CLIENTTRACKPRO
USER GUIDE

All-in-One Business Management for Service Businesses

Version 1.0 • Build 15

A No Boss Network Product

nobossnetwork.xyz

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Welcome & Getting Started

Welcome to ClientTrackPro — the all-in-one business management app built to help service businesses stay organized, save time, and get paid faster.

Whether you run a transportation service, salon, tutoring business, daycare, cleaning service, or another service-based business, ClientTrackPro brings client management, payments, invoicing, attendance, and business analytics into a single, easy-to-use dashboard.

This guide walks you through every feature currently available in ClientTrackPro 1.0, along with a recommended workflow to help you get the most value from the app right away.

Who This Guide Is For

This guide is written for business owners and staff using ClientTrackPro day-to-day — no technical background required.

What's New in Version 1.0

This is the first public release of ClientTrackPro. Version 1.0 (Build 15) includes:

- Client & family management
- Payment tracking with paid/unpaid filtering
- Automatic and manual payment generation
- Invoice creation and management
- Attendance tracking
- Business analytics dashboard
- Support for multiple business types
- Free and Pro subscription tiers

Note: Future versions will add new features here. Check this section after every update to see what's changed.

Quick Start (5-Minute Setup)

Get up and running in five simple steps:

1. Open ClientTrackPro and select your business type from Settings.
2. Tap Add Family/Client to create your first profile.
3. Enter basic contact and billing details.
4. Go to Payment Tracking and generate your first payment.
5. Visit the Dashboard to see your business snapshot update in real time.

Note: The Free tier supports up to 5 client/family profiles total. Upgrade to Pro any time from Settings for unlimited clients.

Best Practices / Recommended Workflow

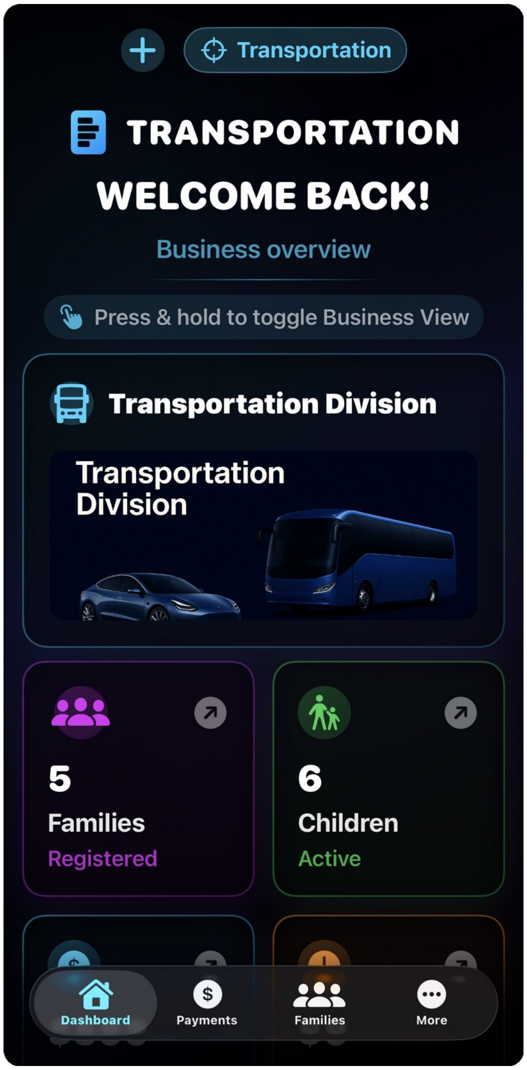
For the smoothest experience, we recommend following this general workflow for each client:

1. Add Family/Client — Create the profile with accurate contact and billing information.
2. Add Child/Dependent (if applicable) — Add each child or dependent under the family profile.
3. Generate Payments — Use automatic or manual payment generation to set up billing.
4. Create Invoice — Generate an invoice for the client's records.
5. Send Invoice (optional) — Share the invoice with your client.
6. Mark Paid — Update payment status as payments come in.
7. Review Dashboard & Analytics — Check revenue and collection rate regularly.

Following this flow consistently keeps your records accurate and makes your weekly and monthly reporting effortless.

