

• FOR OWNERS AND MANAGERS

# How to run the *Acco portal*.

Tap-through guide for everything you'll do as an admin. With screenshots of every form.

Open the portal →

↓ Download PDF

See the cleaner guide

## *What the portal is for*

The portal is the back-of-house system for your cleaning business. Cleaners use it on their phones to see their jobs. **You** use it to add jobs, assign cleaners, and manage your team.

Every staff member needs three things to use it:

1. An **email + password** (their login)
2. A **staff account** (you create it, or they sign up with a code)
3. An **active access code** tied to their role

**Where it lives.** The portal is at `acco-cleaning.vercel.app/portal-app`. Bookmark it.

## *The three roles*

Every account has one role. You can change it anytime.

### CLEANER

#### Cleaner

Sees their own jobs only

Updates job status

Leaves cleaner notes

### MANAGER

#### Manager

Everything a cleaner can do

Sees every job in the system

Posts new jobs and assigns cleaners

Issues cleaner access codes

### ADMIN

#### Admin

Everything a manager can do

Creates staff accounts directly

Issues manager + admin codes

Resets passwords, changes roles, deletes accounts

**Safety net.** An admin can't demote, disable, or delete their own account. This is on purpose so you never get locked out.

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## *Sign in as admin*

Go to **acco-cleaning.vercel.app/portal-app**. Type your admin email and password. Tap **Sign in**.

**First time?** If this is the very first time anyone has used the portal, you'll need to claim your admin account with the seeded access code. Ask your developer (Cody) for it.

### *Acco Staff Portal*

Signed-out preview

Sign in

Create account

#### Staff sign in

Use your staff email and password. If your account has not been activated yet, sign in first and then enter your access code.

Email

maria@example.com

Password

••••••••

Sign in

## *This is your dashboard*

Once signed in, you'll see four things:

1. A **stats strip** at the top (total jobs, active staff, open codes, jobs done today)
2. The **live job board** on the left (every job in the system, color-coded by status)
3. Your **admin tools** on the right (create staff, issue codes, staff directory)
4. The **Create and assign a job** form above the job board

SIGNED IN AS ADMIN

Welcome back, Cody LIVE

Total jobs **12** this week

Active staff **6** 4 cleaners, 2 managers

Open access codes **3** 2 cleaner, 1 manager

Completed today **7** of 9 scheduled

**Live job board**

**Johnson** IN PROGRESS  
Airbnb Turnover - 10:00 AM  
123 Birch St, Bethesda - Maria T.

**Smith** ASSIGNED  
Standard Clean - 1:30 PM  
88 Oak Ave, Silver Spring - Maria T.

**Park** PENDING  
Move-In - 4:00 PM  
414 Maple Rd, Arlington - Unassigned

**Create staff account**  
Add a cleaner, manager, or admin.  
[+ New account](#)

**Create access code**  
For staff self-signup.  
[+ New code](#)

**Staff directory**  
Edit · reset password · delete.  
**6 ACTIVE**

## *Add a new staff member*

Two ways to onboard someone. Pick whichever fits.

### **Way A — You create their account for them**

Best when you have their info handy and want them ready to go.

1. In the right sidebar, find **Create staff account**.
2. Type their **full name, email, and phone**.
3. Pick their **Role** (Cleaner for most hires).
4. Leave **Temporary password** blank to auto-generate a strong one, or type your own.
5. Make sure **Status** is set to **Active**.
6. Click **Create staff account**.

**Then text them.** "Hi! Your Acco portal login is ready. Email: *their-email*. Temp password: *xxxx*. Sign in at [acco-cleaning.vercel.app/portal-app](https://acco-cleaning.vercel.app/portal-app) and change your password."

### **Way B — Hand them an access code and let them sign up**

Best when you want them to do the work themselves.

1. Create a code (see Step 4 below).
2. Text them the code and the portal link.
3. They go to **Create account**, fill in their info, and paste the code.

## Create staff account

Admins can create cleaner, manager, or admin accounts directly.

**Full name**

Maria Torres

**Email**

maria@example.com

**Phone**

(301) 555-0123

**Temporary password**

*Leave blank to auto-generate*

**Role**

Cleaner



**Status**

Active



Create staff account

click to save

 **Tip**

Leave password blank, hit save, and the portal generates a strong temp password for you.

