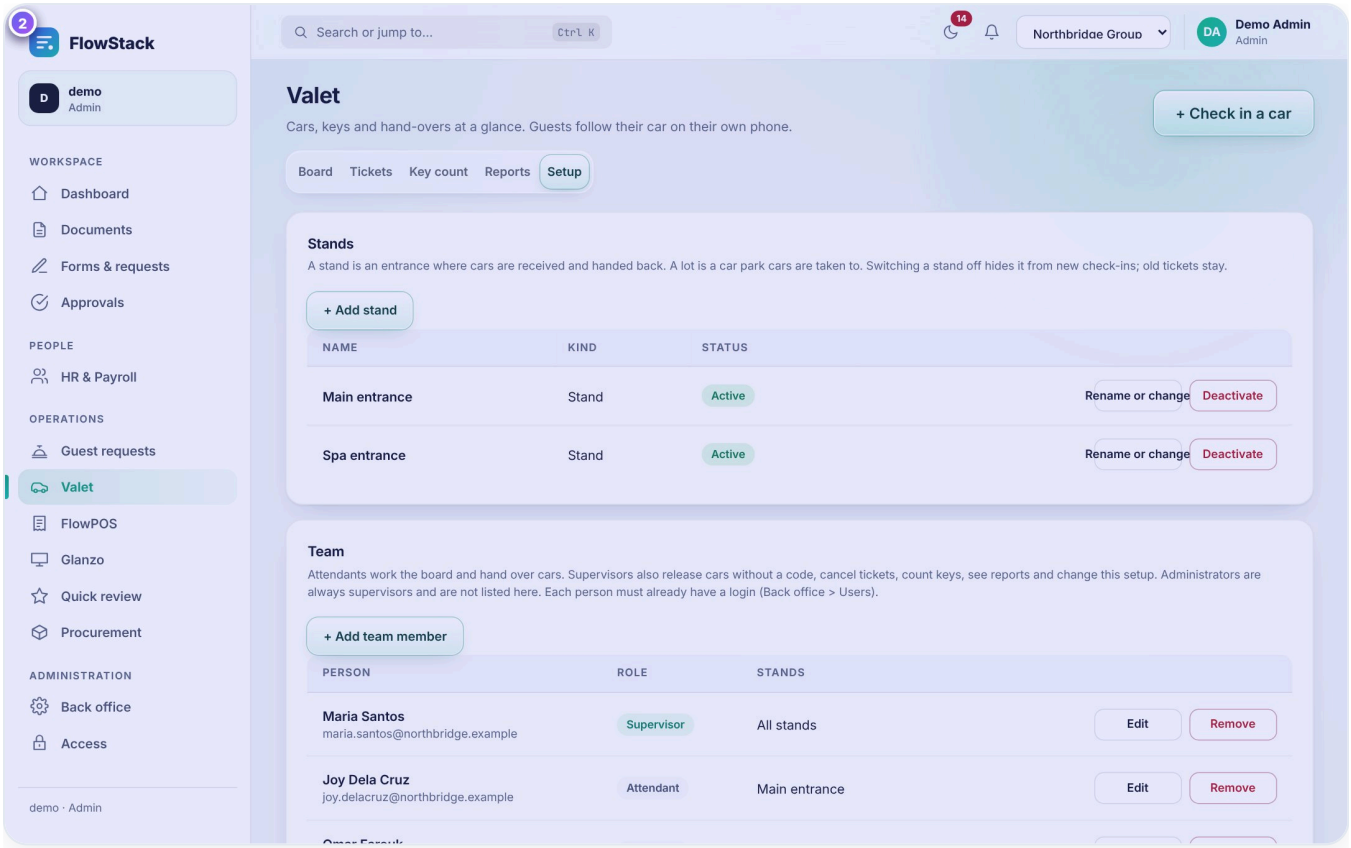
The board raises an alert when a request waits longer than your target, a key is carried for too long, a car returns with more kilometres than your tolerance, a car is released without the code, or the wrong code is entered. Reports show waiting times, the busiest hours, key custody and supervisor releases, and download as a PDF.



1 Waiting times, busiest hours, key custody and supervisor releases

3.9 Set up Valet

Open Valet, then Setup. Add a stand for each entrance where cars are received and handed back, such as Main entrance and Spa entrance. Add your team: each person must already have a login (Back office, People). Attendants work the stands you give them. Supervisors work all stands, can release without a code and cancel tickets. Optionally add a list of key tags, or generate a range such as V-001 to V-150.



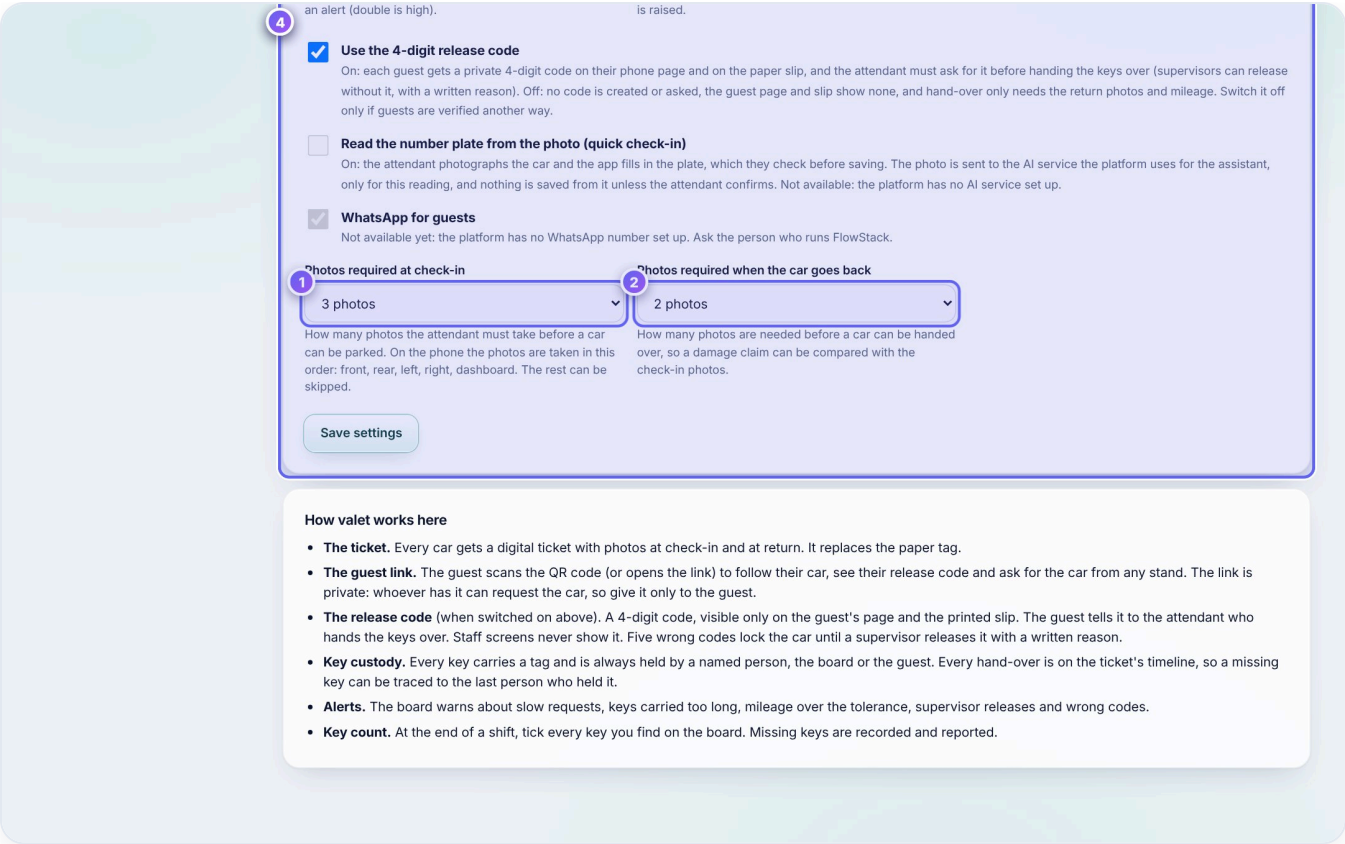
1. Stands: the entrances where cars are received and handed back
2. Team: attendants and supervisors, each with their stands

HOW TO

1. Add each stand.
2. Add the team and choose each person's stands.
3. Optionally add your key tags and print the tag list.
4. Set the rules below.

3.10 The valet rules

Under Settings you control how valet works at your hotel. Target wait is how many minutes a guest should wait from asking to the car being ready: waits beyond it turn red and raise an alert. Key held too long is how long an attendant may carry a key for a car that is not being fetched. Mileage tolerance flags cars that come back with more kilometres than expected. Use the 4-digit release code switches the code on or off. Photos required at check-in and when the car goes back set how many photos are required, from none to six. WhatsApp for guests switches on the WhatsApp QR code and chat, and appears when your plan includes it.

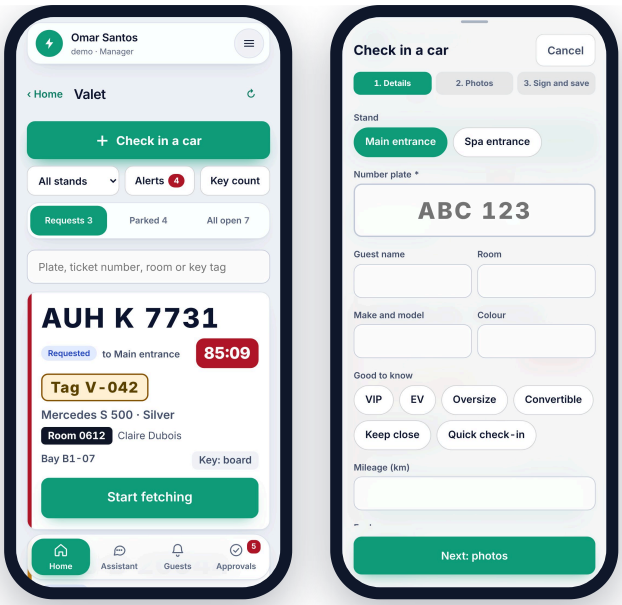


1. Photos required at check-in: from none to six
2. Photos required when the car goes back
3. WhatsApp for guests (part of the Valet WhatsApp plans)
4. The 4-digit release code

> **Tip.** Start with the release code on, three photos at check-in and two at return. You can change any of these at any time.

3.11 Valet on the phone

Attendants and supervisors use Valet from the FlowStack app on their phone. The Valet screen lists requests first, then parked cars, with huge plates for gloves and sunlight. Check in a car walks through the details, a guided photo for each angle (only as many as your setup requires), an optional signature, and save. Hand over asks for the code and the return photos in the same way.



HOW TO

1. Open the FlowStack app and tap Valet.
2. Tap Check in a car and follow the steps.
3. Tap a request to start fetching, mark it ready and hand over.

3.12 Plans

Each car beyond the plan's WhatsApp allowance is AED 0.60. Under Setup you can see, for the last six months, how many cars used WhatsApp, how many messages were sent and how many cars were over the allowance. Ask FlowStack to add the WhatsApp plan to your organization.

PLAN	PRICE A MONTH	WHAT IS INCLUDED
Valet	AED 199	Digital tickets, photos, key custody, stands, alerts, reports and the guest page. No WhatsApp.
Valet + WhatsApp	AED 399	Everything in Valet, plus WhatsApp for up to 500 cars a month.
Valet + WhatsApp, high volume	AED 999	Everything in Valet, plus WhatsApp for up to 2,000 cars a month.

CHAPTER 4

Guest requests

4

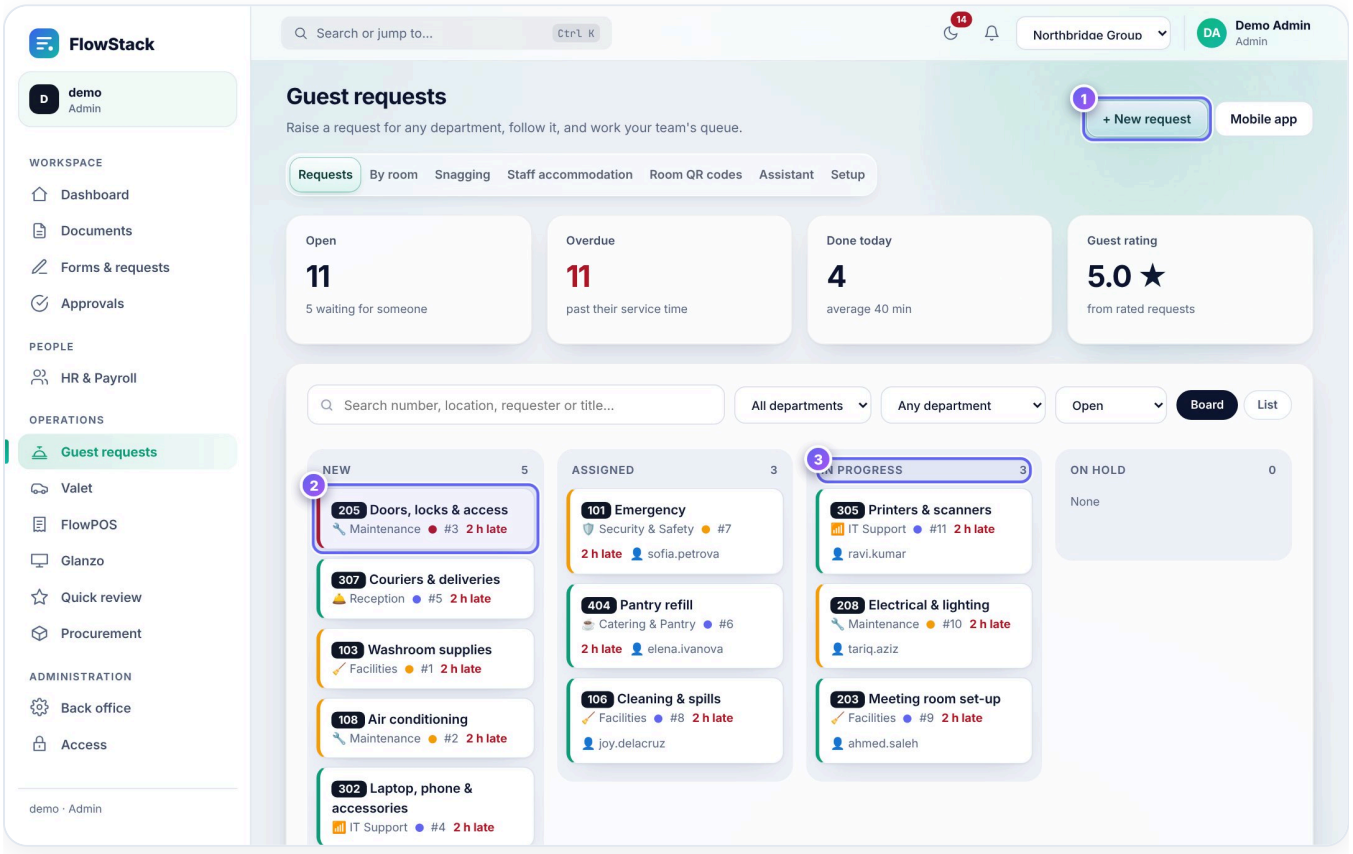
One live board for everything guests, tenants or customers need on site, from a jammed printer to a blocked drain, with timers, teams and an assistant that understands plain words.

Work the request board | Raise a request | Use the assistant | Report snags room by room | Set up departments and services

4.1 The request board

Requests appear on a board with columns for New, Assigned, In progress and On hold. Each card shows the location, the department and the time left before the target is missed. Urgent requests come first. Press List to see the same requests as a table.

The tiles at the top show open and overdue requests, what was done today and the rating.



1 Raise a request

2 Urgent first, with the time left

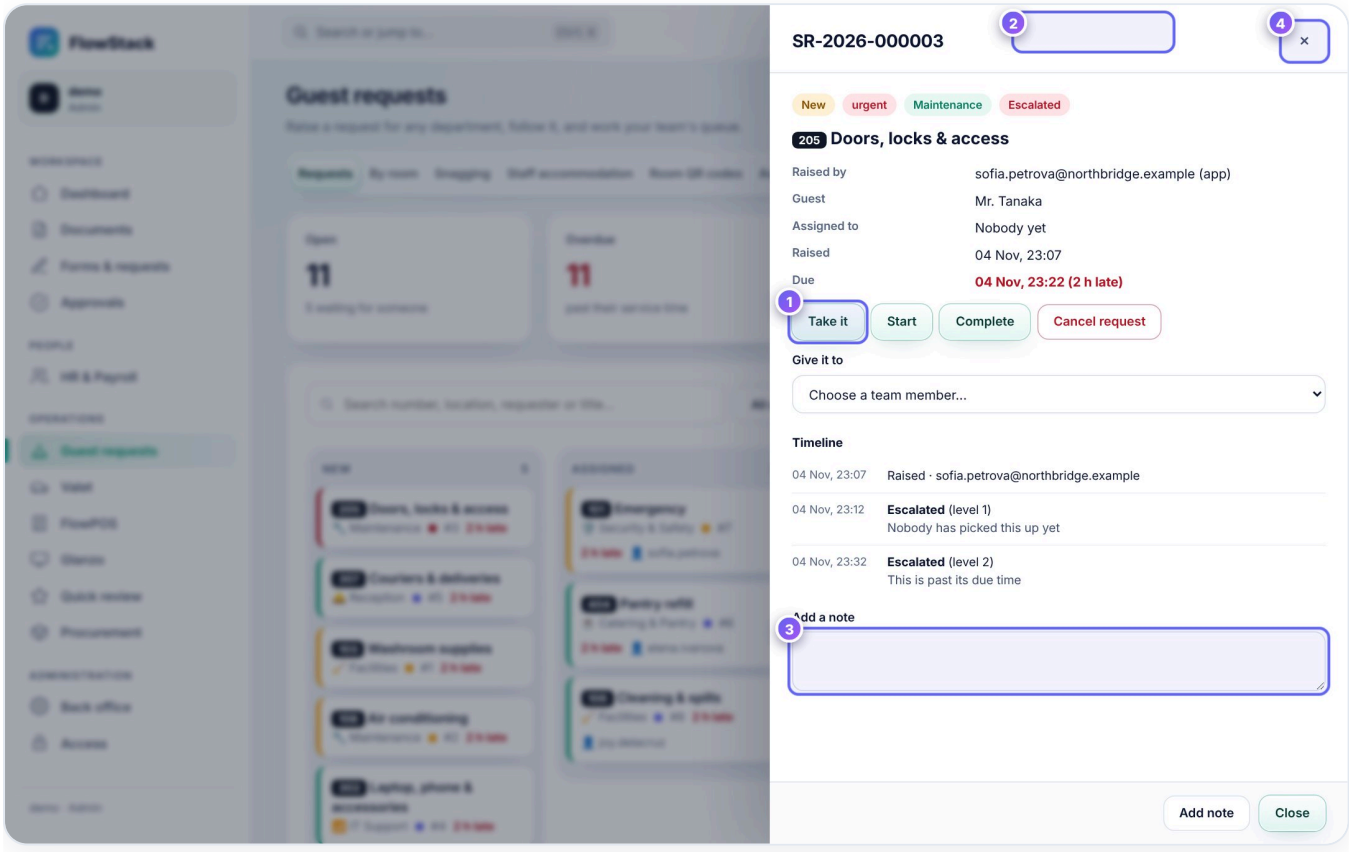
3 Columns follow the life of a request

HOW TO

1. Press a department to see only its requests, or Assigned to me for your own queue.
2. Use the search box to find a location, requester or request number.
3. Press a card to open it.

4.2 Work a request

A request shows who raised it, who it is for, who it is assigned to, and when it is due. A timeline records everything that happened.



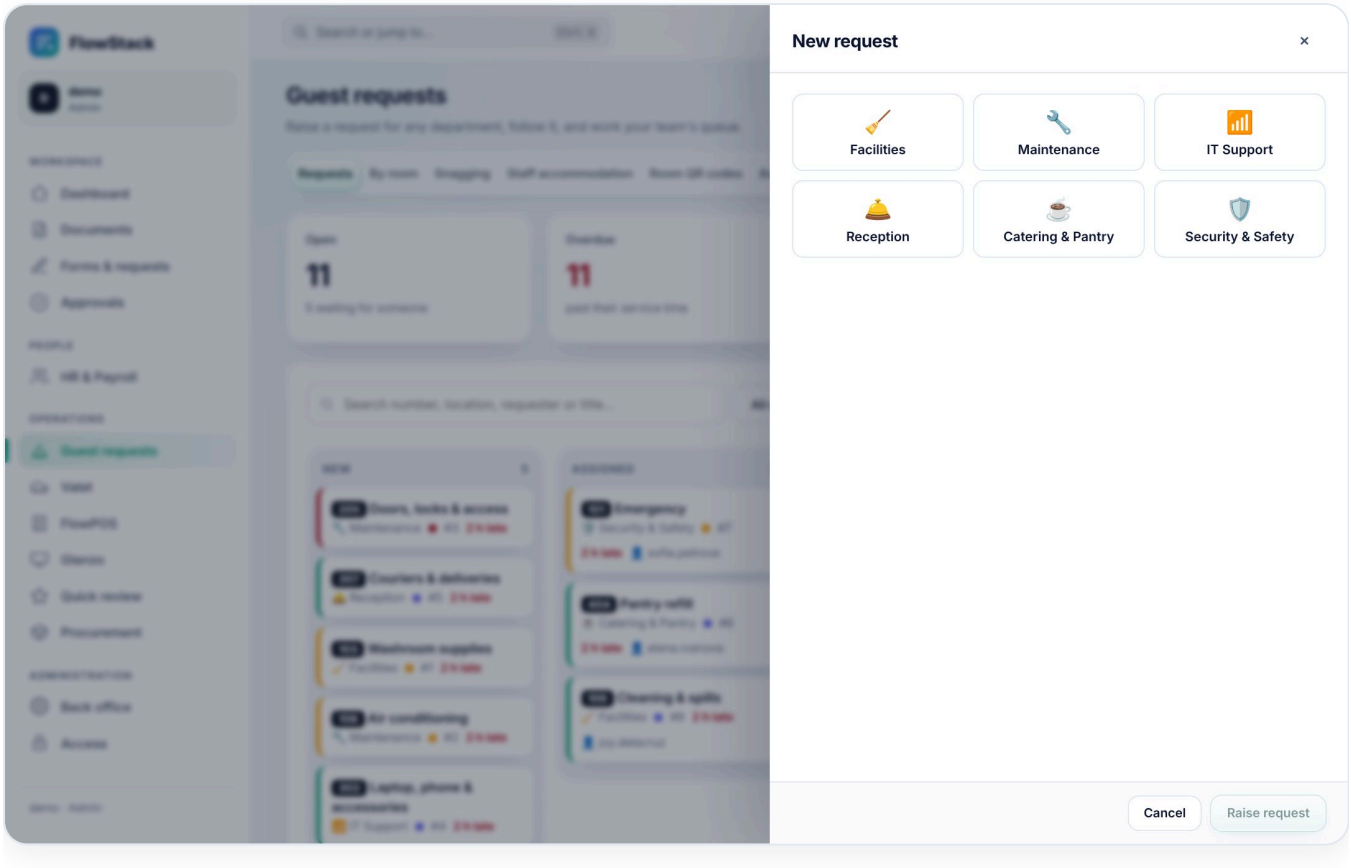
1. Take it, start it, complete it
2. Or give it to a team member
3. Add a note for the team
4. Close

HOW TO

1. Press Take it to claim the request, Start when you begin, and Complete when it is done.
2. Or choose a team member under Give it to.
3. Add a note to keep the team informed.
4. Press Cancel request if it is no longer needed.

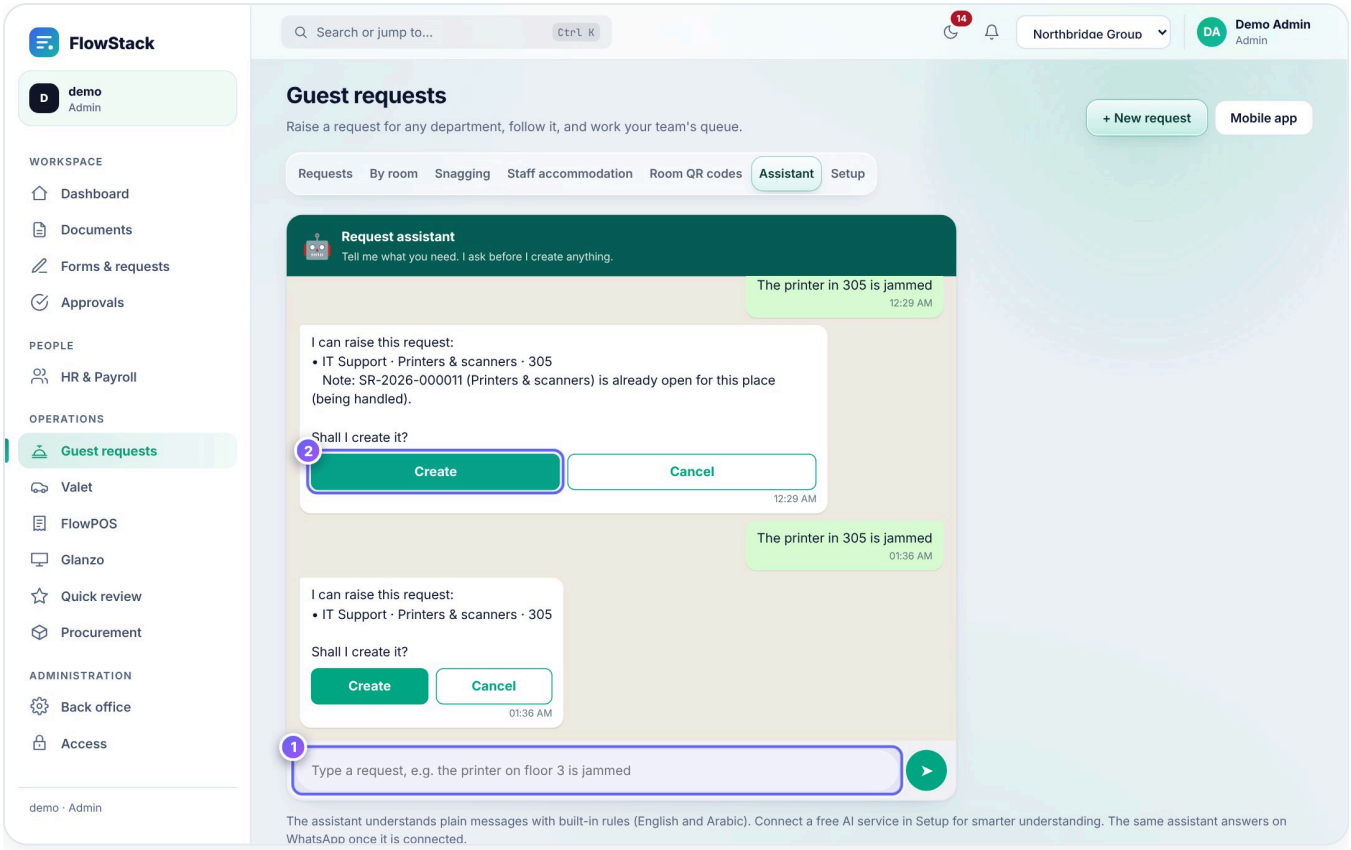
4.3 Raise a request

Anyone with access can raise a request: choose the department, then the type of request, add the location and details and press Raise request. Customers and visitors can also write to your organization's WhatsApp number, and the request is raised for them once they confirm.



4.4 The assistant

The assistant understands plain messages such as: The printer on floor 3 is jammed. It works out the team, location and urgency, shows what it understood and asks whether to create it. Nothing is created until you press Create.



1 Type it the way you would say it

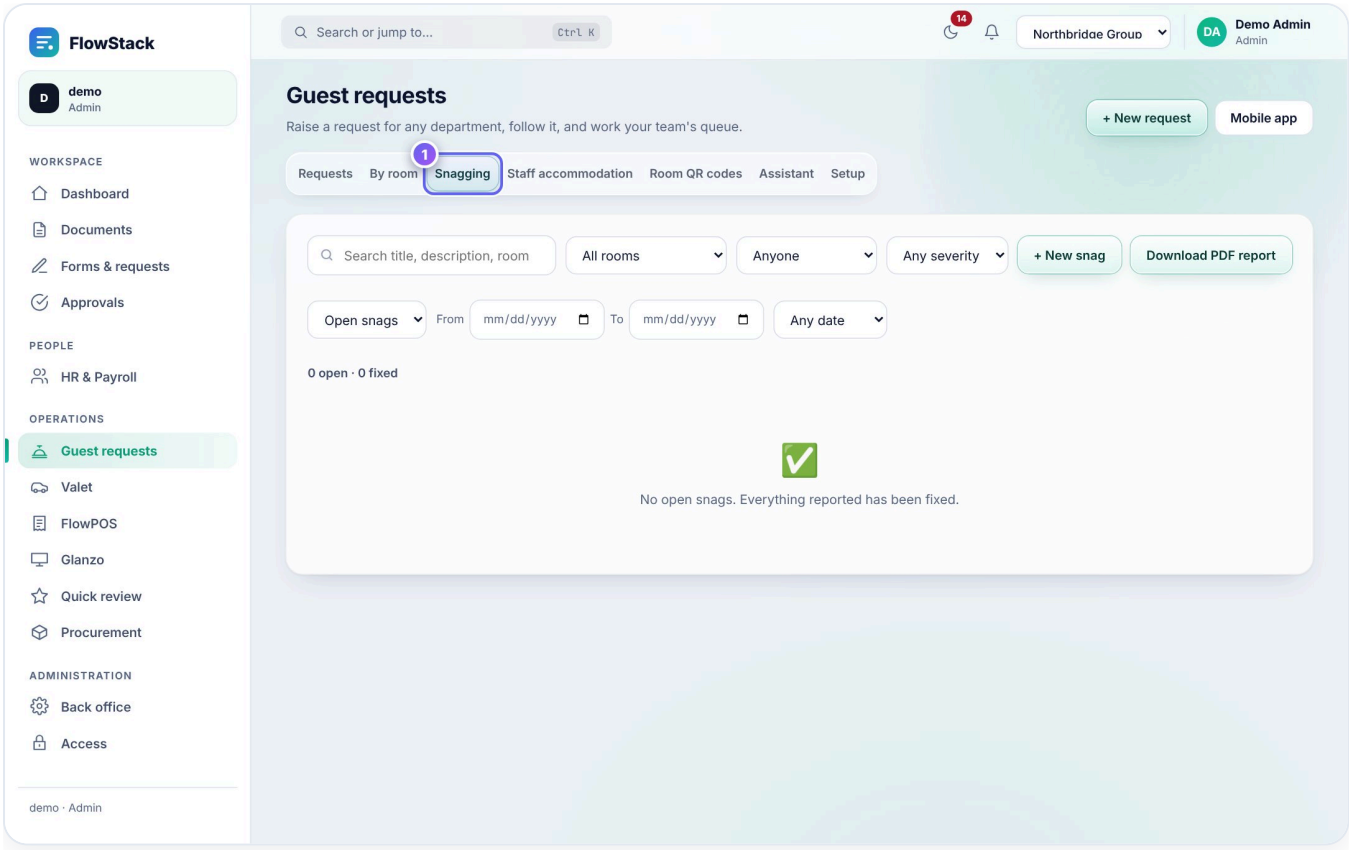
2 Check what it understood, then confirm

Tip. The assistant understands English and Arabic out of the box. Your administrator can connect an AI service for even better understanding.

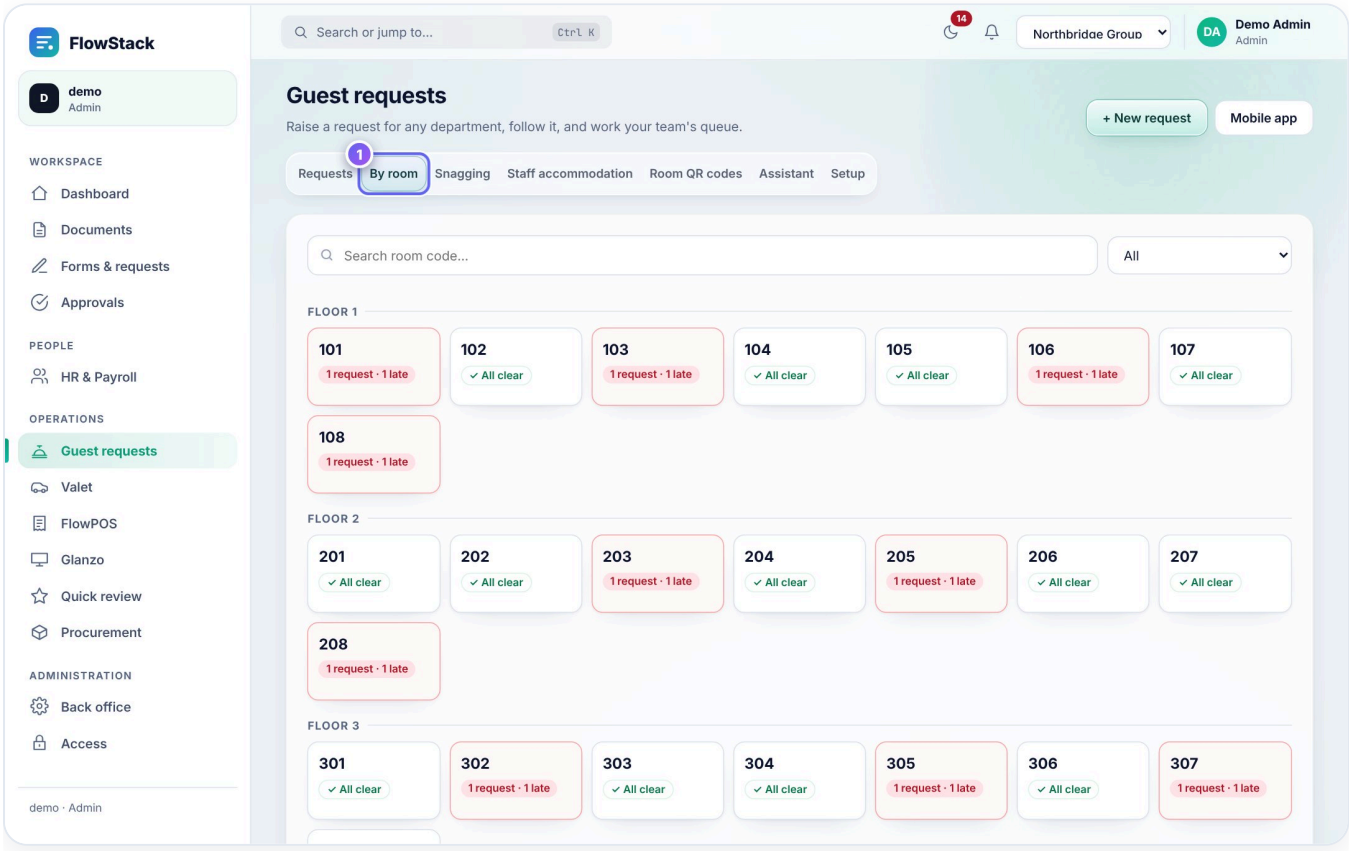
4.5 Snagging: defects room by room

Snagging records defects found in a room: a leaking tap, a stained carpet, a broken lamp. Walk the room, photograph the defect and press Report a snag; it goes on the list with its severity (minor, major or critical), photos and a status. The By room view groups requests and snags by room, and the PDF report gives each room its own page with photos.