Dashboard Overview

The Dashboard is your business command center, giving you an at-a-glance view of what's happening across your business. It updates its layout based on the business type you've selected in Settings.



The Dashboard shows your business type banner, Families and Children counts, and quick navigation.

What You'll See

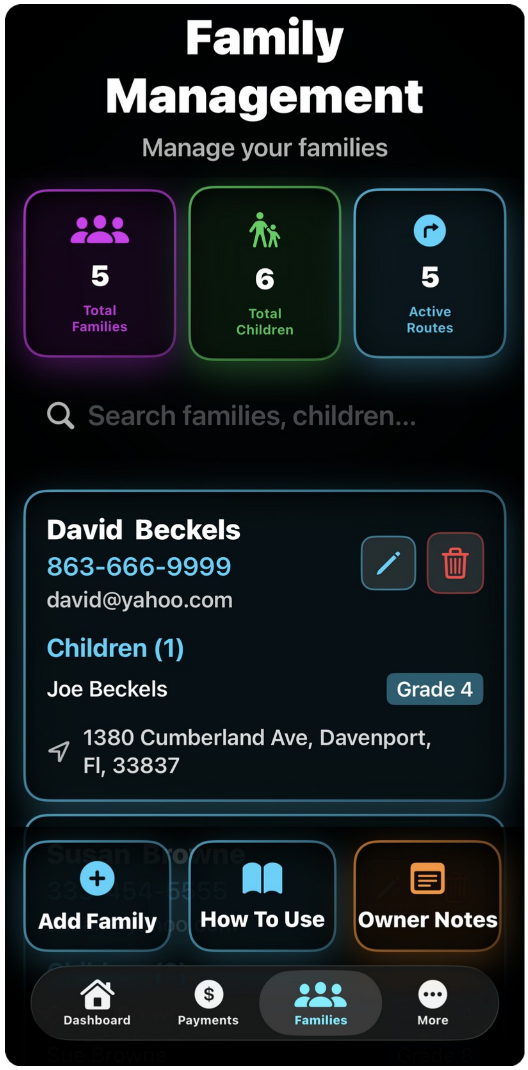
- A business type banner at the top (e.g. Transportation, Salon, Tutoring)
- Total Families and Total Children/Clients counts
- Total Revenue Collected and Pending/Outstanding amounts
- "This Week" snapshot: Payments, Revenue, and Paid counts
- Quick Actions: Add New Family, Generate Weekly Payments, View Payment Reports, Create Invoices
- School Alerts banner (transportation businesses)
- Recent Activity showing the latest payments

Press and hold the business type banner to toggle Business View if you manage more than one business type.

The Dashboard updates automatically as you add clients, generate payments, and mark invoices paid — no manual refresh needed.

Family/Client Management

The Families screen shows Total Families, Total Children, and Active Routes at a glance, with a search bar and a full list of families below.

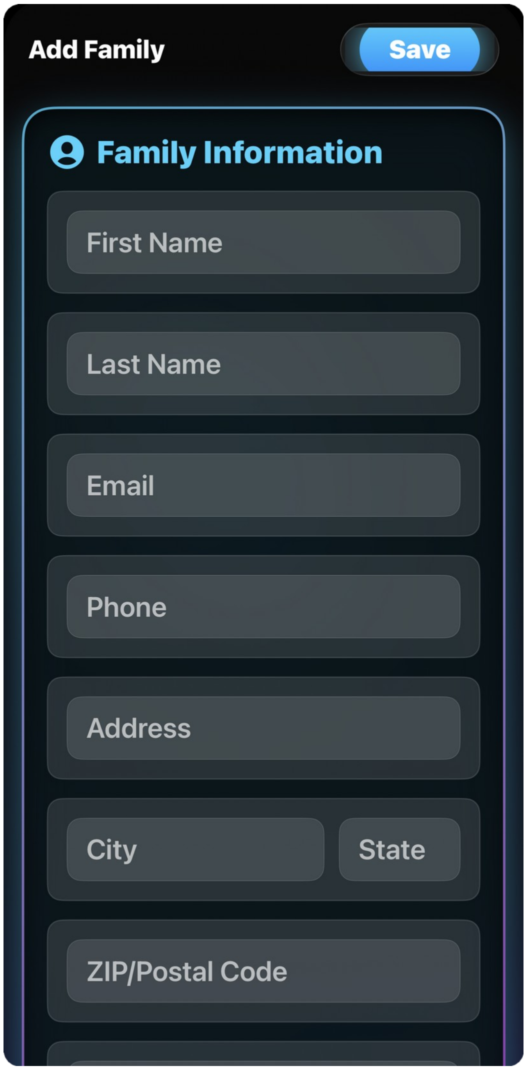


Family Management screen — Total Families, Total Children, and Active Routes at a glance.

