



QC NEXUS

Beta User Guide & Installation Instructions

Open Source Beta 0.9.0

Janitorial quality control, service documentation, client communication, and field reporting - in one simple system.

Welcome to the first-user beta.

QC Nexus is being released free of charge as open-source software. This beta is intended for real-world use and feedback before the public 1.0 release.

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1. What QC Nexus Does

QC Nexus is a lightweight web-based operations platform built specifically around the needs of janitorial and commercial cleaning companies. It is designed to create a clear record of service, improve communication, document issues, and give clients better visibility into the work being performed.

Included in this beta

- Client database with contact information and service frequency
- Client notes and service history
- Lead tracking
- Internal service ticket management
- A public ticket submission page clients can use without logging in
- Nightly job tracking with start, pause, resume, and end controls
- Up to five job photos per upload
- Nightly printable service reports
- Inspections / walkthroughs
- Printable quotes
- Monthly Service Overview reports

Important

QC Nexus runs on your own web hosting. Your operational data remains in the SQLite database stored with your installation.

2. Before You Install

Server requirements

- PHP 8.1 or newer
- PDO SQLite enabled
- PHP file uploads enabled
- HTTPS strongly recommended
- Write permission for the data and uploads folders

Files included

The release ZIP contains the complete application. The most important folders are:

Folder / File	Purpose
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install.php	Initial setup and database creation
data/	Stores the QC Nexus SQLite database
uploads/jobs/	Stores job tracker photos
uploads/walkthroughs/	Stores inspection / walkthrough photos
uploads/branding/	Stores the QC Nexus logo
login.php	Administrator login
ticket_submit.php	Public client ticket page

3. Installation Instructions

These steps work for most standard PHP hosting accounts, including cPanel-style hosting.

1. Download and unzip the QC Nexus release package on your computer.
2. Open your hosting File Manager or connect by FTP/SFTP.
3. Create a folder for QC Nexus, such as /qc-nexus/ under your website's public directory.
4. Upload all files and folders from the QC Nexus release into that folder.
5. Confirm that data/, uploads/jobs/, uploads/walkthroughs/, and uploads/branding/ are writable by PHP.
6. In a browser, open the install page. Example: <https://yourdomain.com/qc-nexus/install.php>
7. Enter your company name, administrator email address, a strong administrator password, and your timezone.
8. Click Install QC Nexus.
9. When installation finishes, click the login link and sign in with the administrator credentials you just created.

If the installer says QC Nexus is already installed

The installer creates data/install.lock after successful setup. Do not delete that file on a working installation unless you intentionally understand the consequences.

Recommended folder permissions

Exact permissions depend on the hosting provider. The goal is simply for PHP to be able to create and update the SQLite database and save uploaded images. Avoid making the entire application world-writable.

4. First Login & Initial Setup

- Log in at /login.php using the administrator account created during installation.
- Open Clients and add the active facilities you plan to service.
- For each client, add the primary contact, phone, email, address, and service frequency.
- Test the Job Tracker with a sample job before using it on a live account.
- Open the public ticket page and make sure a submitted test ticket appears in the internal Tickets area.
- Generate one sample nightly service report and one sample Monthly Service Overview.

Good first-day test

Create a test client named DEMO CLIENT. Run a short test job, add a photo, end the job, print the report, submit a public ticket, and generate a monthly report. Delete or ignore the demo data after you are comfortable with the workflow.

5. Using the Dashboard

The Dashboard is the starting point after login. It gives a quick overview of:

- Active clients
- Open tickets
- Active leads
- Jobs currently running
- Recent jobs
- Recent client comments

Use the navigation buttons across the top to move between the major modules.

6. Clients & Client Notes

Adding a client

- Open Clients.
- Enter the company or facility name.
- Add contact name, email, phone, address, and service frequency as available.
- Click Add Client.

Using client notes

Open a client record to add permanent service notes. Notes are useful for documenting conversations, special instructions, changes in scope, unusual conditions, or follow-up items.

Best practice

Use notes for information that matters later. Keep the nightly Job Tracker for what happened during a specific service visit.

7. Nightly Job Tracker & Service Reports

The Job Tracker is the core field-use feature of QC Nexus.

Starting a job

- Open Job Tracker.
- Choose + New Job.
- Select the client.
- Enter the jobsite or facility name.
- Enter the technician name.
- Click Start Job.

While the job is running

- The shift timer continues to track elapsed service time.
- Use Pause when service is temporarily stopped.
- Use Resume to continue the same job.
- Enter Services Performed to document what was completed.
- Use Notes for issues, observations, client requests, damage, supply concerns, or anything that should appear in the service record.
- Upload job photos. The current beta accepts up to five selected photos in one upload.