On the phone, Snagging is a section of the Guests tab: tap Guests, then Snagging. Photos are shrunk on the phone first, and a snag reported with no signal is kept and sent when the connection returns.



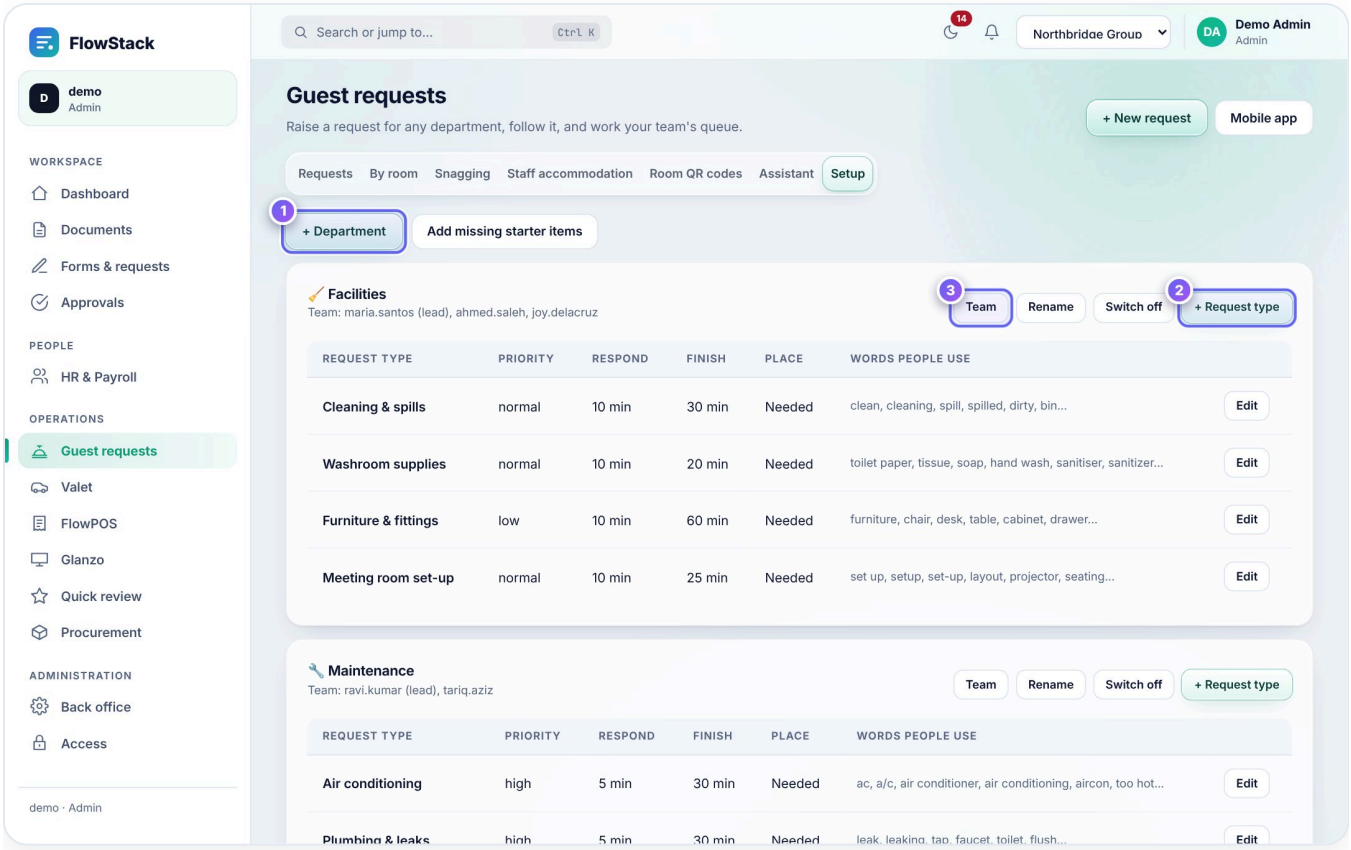
1 Snagging: defects found room by room



1 Requests grouped by room

4.6 Set up departments and services

Under Setup, each department has request types with a priority, a target time to respond and to finish, and the words people use. Press Team to choose who works the queue, and who leads it. A lead assigns work and is alerted when something is overdue.



1 Add a department

2 Add a request type with its target time

3 Choose who handles it

HOW TO

1. Press Add the starter catalog to start with nine departments and ready-made request types, then change anything.
2. For each department, press Team and tick the people who work that queue.
3. Add your locations (rooms, floors, areas) so the assistant can catch typing mistakes.

CHAPTER 5

Quick review

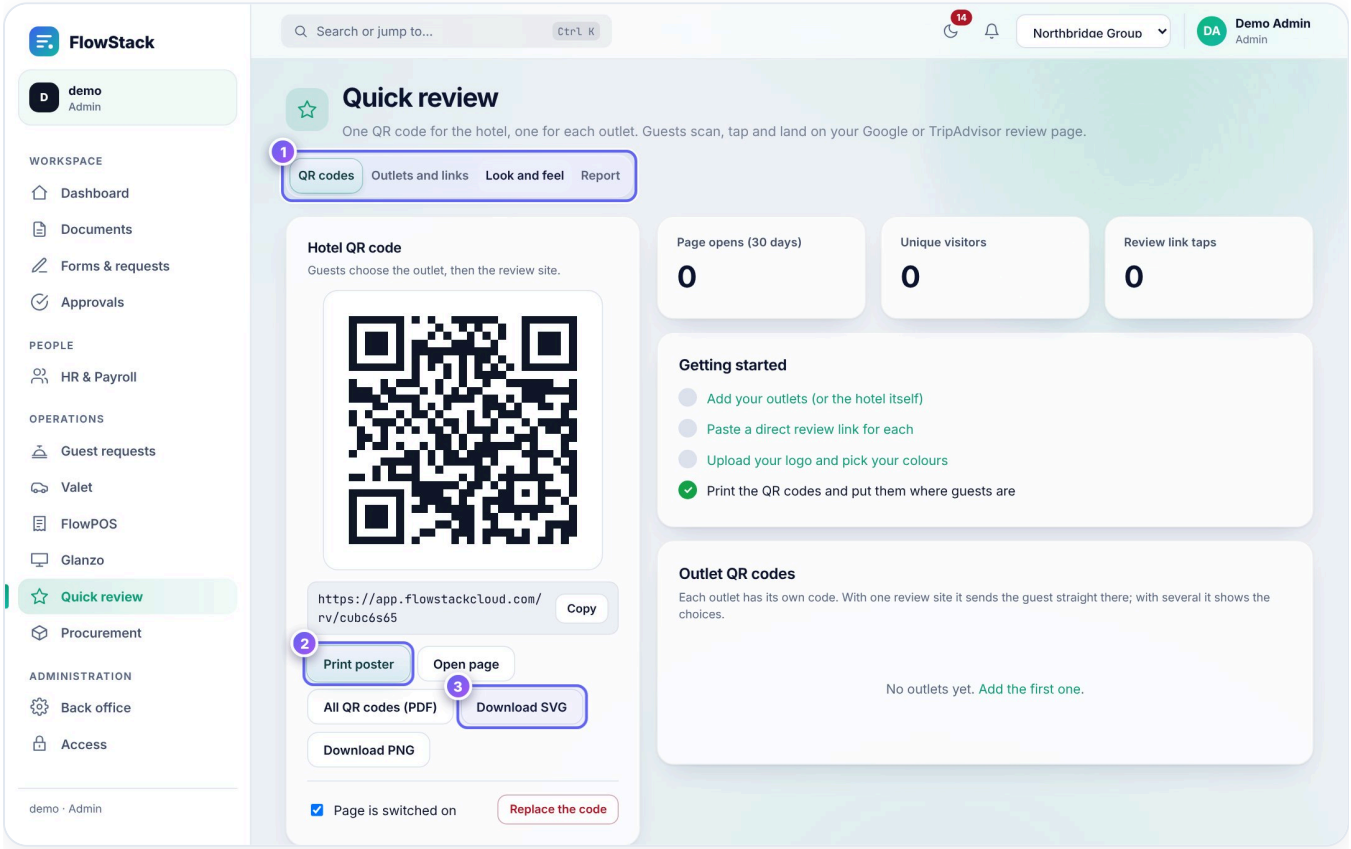
5

Put a QR code on the table, at the front desk and in the room. Guests scan it, pick where they stayed or dined and land on your Google or TripAdvisor review page.

Print the hotel and outlet QR codes | Add outlets and review links | Match your logo and colours | Read the visit and tap report

5.1 One QR code for the hotel and every outlet

Quick review starts with a QR code for the hotel. Each outlet, such as the restaurant, the spa and the bar, has its own code too. With one review site the guest goes straight to it. With several the guest chooses. At the top you see how many guests opened the page, how many different guests, and how many tapped through to a review site in the last 30 days.



1 QR codes, outlets, look and feel, and the report

2 Print a poster for the hotel code

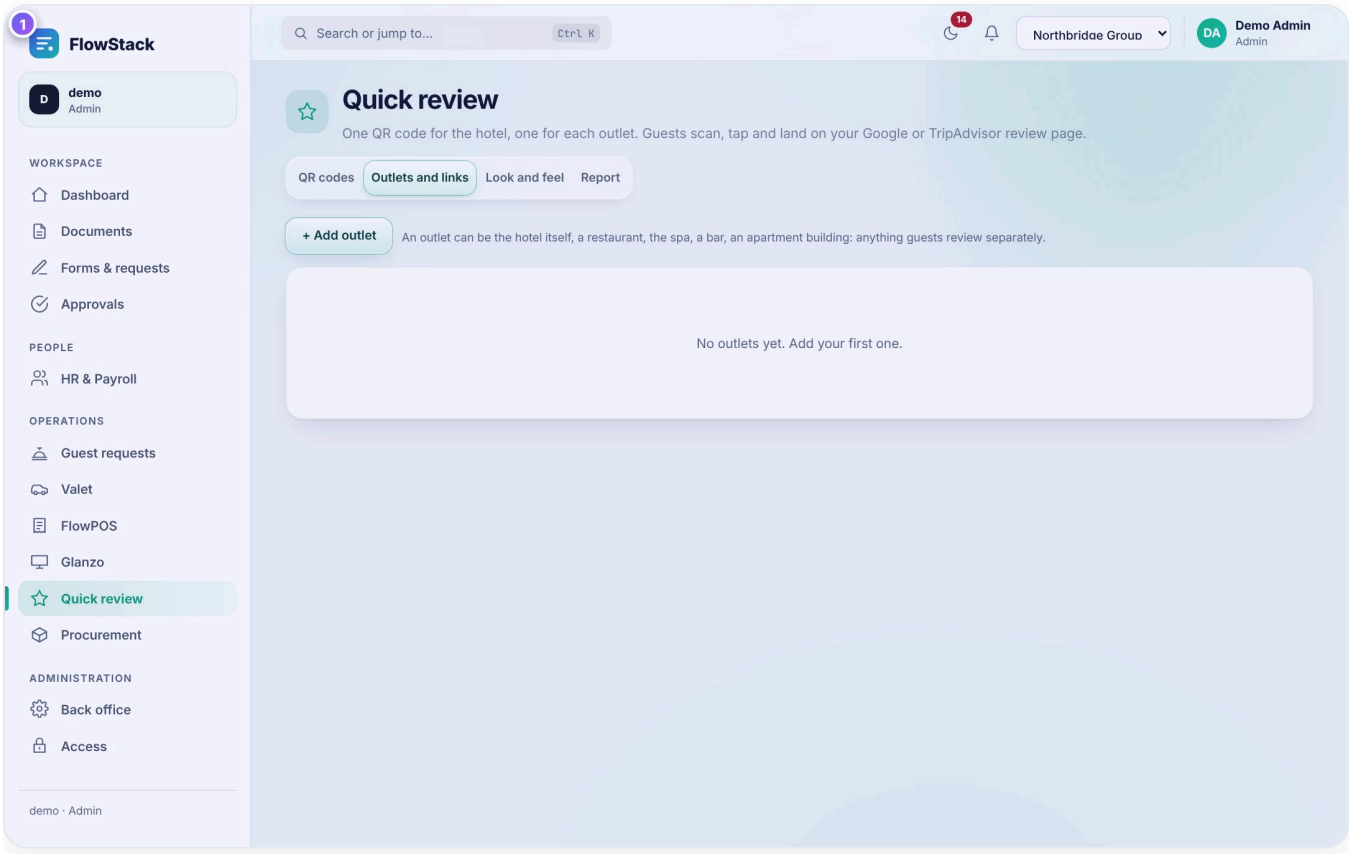
3 Or download the code to use anywhere

HOW TO

1. Open Quick review.
2. Press Print poster for the hotel code, or All QR codes (PDF) for every code at once.
3. Put the posters where guests are: tables, the front desk, rooms and check-out.

5.2 Outlets and review links

Add an entry for the hotel itself and for each outlet, with a short description. For each, paste the direct link to the review page on Google, TripAdvisor, Booking.com or any other review site. There is no limit on the number of outlets.



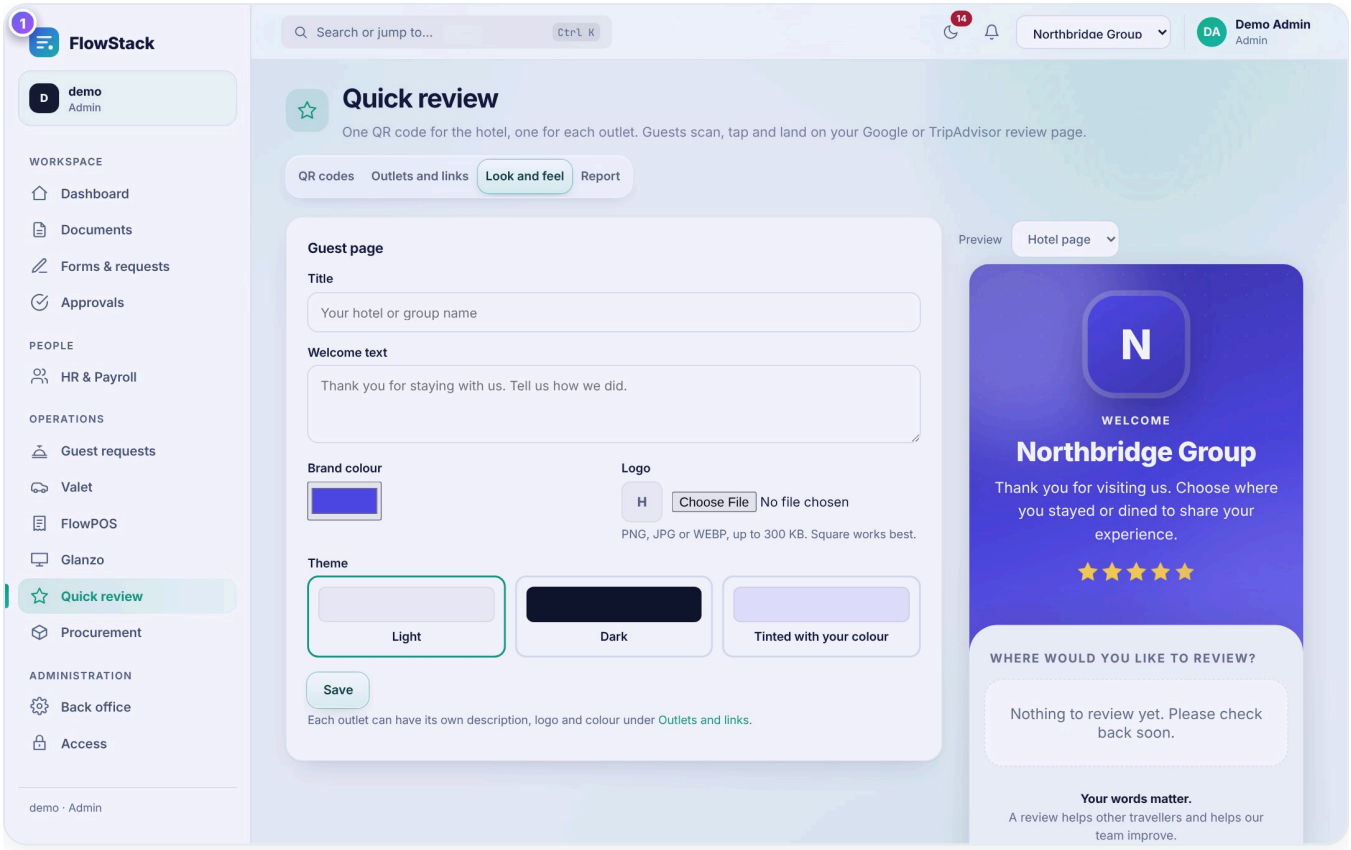
1. One entry for each outlet, with its review links

HOW TO

1. Open Outlets and links and press Add outlet.
2. Type its name and a short description.
3. Paste the direct review link for each site you want guests to use.

5.3 Your logo and colours

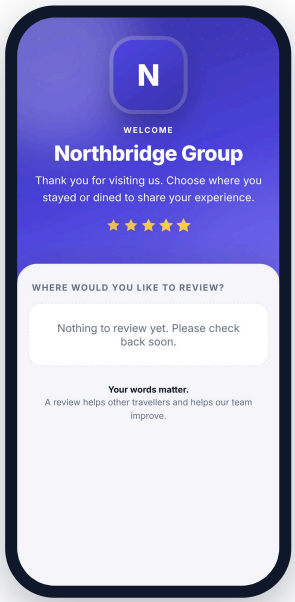
Under Look and feel, upload your logo, choose your colours and edit the welcome words, so the page the guest sees looks like your hotel.



1 Your logo, colours and the welcome text

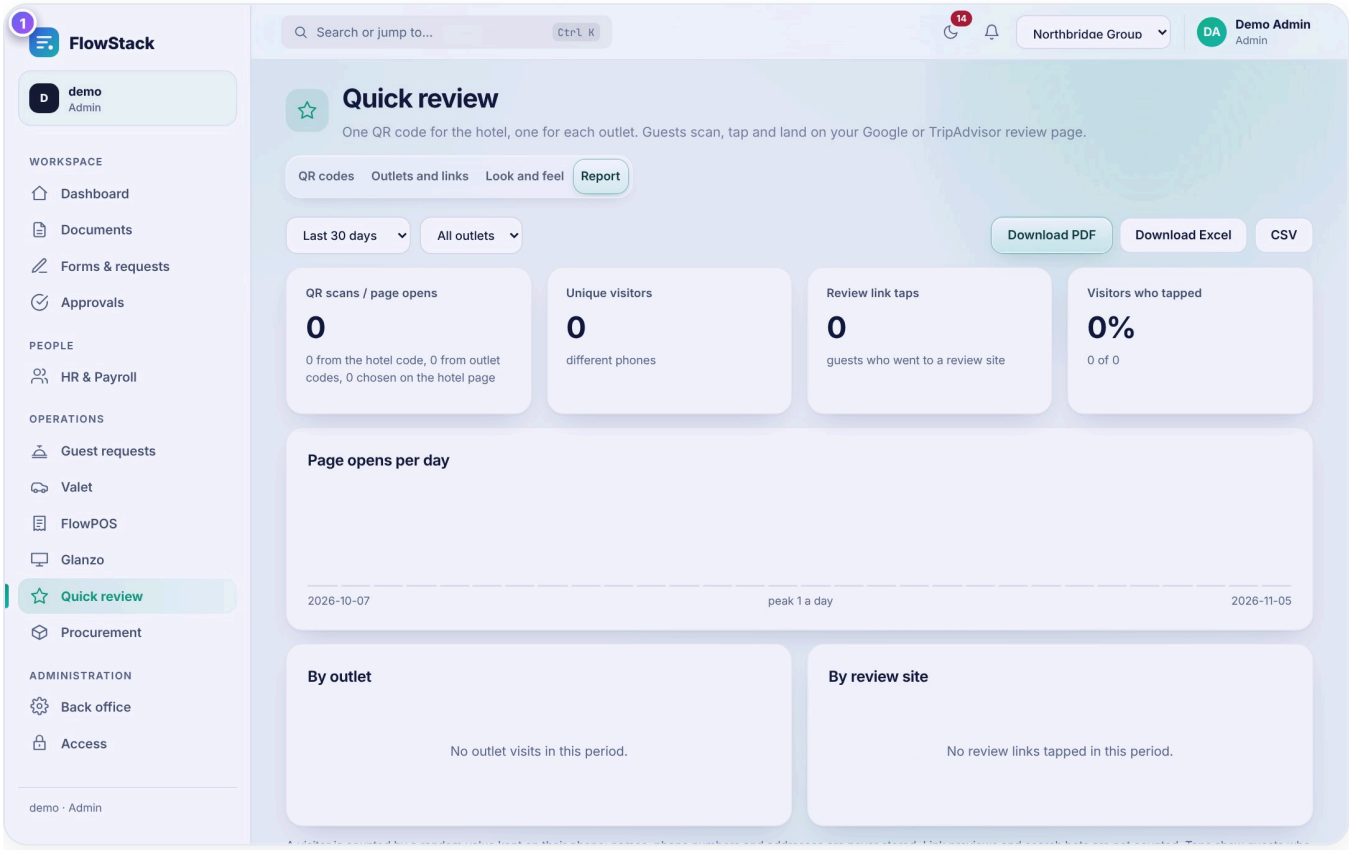
5.4 What the guest sees

The guest scans the code, sees your welcome, picks where they stayed or dined and lands on the review page you chose. They do not log in or install anything.



5.5 The report

The Report tab shows page opens, unique visitors and review link taps for each outlet, so you can see which codes work and which need a better place. Move a poster to a better spot, then watch the numbers.



1 Page opens, unique visitors and review link taps, by outlet

> **Tip.** Reviews are the guest's own. Quick review only takes them to the right page and counts the visits: it never writes or filters reviews.

CHAPTER 6

The mobile app

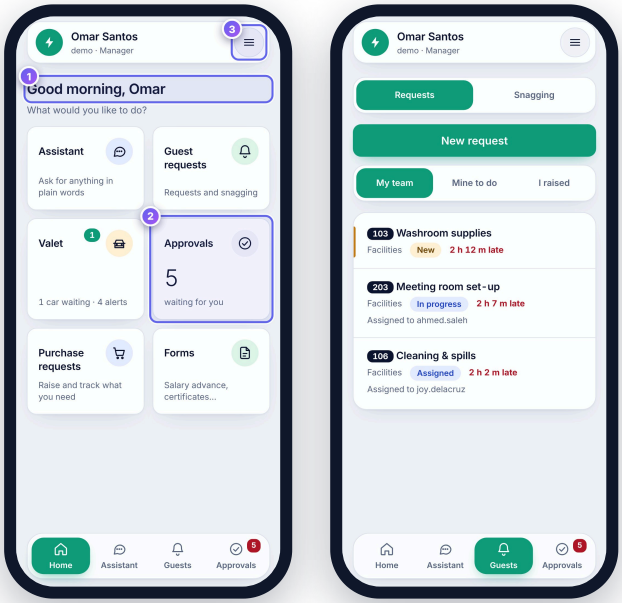
6

Approve, request and follow up from any phone, with notifications when something needs you.

Install FlowStack on your phone | Check in and fetch cars | Handle guest requests and snags | Approve in one tap | Sign contracts

6.1 Home and the bottom bar

The home screen shows a tile for each thing you can do, and only the modules your organization has. The bar at the bottom jumps between Home, Assistant, Guests and Approvals. Guests holds the team's guest requests and, as its own section, Snagging.

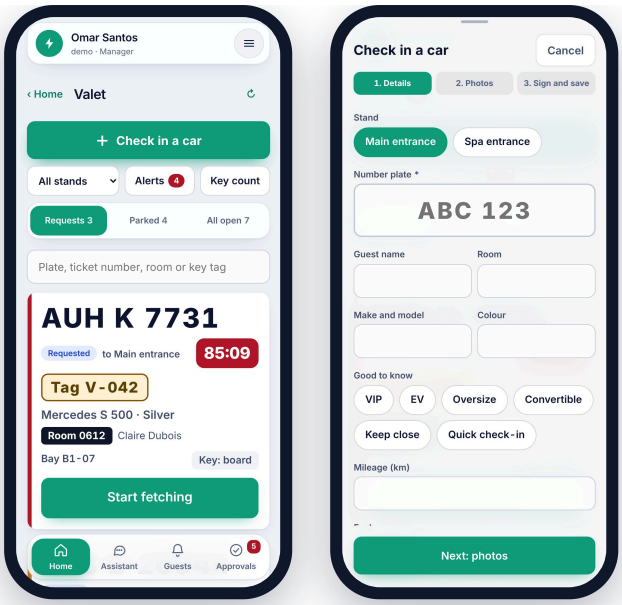


HOW TO

1. Tap a tile on the home screen to open it.
2. Use the bottom bar to jump between Home, Assistant, Guests and Approvals.
3. Open Menu to turn on notifications, or to log out.

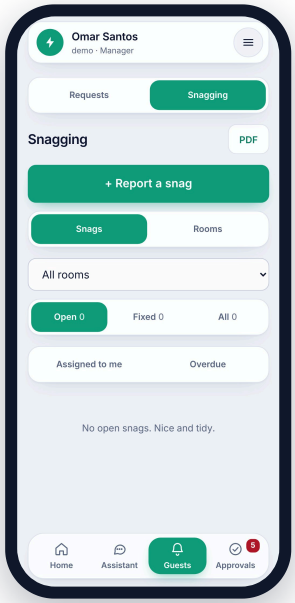
6.2 Valet

Valet attendants check in cars with guided photos (as many as your hotel requires), see every request, start fetching, mark the car ready and hand it over with the release code, all with one thumb. The list shows requests first, then parked cars.



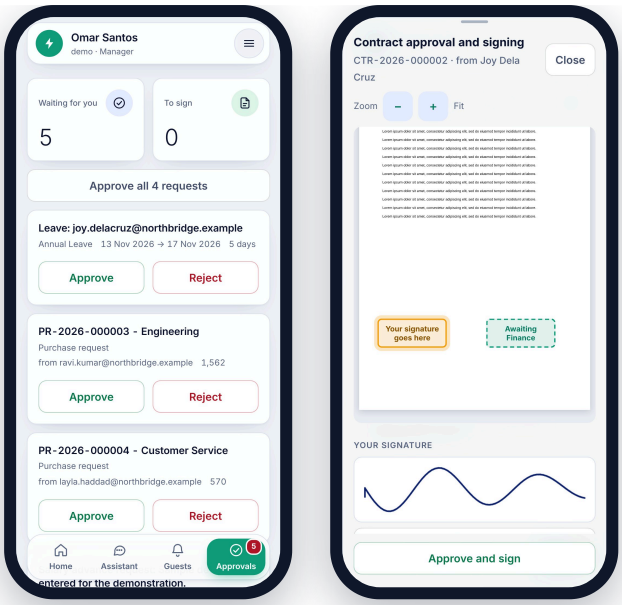
6.3 Snagging

Tap Guests, then Snagging. Press Report a snag, choose the room, take the photos and save. A snag reported without a signal is kept on the phone and sent when the connection returns.



6.4 Approvals and contracts

Approvals gathers purchase requests and forms in one place. Tap an item, then Approve or Reject. Contracts say Review & sign: they open full screen with your box highlighted, with + and - to zoom, and one button: Approve and sign.



HOW TO

1. Tap Approvals, open an item and tap Approve or Reject.
2. For a contract, tap Review & sign, read it and tap Approve and sign.

6.5 Notifications

Turn notifications on once per phone. Tapping an alert opens the right screen. When you log out of the app, notifications for that phone stop, so the next person is not alerted for you.

WHEN	WHO IS ALERTED
A request, order or form needs approval	The approvers for that step (never the person who asked)
An approval is finished	The person who asked
A new service request	The department's team leads (urgent ones as high priority)
A request is given to you, or its status changes	The assignee and the person who asked
A guest asks for their car	The valet team for that stand

CHAPTER 7

Forms & approvals

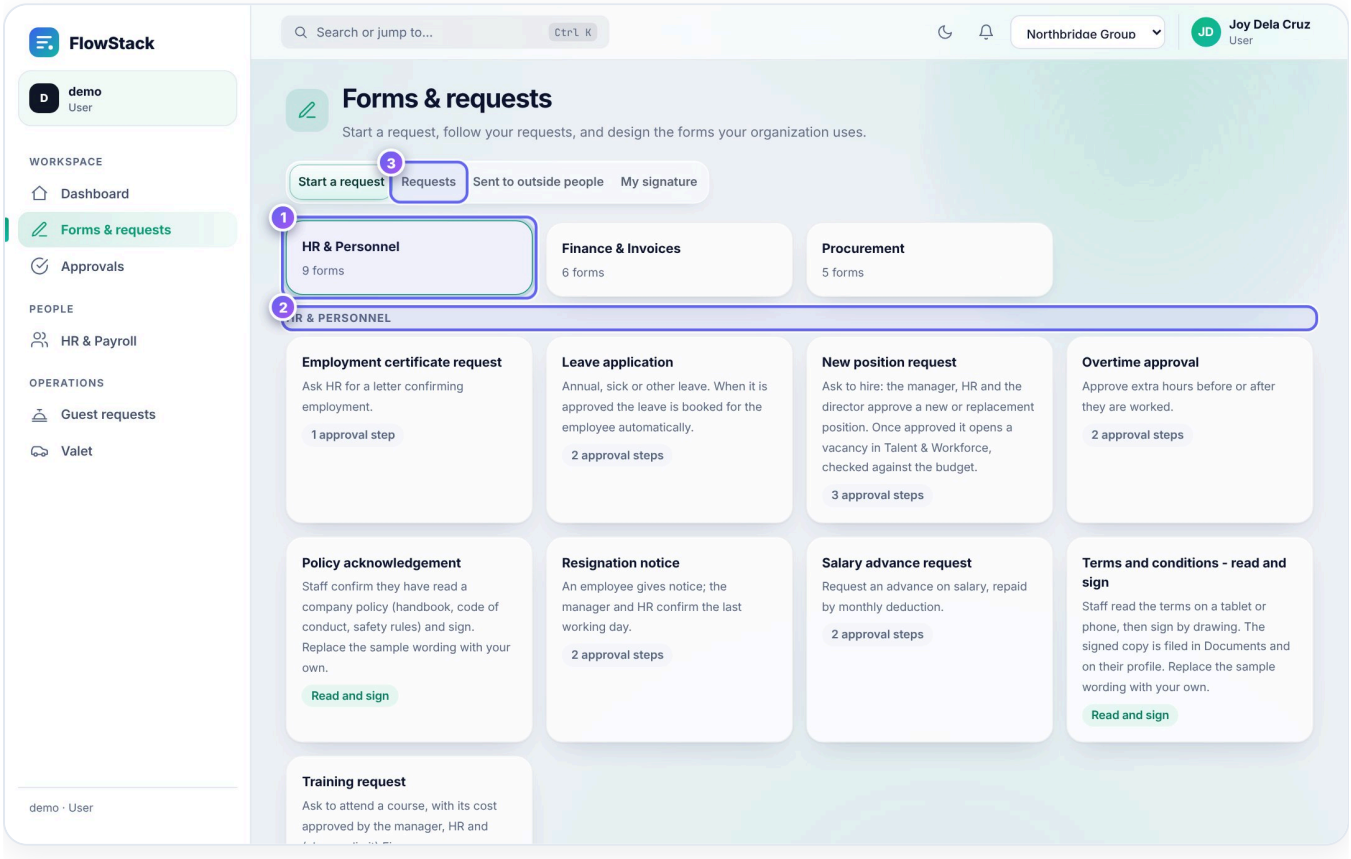
7

Replace paper forms and email chains. Staff start a request, it routes itself to the right approvers, and everyone can follow it.

Start a request | Follow it to the end | Approve requests | Design your own forms

7.1 Start a request

Open Forms and requests, press the category you need (HR, Finance, Procurement or one of your departments), then choose the form. Each form shows how many approval steps it has. Your administrator decides which forms your organization uses: there are ready-made ones for HR, finance and procurement (see Add the ready-made forms below).



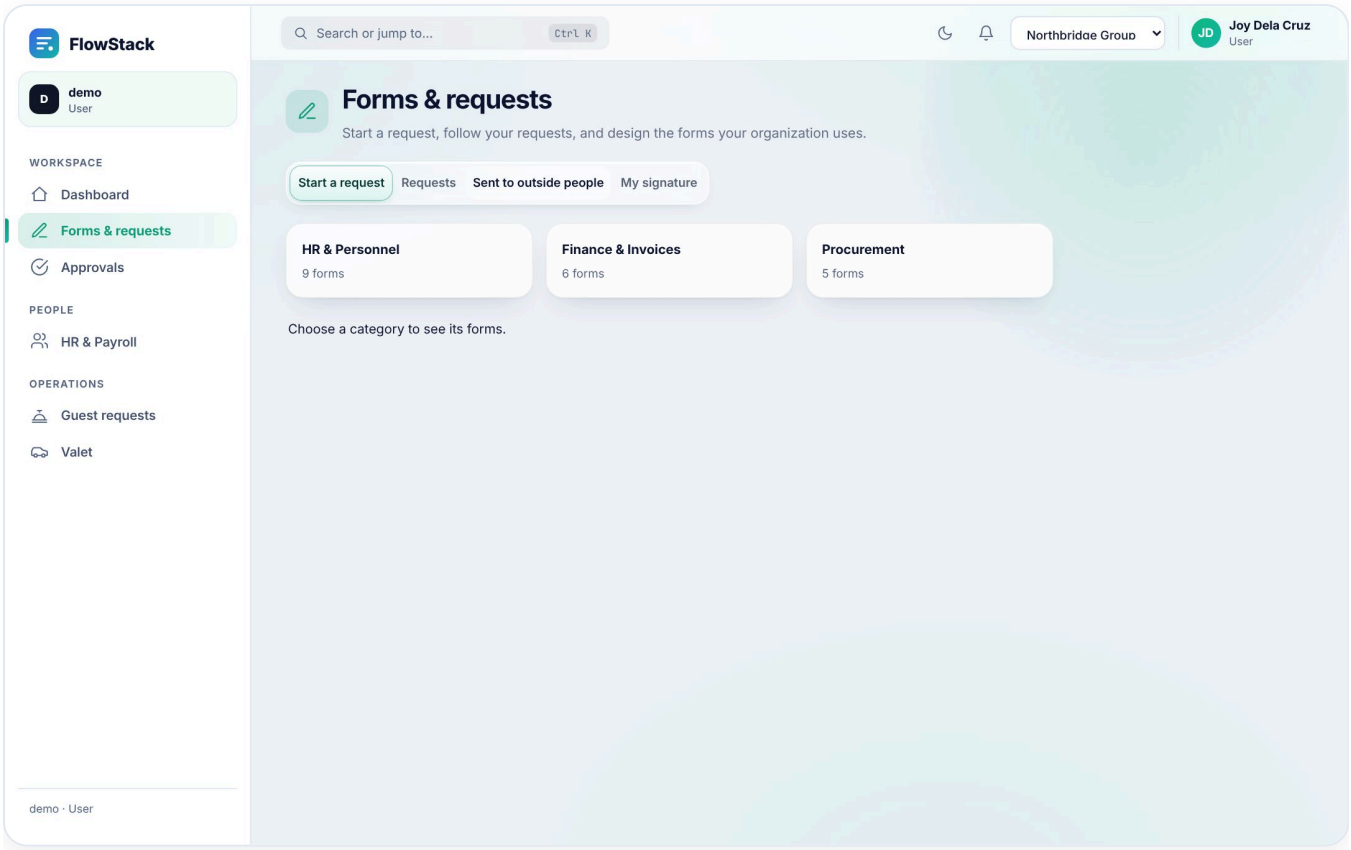
1 Pick a category: its forms appear below

2 Its forms appear here: pick the one to start

3 Follow your requests

7.2 Fill in the form

The form checks your answers as you go: required fields are marked, numbers must be numbers, and choices come from a list. When you press Submit request, the approval chain starts by itself.