Adding a Family/Client

1. From the Families tab, tap Add Family.
2. Fill in Family Information: First Name, Last Name, Email, Phone, Address, City, State, and ZIP/Postal Code.
3. Add optional Notes for the family.
4. Under Child Information, enter the child's First and Last Name.
5. Select School Information: grade level (e.g. Pre-K) and school name.
6. Set up Morning Route and/or Afternoon Route if applicable — including pickup/dropoff address, pickup time, and dropoff time. Toggle "Same as Home" to reuse the family's home address.
7. Choose a Service Type (e.g. One-Way Trip, Round Trip, Daily School Pickup, Daily School Dropoff, Airport Pickup/Dropoff, Medical Appointment).

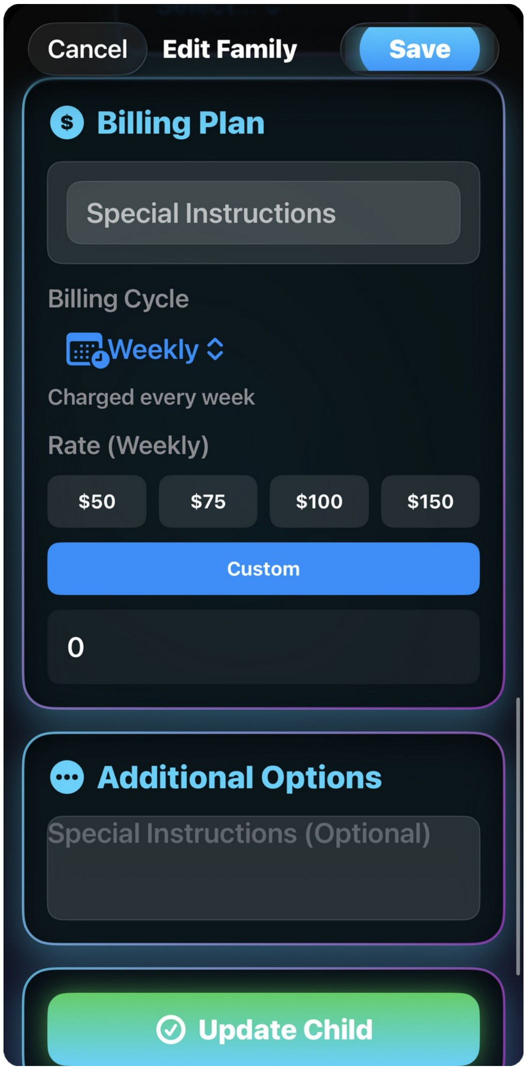
8. Set the Billing Plan: choose a Billing Cycle (Weekly, Every 2 Weeks, Monthly, Quarterly, Yearly, One-Time, Split Payments, or Milestone-Based) and a Rate — quick-select $50/$75/$100/$150 or enter a Custom Amount.
9. Tap Save Child, then Add Another Child if needed, or Save to finish.



Add Family form — Family Information section.

Editing a Family/Client

1. Open the family's profile from the Families list.
2. Tap the edit (pencil) icon.
3. Update any field — contact info, children, route, billing plan, or route order — and tap Save.



Billing Plan section with Apollo Insight tip: billing cycles control auto-generation timing, not pricing — use Custom Amount for flexible per-client rates.