Ending the job

- Confirm services and notes are saved.
- Upload any final documentation photos.
- Click End Job.
- Open the Job Service Report.
- Print it or use the browser's Save as PDF option if a digital copy is needed.

What the nightly report documents

The report includes the jobsite, client, technician, total shift time, start time, end time, services performed, technician notes, and uploaded photos.

8. Service Tickets

Tickets give you one documented place for service concerns and follow-up.

Internal tickets

- Open Tickets.
- Select + New Ticket.
- Choose the client if applicable.
- Add a title, description, priority, and assigned person.
- Close the ticket when the issue is resolved.

Public client ticket page

Clients can submit a ticket without access to the internal QC Nexus dashboard.

Public URL format:

`https://yourdomain.com/qc-nexus/ticket_submit.php`

Share this URL carefully

This page is designed for client issue submission. It does not provide access to the internal client database or administrative dashboard.

9. Leads

The Leads area provides a simple sales pipeline.

- Add the prospect's company and contact information.
- Track the status as New, Hot, Quoted, Won, or Lost.
- Use Notes for walk-through information or follow-up details.

10. Inspections & Quotes

Use Inspections for sales walkthroughs, scope documentation, and pricing.

- Open Inspections and choose + New Inspection.
- Enter company, contact, service address, expected cleaning days, and quote information.
- Document the scope of work in Cleaning Details.
- Add internal notes as needed.
- Open the inspection after saving to add walkthrough photos.
- Use Print Quote to generate a client-facing quote.

11. Monthly Service Overview

The Monthly Service Overview collects service history for one client and one month into a single printable report.

To generate a report

- Open Monthly Reports.
- Select the client.
- Enter the month and year.
- Click Build Report.
- Review the visit count, total labor time, photo count, service details, notes, and tickets.
- Click Print / Save PDF to produce the end-of-month client packet.

This report complements the nightly reports. It does not replace them. The nightly reports remain the detailed record for each individual visit.

12. Recommended Daily Workflow

Step	Recommended Use
Before service	Check open tickets and client notes for anything requiring attention.
Clock in to the job	Start the client job in Job Tracker before beginning service.
Document the work	Record services performed and add notes as the job progresses.
Photograph important items	Capture completed work, unusual conditions, problems, or items that need follow-up.
End the job	End the Job Tracker when service is complete.
Review report	Confirm the nightly report accurately reflects the visit.
Follow up	Create or update a ticket when an issue requires action beyond that visit.

13. Backups, Security & Maintenance

Back up the database

The main QC Nexus data file is `data/qcnexus.sqlite`. Backing up that file protects the client, ticket, lead, job, inspection, and reporting records stored in the database.

Back up uploaded photos

Also back up the `uploads/` folder if you want to preserve job and inspection photos.

Recommended backup routine

- Daily or frequent backup of `data/qcnexus.sqlite` while actively using the system
- Regular backup of the `uploads/` directory
- Keep at least one backup outside the web hosting account
- Make a backup before installing updates or modifying code

Security basics

- Use HTTPS.
- Use a unique administrator password.
- Do not share the administrator login with clients.
- Keep PHP and the hosting account updated.
- Do not expose the `data/` directory through directory browsing.
- Only install code updates from a source you trust.

14. Troubleshooting

Problem	What to Check
Installer will not load	Confirm the files were uploaded to a PHP-enabled web directory and that PHP 8.1+ is available.
SQLite / database error	Confirm PDO SQLite is enabled by the hosting provider and the data/ folder is writable.
Photos will not upload	Confirm PHP uploads are enabled, the uploads folders are writable, and the server upload-size limit is large enough for the images.
Login does not work	Use the admin email and password created during install. Passwords are case-sensitive.
Times appear wrong	The installer asks for a timezone. The default in this beta is America/Chicago; use the timezone appropriate for the business.
Public tickets do not appear	Submit another test ticket and then refresh the internal Tickets page. Confirm the same installation/database is being used.
Blank or server error page	Check the hosting PHP error log before changing files. Back up the installation before making repairs.

15. Beta Feedback

You are one of the first external users of QC Nexus. Real-world feedback is especially valuable during this stage. When reporting a problem, please include what page you were on, what you were trying to do, what happened, and a screenshot if possible.

- Features you use every day
- Anything that feels confusing or takes too many steps
- Reports you wish the system generated
- Mobile usability issues
- Bugs or error messages
- Ideas that would make the software more useful to a cleaning company

Thank you for helping test QC Nexus.

The goal is simple: give small and independent janitorial companies a professional quality-control system without putting another expensive monthly software bill between them and better service.

Open Source License

QC Nexus Beta 0.9.0 is distributed under the MIT License. The software is provided as-is, without warranty. The full license text is included in the release package.