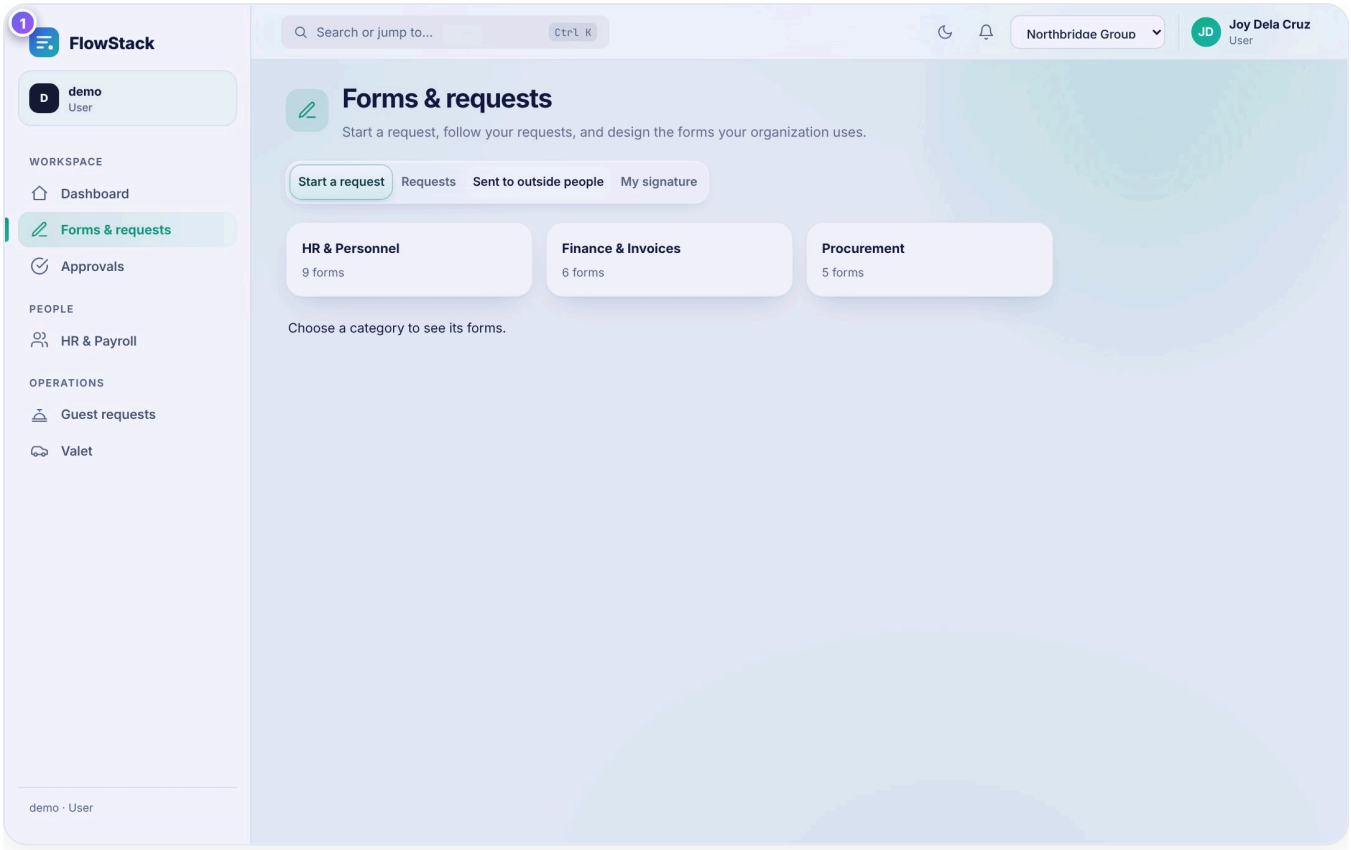


HOW TO

1. Fill in the fields.
2. Tick any confirmation box.
3. Press Submit request.

7.3 Follow your request

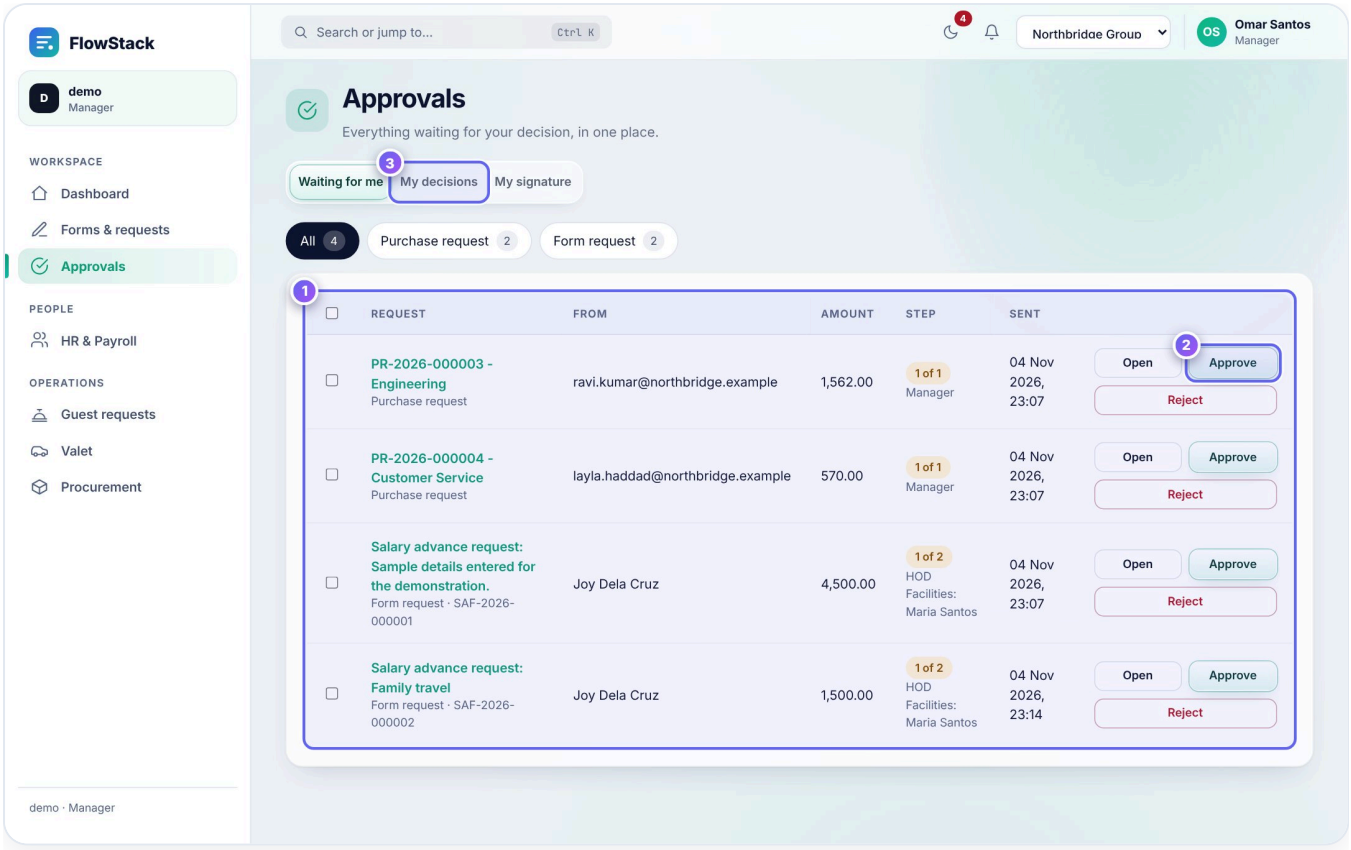
Every request has a number and shows its approval steps: who has to approve, who already did, and any comments. You can cancel it while it is still pending. Open Requests at any time to see all your requests; if you are allowed to, switch from Mine to Everyone.



1 Each approval step and who decides it

7.4 Approve requests

Approvers see everything waiting for them in one inbox, including purchase requests and supplier invoices from Procurement. Press Open to read the details, then Approve or Reject, with a comment. The Approvals page has tabs: Waiting for me, My decisions and My signature, and a row of filters to see only one kind of approval. Your earlier decisions are under My decisions.



1 Everything waiting for your decision

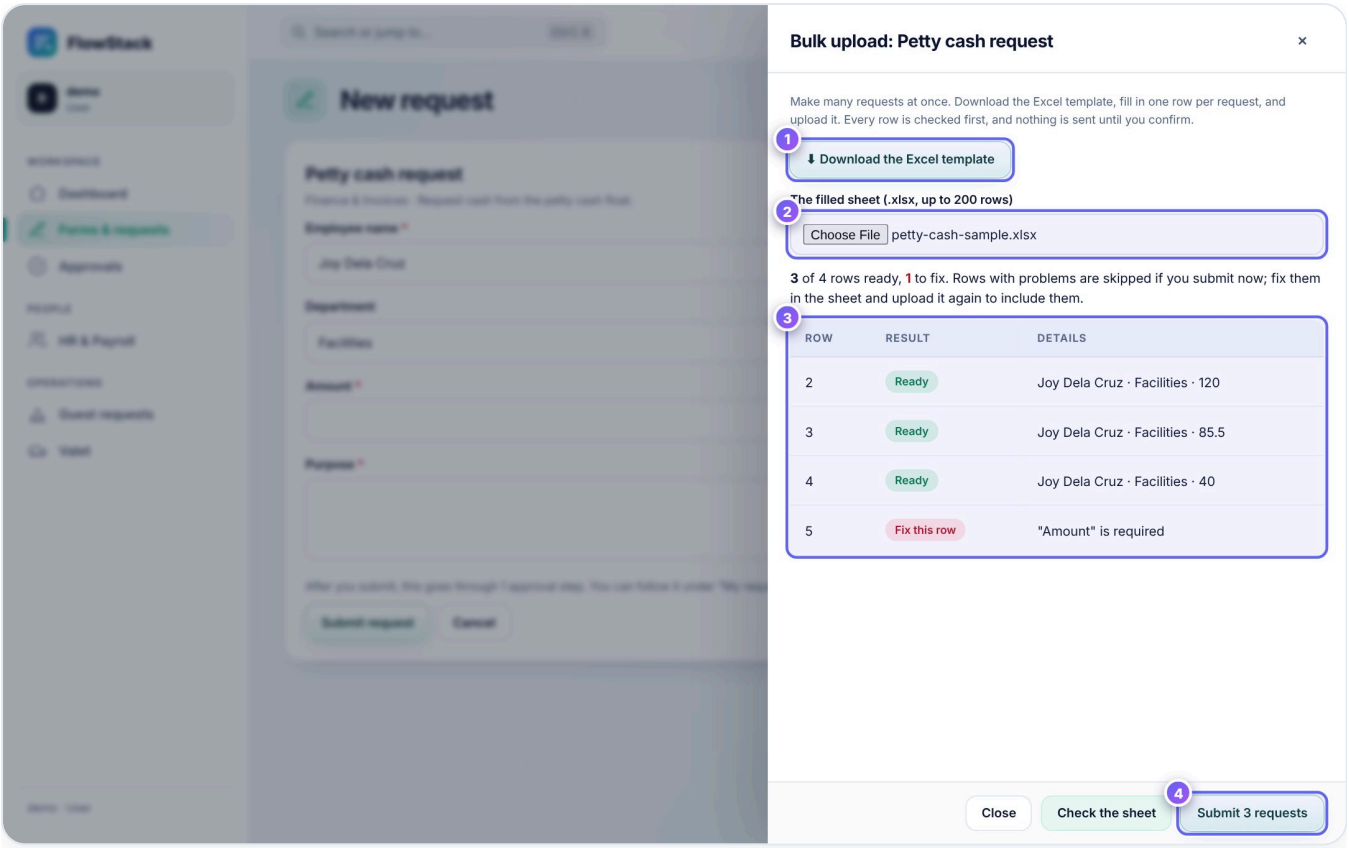
2 Approve, or ask for changes

3 Your earlier decisions

7.5 Make many requests from Excel

When you have many similar requests, such as a batch of petty cash claims, do not fill the form again and again. Open the form and press Bulk upload (Excel). Download the template: it has one column for each field of the form, with drop-down lists for choices and dates. Fill in one row per request (up to 200) and upload the sheet.

FlowStack first checks every row and shows which are ready and which need fixing, with the reason. Nothing is sent until you confirm, and only the ready rows become requests, each with its own number and its own approval chain. Bulk upload is off by default: the form's owner switches it on by ticking Bulk upload allowed in the form's settings (Manage forms, Edit). If the form has an attachment, the column ending (file name) holds the exact name of each file, and you choose all those files in the upload window together with the sheet. For a contract, each approver's signature box is placed at the bottom of the last page.



1. Download the template: one column for each field
2. Upload the sheet you filled in
3. Every row is checked first: ready, or Fix this row with the reason
4. Submit the ready rows: each becomes a request

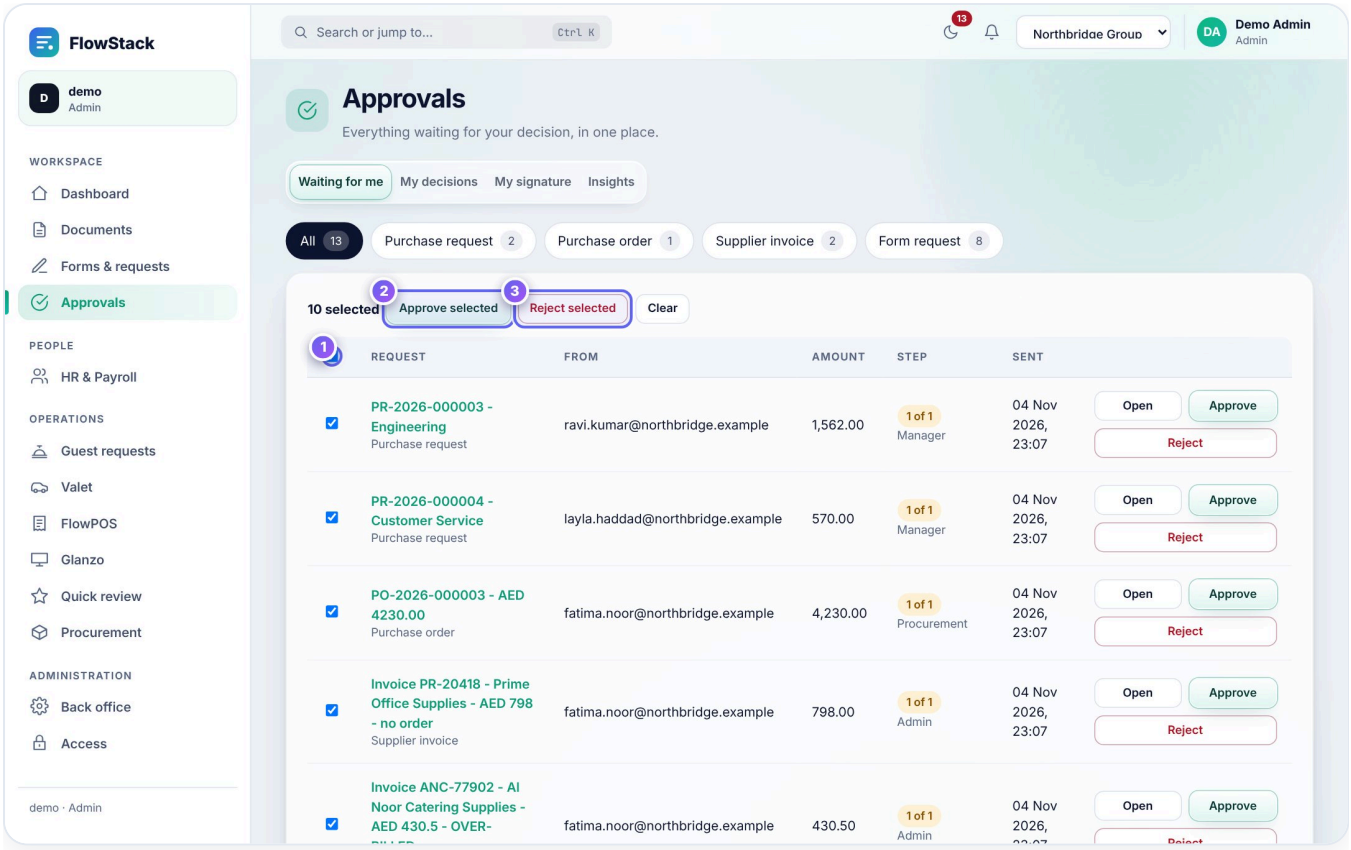
HOW TO

1. Open the form and press Bulk upload (Excel).
2. Download the Excel template and fill in one row per request.
3. Upload the sheet and press Check the sheet.
4. Fix any rows marked Fix this row, then press Submit.

7.6 Approve many at once

In the Approvals inbox, tick the requests you have checked, or tick the box at the top to select all of them, then press Approve selected (or Reject selected, with a reason). Each request is approved in your name with the time and your comment. On the phone, Approve all does the same for everything waiting for you.

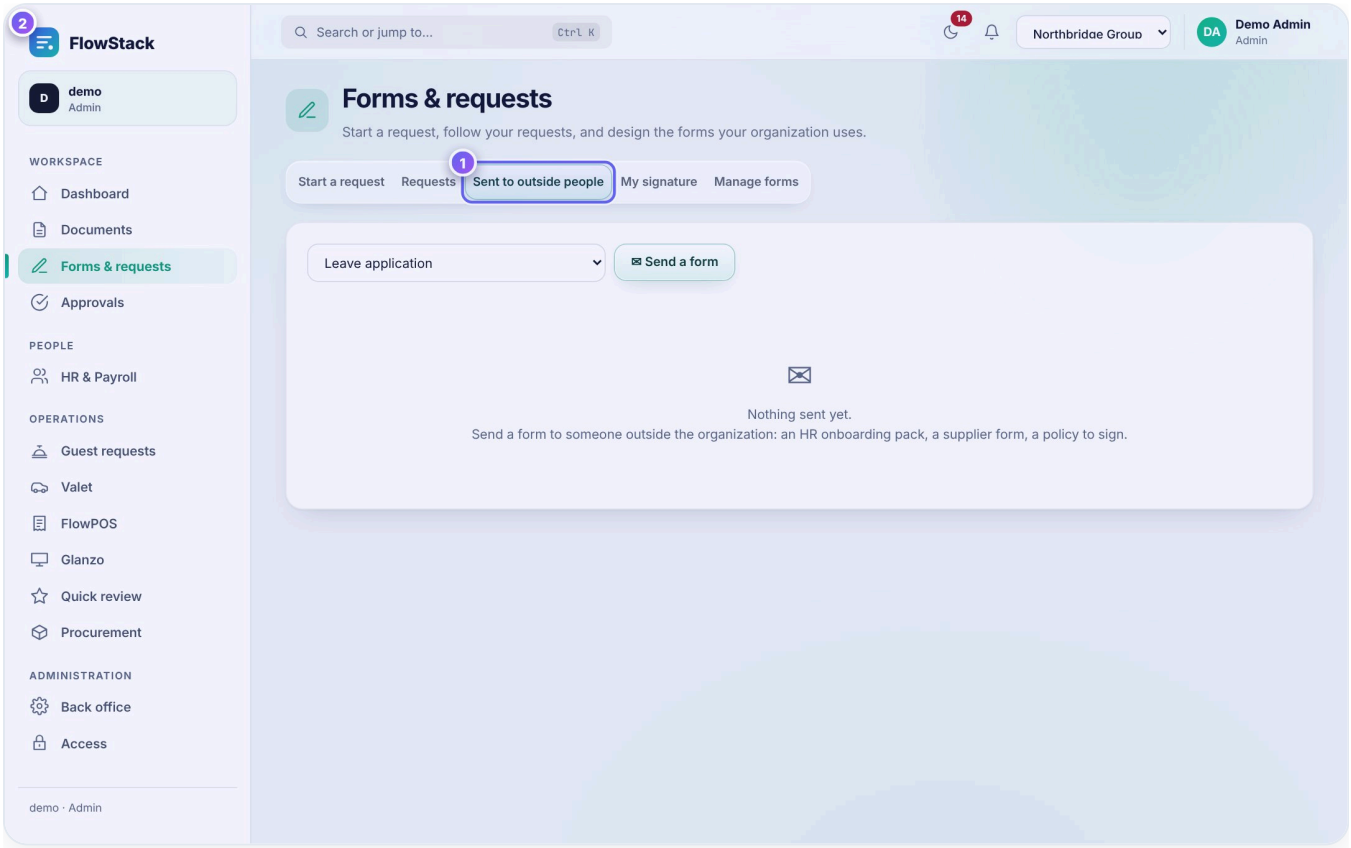
Contracts that need your signature are never approved in bulk: open them, read them and sign.



1. Tick the requests you have checked, or tick all
2. Approve them in one go: each in your name, with the time
3. Or reject them, with a reason

7.7 Send to people outside your organization

Some documents need a signature or an answer from someone who has no login: a supplier, a candidate, a contractor. Under Sent to outside people you can send a form by email, or send a PDF for signature. The person opens a private link on their phone, signs or answers with no login, and the signed copy is filed in Documents. The same tab shows everything you sent, with where each one stands.



1 Everything you sent to people outside your organization

2 By signature or by email, with where each one stands

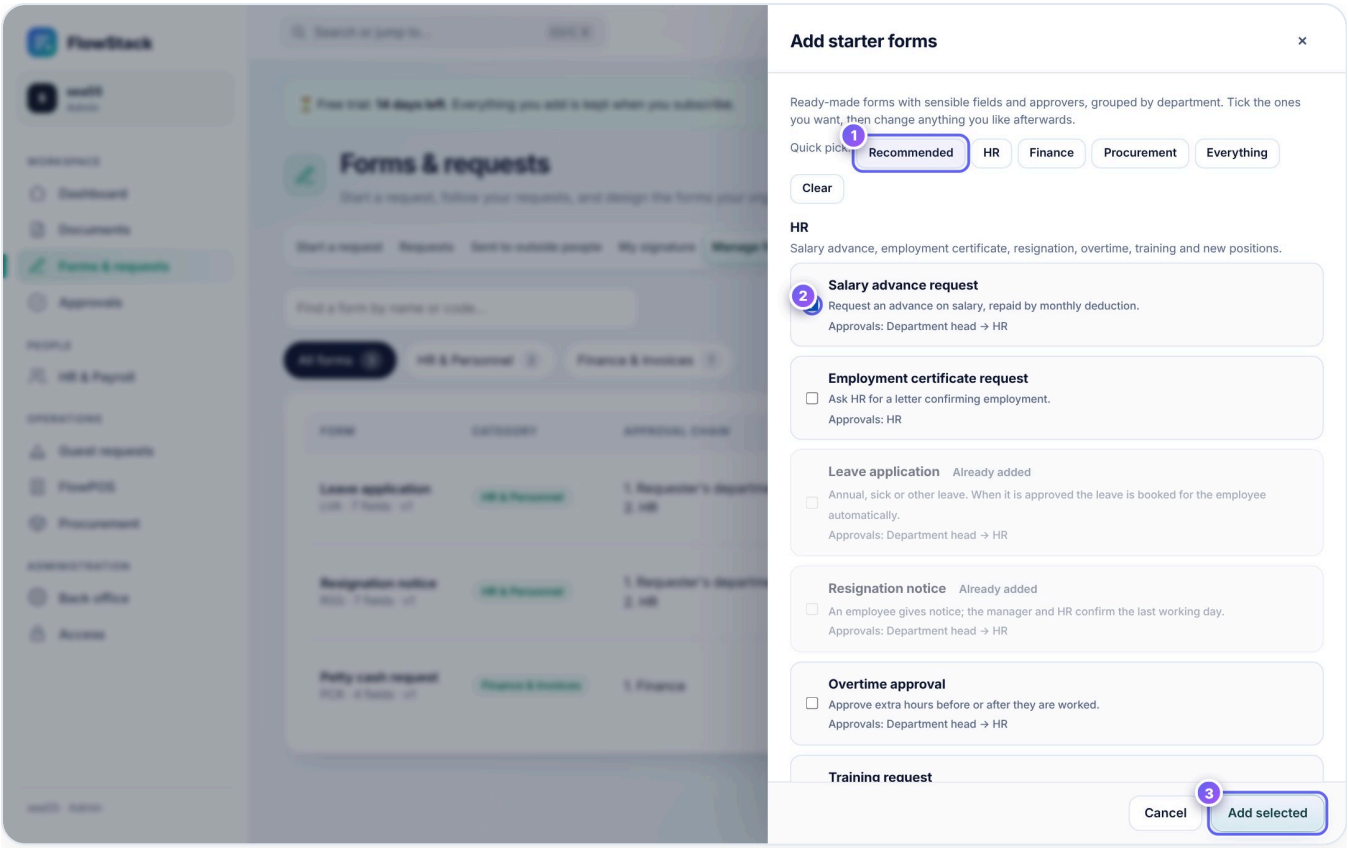
7.8 Printing a request

Press Print on any request for a clean sheet. The Requested by block shows the requester's name and date, the Approved by block shows the name, step and date of every approver (with their signature when it was a signed contract), and the last block shows the date of the final approval.

7.9 Add the ready-made forms

Administrators do not have to start from a blank page. In Manage forms, press Add starter forms to choose from 17 ready-made forms, grouped by department: HR (salary advance, employment certificate, resignation notice, overtime, training, new position), Finance (AP invoice approval, expense claim, petty cash, travel, payment request, budget change) and Procurement (vendor registration, purchase approval outside the catalogue, equipment request, contract approval and NDA signing).

Each form shows its approvers, for example Department head, then Finance (from 5,000). Quick pick ticks the recommended set, a whole department, or everything. Forms you already have are greyed out. Everything can be changed after you add it, so treat the starters as a first draft and adjust the approvers and amount limits to how your organization works.



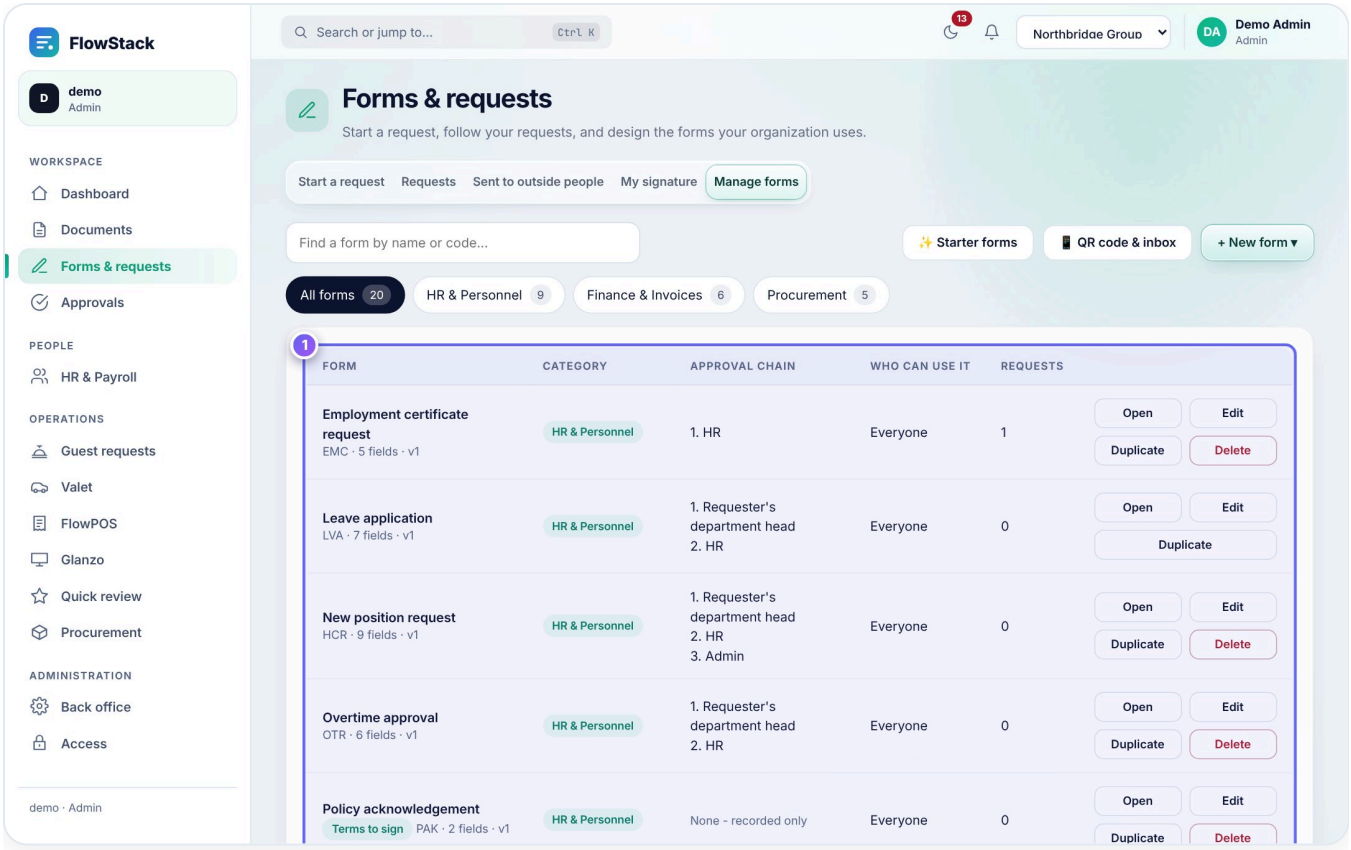
1. Quick pick: the recommended set, or a whole department
2. Each form shows its approvers
3. Add the ticked forms to your organization

HOW TO

1. Open Manage forms and press Add starter forms.
2. Press Recommended, or a department, or tick forms one by one.
3. Press Add selected, then open any form to adjust its fields and approvers.

7.10 Design your own forms

Press New form to start from scratch, New contract form for a contract that needs signatures (see chapter 8), or Duplicate an existing form and change it. You choose the fields, who can use each form, and the approvers for each.



1 Your forms and their approvers

HOW TO

1. Press New form, then name it and choose its category.
2. Add the fields people must fill in.
3. Choose the approvers, in order. Add a step that applies only above a certain amount if you need one.
4. Choose who can use the form, tick Bulk upload allowed if people may make requests from an Excel sheet (off by default), and save it.

CHAPTER 8

Contract signing

8

Send a contract as a PDF, mark where each approver signs, and their saved e-signature and the date are placed on it automatically when they approve.

Save your signature once | Design a contract form | Send a contract for signing | Review and sign | Download the signed copy

8.1 Save your signature

Everyone who approves contracts saves a signature once. Open Forms and requests, then My signature. Draw it with the mouse, a pen or your finger, type your name in a handwriting style, or upload a photo of your signature on white paper (the paper background is removed). The same page is in the mobile app, under Menu.

Your signature is private to you. If you later change it, contracts you already signed keep the signature you used on the day.

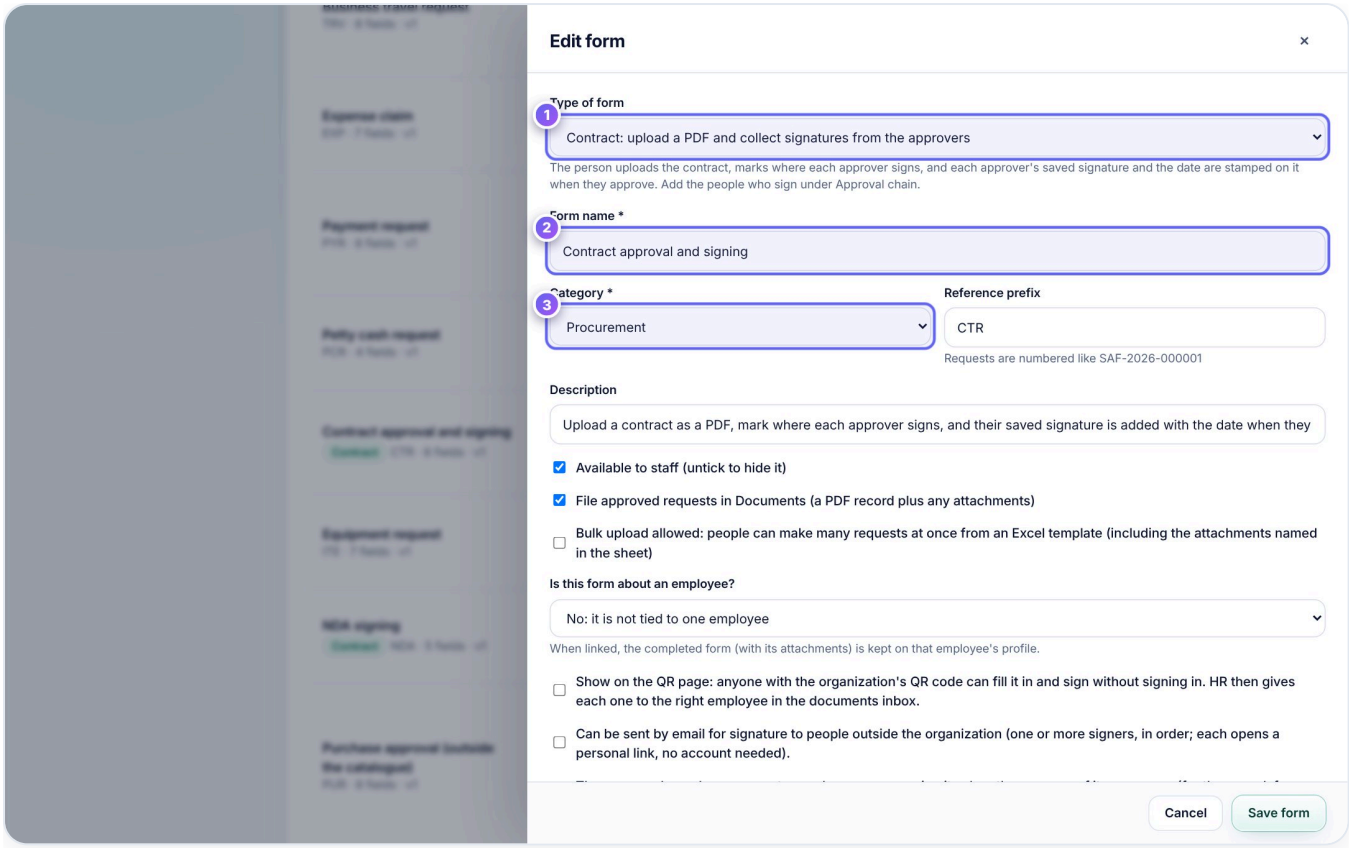
HOW TO

1. Open Forms and requests, then My signature.
2. Draw, type or upload your signature.
3. Check the preview and press Save signature.

> **Tip.** You cannot approve a contract until you have saved a signature. If you forgot, FlowStack asks for it when you press Approve and sign.