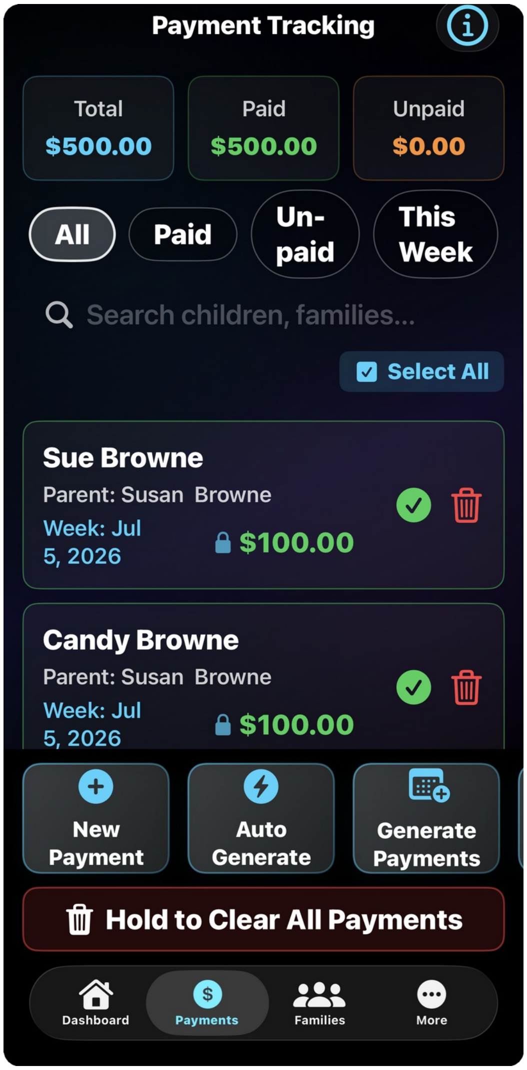
Business-Type-Specific Fields

Depending on the business type you select in Settings, ClientTrackPro shows relevant fields — school and AM/PM route information for transportation businesses, or simplified service fields for salons, tutoring, cleaning, and other business types.

> **Note:** ClientTrackPro does not include built-in turn-by-turn navigation. Route fields capture pickup/dropoff addresses and times for your own records and scheduling — they are not a GPS or driving-directions feature.

Payment Tracking

Payment Tracking is where you manage billing for every client in one place. The top of the screen shows Total, Paid, and Unpaid amounts at a glance.



Payment Tracking screen with Total/Paid/Unpaid summary, filters, and per-payment actions.

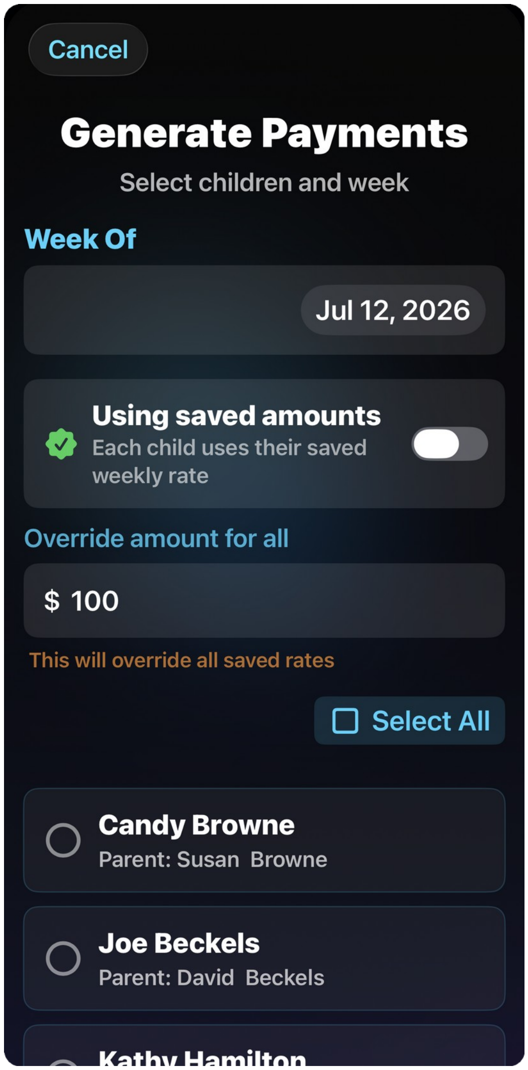
Viewing and Filtering Payments

- Filter by All, Paid, Unpaid, or This Week
- Search by child or family name
- Select All to choose multiple payments at once
- Each payment card shows the child's name, parent, week, and amount, with a checkmark to mark paid and a delete icon to remove it