## *Issue an access code*

Access codes let new hires sign themselves up. One code = one person.

1. In the right sidebar, find **Create access code**.
2. Pick the **Role** (Cleaner, Manager, or Admin).
3. Add a **Label** for your own tracking (example: "*Maria T. cleaner code*").
4. *Optional*: set an **expiration date** so the code dies if unused.
5. *Optional*: add internal **notes**.
6. Click **Create code**.
7. **Copy the new code** and text it to your hire.

**Treat codes like keys.** Don't post them in group chats. One person, one code.

**Managers vs admins.** Managers can only create *cleaner* codes. Only admins can create manager or admin codes.

## Create access code

Admins can issue cleaner, manager, or admin activation codes.

**Role**

Cleaner



**Expires at (optional)**

mm / dd / yyyy

**Label**

Maria T. cleaner code

**Notes (optional)**

Started April 22, lives in Silver Spring,  
prefers morning shifts.

Create code

✓ NEW CODE READY

CLEANER-AB12-CD34

copy + text it to your hire

Copy Hire

## *Post and assign a job*

Above the live job board you'll see the **Create and assign a job** form.

1. Type the **Client name** and **Address**.
2. Pick the **Service type** (Residential, Airbnb Turnover, Move-In/Out, Concierge, Commercial).
3. Pick a **date and time**.
4. Pick a **cleaner to assign** (or leave it unassigned and assign later).
5. Add **Office notes** — entry code, parking, anything the cleaner needs.
6. Click **Create job**.

### **Job status meanings**

**Pending** — created but not assigned

**Assigned** — given to a cleaner, not started

**In progress** — the cleaner is on site

**Complete** — cleaner finished and submitted

**Cancelled** — you cancelled it

## Create and assign a job

Add a client job, set the service type, and assign a cleaner.

**Client name**

Johnson

**Service type**

Airbnb Turnover



**Address**

123 Birch St, Bethesda, MD 20814

**Scheduled for**

May 18, 10:00 AM



**Assign cleaner**

Maria T.



**Office notes (entry, parking, special instructions)**

Lockbox code 4422. Pet in upstairs bedroom.  
Park on the street, not the driveway.

Create job

posts the job now

## *Edit, reset, or remove staff*

The **Staff directory** in the right sidebar shows every account, with editing tools on each card.

### **To edit someone**

1. Find them in the Staff directory.
2. Change name, email, phone, role, or status.
3. *To reset their password:* type a new one in the **Reset password** field (leave blank to keep current).
4. Click **Save account**.

### **To pause someone**

Set their **Status** to **Inactive** and save. They can't sign in until you switch them back to Active.

### **To delete someone**

Click **Delete account**. **This is permanent.** Use Inactive instead if you might bring them back.

**You can't delete yourself.** Your own admin account is protected. To remove yourself, another admin has to do it.

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### *Your typical day*

1. **Morning — check the job board.** Are all of today's jobs assigned? Anything still *Pending*?
2. **Post any same-day jobs.** Use the Create and assign a job form. Pick the cleaner right away if you know who's going.
3. **Hand out access codes** if you're onboarding anyone today.
4. **Watch statuses through the day.** Cleaners move jobs from *Assigned* → *In progress* → *Complete*. Their notes show up under each job.
5. **End of day — confirm everything closed out.** A job still *In progress* after hours probably needs a follow-up text to the cleaner.

## ?

### *If something's not working*

#### **A new account shows "Activation required"**

They signed up without a valid code, or the code was already claimed. Issue a fresh code, have them sign in and finish activation.

#### **An account shows "Access blocked"**

Status was set to Blocked or Inactive. Find them in the Staff directory, switch back to Active, save.

#### **A cleaner can't see a job**

Cleaners only see jobs assigned to them. Open the job, change Assigned cleaner to the right person, save.

#### **Someone forgot their password**

Open their card, type a new password in Reset password, save. Text them the new one and tell them to change it.

#### **The portal won't load at all**

This usually means the backend (Supabase) is not connected yet. Contact Cody for help.

#### **Still stuck?**

Call **1 (800) 644-0614** or email [booking@accocleaningservice.com](mailto:booking@accocleaningservice.com).