8.2 Design a contract form

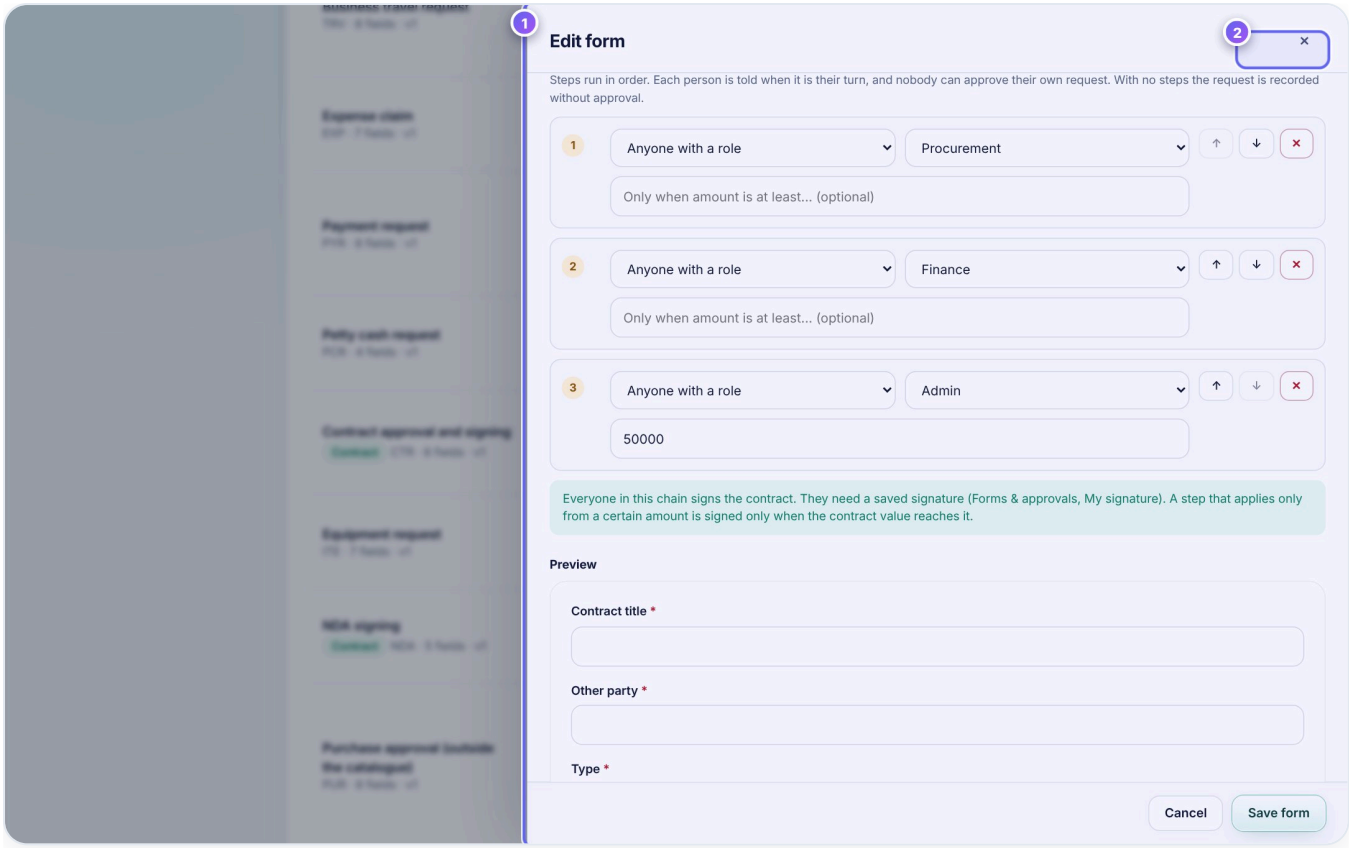
Contracts have their own kind of form. Administrators, and the people who run the form's category, press New contract form in Manage forms, or add the starter form Contract approval and signing. A contract form always has a Contract (PDF) field, plus any details you want to collect, such as the other party, the value and the dates.



1. Choose Contract: upload a PDF and collect signatures
2. Name the form
3. Choose its category

8.3 Choose who signs

The approval chain of a contract form is also its list of signers: everyone in it signs, in order. A step that applies only from a certain amount signs only when the contract value reaches that amount. The person who sends a contract may sign it too when they are one of the signers, which is useful for the record (for example an administrator signing their own contract); the form setting The person who makes a request may also approve or sign it controls this. An administrator who covers for an absent approver signs with their own signature.



1 Everyone in this chain signs, in this order

2 Add another signer

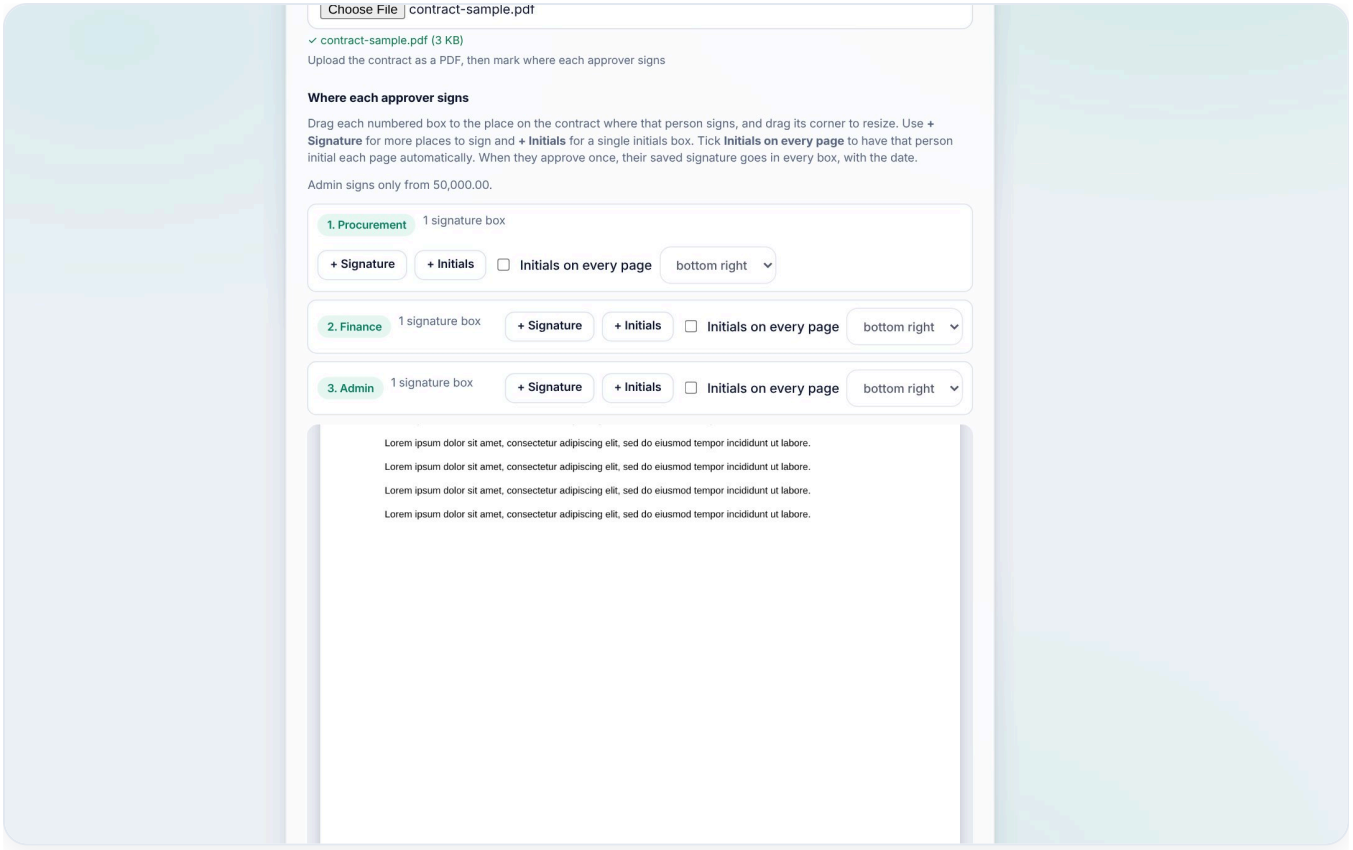
HOW TO

1. Set the type of form to Contract.
2. Add the details to collect.
3. Add the approvers, in the order they sign.
4. Press Save form.

8.4 Send a contract for signing

Open the contract form, fill in the details and upload the contract as a PDF. The contract appears on screen with one numbered box for each signer. Drag each box to the place on the contract where that person signs, onto any page, and drag its corner to make it bigger or smaller. When you press Submit request, the first approver is told.

PDFs with a password, or that cannot be opened, are refused straight away so nobody finds out later.

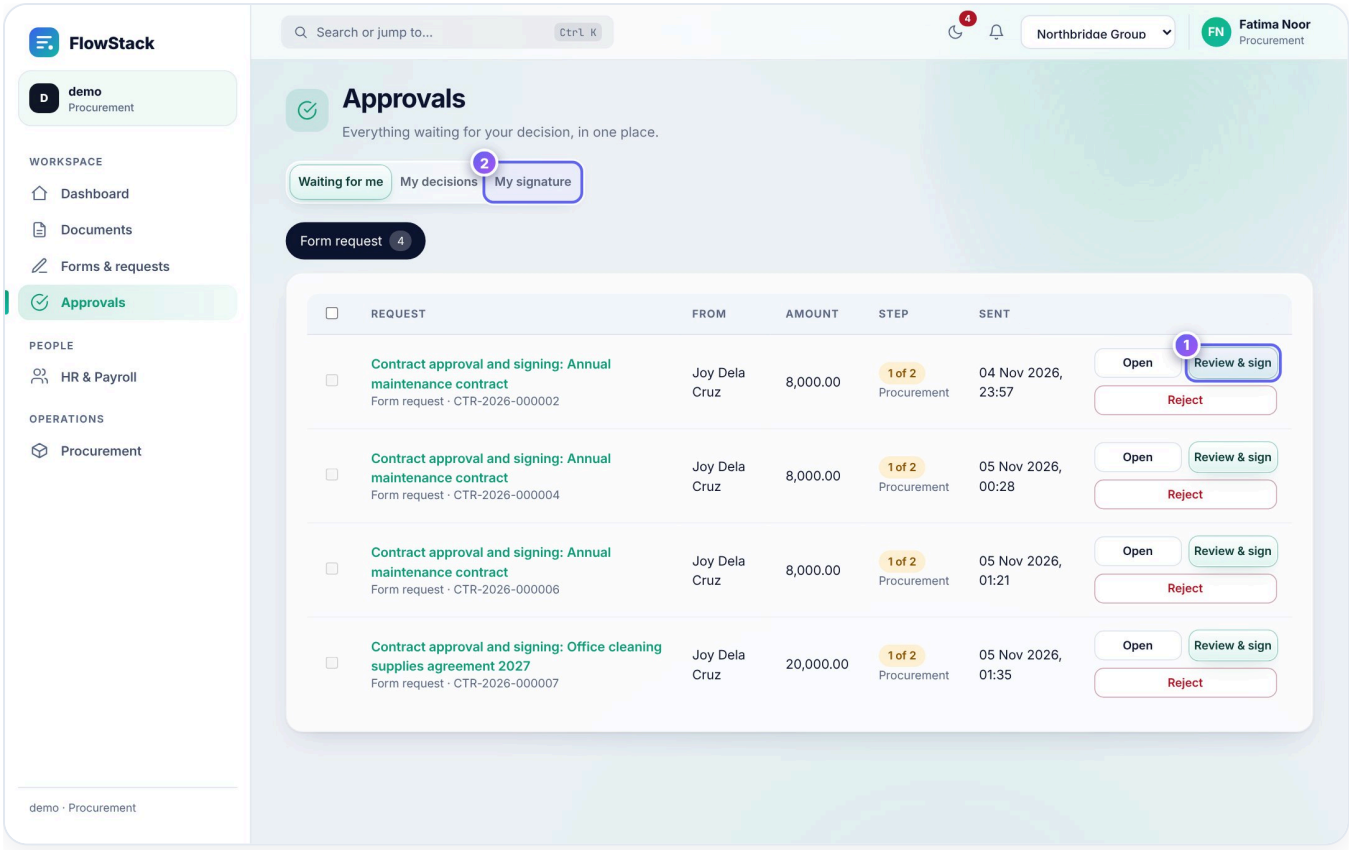


HOW TO

1. Open the contract form from Start a request.
2. Fill in the details and upload the PDF.
3. Drag each numbered box to where that person signs.
4. Press Submit request.

8.5 Approvers are told

A contract waiting for you appears in your Approvals inbox, or on your phone, marked Review & sign instead of Approve. This is so nobody signs a contract without reading it.

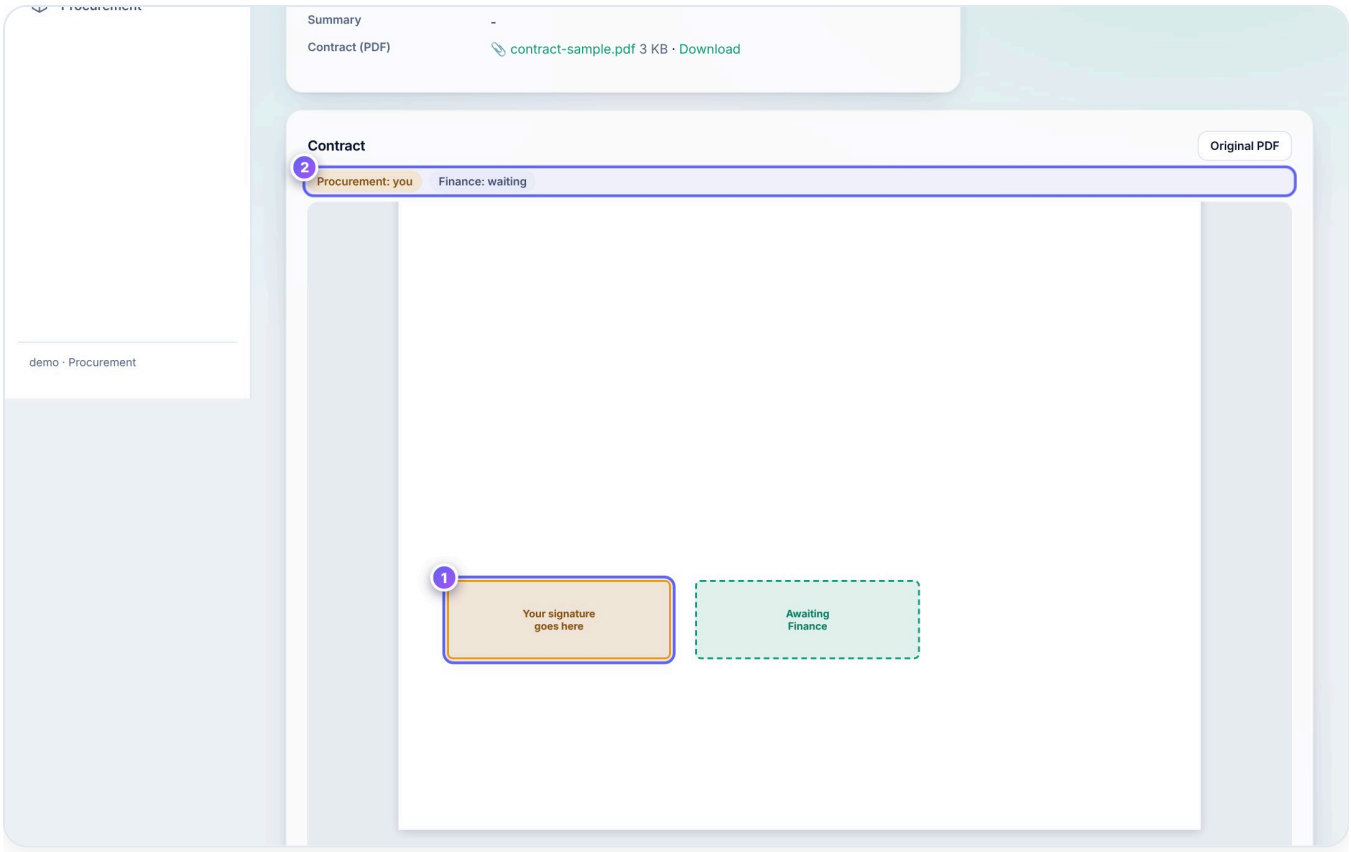


1 Contracts say Review & sign: open it to see where you sign

2 Your saved signature

8.6 Review and sign

The request page shows the contract, with a highlighted box where your signature goes. Boxes of people who have already signed show their signature, name and date. Boxes for people still to come say Awaiting.

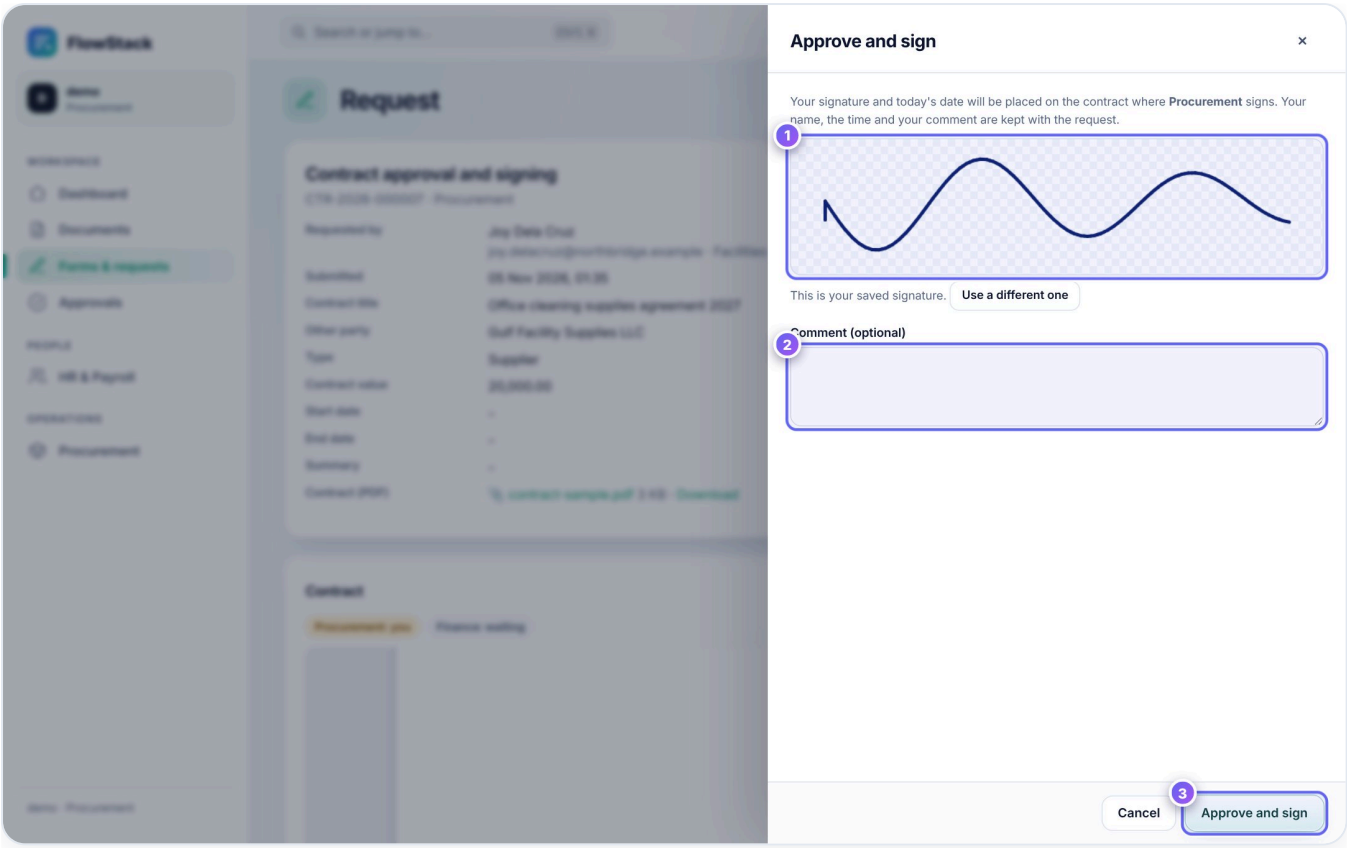


1 Your signature goes here

2 Who has signed and who is still to come

8.7 Approve and sign

Press Approve and sign. Your saved signature is shown; you can use a different one for this contract if you wish. When you confirm, your signature, name and the date and time are placed on the contract, and the request moves on to the next signer. You can also reject a contract with a reason. Nothing is signed when you reject.



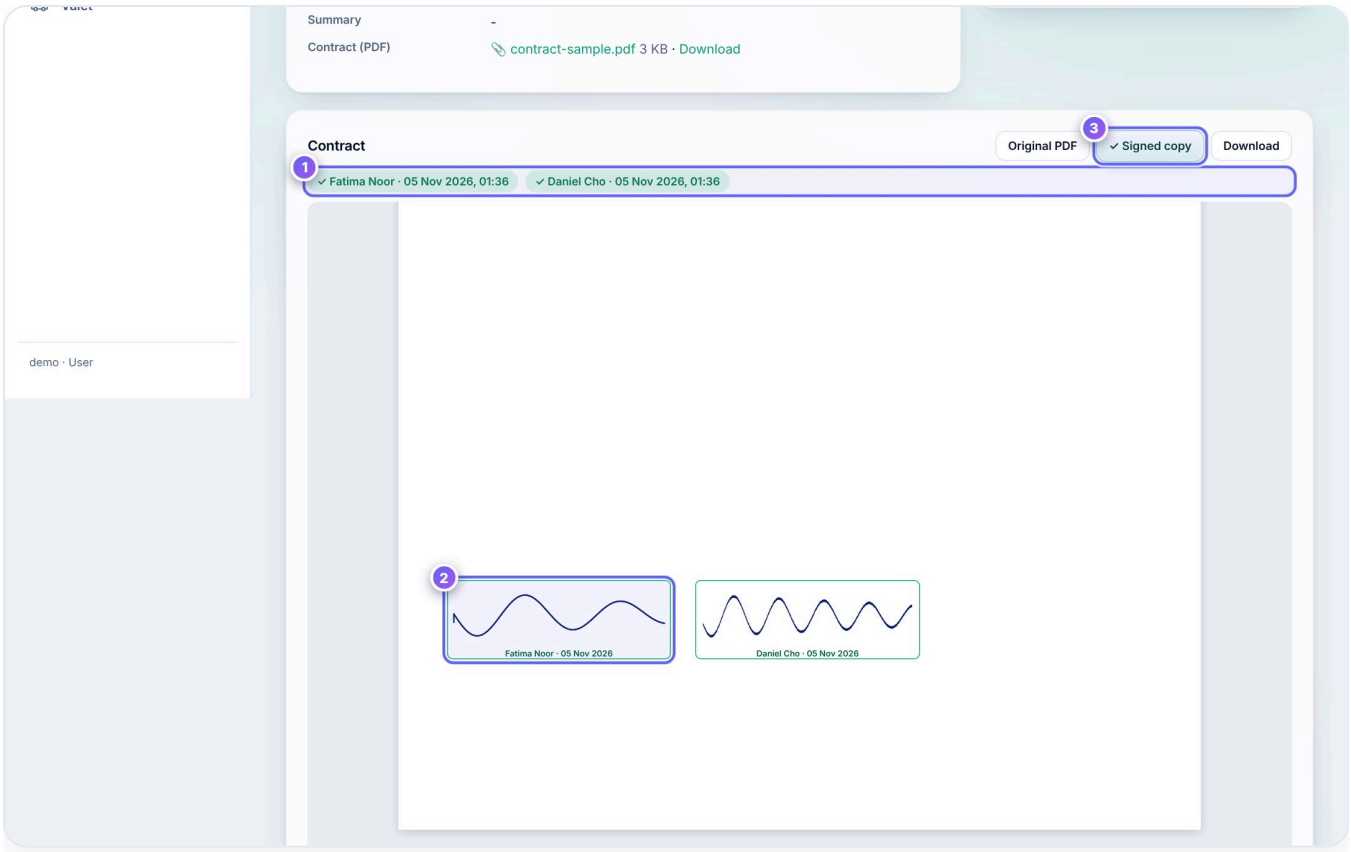
1. Your saved signature
2. Add a comment if you wish
3. Approve and sign: your signature and the date go on the contract

HOW TO

1. Open the request and read the contract.
2. Press Approve and sign.
3. Check your signature, add a comment if you like, and confirm.

8.8 The signed copy

After every signature FlowStack builds a new signed PDF: the original pages with the signatures so far, and a Signature certificate page at the end listing who signed, when, and a fingerprint of the original file. Anyone who can open the request can open or download it. When the last person signs, the signed copy is filed in Documents next to the original contract.



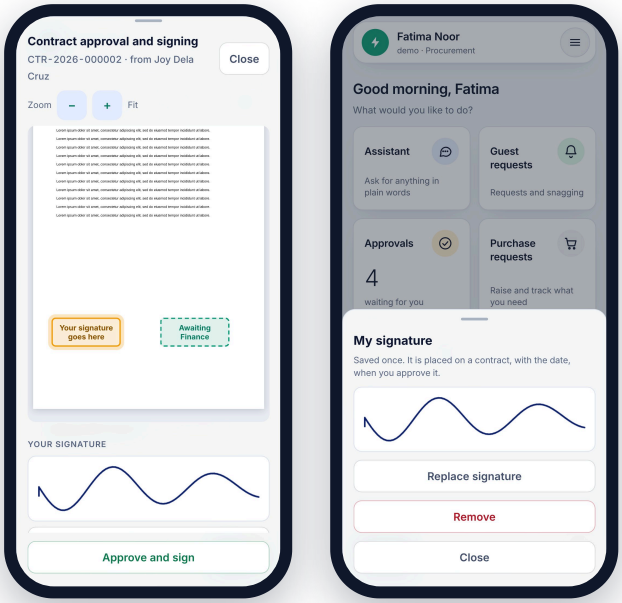
1. Each signer, with the date and time
2. The signature is placed where you marked it
3. Open or download the signed PDF



Tip. Each signature is applied by FlowStack when the approver approves while signed in to their own account. Times are shown in UTC.

8.9 Signing on your phone

In the mobile app, a contract in your Approvals tab says Review & sign. It opens full screen with your box highlighted. Use the + and - buttons to zoom into small print. Your saved signature is shown below the contract, with one button: Approve and sign. Menu, then My signature, lets you save or change your signature on the phone.



HOW TO

1. Tap Approvals, then Review & sign.
2. Read the contract and zoom in where you need to.
3. Check your signature and tap Approve and sign.

CHAPTER 9

Documents

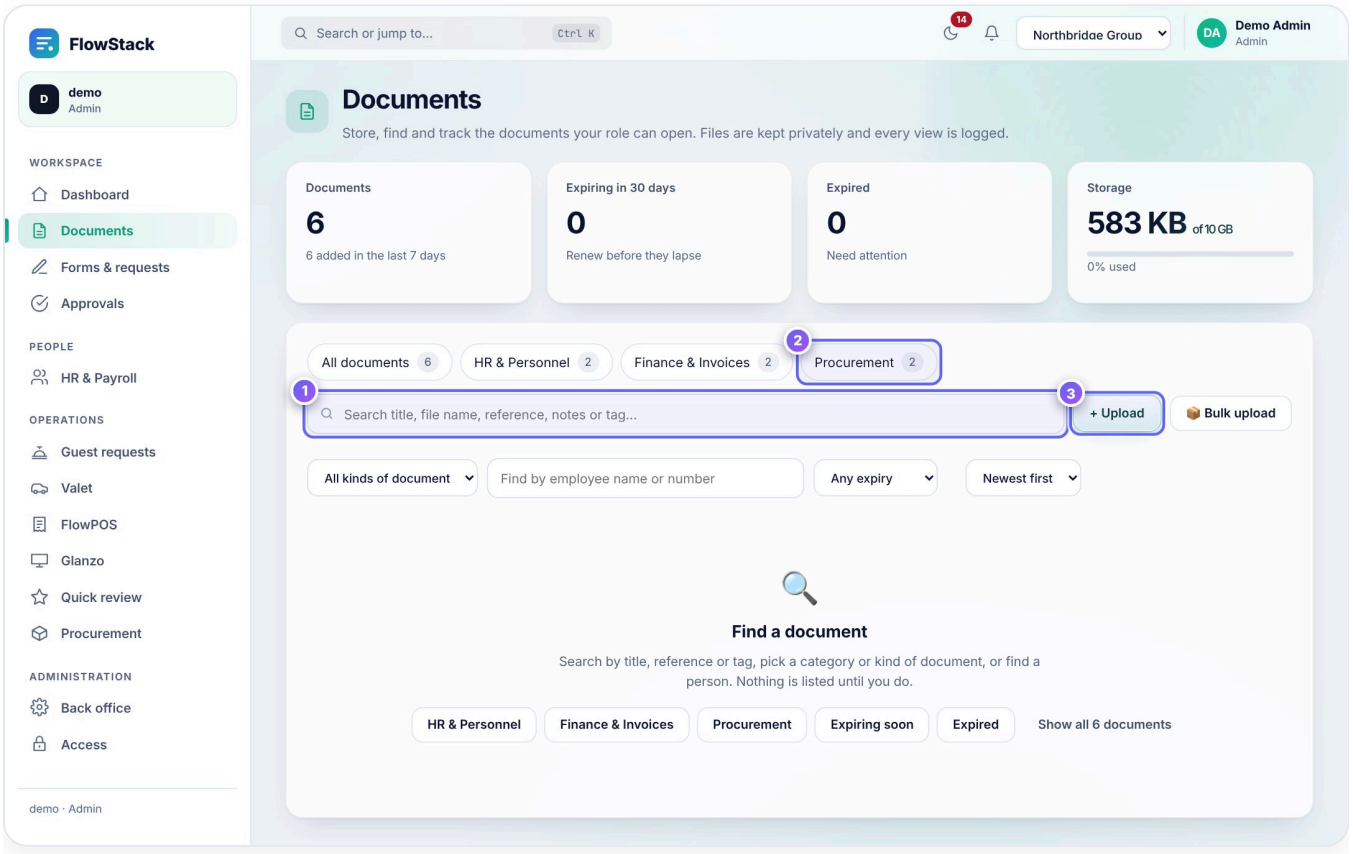
9

A private place for licences, contracts, policies and certificates, with expiry dates that warn you before it is too late.

Find any document quickly | See what is about to expire | Upload a document

9.1 The document repository

Documents are organised in categories, and each person only sees the categories their role allows. The tiles at the top show how many documents you have and how many are expiring or expired. Every view and download is logged.



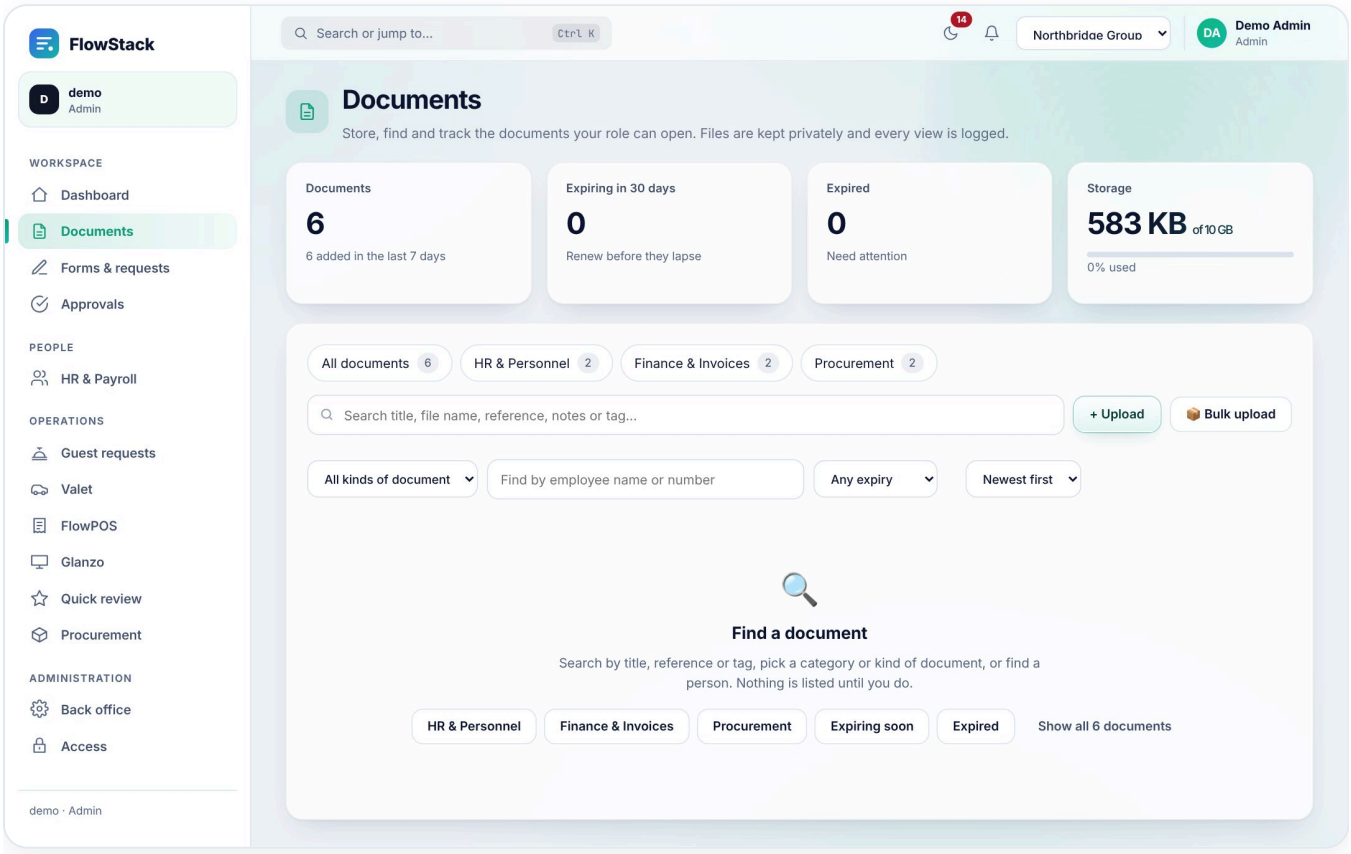
1. Search by title, reference, notes or tag
2. Categories: each team sees its own
3. Upload a document

HOW TO

1. Search by title, file name, reference, notes or tag.
2. Press a category to narrow the list.
3. Press View to read a document in the browser, or Download to save it.

9.2 Watch expiry dates

Filter by expiry to see what needs renewing. Documents expiring within 30 days show in orange, and expired ones in red. Sort by expiry date to put the most urgent first. The dashboard also lists documents to renew.