Generating Payments

1. Tap Generate Payments from the Payment Tracking screen.
2. Select the week using the calendar.

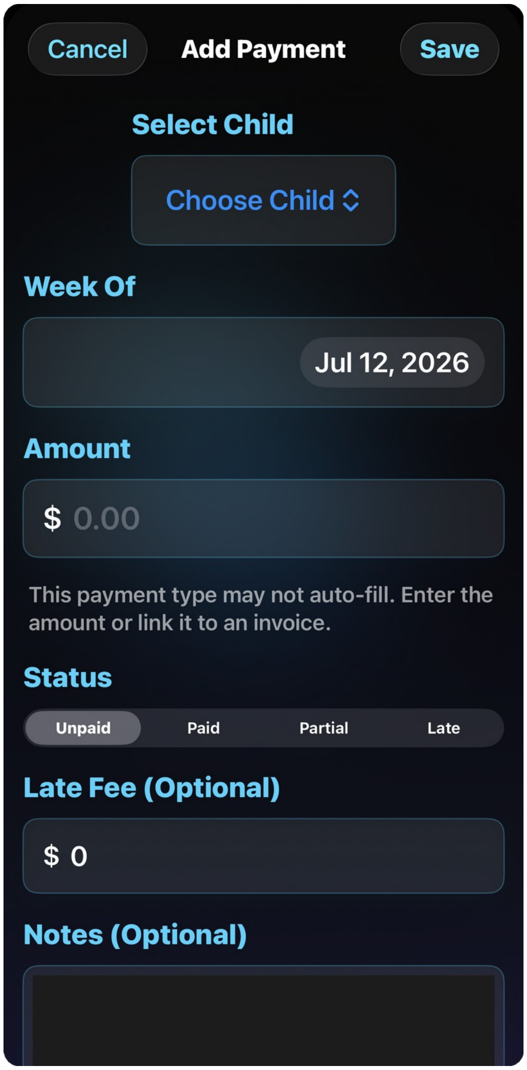
3. Toggle Skip Inactive Families if you only want active clients included.
4. Choose to use each child's saved weekly rate, or toggle Override Amount for All to set one custom amount for the whole batch.
5. Select the children to include, or tap Select All, then confirm to generate the payments.



Generate Payments — select the week and children to bill.

Adding a Single Payment

Tap New Payment to add one manually: choose the child, week, amount, status (Unpaid, Paid, Partial, or Late), an optional late fee, and optional notes.



Add Payment form — select child, week, amount, status, late fee, and notes.

Marking Payments as Paid

Tap the checkmark next to any payment to instantly toggle its status between Paid and Unpaid. Changes save automatically and reflect immediately across your Dashboard and Analytics.

Auto Generate

Turn on Auto Generate (in Settings, under Business Type) to have ClientTrackPro automatically create weekly payments on your billing cycle, instead of generating them manually each time.

Exporting and Importing Payments

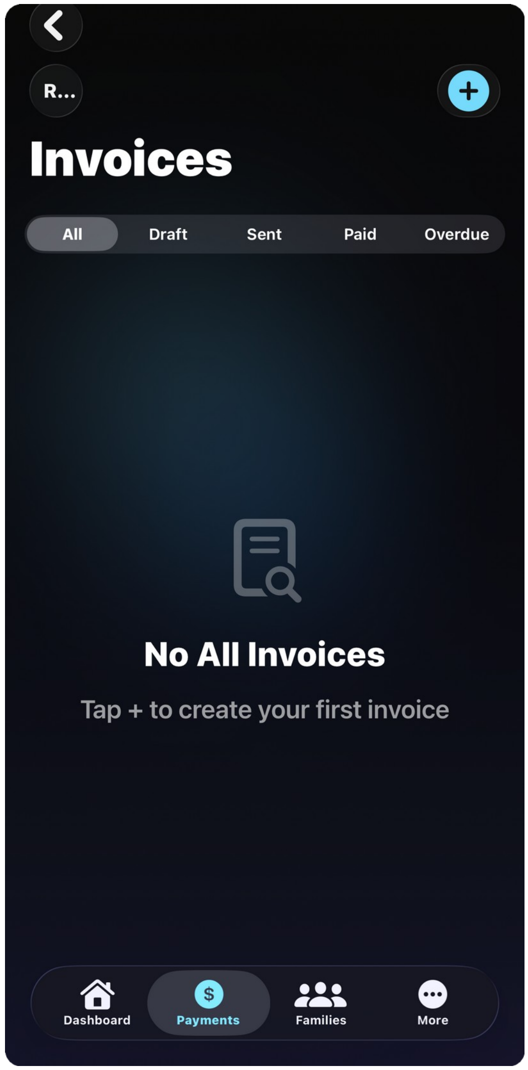
Use Export to download your payment records as a CSV or PDF — choose whether to include notes and whether to export only unpaid payments. Use Import CSV to bulk-upload payment data using the required column format: Child Name, Amount, Week Of, Paid, Paid Date, and Notes.

Clearing Payments

Hold to Clear All Payments removes every payment record for a fresh start (for example, at the start of a new term). This action cannot be undone casually — use it carefully.

Invoice Management

The Invoices screen lists all invoices with tabs for All, Draft, Sent, Paid, and Overdue.



Invoices screen — tap + to create your first invoice.

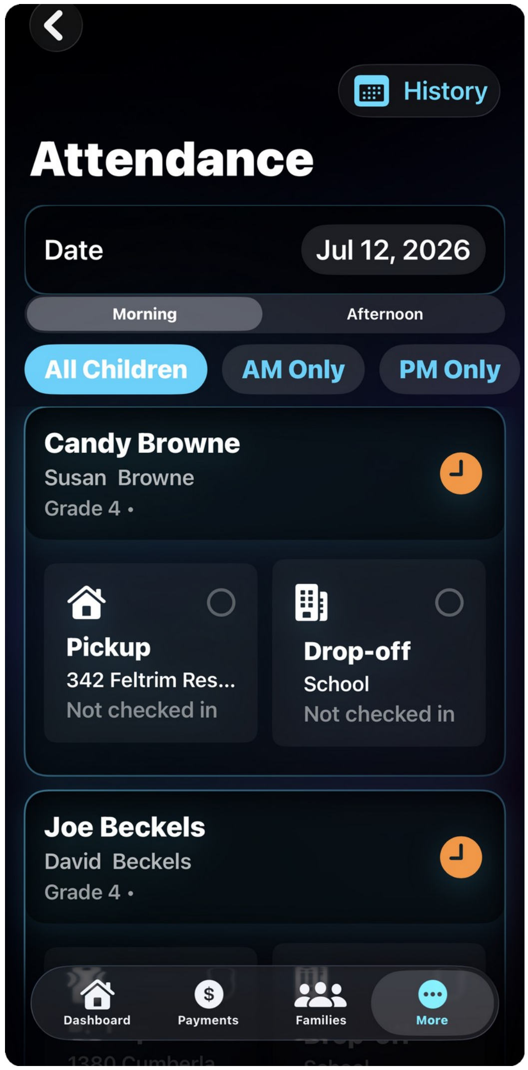
Creating an Invoice

1. Navigate to Invoices and tap the + button.
2. ClientTrackPro shows any unpaid payments available to invoice — if everything is already paid, you'll see "All Caught Up!"
3. Select the client and the payment(s) to include.
4. Review the invoice details and save.

Invoices give your clients a clear, professional record of charges and can be used for your own bookkeeping as well.

Attendance Tracking

For businesses that track daily attendance — such as transportation, daycare, or tutoring services — ClientTrackPro provides simple attendance logging by date.