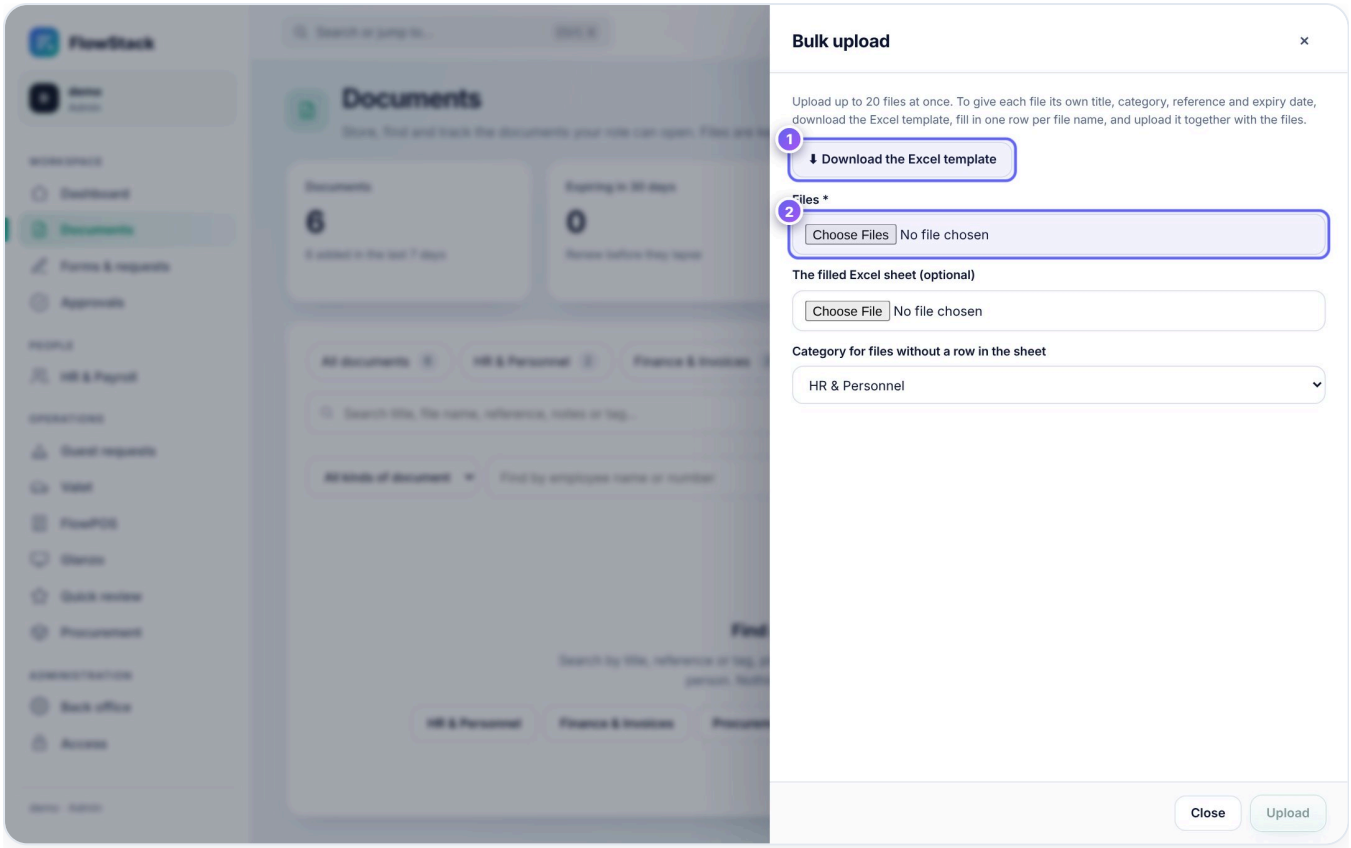


HOW TO

1. Press Expiring soon or Expired.
2. Open the document, renew it, and press Edit to enter the new expiry date.

9.3 Upload many documents at once

Press Bulk upload to add up to 20 files in one go. To give each file its own title, category, reference number, dates and tags, download the Excel template, type each file name in the first column with its details beside it, and upload the sheet together with the files. Files with no row in the sheet are uploaded with their own name as the title, in the category you choose on the screen. A result list shows each file that went in and any that did not, with the reason.



1 Optional: an Excel sheet gives each file its own details

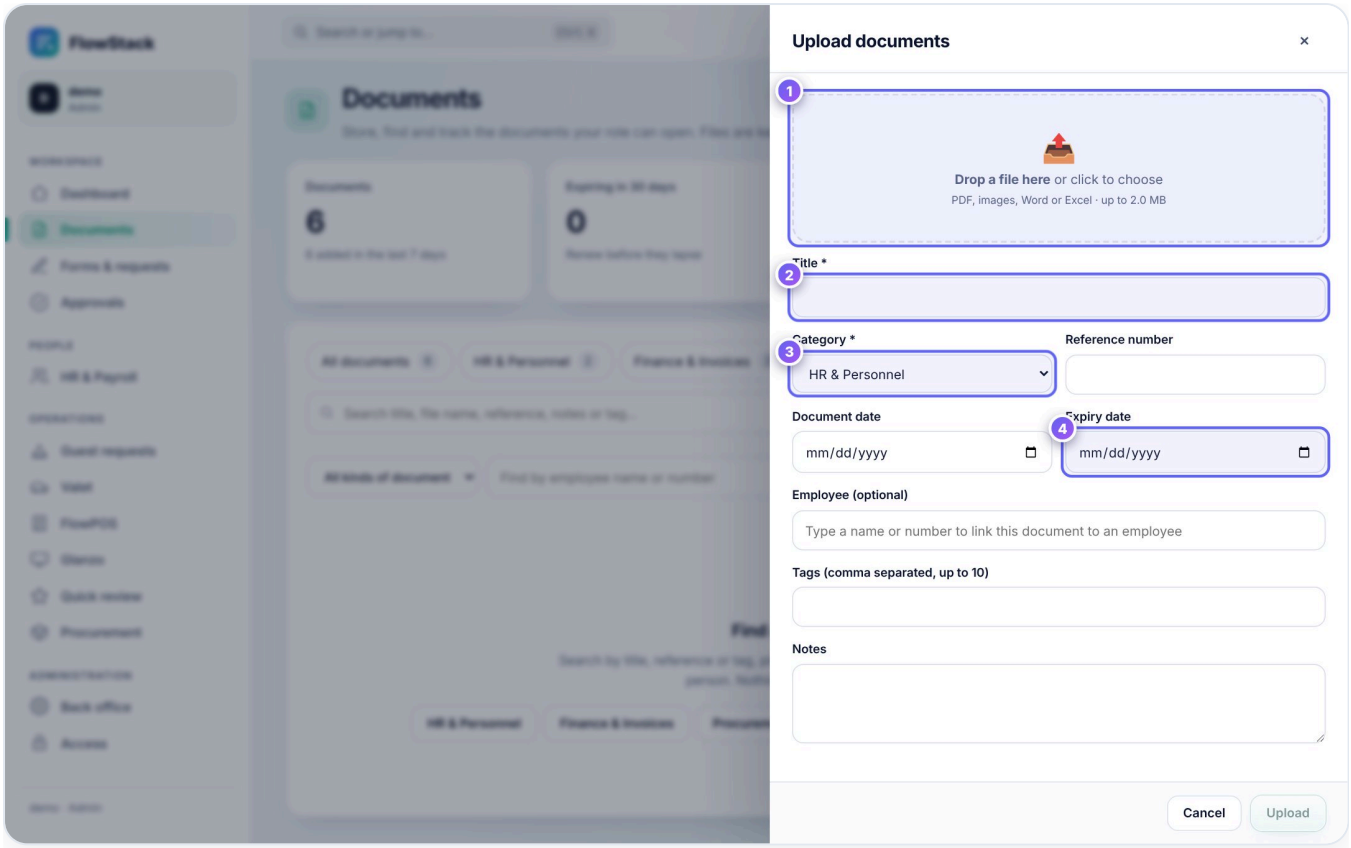
2 Choose up to 20 files at once

HOW TO

1. Press Bulk upload.
2. Optional: download the Excel template and fill in one row per file name.
3. Choose the files, and the sheet if you made one.
4. Press Upload.

9.4 Upload a document

Press Upload, drop the file or choose it, and give it a clear title and a category. If it expires, add the date. Add tags to find it later. PDF, images, Word and Excel files up to 2 MB are accepted.



1. Drop the file here, or click to choose it
2. Give it a clear title
3. Choose the category
4. If it expires, set the date

HOW TO

1. Press Upload.
2. Drop the file in the box.
3. Enter the title, category and any reference.
4. Enter the expiry date and tags, then press Upload.

CHAPTER 10

HR & Leave

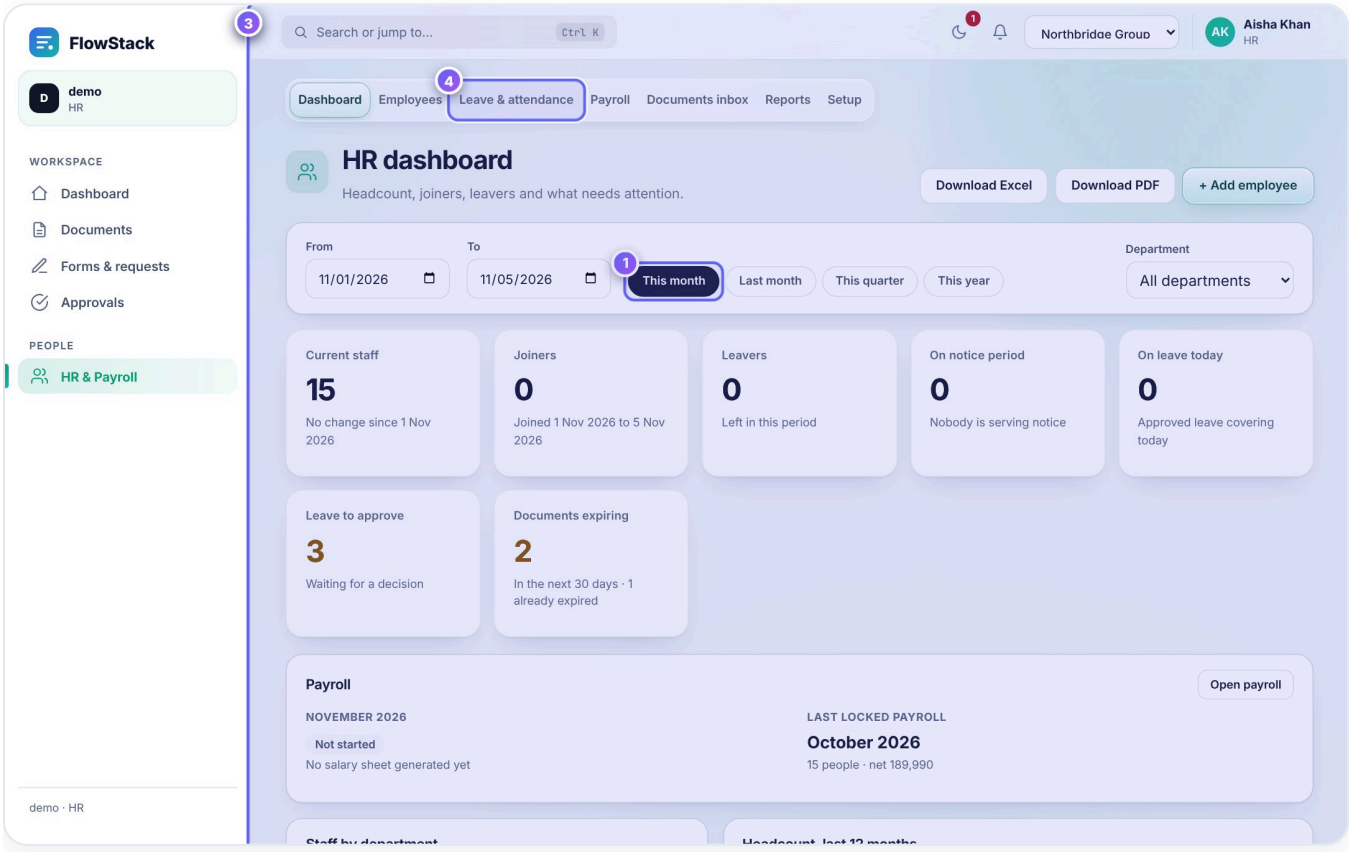
10

Keep every employee record in one place, onboard new joiners, track visas and IDs, and handle leave, shifts and attendance without paperwork.

Find and edit employee records | Onboard a new joiner | Apply for and approve leave | Use shifts, attendance and reports

10.1 The HR dashboard

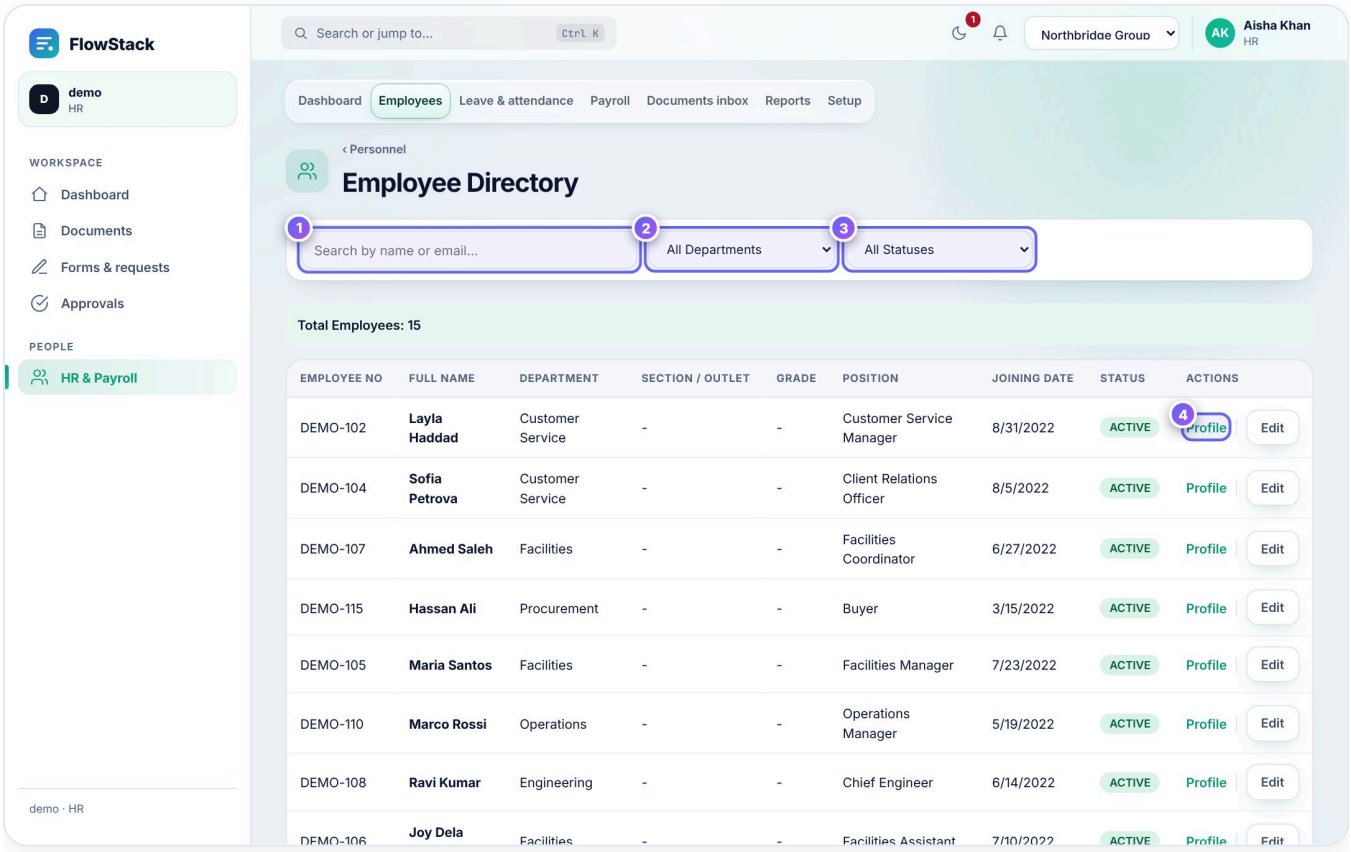
The HR dashboard shows headcount, leavers, who is on a notice period, who is on leave today and what is waiting for you, for the period you choose (this month, last month, this quarter or this year). Press a card to open the list behind it. The menu at the top of every HR page takes you to Employees, Leave and attendance, Payroll, the Documents inbox, Reports and Setup.



1. Choose the period the dashboard covers
2. Headcount, leavers and who is on notice
3. Leave waiting for a decision
4. The menu: employees, leave, payroll, documents inbox, reports and setup

10.2 The employee directory

The directory lists everyone in the organization. Search by name or email, or narrow the list by department or status.



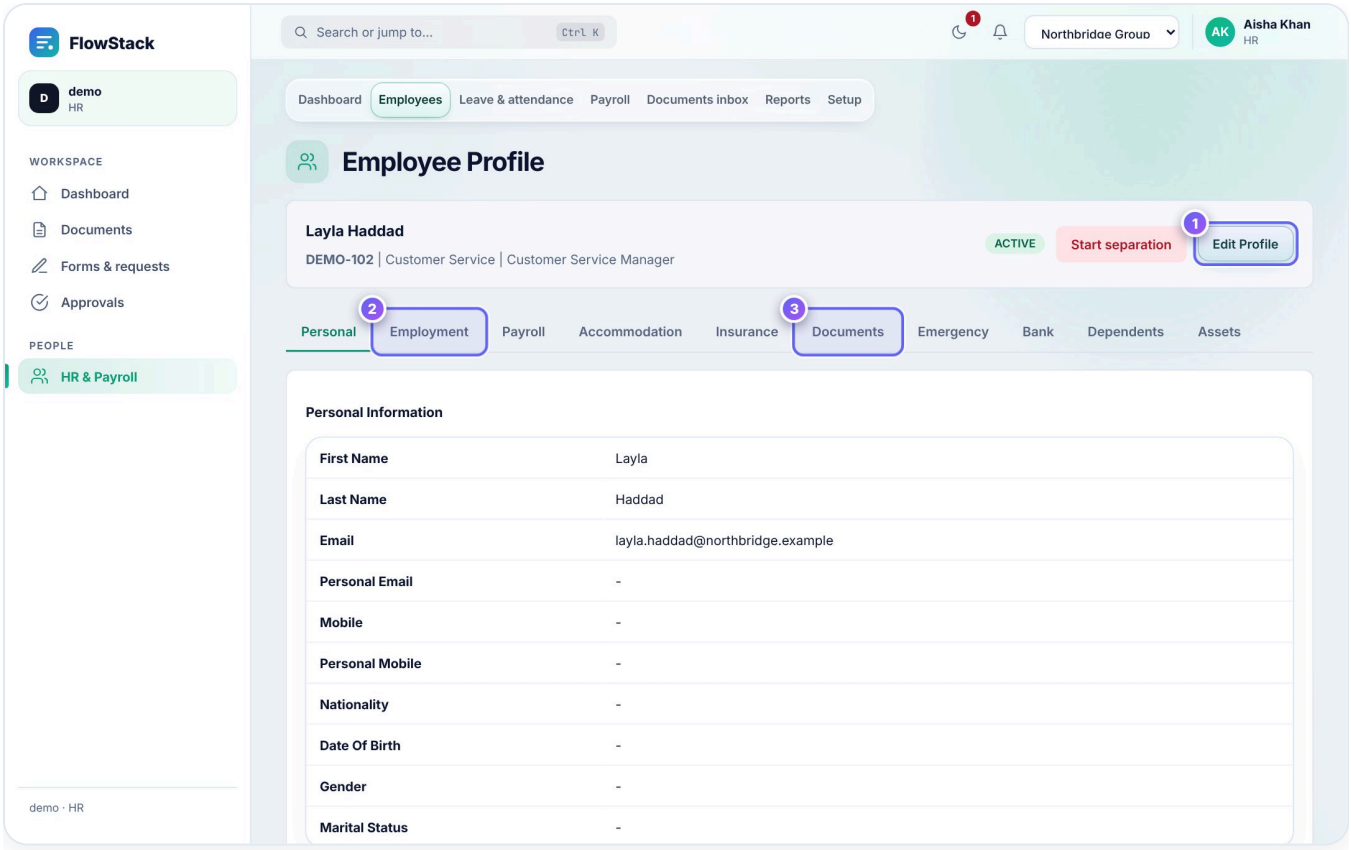
1. Search by name or email
2. Filter by department
3. Filter by status
4. Open someone's full profile

HOW TO

1. Type part of a name or email in the search box.
2. Pick a department or status to filter.
3. Press Profile to open the full record, or Edit to change it.

10.3 An employee profile

A profile keeps everything about a person in tabs: personal details, employment, payroll, accommodation, insurance, documents, emergency contacts, bank details and dependents. Press Edit Profile to change anything.



1 Edit the record

2 One tab for each part of the record

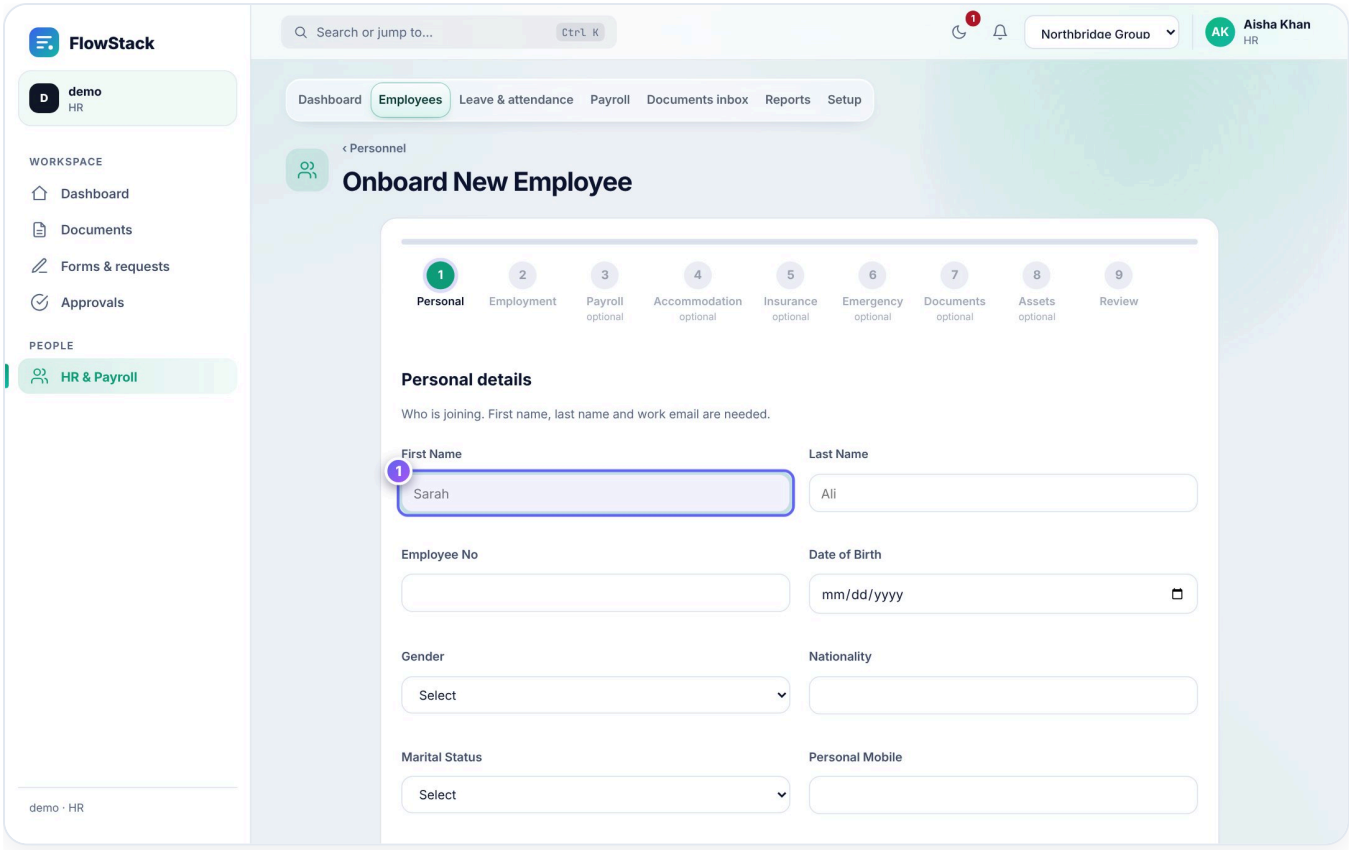
3 Documents with expiry dates

HOW TO

1. Press a tab to see that part of the record.
2. Press Edit Profile, change what you need and save.
3. Use the Documents tab for passports, visas and IDs with their expiry dates.

10.4 Onboard a new employee

Adding a new joiner is a guided form with a step for each part of the record. You can move between steps, and the Review step shows everything before you save.



1 Start with the personal details

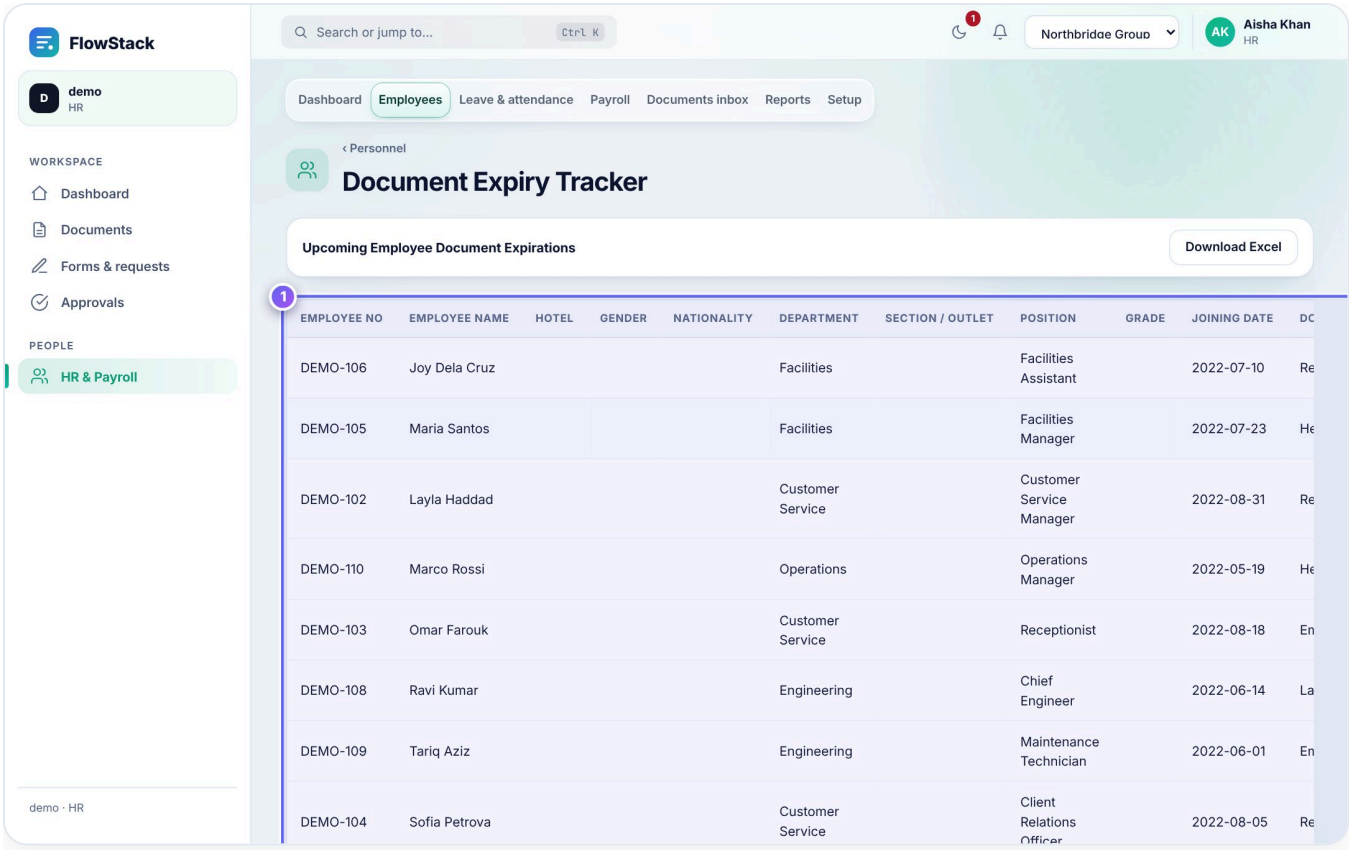
HOW TO

1. Start with the personal details.
2. Continue through Employment, Payroll, Accommodation, Insurance, Emergency and Documents. Fill what you have and leave the rest for later.
3. Open Review and check the details, then save.

> **Tip.** Use the same work email on the employee record and on their login. Approvals and leave use it to recognise the person.

10.5 Document expiry tracker

The tracker lists every employee document that has an expiry date, with the soonest first and the days left. Expired documents show a negative number, so visas and IDs never lapse by surprise.



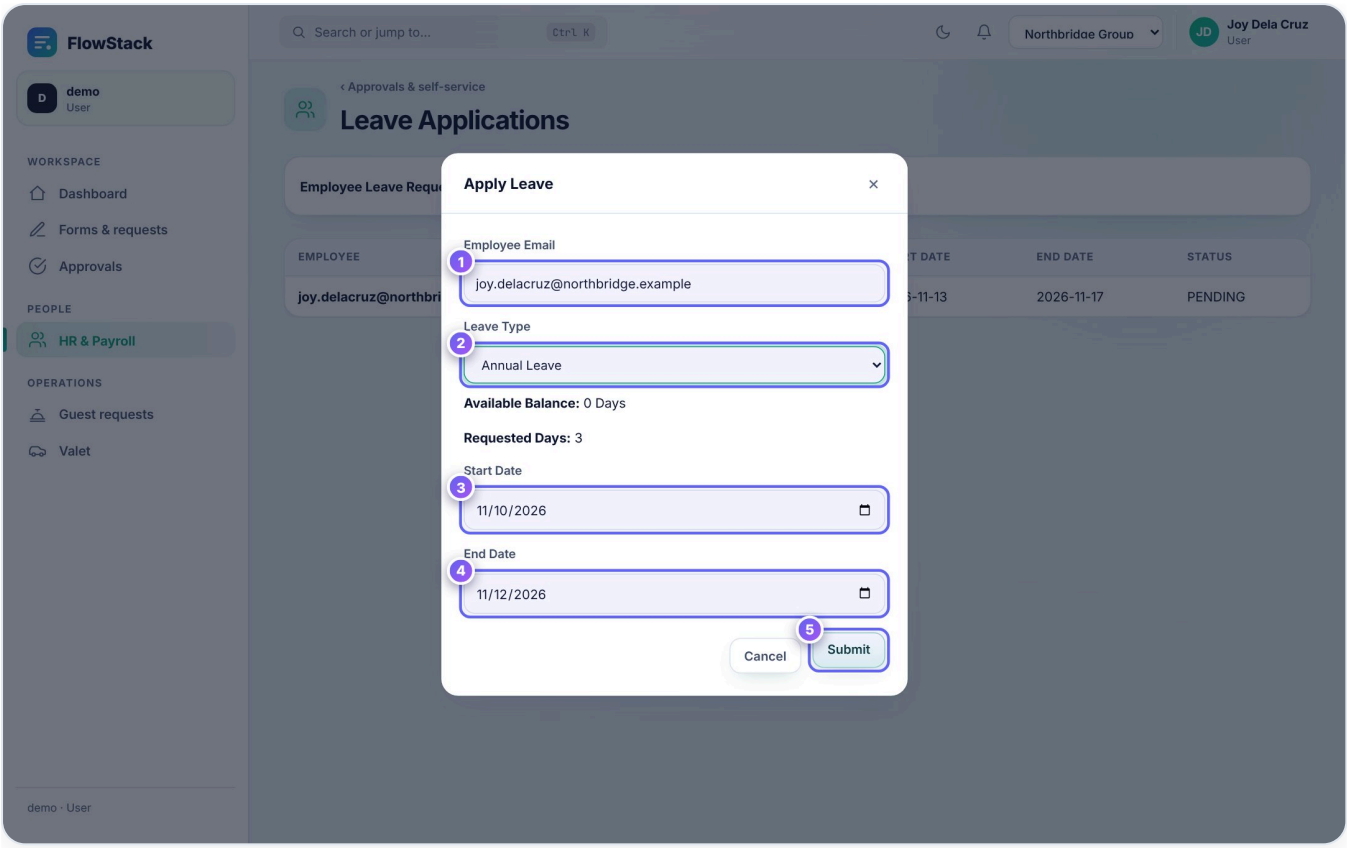
1 Visas, passports and IDs, soonest expiry first

HOW TO

1. Open Personnel, then Document Expiry Tracker.
2. Work from the top of the list: those are the ones that need action first.
3. Update the date on the employee profile after you renew the document.

10.6 Apply for leave

Employees apply for leave in seconds. FlowStack shows the available balance and the number of days requested before the request is sent.



1. Your work email: your balance appears below
2. Choose the type of leave
3. First day
4. Last day
5. Send it for approval

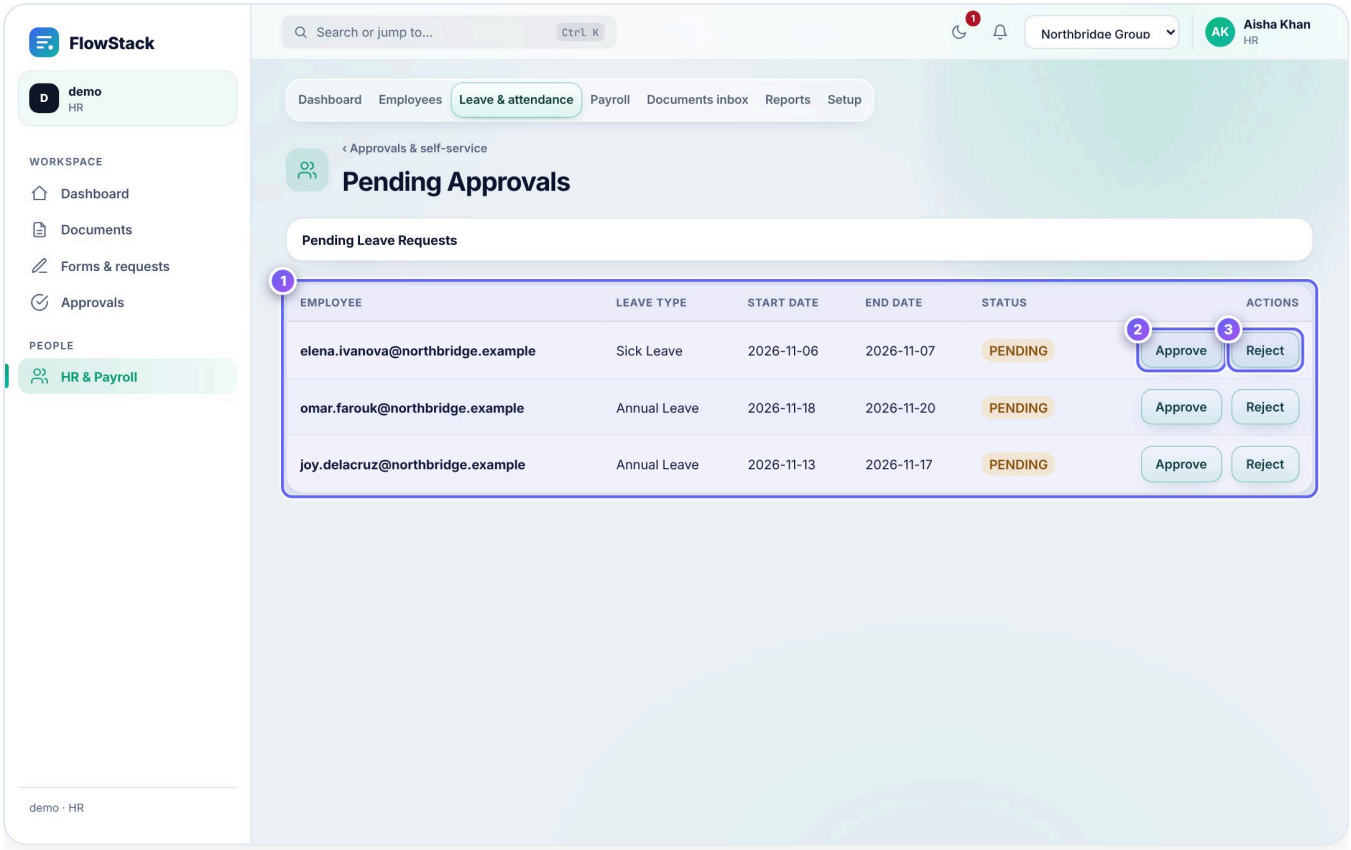
HOW TO

1. Open Approvals and Self-Service, then Apply Leave, and press + Apply Leave.
2. Choose the type of leave and the first and last day.
3. Check the balance and the days requested, then press Submit.