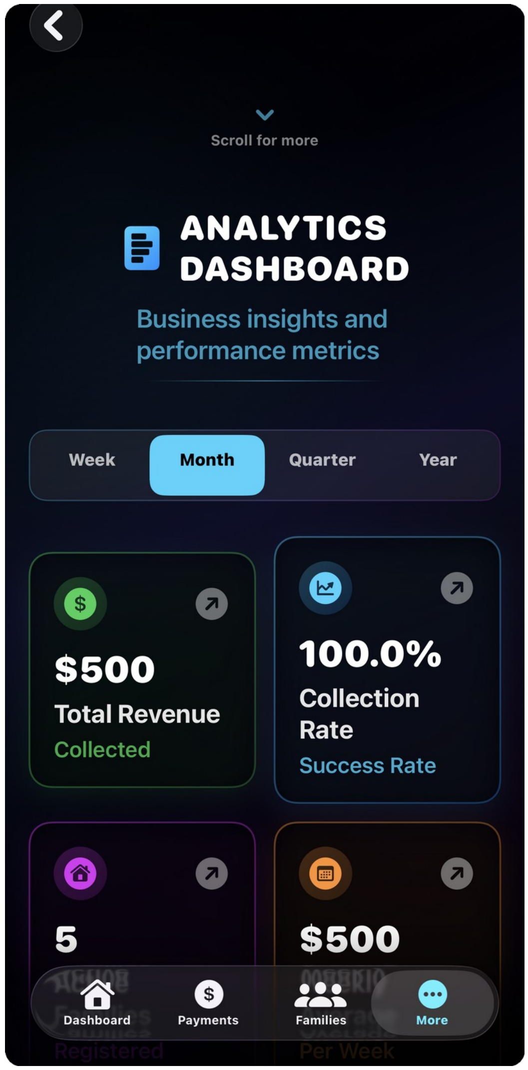
Attendance screen — Morning/Afternoon toggle with Pickup and Drop-off checkboxes per child.

- Pick a date, then switch between Morning and Afternoon
- Filter by All Children, AM Only, or PM Only
- Tap the Pickup and Drop-off boxes to check a child in for each leg of the trip
- Tap History to review past attendance records

Attendance records help you keep accurate participation logs alongside your billing records.

Analytics Dashboard

The Analytics Dashboard gives you deeper insight into how your business is performing over time, with Week, Month, Quarter, and Year views.



Analytics Dashboard — Total Revenue, Collection Rate, Families, and more, filterable by time period.

- Total Revenue Collected
- Collection Rate (Success Rate)
- Total Families and total billed amounts
- Scroll for more detailed breakdowns

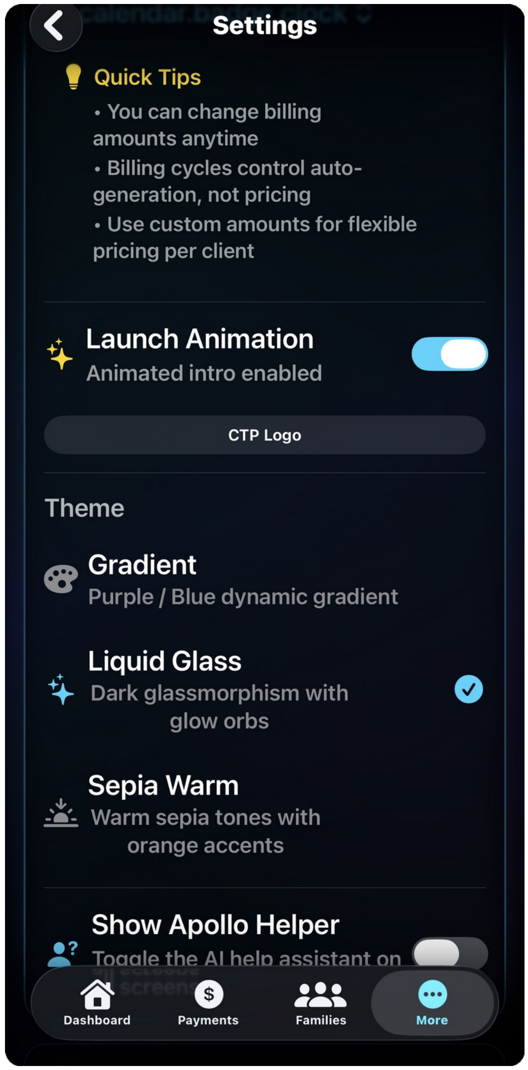
School Alerts

Transportation businesses also have access to School Alerts under the More tab — showing weather alerts and other notices relevant to Polk County or NYC Schools, filterable by region.

Use Analytics regularly to identify trends, catch collection issues early, and make informed business decisions.

Settings & Business Types

Settings is accessed from the More tab and lets you customize how ClientTrackPro looks and behaves.



Settings — Themes include Gradient, Liquid Glass, and Sepia Warm, plus the Apollo Helper toggle.