> **Tip.** HR can enter a leave request for an employee, for example one that arrived through your organization's QR code form: type the employee's work email in the first box.

10.7 Approve leave

Heads of department and HR see the requests waiting for them. Approve or reject with one click. The employee is notified, the balance updates and the request moves into leave history.



1. Requests waiting for you
2. Approve: the employee is told straight away
3. Reject, with a reason

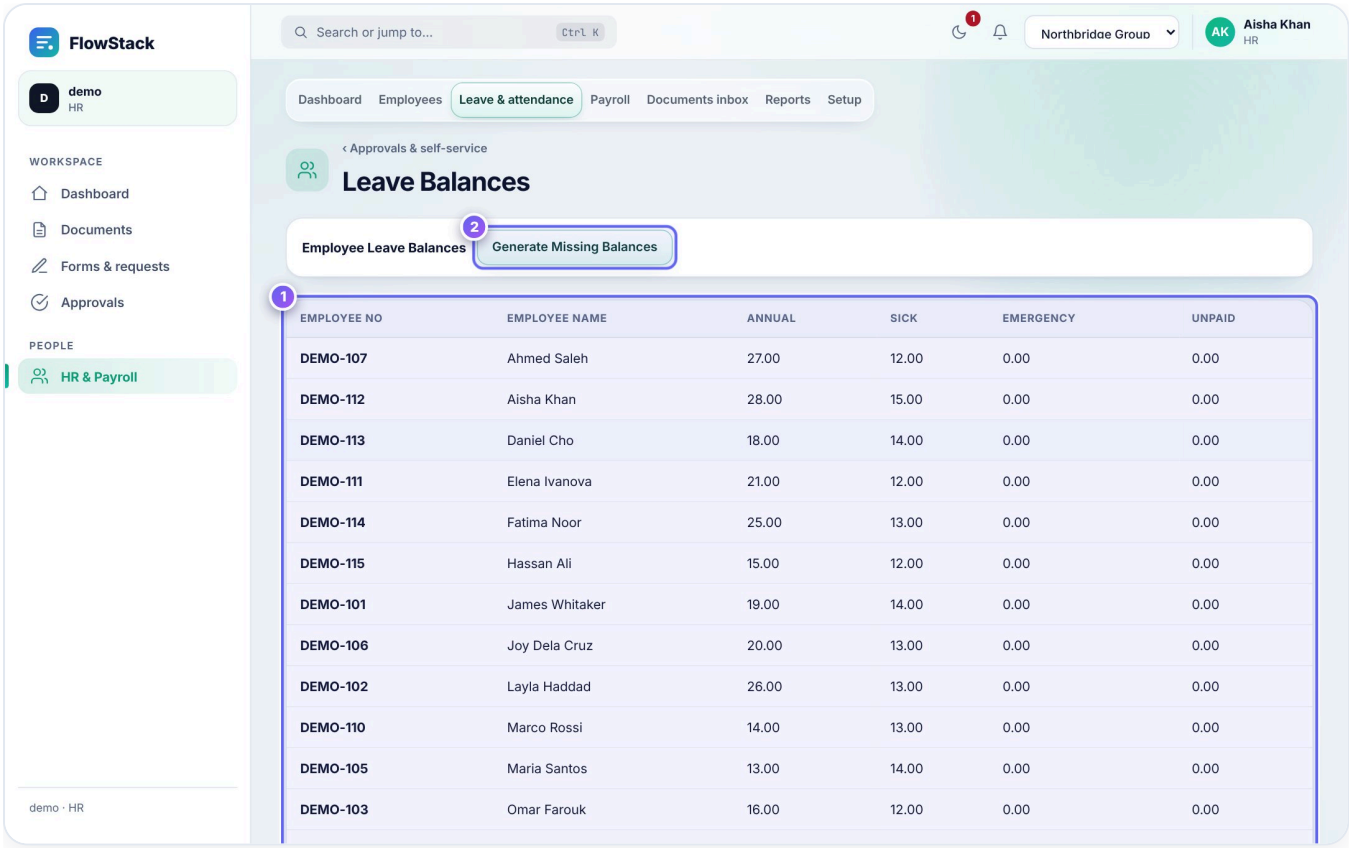
HOW TO

1. Open Pending Approvals.
2. Press Approve or Reject.

> **Tip.** You can also approve from your phone: leave requests appear in Approvals in the mobile app.

10.8 Leave balances

Balances show every employee's remaining days for each type of leave. They update as leave is approved. Press Generate Missing Balances to create balances for new joiners or a new leave type.

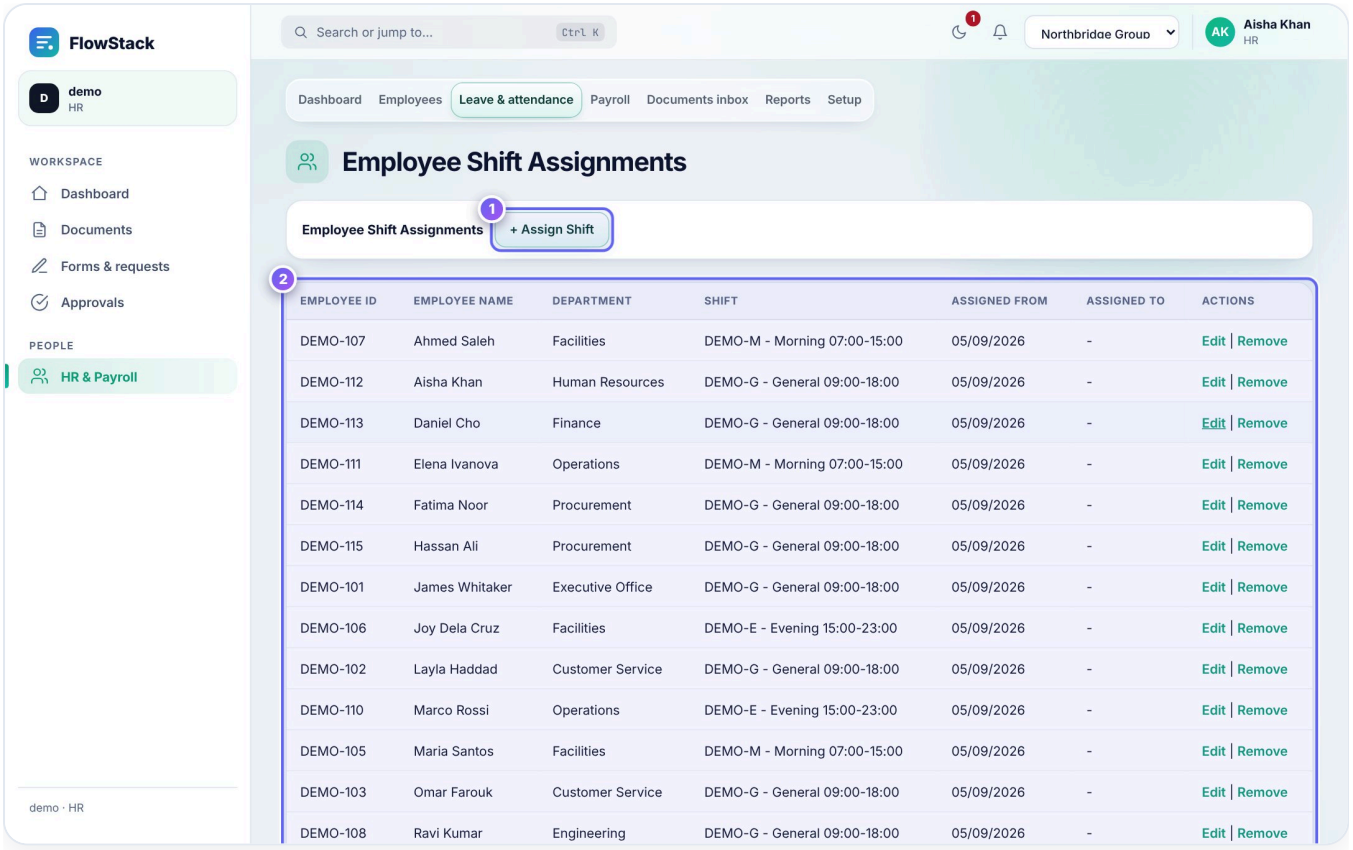


1 Every employee's balance for each type of leave

2 Create balances for new joiners

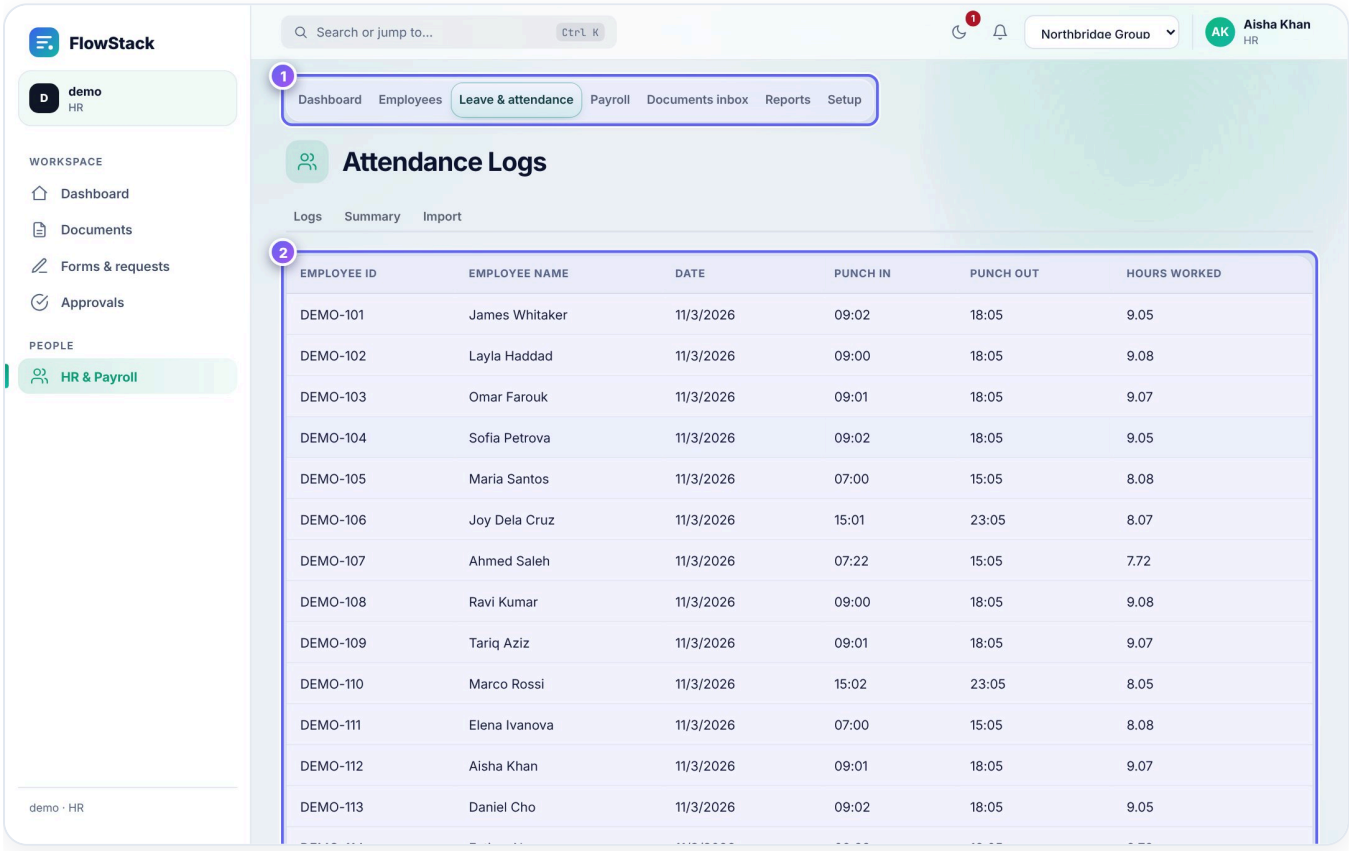
10.9 Shifts and attendance

Define your shifts under HR Setup, then give each employee a shift here. Attendance punches, from a clock or an import, appear in the attendance log with the hours worked, and feed the reports.



1 Give someone a shift

2 Who works which shift, and from when



1 Logs, a summary, or import punches from your clock

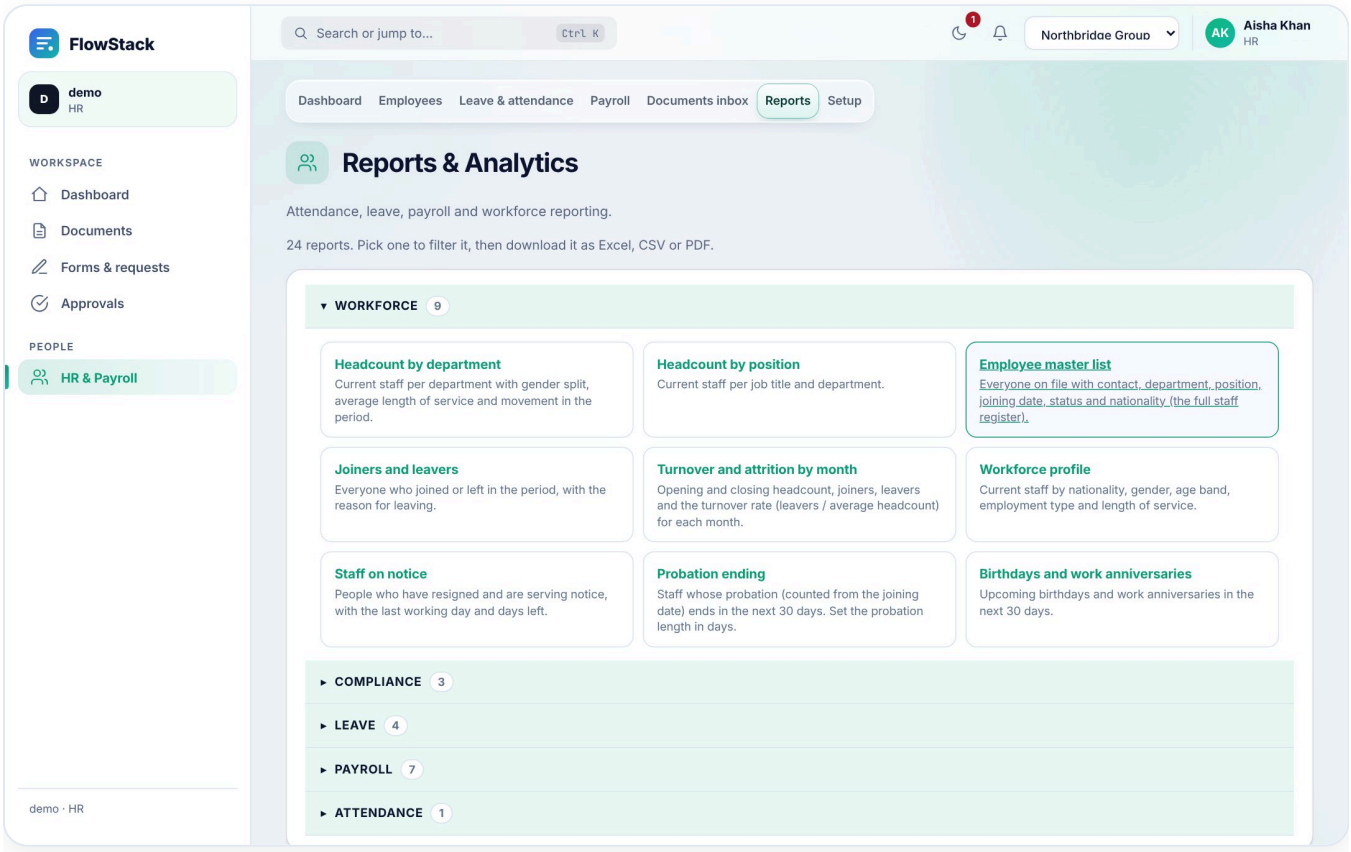
2 Punch in, punch out and hours worked

HOW TO

1. Press + Assign Shift, choose the employee, shift and start date.
2. Open Attendance Logs to see punches. The Summary and Import tabs help with month-end and bulk uploads.

10.10 HR reports

Ready-made reports cover active employees, attendance, late arrivals, absences, overtime, leave balances and payroll. Open a report, choose the period and print it or save it as a PDF from your browser.



CHAPTER 11

Payroll

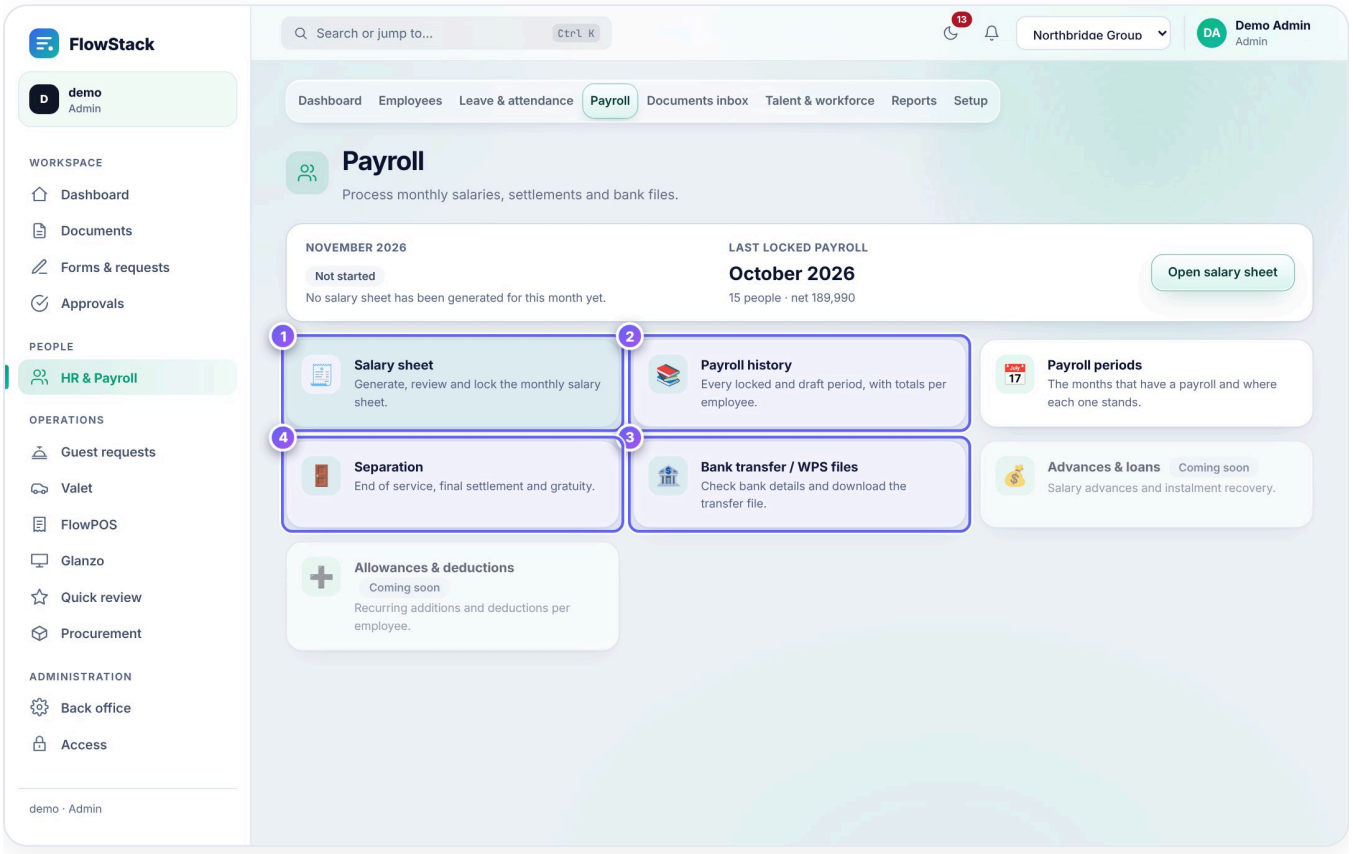
11

Calculate pay for everyone, review it, lock the month, create the UAE bank file and print payslips.

Generate and review a payroll | Lock a month | Create the WPS bank file | Open payslips

11.1 Payroll hub

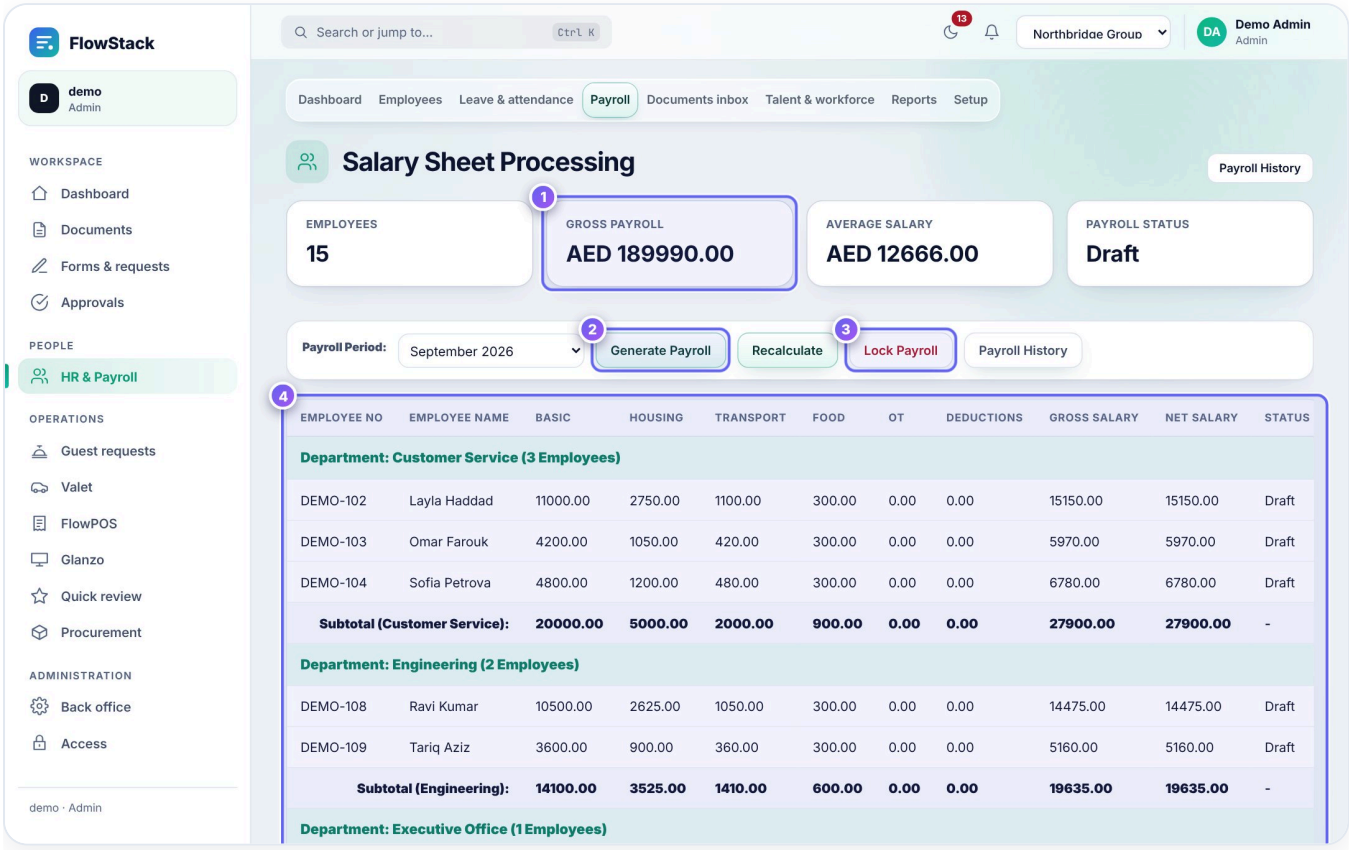
Payroll is built on each employee's salary profile: basic pay and allowances, which you keep on their HR profile. Open Salary Sheet Processing to calculate a month, Payroll History for earlier months, and Bank Transfer / WPS Files for the bank file. Items shown in grey are not available yet.



1. Calculate this month's pay
2. Every locked month
3. The bank file for WPS
4. End of service and final settlement

11.2 Calculate the salary sheet

The salary sheet shows gross and net pay for everyone, grouped by department, with the totals for the month at the top. Generate Payroll creates the month, Recalculate refreshes it after you change a salary, and Lock Payroll closes the month so nothing can change after approval.



1. Totals for the month
2. Calculate everyone's pay
3. Lock the month so it cannot change
4. Pay by department: basic, allowances, overtime, deductions

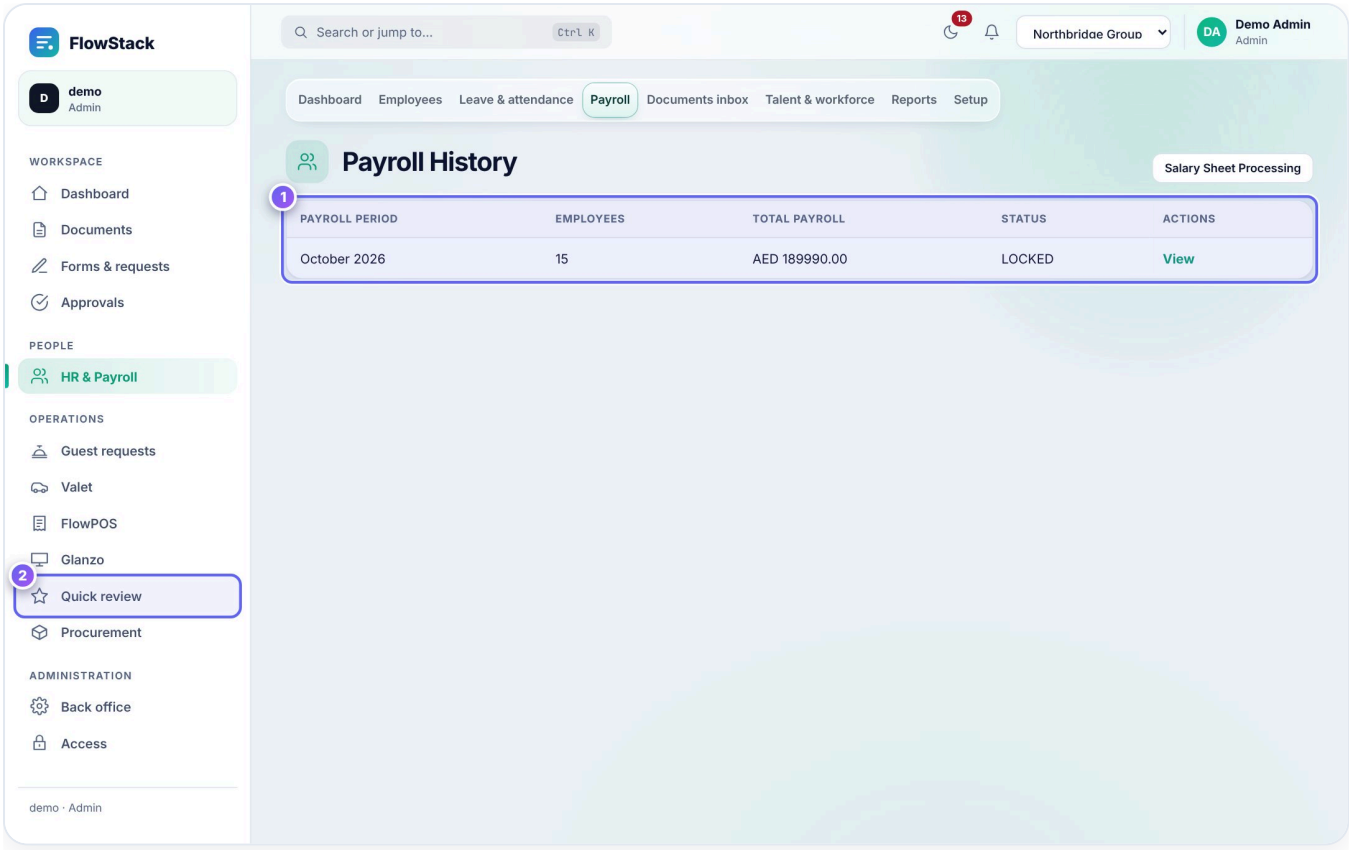
HOW TO

1. Choose the payroll period.
2. Press Generate Payroll.
3. Check the totals and the department sections. Change salaries on the HR profile if something is wrong, then press Recalculate.
4. When the figures are final, press Lock Payroll.

> **Tip.** Lock only when you are sure. A locked month is kept exactly as it was, for audit.

11.3 Payroll history and payslips

Every locked month is kept here with its employee count, total and status. Press View to open a month in full. From there, View Payslip opens a payslip for each employee, ready to print or save as a PDF.

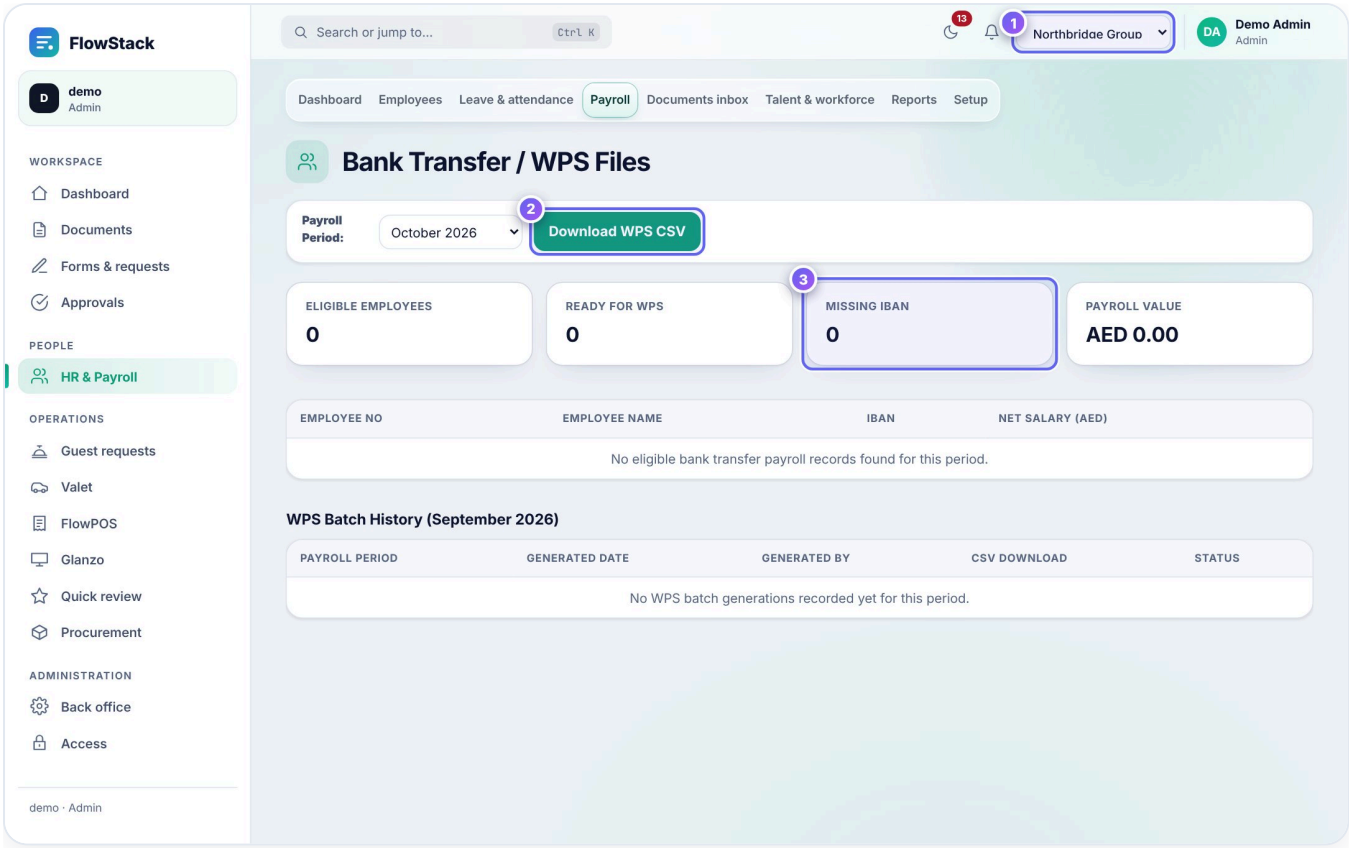


1 Each month, its total and status

2 Open a month in full

11.4 The WPS bank file

Select the month and press Download WPS CSV to create the salary file for your bank under the UAE Wages Protection System. The tiles show how many employees are ready, and how many are missing bank details, so you can fix problems before you upload.



1. Pick the payroll month
2. Download the bank file
3. Anyone without bank details shows here

HOW TO

1. Choose the payroll period.
2. Check that Missing IBAN is zero. If not, add the IBAN on the employee's Bank tab.
3. Press Download WPS CSV and upload the file to your bank.

CHAPTER 12

Procurement

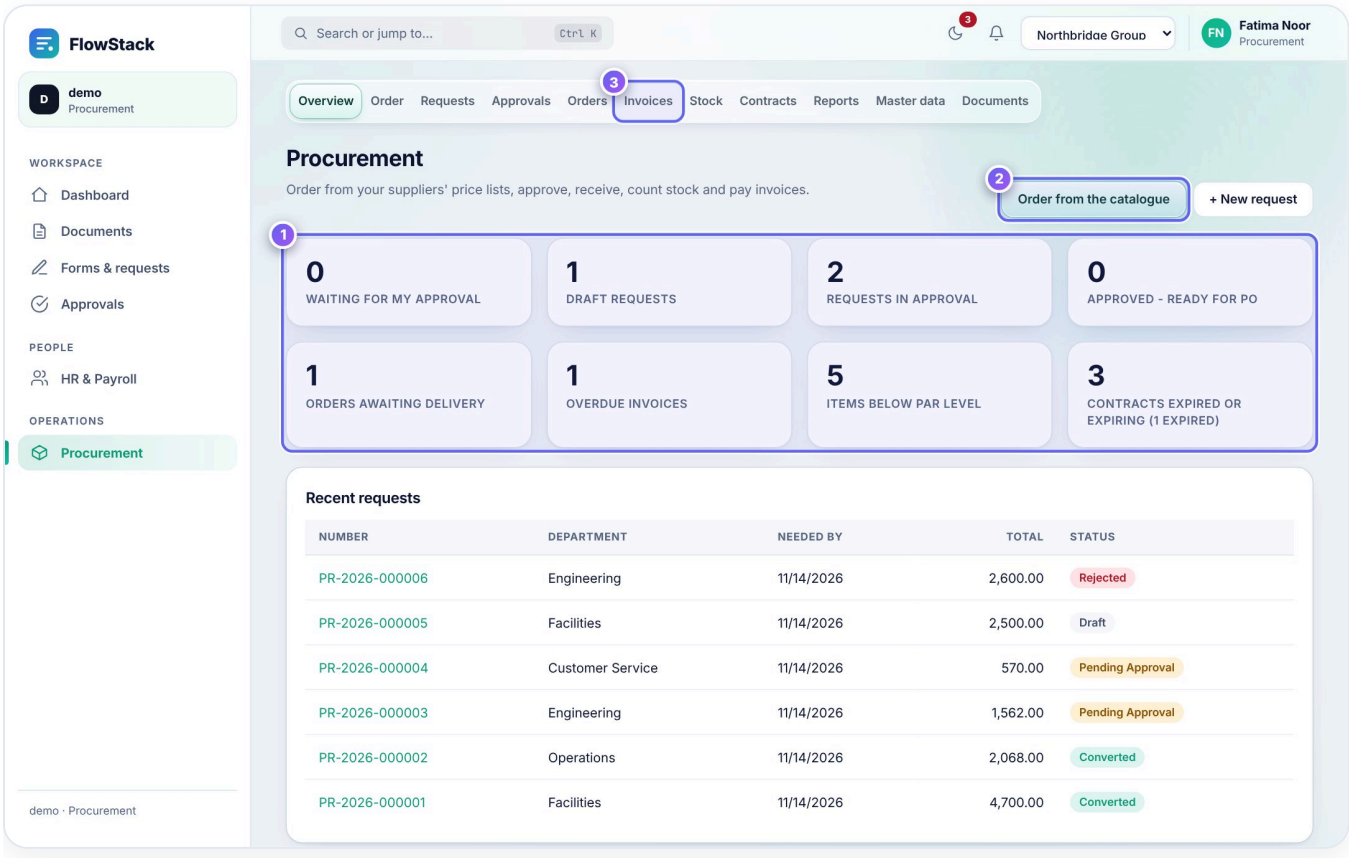
12

Buy from your suppliers' price lists, get approvals, receive goods into stock, count stock, match invoices and track contracts, all in one flow.