Business Type

View and change your Current Business type (e.g. Transportation). ClientTrackPro adapts its terminology and available fields based on the business type you select.

Auto Generate Payments

Toggle Auto Generate on to have payments created automatically on your billing cycle, or leave it off for manual payment generation only.

My Defaults

Set default City, State/Province, and ZIP/Postal Code so new client profiles are pre-filled faster. Transportation businesses can also set default Schools and default Pickup/Drop-off Schools.

Recover Deleted Payments

If you've deleted a payment by mistake, this section lets you recover it, as long as it hasn't been permanently cleared.

Appearance & Themes

- Gradient — Purple/Blue dynamic gradient
- Liquid Glass — Dark glassmorphism with glow orbs
- Sepia Warm — Warm sepia tones with orange accents

You can also toggle the Launch Animation on or off, and enable Show Apollo Helper to display the in-app AI assistant across screens.

Other Settings

- Default Billing Cycle for new clients
- Developer Options: Testing Mode, for quickly switching business types during setup (not needed for day-to-day use)

Subscription & Free vs. Pro

Free Tier

The Free tier includes up to 5 client/family profiles total, across all business types, with full access to core features.

Pro Tier

Upgrading to Pro unlocks:

- Unlimited client/family profiles
- All supported business types
- Full access to premium features

Plans

- Pro Monthly — $14.99/month, with a 7-day free trial
- Pro Yearly — $149.99/year, with a 7-day free trial

Subscriptions are billed through your Apple ID and can be managed or canceled anytime in your device's Subscription settings.

Glossary

Apollo Helper	An in-app assistance toggle available in Settings.
Client	An individual or business account managed within ClientTrackPro, depending on your business type.
Collection Rate	The percentage of billed payments that have been marked as paid.
Dependent	A child or individual associated with a Family profile (e.g., a student or a pet, depending on business type).
Family	A billing unit in ClientTrackPro representing a primary contact and any associated dependents.
Generate Payments	The action of creating new payment records for one or more clients, either manually or automatically.
Invoice	A formal billing record created for a client, summarizing charges for a given period.
Pro Tier	The paid subscription level that unlocks unlimited clients and full feature access.

FAQ & Troubleshooting

Q: How many clients can I add on the Free plan?

A: Up to 5 total client/family profiles across all business types. Upgrade to Pro for unlimited clients.

Q: Why isn't a payment status updating?

A: Payment status updates immediately when you tap the checkmark. If it does not, contact support.

Q: Does ClientTrackPro provide driving directions or navigation?

A: No. ClientTrackPro is a business management tool and does not include built-in route planning, navigation, or turn-by-turn directions.

Q: Is my data stored on ClientTrackPro's servers?

A: No. All data is stored locally on your device using Apple's Core Data framework. If you enable iCloud sync, your data is stored in your personal iCloud account — never on our servers.

Q: How do I cancel my subscription?

A: Subscriptions are managed through your Apple ID. Go to your device's Settings > [Your Name] > Subscriptions to manage or cancel.

Q: Can I restore my purchase on a new device?

A: Yes. Use the Restore Purchases option in Settings to restore your Pro subscription on a new device signed in with the same Apple ID.

Q: Will I lose my data if I cancel Pro?

A: No. Canceling your subscription does not automatically delete your existing data. Your records remain on your device. However, Pro-only features may become unavailable until you subscribe again.

Support & Contact

We're here to help. If you have questions, run into an issue, or want to share feedback, reach out any time.

Support

https://nobossnetwork.xyz/support

Privacy Policy

https://nobossnetwork.xyz/privacy

Terms of Use

https://nobossnetwork.xyz/terms-of-service

Before Contacting Support

To help us resolve your issue as quickly as possible, please include:

- Device model
- iOS version
- ClientTrackPro version
- Steps to reproduce the issue

Thank You for Choosing

CLIENTTRACKPRO

We built ClientTrackPro to help service businesses like yours run smoother, get paid faster, and stay organized every day.

Thank you for trusting us with a part of your business.

Keep the app updated to get the latest features and fixes, and don't hesitate to reach out through the Support page with any questions or feedback — we'd love to hear from you.

We appreciate your business and look forward to supporting your success.

nobossnetwork.xyz/support