Order from the catalogue | Approve, receive and stock goods | Match and pay invoices | Track contracts and spend

12.1 The procurement home

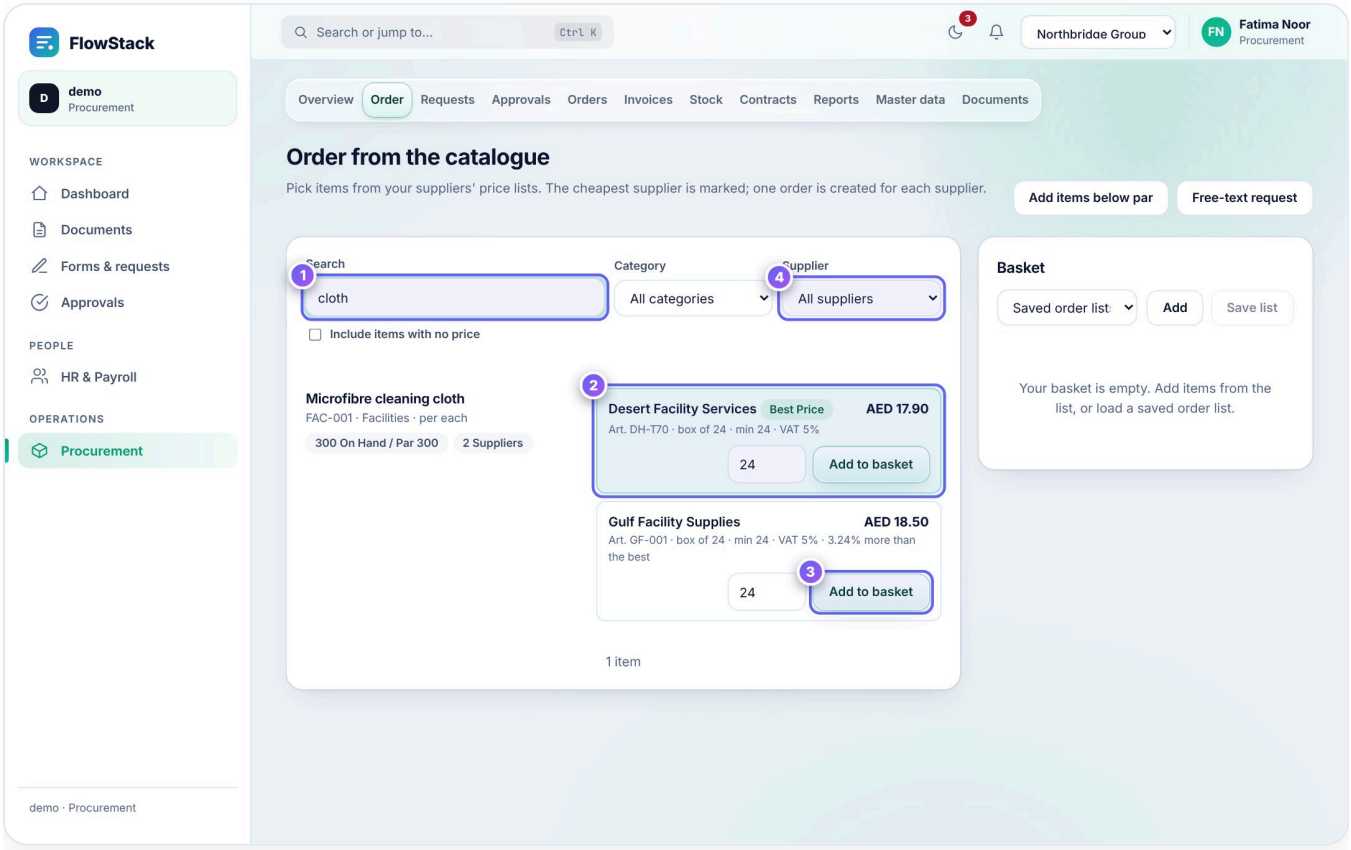
The tabs run in the order the work happens: Order, Requests, Approvals, Orders, Invoices, Stock, Contracts, Reports and Master data. The home page shows what needs attention: approvals waiting, orders on the way, overdue invoices, items below their par level and contracts that are expiring.



1. What needs attention
2. Start an order
3. The steps, in order, from ordering to reports

12.2 Order from the catalogue

The catalogue shows every item your suppliers sell, with each supplier's price. The cheapest supplier is marked Best price. Search by name, item code, barcode or the supplier's article number, and filter by category or supplier.



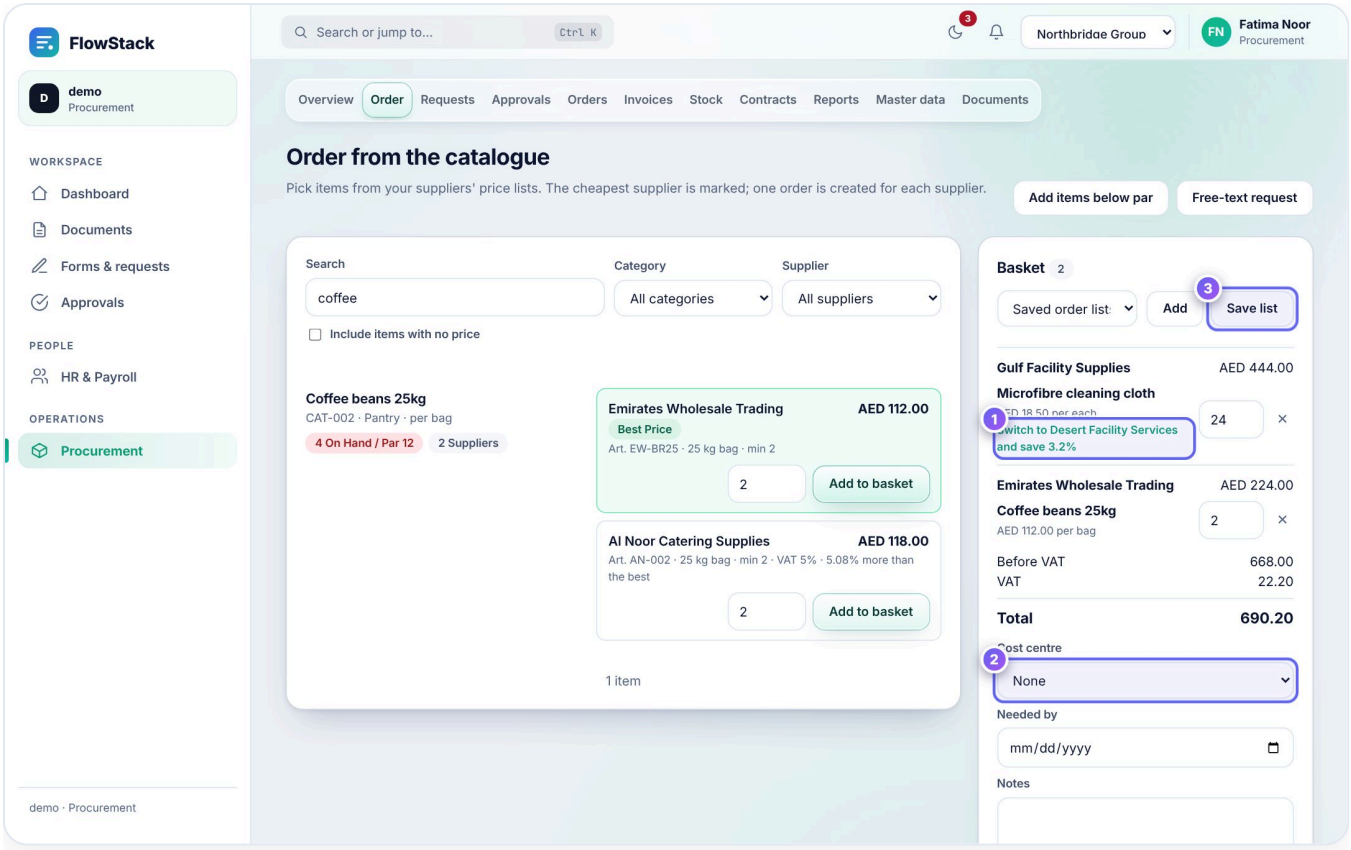
1. Search by name, code, barcode or supplier article number
2. The cheapest supplier is marked
3. Add to the basket
4. Or look at one supplier's list

HOW TO

1. Type what you need in the search box.
2. Compare the suppliers. Notes show pack size, minimum quantity and VAT.
3. Enter a quantity and press Add to basket.

12.3 The basket and checkout

The basket groups items by supplier. If another supplier is cheaper for an item, FlowStack offers to switch with one click and shows the saving. Procurement staff create one purchase order for each supplier, at the price list price. Everyone else sends a purchase request, and procurement turns the approved request into orders.



1 A cheaper supplier? Switch with one click

2 Charge it to a cost centre

3 Save the basket as an order list

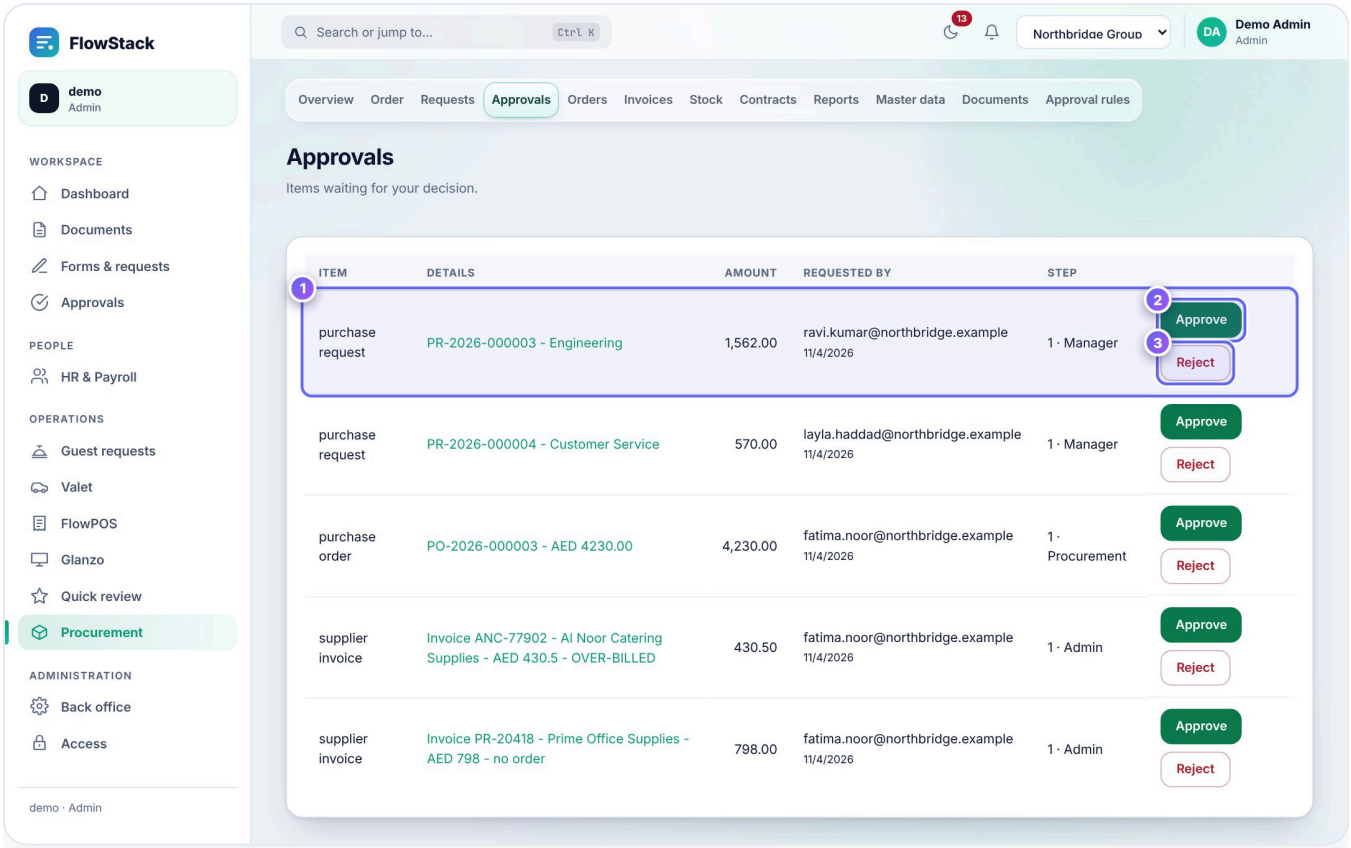
HOW TO

1. Check the quantities and any Switch to suggestions.
2. Choose a cost centre and, if you like, a needed-by date and notes.
3. Press Create orders and send for approval (or Save as drafts).
4. Press Save list to keep the basket as an order list for next time.

> **Tip.** Prices always come from the price lists. A cost centre with a monthly budget shows a warning, never a block, if an order would take it over.

12.4 Approvals

Everything waiting for a decision is in one list: purchase requests, purchase orders and supplier invoices. Approvers see only what is assigned to them. The same list is available on the phone.



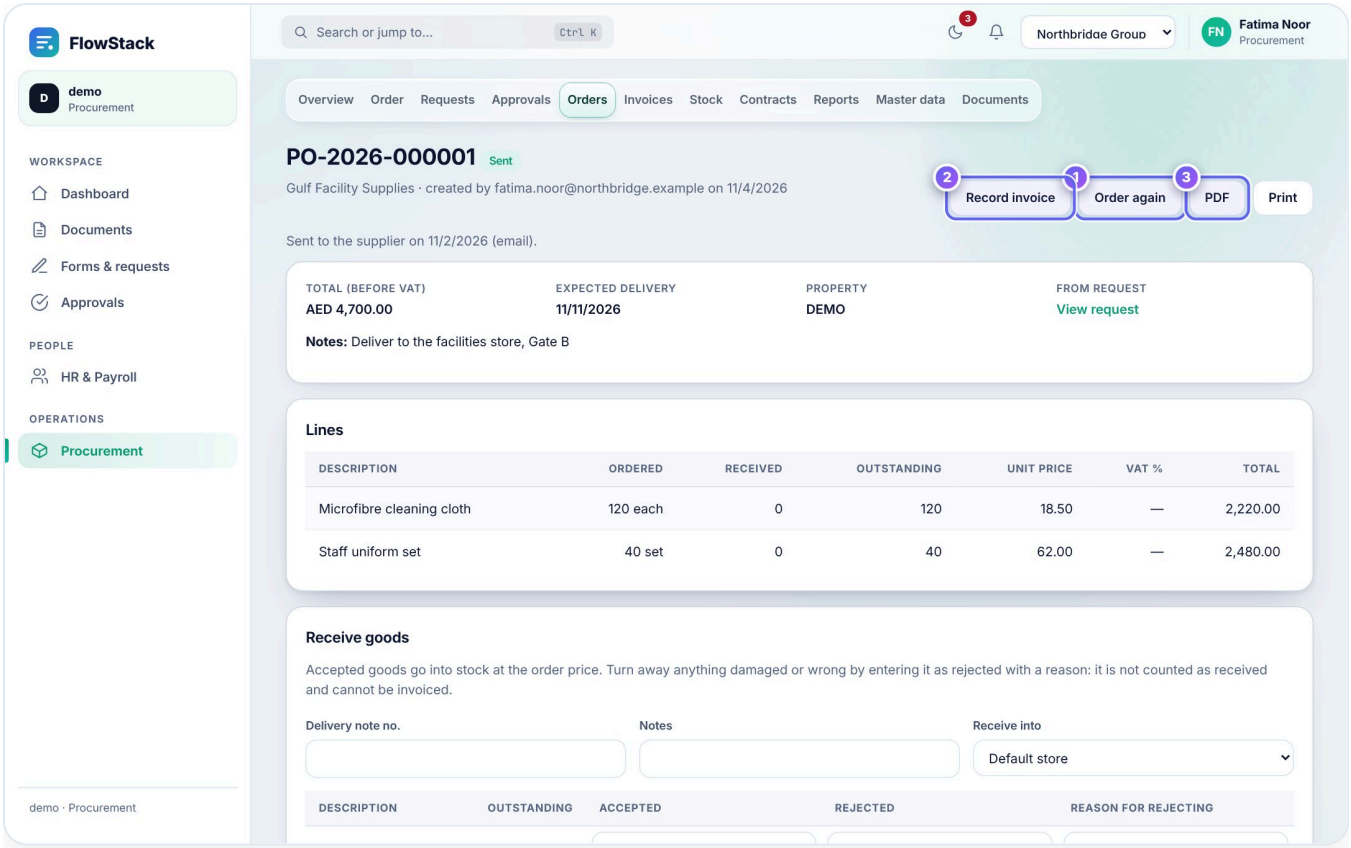
1. Each item waiting for a decision
2. Approve
3. Reject, with a reason

HOW TO

1. Press the item to read the details.
2. Press Approve, or Reject and give a reason.

12.5 Orders

Once every approver has approved an order, FlowStack emails it to the supplier automatically, using your organization's email settings. If the supplier has no email address, you will see why and can send it yourself. From the order you can print the PDF, order the same things again, or record the supplier's invoice.



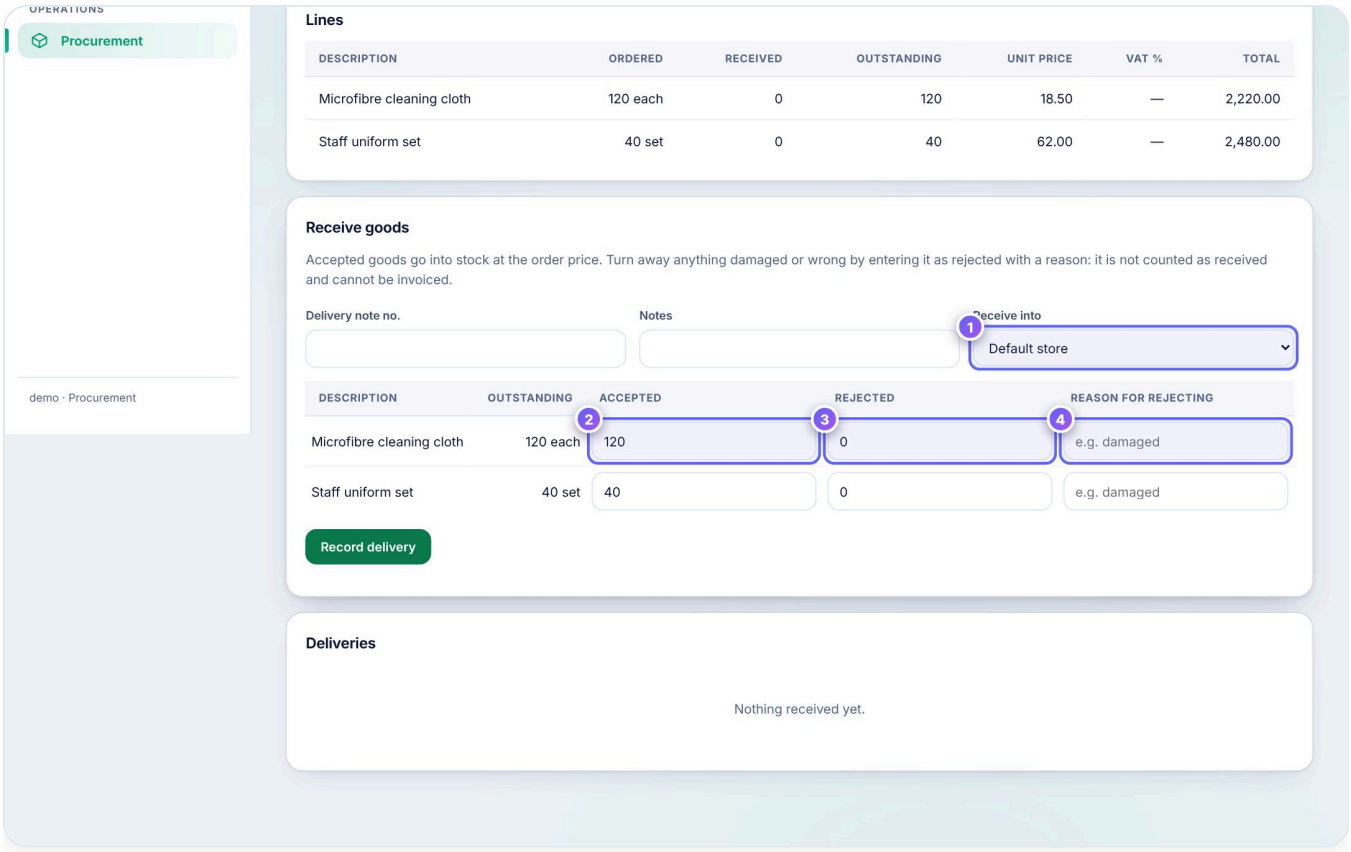
1 Order the same things again

2 Record the supplier's invoice

3 The order as a PDF, as sent to the supplier

12.6 Receive goods

When the goods arrive, open the order and record the delivery. Enter how many you accept and how many you turn away, with a reason. Accepted goods go straight into stock, at the order price, in the store you choose. Rejected goods are not counted as received and cannot be invoiced.



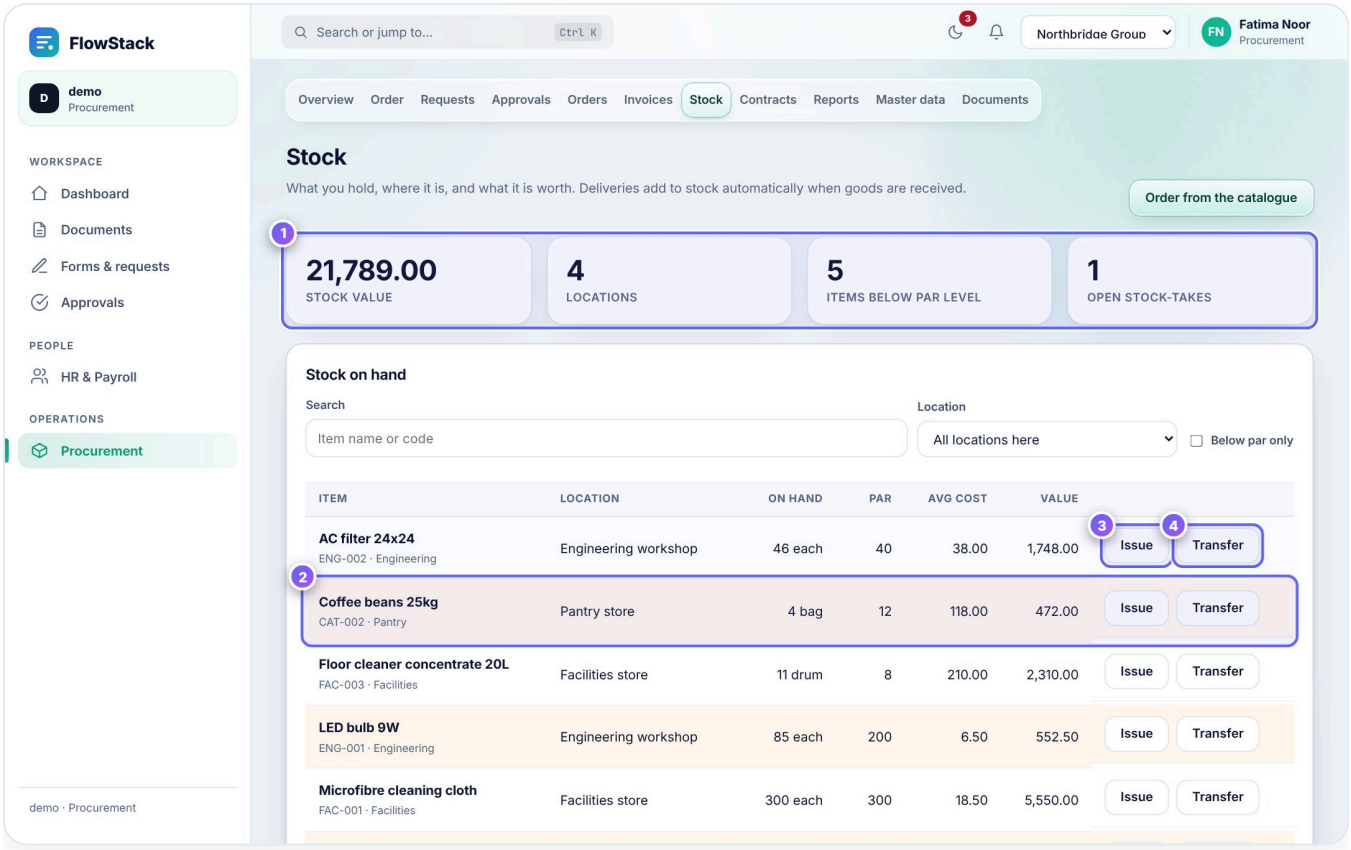
1. Which store the goods go into
2. How many you accept
3. How many you turn away
4. And why

HOW TO

1. Choose the store the goods go into.
2. Enter the accepted quantity for each line.
3. Enter any rejected quantity and the reason.
4. Press Record delivery. You can receive an order in several deliveries.

12.7 Stock on hand

Stock shows what you hold in each store, pantry or workshop, what it is worth, and what is below its par level (the quantity you want to keep). Items below par are shaded. Press Issue to record stock used or lost, and Transfer to move it to another location, even in another property.



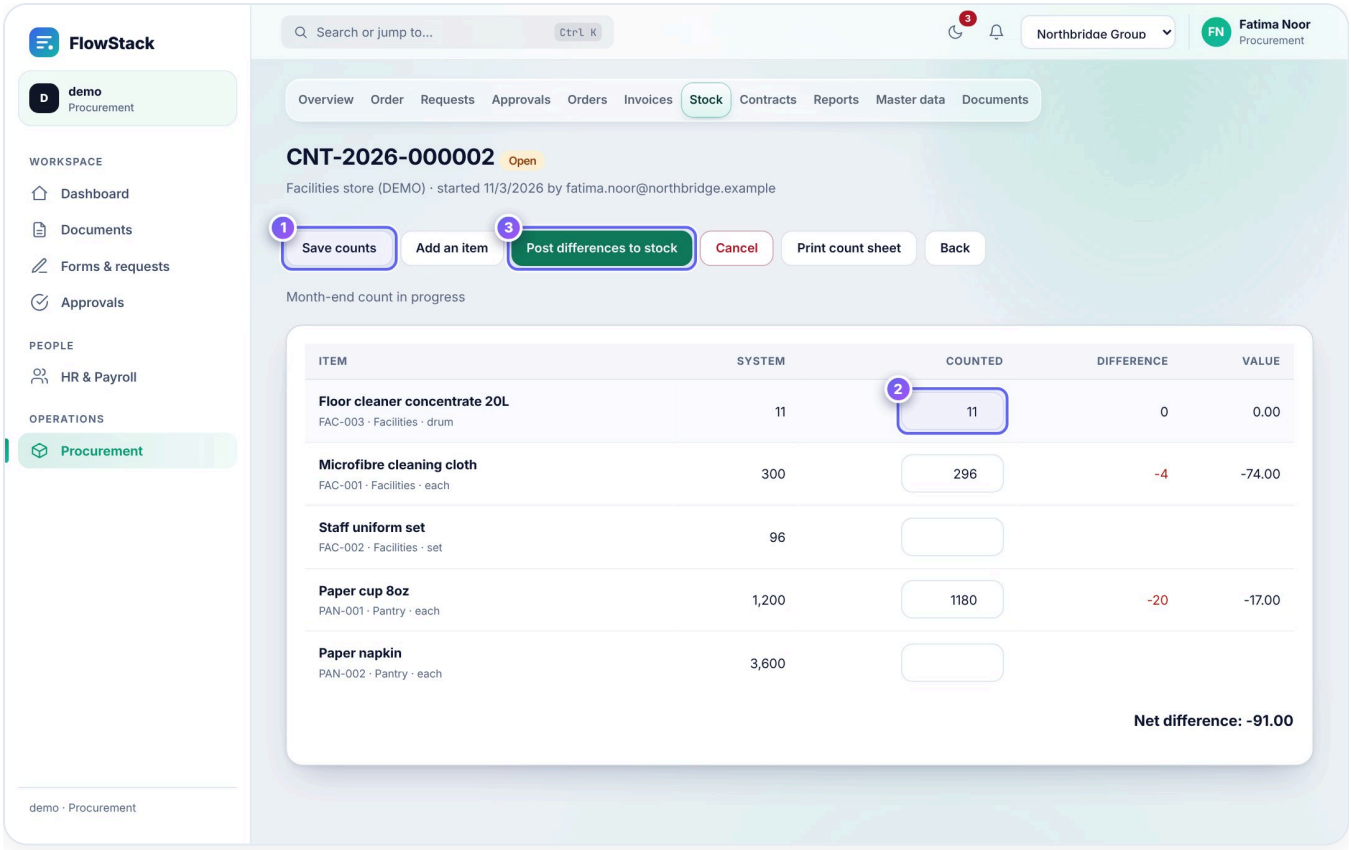
1. Value, locations and what is low
2. Below its par level: time to reorder
3. Issue stock to the pantry or a floor
4. Move it between stores or properties

HOW TO

1. Use the search and location filters to find an item.
2. Press Issue, enter the quantity and the reason.
3. Press Transfer, choose the destination and quantity.
4. Press Order from the catalogue, then Add items below par, to reorder what is low in one go.

12.8 Stock-takes

A stock-take freezes the system quantity as a reference, you enter what you actually counted, and FlowStack shows the difference and its value. Only when you post does stock change, and only for the lines you counted.



1. Save your counts as you go
2. Enter what you counted
3. Post the differences to stock when you are done

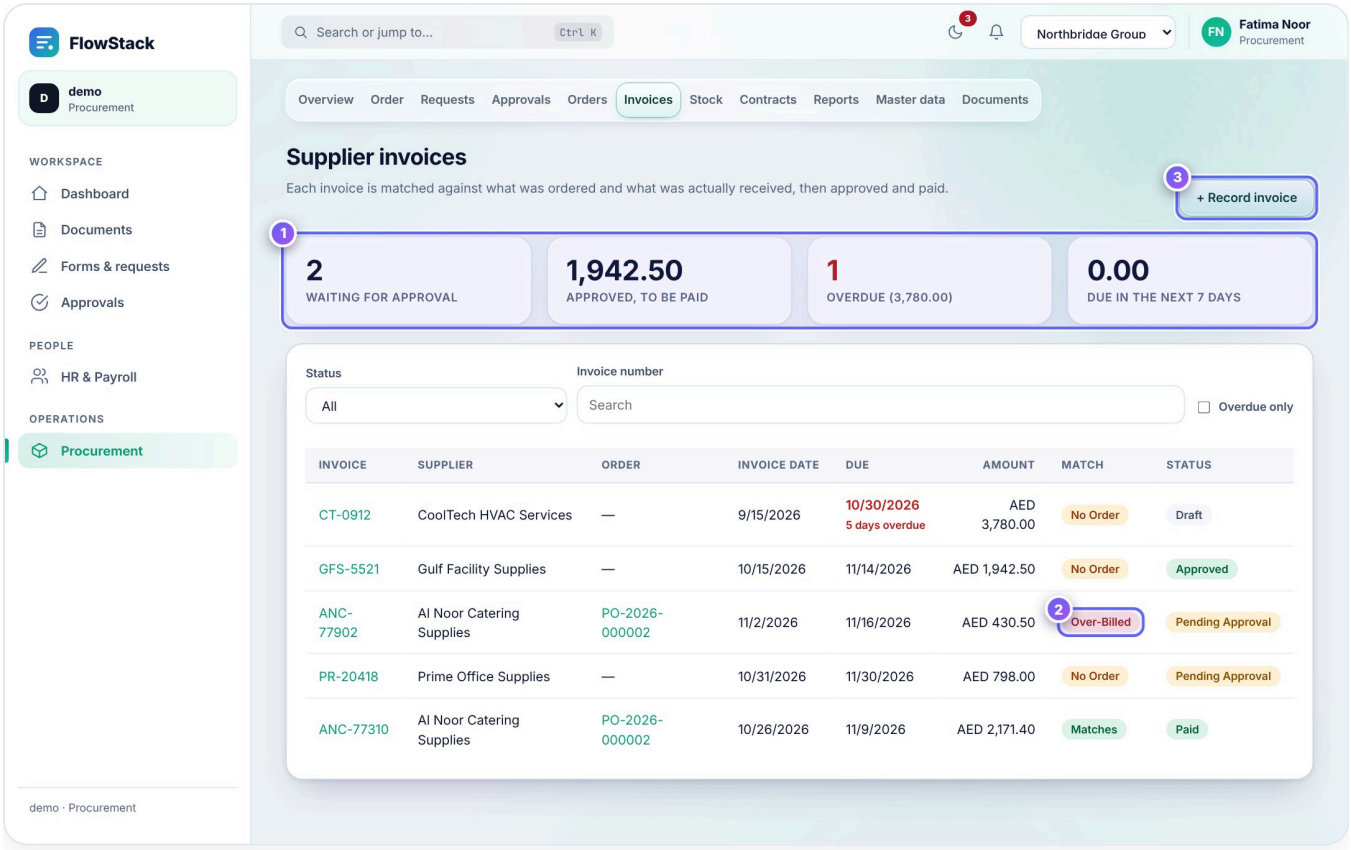
HOW TO

1. On the Stock page, press Start a stock-take and choose the location.
2. Enter the counted quantity for each item. Press Save counts as you go.
3. Check the net difference, then press Post differences to stock.

> **Tip.** Press Print count sheet to take a paper list to the store.

12.9 Supplier invoices

Record each invoice against its purchase order. FlowStack matches it against what was ordered, what was actually received, and what has already been invoiced, and shows Matches, Over-billed or No order. Then it goes through approval, and you mark it paid.



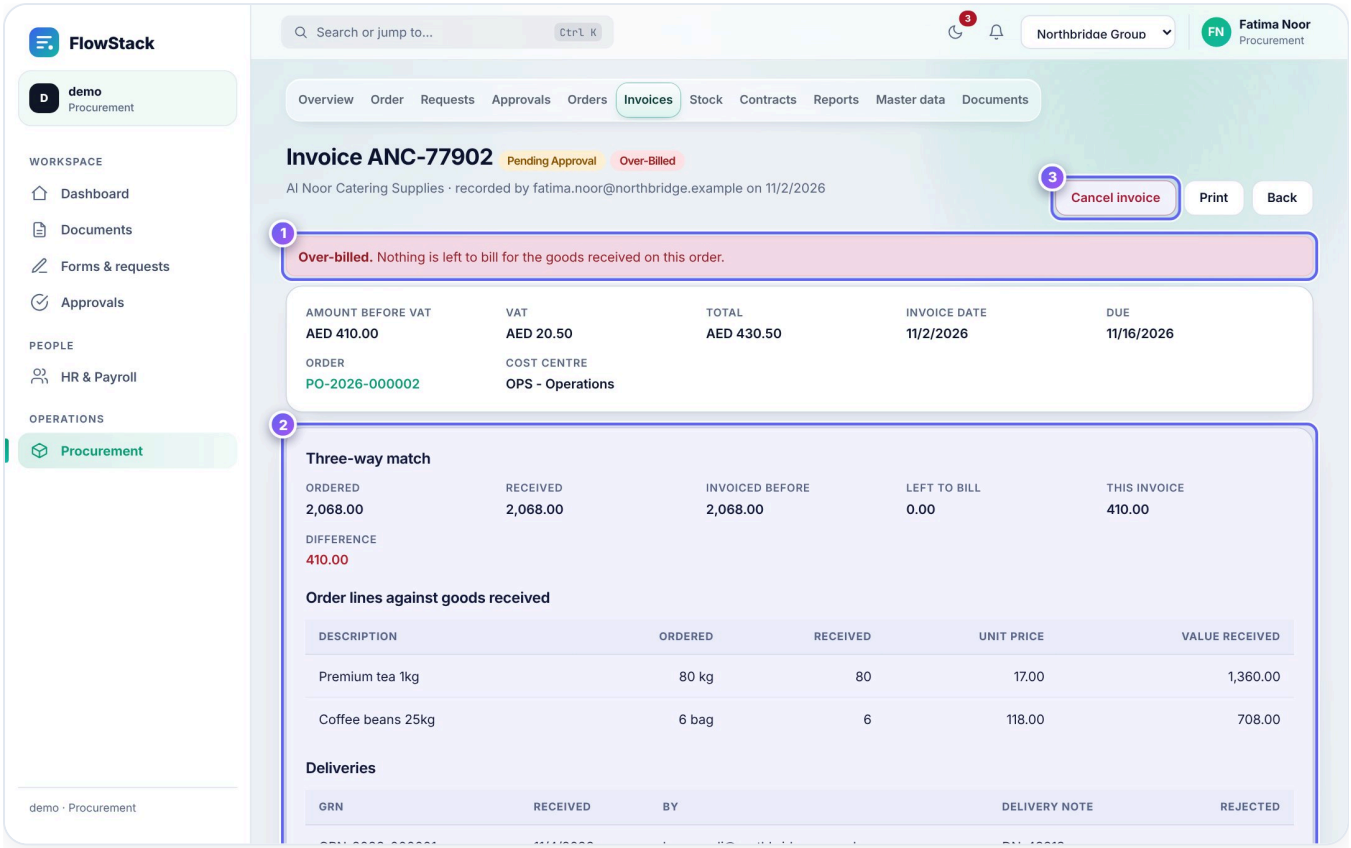
1. Waiting, approved, overdue and due soon
2. Over-billed: flagged before anyone pays
3. Record a new invoice

HOW TO

1. Press + Record invoice and choose the order.
2. Enter the invoice number, dates and amounts. The due date follows the supplier's payment terms.
3. Press Save and submit for approval.
4. After approval, press Mark as paid and enter the payment reference.

12.10 The three-way match

Each invoice shows the match in plain words, with ordered, received, already invoiced and left to bill side by side. If a supplier bills more than the goods received, the invoice is flagged Over-billed, and the approver sees the warning before anything is paid.



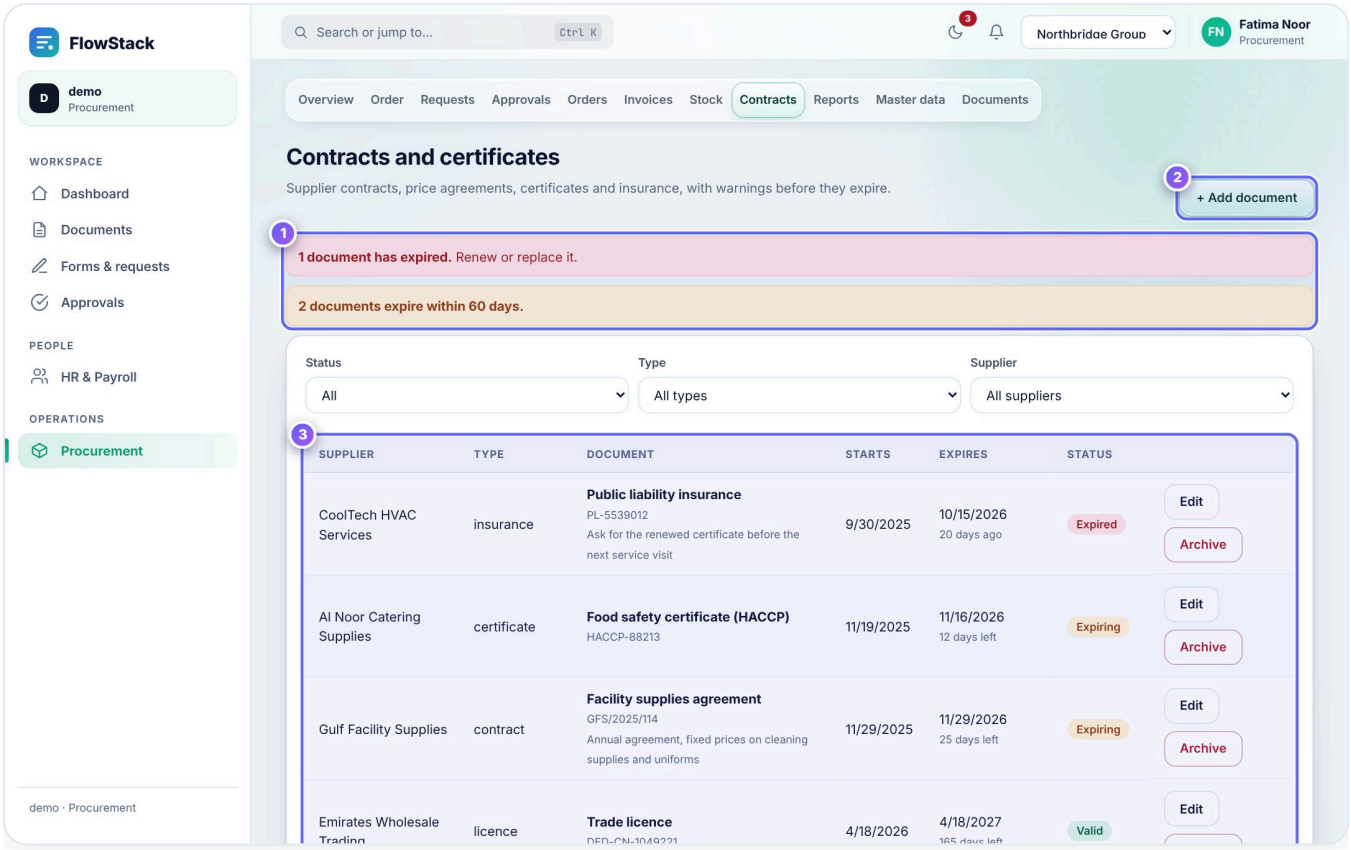
1 The match result, in plain words

2 Ordered, received and already invoiced, side by side

3 Cancel it before it is paid

12.11 Contracts and certificates

Keep each supplier's contracts, price agreements, certificates and insurance with their expiry dates. FlowStack warns you 60 days before something expires and flags what has already expired. A document set to renew automatically rolls forward by itself.



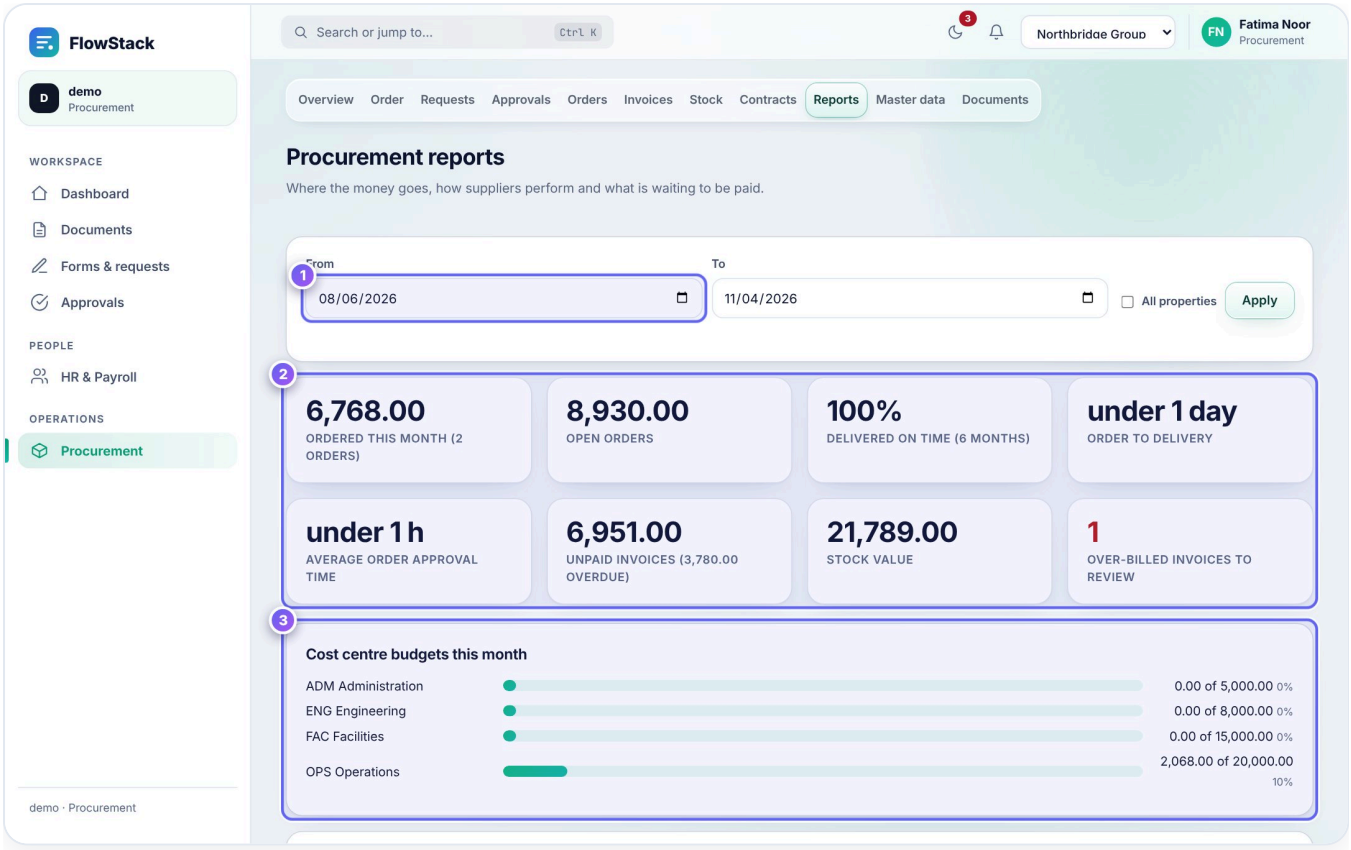
1. Expired and expiring documents
2. Add a contract or certificate
3. Every contract with its expiry date

HOW TO

1. Press + Add document and choose the supplier and type.
2. Enter the dates. Tick Renew automatically if it renews by itself.
3. Use the filters to see what is expiring or expired.

12.12 Reports

Reports show where the money goes and how your suppliers perform. Choose the period at the top. The tiles show spend this month, open orders, on-time delivery and unpaid invoices, and the budgets for each cost centre.



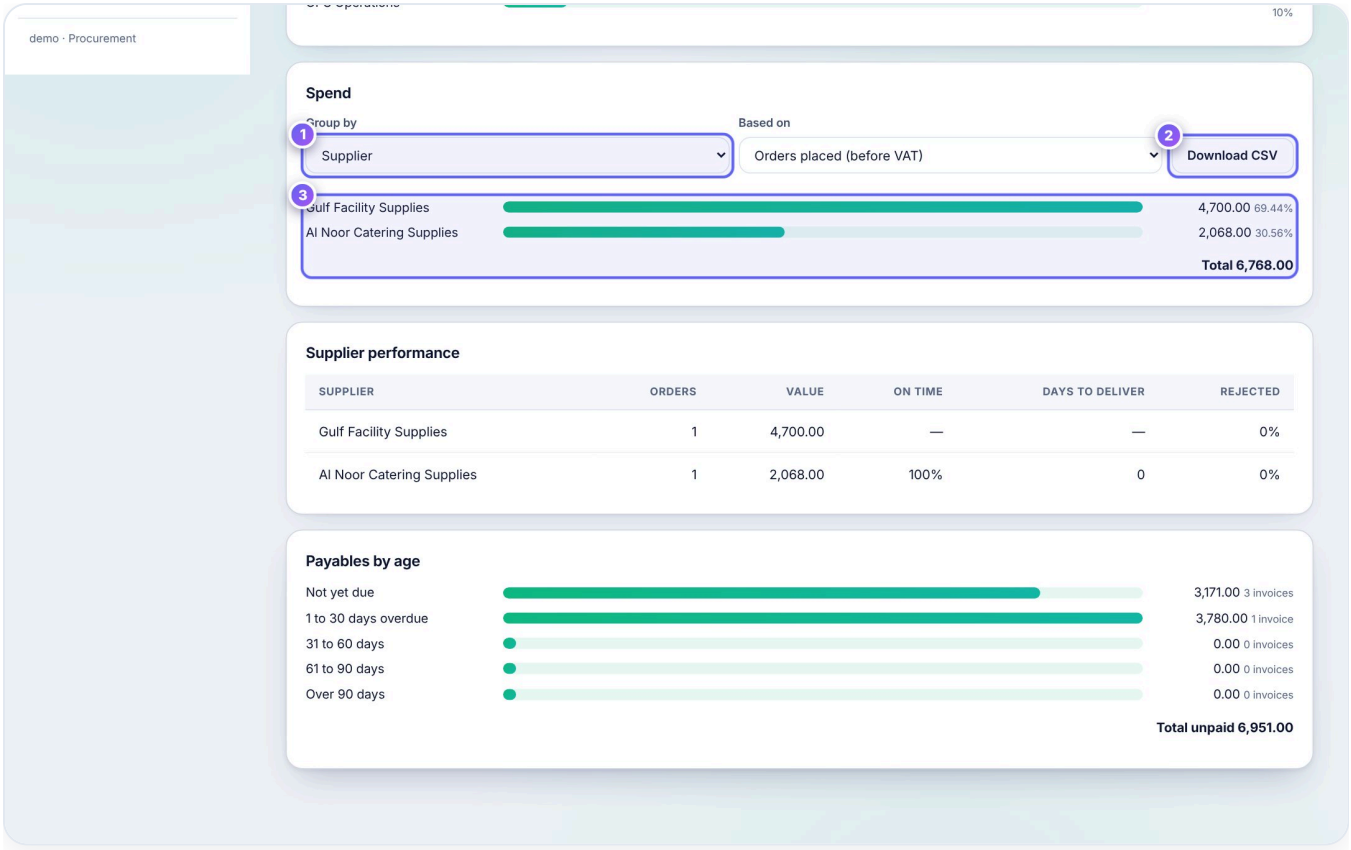
1 Choose the period

2 The numbers that matter

3 Cost centre budgets this month

12.13 Spend, by anything

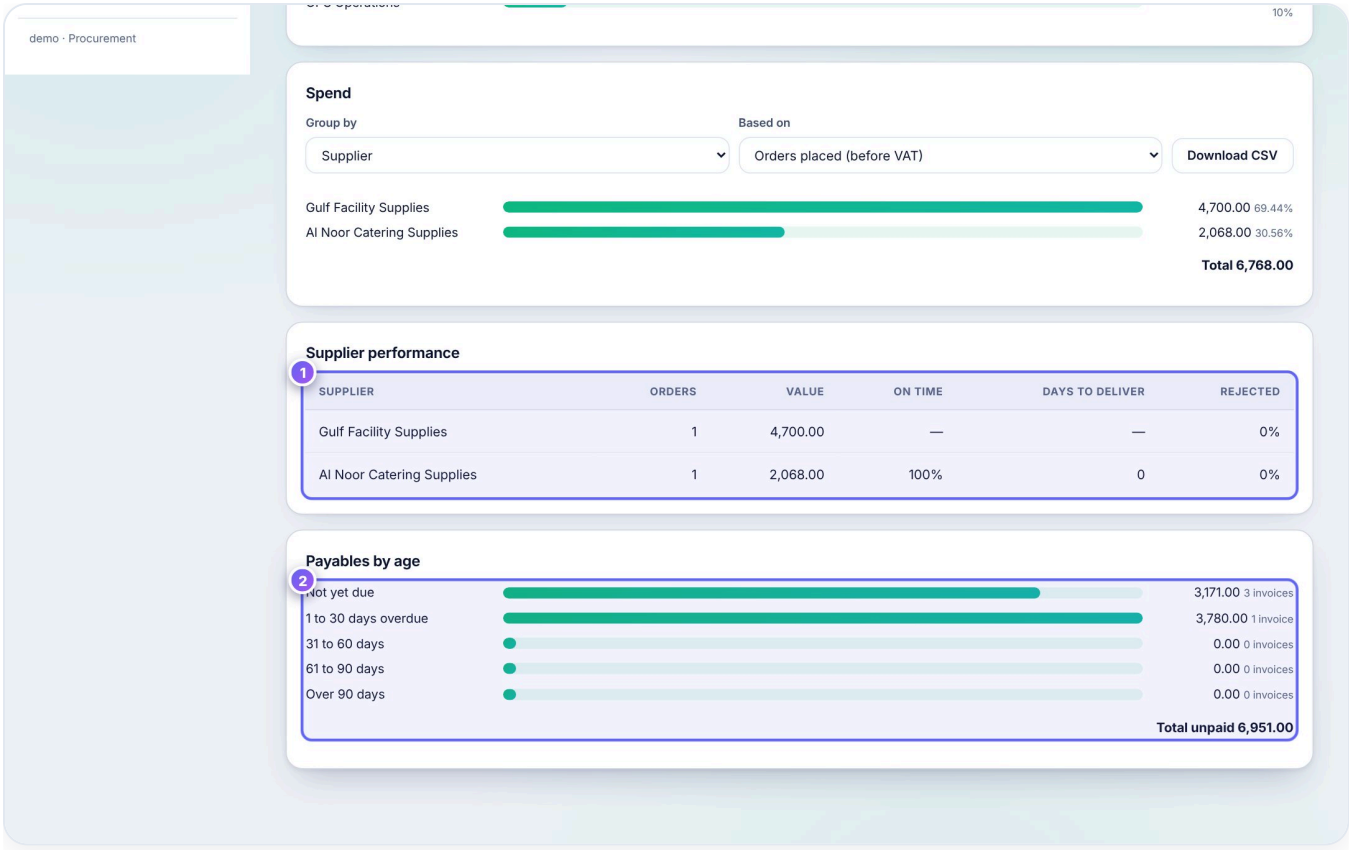
Group spend by supplier, category, cost centre, department, property or month, based on orders placed or on approved and paid invoices. Press Download CSV to open it in Excel.



1. Group by supplier, category, cost centre, department, property or month
2. Download it for Excel
3. Where the money goes

12.14 Supplier performance and payables

Supplier performance shows orders, value, how often deliveries arrived on time, how long they took and how much was rejected. Payables by age shows what you owe, split into not yet due and overdue bands.

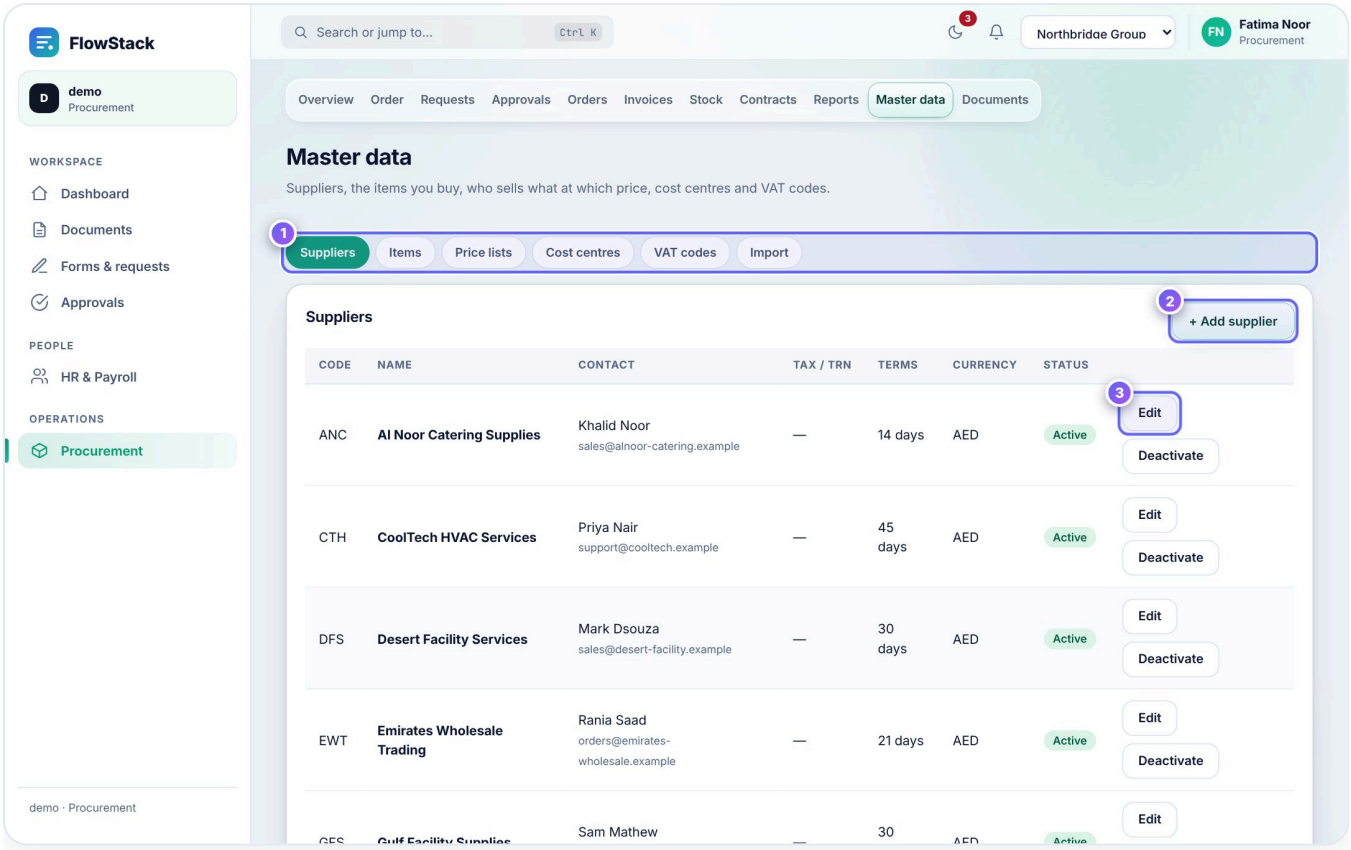


1 How each supplier performs

2 What you owe, by age

12.15 Master data: suppliers, items and prices

Master data is where you maintain the lists the catalogue is built from: suppliers, items, price lists, cost centres and VAT codes. Make sure every supplier has an email address, so approved orders can be emailed.



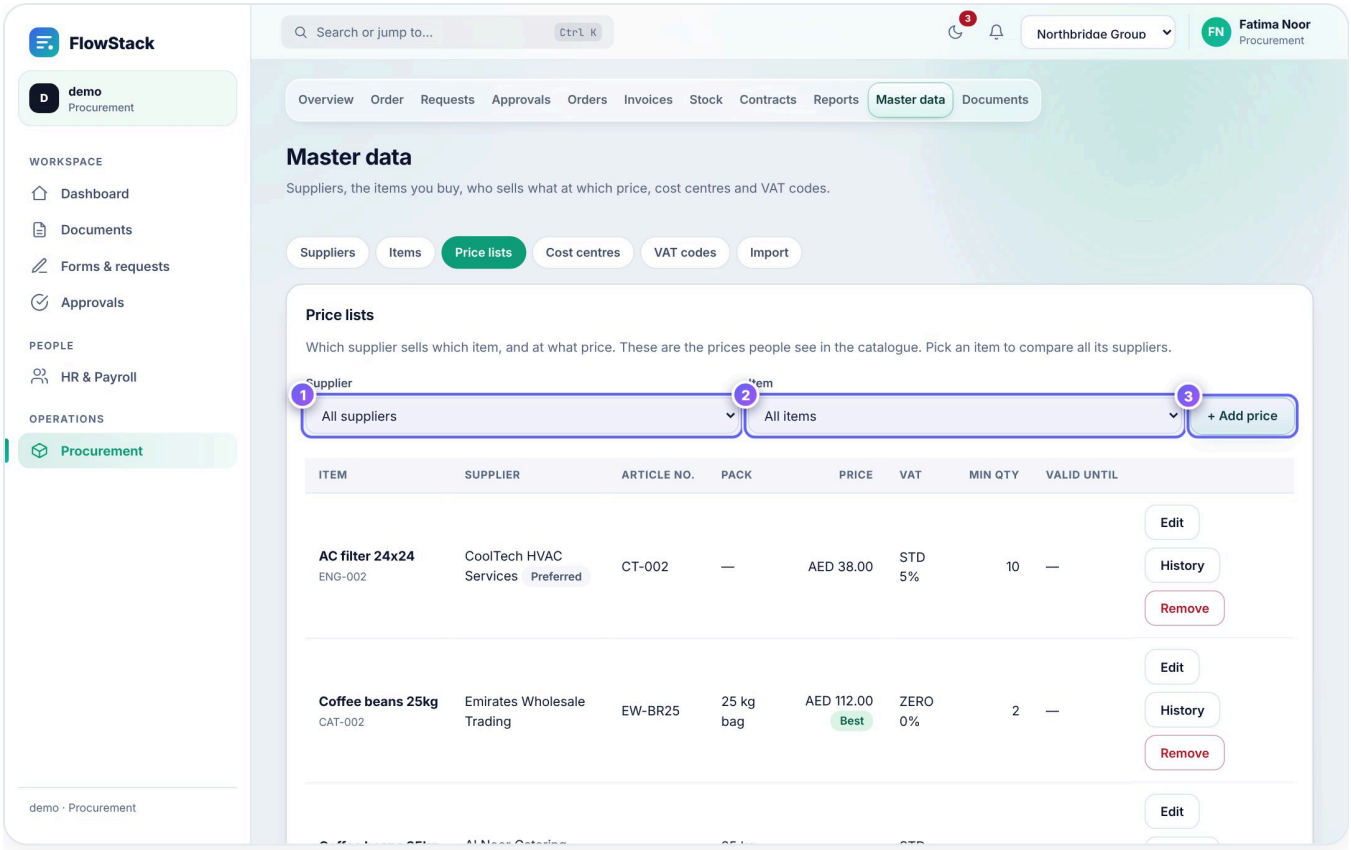
1. Suppliers, items, price lists, cost centres, VAT and import
2. Add a supplier
3. Edit contact details and email

HOW TO

1. Suppliers: add a supplier or press Edit to change contact details.
2. Items: add what you buy, with a unit, category, par level and barcode.
3. Cost centres and VAT codes: add the ones you use. The VAT tab can add the UAE codes for you.

12.16 Price lists

A price says which supplier sells which item, at what price, with their article number, pack, VAT code and minimum order. When several suppliers sell the same item, the catalogue compares them. Changes to a price are kept in its history.



1 See one supplier's prices

2 Or compare every supplier for one item

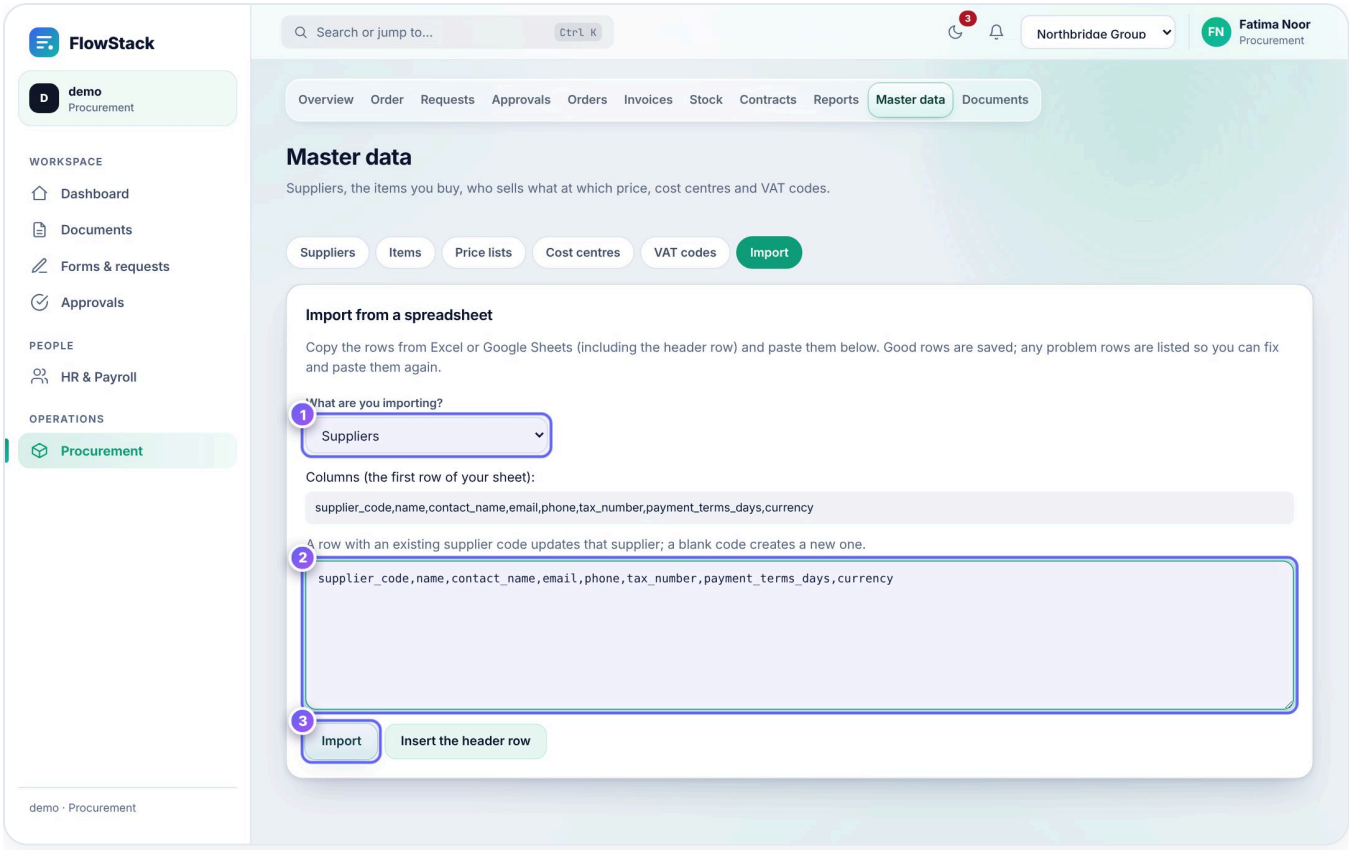
3 Add a price

HOW TO

1. Press + Add price and choose the supplier and item.
2. Enter the price, minimum quantity and an optional valid-until date.
3. Tick Preferred to choose this supplier automatically for the item.

12.17 Import from a spreadsheet

The fastest way to set up is to paste from Excel or Google Sheets. Choose what you are importing, press Insert the header row to see the columns, paste your rows under it and press Import. Good rows are saved; any problem rows are listed with the reason so you can fix and paste them again.



1. Suppliers, items or a price list
2. Paste rows copied from Excel
3. Import: problem rows are listed for you

Tip. Import suppliers and items first, then the price list that refers to them.

REFERENCE

Roles, questions and answers

Appendix A What each role can do

ROLE	WHAT IT OPENS
Admin	Everything in the organization, including Back office
HR	All HR data, leave, shifts, attendance and payroll
Payroll	Payroll, salary sheets, WPS files and payslips
Finance	Payroll, WPS files, payslips and finance documents
Procurement	Suppliers, items, purchase orders, goods receipts, stock and invoices
Director	Approves leave and sees attendance for their own department
Manager	Approves leave and sees attendance for their own department
Supervisor	Approves leave and sees attendance for their own department
User	Own profile, leave and purchase requests

The role is the starting point. In Back office you can tick extra modules for a person. Administrators can approve any step.

Appendix B Questions and answers

I did not get my welcome email.
Check your spam folder. If it is not there, press Forgot your password? on the sign-in page, enter your organization code and email, and we will send a new link.

I cannot see a module in my menu.
The menu shows only the modules your organization has, and only what your role allows. Ask your administrator to check your role and module access in Back office.

Who can approve a request?
The approvers set up in Approval rules. People can never approve their own requests. If no approver can be found, an administrator approves.

An approved purchase order was not emailed to the supplier.
The supplier probably has no email address, or your email settings are not set up. The order page tells you why. Fix it, then press Send to supplier now.

Can I change a locked payroll month?
No. A locked month is kept exactly as approved. Ask an administrator how to correct it in the next month.

What happens when my trial ends?
Your data is kept. People can only open the subscription page and log out until you subscribe.

I forgot my password.
Press Forgot your password? on the sign-in page. You will get a link that works for one hour.

Does a valet guest need WhatsApp?
No. The QR code on the slip opens a private web page that shows where the car is and the release code. WhatsApp is an extra way to ask for the car, and is part of the Valet WhatsApp plans.

How many photos does valet require?
Your administrator decides, under Valet, Setup: from none to six at check-in, and from none to six when the car goes back. A car cannot be parked or handed over until the requirement is met.

Where did Leave and Documents go in the phone app?
The phone app focuses on valet, guest requests and approvals. Leave requests are entered by HR (for example from your QR code form), and documents are on the web.

How do I add FlowStack to my phone?
Open it in Safari or Chrome, sign in, then use Add to Home Screen (iPhone) or Install app (Android).

Appendix C Glossary

Release code	The private 4-digit code a valet guest reads out to collect their car. Staff screens never show it.
Stand	An entrance where valet cars are received and handed back, such as the main entrance.
Snag	A defect found in a room, such as a leaking tap, recorded with photos and followed until it is fixed.
Quick review	A QR code that takes a guest straight to your Google or TripAdvisor review page.
Approval rule	A rule that decides who must approve something, by amount and department.
Cost centre	A label such as Operations or Facilities used to report spend, optionally with a monthly budget.
Goods receipt	The record of a delivery against an order.
Head of department (HOD)	The person marked as head of a department on their HR profile; approves for that department.
IBAN	The bank account number used in salary transfers.

Par level	The quantity of an item you want to keep in stock. Below it, the item is flagged for reorder.
Property	One site, branch or location in your organization.
Purchase order	An order sent to a supplier, with prices.
Purchase request	A request to buy something, which purchasing turns into an order once approved.
SLA / service time	The target time to respond to and finish a request.
Three-way match	Checking an invoice against the order and the goods received.
WPS	The UAE Wages Protection System: the file format banks use for salary transfers.

Need a hand?

Write to support@flowstackcloud.com and tell us your organization code and what you were doing. A screenshot helps.